

D2.2 – Summary of TISP meetings in book trade events - Year 2

Project Acronym: TISP
Grant Agreement number: 325109
Project Title: Technology and Innovation for Smart Publishing

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Project co-funded by the European Commission within the ICT Policy Support Programme		
Dissemination Level		
PU	Public, for wide dissemination	X
CO	Confidential, only for members of the consortium and the Commission Services	
RE	Restricted to a group specified by the consortium	

REVISION HISTORY

Revision	Date	Author	Org.	Description
v.1.0	11/25/2014	J. Fierro, L.Gonzales	FGSR	First version
v.1.1	12/03/2014	M. Loi	AIE	Comments and revision
v.1.2	12/15/2014	J.Fierro	FGSR	Second version revised
v.1.3	12/18/2014	E. Molinari	AIE	Integration of information and data
v.1.4	12/18/2014	P.Chazerand, Enrico Turrin	FEP, DE	Overall conclusions
v.1.5	12/19/2014	M.Loi	AIE	Overall check and final revisions

Statement of originality:

This deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

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EXECUTIVE SUMMARY

TISP is an **European platform** for sharing experiences, market analysis, business cases, where the Publishing and ICT industry can find a room for a debate about **innovation** and both communities can match to support the creation of **innovative products and services** as well as develop **new technological solutions** useful for the professionals of the book value chain.

The **professional meetings** represent the basis of TISP strategy. Seminars and workshops held in occasion of the most important fairs of both the sectors and during international conferences are in fact the best situations for content providers and technology providers to get in touch, to know each other and starting new collaborations. During these meetings publishers representatives collect information, validated by the community of experts participating the TISP meetings, also coming from the ICT world, to be later disseminated in the European publishing community. ICT representatives may better understand the evolution of the demand of innovative solutions and possibly suggest new ways of using technologies to approach existing needs.

The purpose of this document is to summarize the TISP activities held at **Book Trade Events during 2014**. Three international events were selected this year within this context to organize TISP workshops and internal meetings:

- **BOLOGNA CHILDREN`S BOOK FAIR**, the most important international event dedicated to the children`s publishing and multimedia industry (March 24th to March 27th; Italy).
- **LONDON BOOK FAIR**, the global marketplace for rights negotiation and the sale and distribution of content across print, audio, TV, film and digital channels (April 7th to April 12th; UK).
- **FRANKFURT BOOK FAIR**, the largest book fair in the world (October 8th to October 12th; Germany).

The preparatory phase of each event involves a detailed analysis of the corresponding programme in order to identify the most relevant events for the TISP partners. As for the specific workshops that TISP organizes on occasion of these Fairs, the programme was built taking advantage of the expertise and network of experts and professionals pertaining to the partner organisations.

After each event, impressions and feedback were collected and shared among TISP members. In this respect, it must be emphasized that **launching of the Smart Book** has been a turning point that is allowing a most intensive and effective sharing of experience inside the network.

For each Book Trade event the document contains a short description of the context, the TISP initiatives within the event, participants and conclusions. Section 2 explores the information assets and other diverse documents produced by TISP partners. Section 3 summarizes the general conclusions of the TISP year and Section 4 includes a draft of the planned TISP activities in Book Trade Fairs for next year (2015). The final annex provides a partial view for some of the materials produced during 2014 (a wider list of materials is mentioned in Section 2).

1. INTERNATIONAL TISP EVENTS

1.1 BOLOGNA CHILDREN'S BOOK FAIR, BOLOGNA (ITALY)

1.1.1 Context



The Bologna Children's Book Fair is the most important international event dedicated to the children's publishing and multimedia industry, attended this year by more than 30,000 writers, illustrators, exhibitors and trade operators. Brazil was the guest Country of Honour.

A wide variety of exhibitions, meetings, lectures, debates and the awards ceremony that shaped a very attractive program which included a new initiative, started in 2013, particularly interesting for TISP: Bologna Digital.

Bologna Digital focused on the digital media market. More exhibition space was allocated this year to the most innovative businesses producing apps, APIs and other diverse technological solutions for publishing.

The Digital Area offered a unique chance to explore all about new content for children in digital format and be aware of the upcoming changes the publishing industry is implementing in products addressed to kids and young adults.

