



2021 Year-in-Review: International Publishing News

Interviews with

- **Bodour Al Qasimi**
 - **Paula Gori**
 - **Michiel Kolman**
- **Rüdiger Wischenbart**

For podcast release

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KENNEALLY: Welcome to Copyright Clearance Center's podcast series. I'm Christopher Kenneally.

In the final weeks of 2021, Velocity of Content is looking back at the past twelve months of programs.

Over a year of vaccines and variants, COVID-19 played hide-and-seek around the world. After a devastating pandemic year in 2020, any return to normal was fitful, as Delta and Omicron crashed party after party.

The ongoing global public health crisis deeply challenged all sectors of publishing in 2021. Yet industry stakeholders remained determined in the pursuit of renewal and recovery.

At its first-ever virtual general assembly in 2020, the International Publishers Association elected as president Bodour Al Qasimi, founder and CEO of Kalimat Group in Sharjah, the United Arab Emirates. I spoke with Bodour in January, shortly after she took office for a two-year term.

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KENNEALLY: The next couple of years will be years fraught for everyone, not just publishers. I have to ask you about the state of international publishing right now in the midst of the global pandemic.

AL QASIMI: As you know, Chris, the global publishing sector has suffered enormously from the ramifications of this pandemic. And this should not come as a surprise to anyone. Despite that, many publishers have adapted themselves to the digital world before the pandemic. The majority are still dependent, though, on physical set-ups like bookstores and libraries to sell their books.



And book fairs were such a major opportunity for all publishers to sell their books and make business deals.

All of that stopped and it stopped suddenly without much warning. So you can imagine the state of shock and confusion during the initial stages of this pandemic. But you know this sudden disruption forced the publishing community worldwide to do some serious soul-searching, to find out the reasons why we were vulnerable to such a sudden event.

Priority number one for me now is to help our members transition from this crisis into new growth and this is why we published our COVID-19 report, *From Response to Recovery*, which is available on the IPA website.

And we're also working on a global publishing industry recovery plan that is informed by the voices and the needs of the publishing sector and its stakeholders. This is a plan to stabilize and grow the publishing industry and will support all our members to implement it. And I'll also focus on making the sector more inclusive and more diverse.

And if we learned any lessons from this pandemic, Chris, it's that we need to be extremely innovative to remain on top of our game. Innovation requires fresh thinking and fresh ideas and no one can generate new ideas if the same kinds of people are at the brainstorming and decision-making tables.

KENNEALLY: And IPA as an organization, and all of its members individually, work hard to provide access to quality-assured content for education, for research, for culture, for citizenship, and that is a particularly difficult task at this moment because we are all confronted with fake news, misinformation and bogus science. And what do you think readers, consumers, listeners to this program, should be doing to protect themselves from those kinds of scourges?

AL QASIMI: This is a million-dollar question, Chris. Really. And parallel with COVID-19, another pandemic has been growing and getting more serious and that's fake news. It's the other side of democratization of information which was made possible by the Internet. For readers, the dangers of not being vigilant are serious and so it's important for them to be aware of that. Most important thing to do is to increase the level of our media literacy, to be able to scrutinize a news source for credibility and reliability.

It's also important for readers to become critical of the news they consume and share the responsibility by not sharing news stories until they determine that they are genuine and also by not sharing fake news with anyone. The less people share fake news, the less oxygen this news will have.



Also, nowadays, there are so many available tools for free that allow readers to fact-check news sites and evaluate resources. And above all, readers need to exercise common sense and good citizenship and understand clearly that their actions can be part of the solution or part of the problem.

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KENNEALLY: Across the European Union, fact-checkers, media literacy experts, and academic researchers are collaborating to fight online disinformation.

The European Digital Media Observatory, established in June 2020, hopes to counter fake news and other digital disinformation with facts and research. It will also provide materials to media literacy practitioners, teachers, and citizens to increase awareness about the dangers of disinformation and why it threatens the future of democratic societies.

Paula Gori is the secretary-general of EDMO, based in Florence, Italy. She explained how disinformation cannot be rooted out at a single source. Many tributaries feed the dark ocean of fake news: social media, of course. But also governments and political parties and politicians.

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GORI: Probably you should be reminded that disinformation includes all forms of false, inaccurate, or misleading information designed, presented, and promoted to intentionally cause public harm or for profit.

Secondly, I think we should make a distinction between the various elements. For example, who created the content? Who produced the content? Who distributes the content? Which tools are used? Which is the target audience? How the target audience receives the message – and so on. In order to understand the actors, the vectors, the tools, and the trends, actually research based on data is really key. This is why EDMO is in contact, as you were mentioning, with the online platforms with the aim of establishing a framework to access their data – in full respect, of course, of data protection for research purposes.

Research is really key to understand – to go back to the agents, who they are and how they act. What has been seen so far is that when official actors are involved, the impact is greater, of course, because it is backed with more funding and sophisticated tools. Thanks to online platforms, we all know we have access to a variety of news as well as to a larger number of views, but we also know that they have changed the way that our citizens access and engage with the news. This is also a place where disinformation can be spread at incredible scale, speed, and precision.