The Digital Cafe presented a broad programme of meetings (over twenty talks and panel discussions) dealing with key issues related to the transition from conventional printing to digital publication.

The schedule also included the Master Classes, a group of four sessions with a very specific focus: tools for digital writing and drawing, tips and tricks for social sales, right management of digital right contract and digital design for interactive stories and user experience.



The TISP workshop was held within this programme of Master Classes.

1.1.2 TISP Initiatives

TISP WORKSHOP

Title: **STORY-TELLING AND STORY-SELLING. DIGITAL KIDS BETWEEN TRANSMEDIA EXPERIENCES AND MARKET TRENDS**

Date: **Wednesday March 26th, 2014**

Organizers: **TISP, Editech, AIE, Bologna Children's Book Fair**

Speakers: - **Roberta Franceschetti**, Mamamò
- **Ann Betts**, Managing Director Client Services Nielsen Book International
- **Mike Gaunt**, CEO Go Mad Kids
- **Irene Angelopoulos**, Founder Mubo
- **Giulio Caperdoni**, COO Vidiemme
- **Sameer Reina**, Magic Box
- **Elena Favilli**, Founder Timbuktu

Chair: - **Cristina Mussinelli**, Consultant for sigital publishing at AIE

[Event Summary](#) [extracted from the report by Enrico Turrin, available in Smart Book]

On March 26 took place in Bologna this event, a Masterclass organized by TISP, AIE and Bologna Children's Book Fair in collaboration with Editech.

Cristina Mussinelli (AIE) introduced the event and the first panel that provided some insights into the children's book market and its consumers in the digital age.

Ann Betts, Managing Director Client Services, Nielsen Book International, showed that overall the children's book market is more robust than the total market in almost all the countries where a Nielsen BookScan service operates. In both the UK and Italy performance was driven by picture books and activity books for the younger age group (0-5 years) and children's nonfiction for the UK and both children's fiction and nonfiction for 10 – 13 year olds in Italy.

As for children's activities and behaviour the key findings are that a third of children read books to themselves everyday – only watching TV sees more participation and that three in five children read to themselves weekly while half are read to weekly – and that reading is declining overall while game apps and YouTube are on the rise. Most children are still heavy/medium readers, though occasional/non-readers are on the rise (reading is taking a hit from other activities); the increase in occasional/non-readers is especially true of those aged 11+.

As for devices, children access/use of tablets doubled in 2013. The majority of children uses devices to play games and older children have more diverse usages. The favored device for digital reading has changed: the tablet has taken over for most age groups except the oldest (still using mostly e-readers). One third of reading children have read books digitally but the majority still prefers print.

As for discovery, libraries and schools drive discovery among families with bookshops, supermarkets and online book retailers following close behind. The older and more a child reads the more diverse are their routes of discovery. He made an overview on the project inviting the attendances to participate in the TISP discussions and activities.

Roberta Franceschetti (Mamamò) offered a presentation of the Italian *#Natigitali 2014*, a survey promoted by AIE, FattoreMamma and Mamamò, in collaboration with AIB (Associazione Italiana Biblioteche) and Filastrocche.it. Aim of survey was the analysis of parents' attitude towards new technologies and reading, the inclination to let kids use new devices for extra study purposes, the relationship between reading printed and digital books, the sources of information and the sales channels of printed and digital books. The survey was distributed online in January and February 2014 and was addressed to parents and librarians. 910 answers were collected and 696 of them – excluding the librarians – were analyzed, providing an overview of the attitudes of the most innovative part of Italian parents.

Parents' inclination to let kids read digital books was 5% higher than last year. 16% of children reads everyday and at least once a week digital books while 73% reads everyday printed books. Print is preferred mostly before going to sleep and is regarded as a strengthening bond between children and parents while digital is preferred for entertainment, baby-sitting and convenience. The most important elements of digital books are the learning side, the entertainment, the boost to imagination and independence. As for the parents' attitudes, digital is expected to have technological, multimedia and editorial value. 'Non-digital parents' don't read digital because of the lack of devices and of occasions. Overall, 'digital-adverse parents' are declining and 'digital parents' don't see much difference: the story is what really matters. Some fear excess of screen time while the discovery is linked to word of mouth, booksellers, blogs. Reviews and images have a great influence in buying digital. As for the willingness to spend, it's much higher in print.