On top of that, let's not forget that emotions are the main driver for sharing. Think, for example, of fear in the case of disinformation about vaccines, or anger and frustration in the case of political extremism.

KENNEALLY: It's been called an infodemic as well as a pandemic.

GORI: Indeed. Indeed. Absolutely. And I think that the problem of disinformation was absolutely evident before, but during the pandemic, people felt it even more, because it was really affecting their lives. So it was easy to spread, because a hashtag – for example, #COVID19 – was really searchable, and people were really relying on social media – actually, or media, but we know that we all consume media on social media – to access information. We were also more vulnerable, because we were afraid of what was happening. And we were all staying at home, so we were consuming, actually, social media even more than before.

In 2021, CCC signed onto the SDG Publishers Compact, joining stakeholders from across the publishing industry to pledge commitment to the United Nations' seventeen Sustainable Development Goals to be achieved by 2030. CCC has specifically committed to develop sustainable practices in the areas of Quality Education; Industry, Innovation and Infrastructure; and Reduced Inequalities.

SDG 13 is Climate Action, urging nations to develop capacity to respond to climate disasters and reduce greenhouse gas emissions. When the United Nations Climate Change Conference gathered in Glasgow, Scotland, in early November, the international publishing community stood ready for action.

The International Publishers Association and other leading organizations across the global book sector have committed to taking responsibility for the industry's environmental impact and adopting climate-friendly practices across the publishing supply chain.

Dr. Michiel Kolman is Senior Vice President and Academic Ambassador at Elsevier and former IPA President. During his tenure, he launched the SDG Book Club together with the UN. In October 2020, he launched the SDG Publishers Compact with the UN.

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KOLMAN: I think there's an incredible sense of urgency right now among publishers, and the reason is we've seen it in the latest IPCC report, which came out in August of this year, and I think the UN secretary-general really called it correctly – it's code red for humanity. There is now irrefutable evidence that climate change is human-induced, and we must take action now, otherwise it's simply too late.



Publishers across our sector must think about what is their responsibility for our own collective environment? What is their impact, and how can they contribute?

I think publishers can really contribute in two ways. One is to get their own house in order, so to say. And the other is, of course, through what we publish.

KENNEALLY: The question really is if publishers want to address environmental concerns there, how can they go about that? I suppose one step is to understand it – make the assessment first – and then think about the remedies that can be applied.

KOLMAN: If you just take one example, my own company at Elsevier, we completely mapped out what our carbon footprint is. It's called a scope 1 and scope 3 – business and travel – and then the really big one is scope 3. In that, we're going to map out exactly at the end of this year or next year what it's going to be and how we can reduce it. Scope 3 is our supply chain, essentially. That means you have to come up with partnerships with suppliers. You have to work with organizations like the Green Book Alliance and really map out what can you do? I think partnership is crucially important.

KENNEALLY: How important in all of this is public education when addressing climate change? Because clearly, publishers have an important role in educating the public about all of these issues.

KOLMAN: I could not agree more. I think public education is crucial here. It's clear if you are going to address climate change, there will be tradeoffs for the public, and some of them are not going to be easy. Tradeoffs will require things like how do we eat? How do we travel? What kind of energy do we use? So you need a real firm grasp of the basic scientific concepts around climate change. They are, I think, critical. And I think publishers play a very important role there so that there will be acceptance around these changes which will be needed.

If I can put my Elsevier hat on, we also have to strengthen the bridge between science and policy. We need to be honest about these tradeoffs that are coming. But we also need to be able to promote this multidisciplinary scientific approach – science that needs to be explained, all the benefits, all the tradeoffs that are necessary. That means research connections with the social sciences, with economics and things like that, so that we all collectively can achieve this net-zero transition.

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KENNEALLY: For a quarter-century, the business narrative across all sectors in publishing is a story of mergers and acquisitions. In the latest chapter, the familiar tale carries on as before, yet plot twists will lie ahead.



In the 2021 edition of Global 50, an annual ranking of the publishing industry's leading firms, industry analyst Rüdiger Wischenbart highlighted what authors and regulators have watched warily as consolidation advanced unchecked.

The combined revenue of the top 10 companies now tops that of the following 40, according to the report. Globalization has accelerated significantly, driven by digital transformation.

WISCHENBART: The entire models behind those strategies in the groups that made sense out of such a merger have changed dramatically over the past 10 years.

For instance, many educational companies outside of the US have become learning platforms or learning institutions, acquiring schools and getting us into trouble as observers and analysts, because our definitions of what is a publishing company is getting more and more complicated. Really, before this, the same started with the entire professional and academic sector. Here again, we have a dramatic transformation, as Clarivate or Thomson Reuters do not put the data, the information, center stage, but the services that they can distill out of the information that they govern.