The second part of the Masterclass was devoted to case studies where publishing houses and ICT companies discussed issues and strengths of their partnership, the competences involved and innovative products highlighting the results achieved through their collaboration.

Irene Angelopoulos (Mubo) and **Giulio Caperdoni** (Vidiemme) presented *GoogleGlass4Museum*, a prototype app designed to give an interactive tour of the Hall of 500 in the Palazzo Vecchio (Florence). The project is the result of the synergy between the digital-first publisher Mubo and the ICT company Vidiemme which, a year ago, decided to focus on new technologies and devices, like wearables. At the core of the project, there's storytelling, specially designed for the specificities of the device and used to create a metaphor for the user, drawing attention to the mysteries related to the lost fresco of Leonardo Da Vinci's Battaglia of Anghiari. The goal is to let people immerse themselves in the story in a more meaningful way through this metaphor, providing a bigger engagement. The project uses also gaming approach like levels, hidden items, award of prizes. As for technology, a great focus has been devoted to the optimization for Google Glass and user experience with the idea to 'make the device super-powers fit for user'. The device is not conceived as an end in itself but as a bridge between the users (young adults) and the reality.

Mike Gaunt (GoMadKids) and **Bobby Thandi** (Dubit) presented *Turmali* from GoMadKids, Starting point was the the assumption that kids don't like educational games, parents do. If 350 million kids are online today playing games, how to make games that kids like and parents find useful? The solution proposed, *Turmali*, is a game with a story, composed of 130 short stories of 6-7,000 words each. Beside a a safe chatting place to other children playing around the world, *Turmali* provides a series of short cartoon strips with a little text to encourage players to search e-books connected to the story as they play the game. Each individual story is available as e-book.

Harish Agrawal presented *MagicBox*, providing an overview of the trends in K-12 education. Since market forces publishers to convert their content into distributable digital format, mid-size publishers are struggling to showcase their digital product to buyers, to manage licensing and digital rights and to manage distribution on different devices and formats. The disruption is caused by the arrival of tablets and smartphones in hands of children, by the technology expected to reduce cost and increase quality of education – yet to be proven but governments investing a lot in it, so schools want digital content. K-12 trends in education show that digital content keeps growing and tablets are widely adopted while digital textbooks are expected to be cheaper. For the publishing industry the problem is that the ROI is unknown and the digital strategy is not defined and unclear. The solution proposed by Magic Box is a cloud based mobile publishing platform for K12 publishers which allows to sell digital and not digital products through a branded e-commerce store, distribute digital content on different devices and analyze and review usage of the content.

Arianna Giorgia Bonazzi presented *Timbuktu*, a children's media company which aims to stimulate children to learn through experiences. Timbuktu's flagship product is the subscription-based

Timbuktu Magazine, a monthly magazine for children aged 6-10, just awarded with the prize for Best Children’s Magazine of the Year. The mission is to nurture a generation of girls and boys who are more confident, courageous, and critical – giving them a real opportunity to become creative thinkers and active citizens of the 21st century. Discover, laugh, play, inspire are the keywords of Timbuktu, which can count on a constellation of other apps, like Timbuktu Pizza and Timbuktu Pasta, based on the same group of characters that live in the magazine. Great emphasis was devoted to the relationship with children, carried out especially during the Timbuktu Camps, hands-on workshops where children are faced with complex design challenges that help them develop critical thinking, creative expression, and learning skills through mobile technology.

ATTENDANCE TO OTHER ACTIVITIES IN BCBF

After the consortium meeting that followed the workshop, registered participants were accompanied for a **guided tour of the Book Fair** and a visit to the Digital Area exhibiting the most innovative companies in app development, technical publishing solutions and interactive storytelling from new publishers, developers and device manufactures.

In addition to the tasks to prepare the workshop and the meeting, the fair’s program was analysed in detail to identify activities with content of particular interest to the consortium members (those whose contents were related to the list of topics defined as priority interest by TISP).