So it's an entirely dynamic and complex universe that is transforming. Only trade or consumer book publishing pretends to a certain degree that their little world is still intact and in the same shape as in our parents' generation.

The classical M&A – someone acquiring a competitor, gobbling up that competitor, like Penguin Random House trying to acquire Simon & Schuster, or HarperCollins having acquired now successfully the better part of Houghton Mifflin Harcourt – that's the American way of doing business, yes? That's really getting bigger, and by getting bigger, enlarging the footprint and allowing a more efficient back office that drives down costs and generates more volume. We saw over the pandemic, very oddly and paradoxically, that these companies improved their bottom line very, very strongly. Some of these houses had their best financial years ever despite – or because of – navigating through that very complicated transformation triggered by the pandemic.

When I was discussing that topic with friends of a German professional publishing magazine, they said, oh, no, we don't have any consolidation in publishing in the first place. I said, wait a moment. You have the same degree of consolidation, but surprisingly, not among the publishers, but in retail. Because over the past 10 years or so, you have a book retail chain, Thalia, which was almost bankrupt 10 years ago, change ownership, change the model and everything – went very, very strongly into online channel and into buying up local, regional book chains. They are just about books, but like a good friend who is getting more and more and into – others would say a bully, because he was growing and getting so muscular over the 10 years, they are now at the same level of turnover from bookselling as Amazon in Germany. And let me remind you –



German Amazon is the largest international market for Amazon in the first place. It's bigger than Amazon China or Japan.

So suddenly, the same thing happens in a slightly different twist in retail. So we see really a global picture that the big organizations are in a process of redefining their very setup, their DNA, their orientation – in short, their strategy and their approach to books and readers.

KENNEALLY: Rüdiger, things are moving so fast that your report, which only recently appeared, is now outdated in a sense because of the intervention of the US Department of Justice attempting to block that Penguin Random House/Simon & Schuster merger. It's a long road ahead in that particular case. But any early thoughts about what that lawsuit, that antitrust move, may mean for the entire industry?

WISCHENBART: Of course, I will not comment on the legal aspect, because I'm not a lawyer. But for me, the confrontation now between Penguin Random House and the US Department of Justice is exactly about the creators. Is there a way to secure that liberty that is the prerequisite, both in business terms to make it work, and in creative terms to allow that diversity of expressions? Is there an organizational way to prevail – to guarantee that in these big units and in a high degree of market consolidation across the board? Or do we have to break up and be more – how should I say – do we need the smaller units in order to secure the creative freedom?

KENNEALLY: Let's just return to the point I made at the opening, which is the lopsided nature of the Global 50, that the top 10 outweighs the remaining 40 by considerable dollars. And I want to ask you finally, Rüdiger Wischenbart, about the impact not only on business, on investment, on shareholders, but on culture. What do you think this is going to mean for us looking ahead? Is cultural diversity going to become an important piece of the reckoning in terms of consolidations, mergers, acquisitions?

WISCHENBART: I suppose that one way or another, we very, very much need smaller units. How they are organized are different models. But we need smaller units to find new impulses, new narrations, new stories that fit to those changing lives that we have every day.

So personally, despite all the consolidation, I'm not the biggest fan of everything under one roof. That's a Chinese formula. The Chinese emperors always want to have everything under one sky. That imperial approach, I guess, is a little bit outdated. I would more think that we need all kinds of different ways, different practices, and we need many skies, many ambitions, etc. Just breaking up companies is certainly not the golden rule. It's more about finding ways to allow the coexistence and the crossover between different organizations without one swallowing the other flatly.



So I think we really need to reconceive that entire creative industries field. And for us as analysts, as I said, that's the fun part, because we realize that we are very much into a transition. At the end, if we are honest, we have no clue what's the endgame in this. Personally, I'm fairly confident that it's not the model under one sky. It's not going to be the imperial model. But it will require a very important mix of regulation, of granular maneuvers, to satisfy ever more segmented and specialized consumer behaviors and consumer preferences. We have a very strong force coming from the consumers to go specifically into small niches, which again is against that imperial approach. So personally, I'm an optimist. But it will bring us many surprises in the years ahead.

KENNEALLY: Well, it sounds to me like there's a clash ahead between the Empire and the Force – the force of consumers.

WISCHENBART: That would be a good formula.

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KENNEALLY: Oxford Languages have chosen 'vaxxed' as the word of the year for 2021. On the short list for that lexicographical distinction was certainly "languishing" – defined as "failing to make progress" as well as "feeble or weak."

While many have felt 2021 was a time for languishing, global publishing did not. It got up and went about the business of innovating. It confronted the insidious threats of disinformation and fake news. And from behind the clouds of monopoly, authors, publishers and consumers could glimpse rays of judicial and regulatory relief.

Our co-producer and recording engineer is Jeremy Brieske of Burst Marketing.

You can subscribe to this program wherever you go for podcasts and please do follow us on Twitter and Facebook.

I'm Christopher Kenneally. Thanks for joining me throughout the year on Velocity of Content from CCC.

Best wishes for 2022!