The results of this work were:

- A dossier containing twenty five suggested activities, with basic information about each one and a brief summary of content. The bulk of this activities belonged to the **Digital Café** key area included in the Bologna Digital Programme, supplemented with some sessions included within the **MasterClasses** programme. The TISP workshop was part of this series of panels focused on the design of interactive stories, digital right contracts, tools for digital writers and illustrators and other very specific issues.
- An online form with the list of those activities, so that the TISP members attending the Fair could select the activities they were going to attend (two at least) and report on behalf of TISP network. The final list about the TISP coverage of the BCBF was the following:




PERSON / ORGANIZATION	ACTIVITIES TO ATTEND
Aida Millán (AMETIC)	<ul style="list-style-type: none"> - DIGITAL PUBLISHING HAS HAD AN UNPREDICTABLE IMPACT ON THE BUSINESS OF STORYTELLING - DIGITAL MINDS INTERVIEW N°2
Barbara Carnevale (ANITEC)	<ul style="list-style-type: none"> - TECHNOLOGY IN THE HANDS OF THE ARTIST - ONE DIGITAL SOLUTION ACROSS ALL PLATFORM
Aida Dobkeviciute (Lithuanian Publishers Ass.)	<ul style="list-style-type: none"> - DIGITAL MINDS INTERVIEW 1 - CHILDREN, PAPER AND DIGITAL FUTURE - CHILDREN'S ILLUSTRATION IN A DIGITAL AGE - DIGITAL MINDS INTERVIEW N°2 - VIRTUAL GLOBAL DISTRIBUTION - REALITY OR MYTH? - E' IS FOR 'EVERYONE': WHY PUBLISHERS NEED TO GET TO GRIPS WITH TRANSMEDIA STORYTELLING
Vogelbacher (MVB)	<ul style="list-style-type: none"> - ONE DIGITAL SOLUTION ACROSS ALL PLATFORM - SELL MORE BOOKS AND COMMUNICATE BETTER USING ONIX: WHY GOOD METADATA IS GOOD BUSINESS
Evi Werkers (BOEK.BE)	<ul style="list-style-type: none"> - THE POWER OF PERSONALIZATION: HOW SOURCEBOOKS IS DEVELOPING NEW CHANNELS, NEW PRODUCTS AND NEW PARTNERSHIPS - DIGITAL PUBLISHING HAS HAD AN UNPREDICTABLE IMPACT ON THE BUSINESS OF STORYTELLING
Sergio Mejias (Bubok Publishing)	<ul style="list-style-type: none"> - THE POWER OF PERSONALIZATION: HOW SOURCEBOOKS IS DEVELOPING NEW CHANNELS, NEW PRODUCTS AND NEW PARTNERSHIPS - TECHNOLOGY IN THE HANDS OF THE ARTIST - 'CREATE THE BOOK OF THE FUTURE'(AWARD CEREMONY)
Jesus Peraita (FGEE)	<ul style="list-style-type: none"> - VIRTUAL GLOBAL DISTRIBUTION - REALITY OR MYTH? - PUBCODER
Katinka Imhoff (University of Mainz)	<ul style="list-style-type: none"> - DIGITAL PUBLISHING HAS HAD AN UNPREDICTABLE IMPACT ON THE BUSINESS OF STORYTELLING - ONE DIGITAL SOLUTION ACROSS ALL PLATFORM
Elisa Molinari (AIE)	<ul style="list-style-type: none"> - MASTERCLASS: GENERATION REMIX
Enrico Turrin (FEP)	<ul style="list-style-type: none"> - VIRTUAL GLOBAL DISTRIBUTION - REALITY OR MYTH? - PUBCODER
Diana Boicheva (Bulgarian Book Assoc.)	<ul style="list-style-type: none"> - E' IS FOR 'EVERYONE': WHY PUBLISHERS NEED TO GET TO GRIPS WITH TRANSMEDIA STORYTELLING
Seonaid MacLeod (The Publishers Assoc.)	<ul style="list-style-type: none"> - DIGITAL PUBLISHING HAS HAD AN UNPREDICTABLE IMPACT ON THE BUSINESS OF STORYTELLING - MASTERCLASS: GENERATION REMIX
Elisabetta Bianchini (Digitaleurope)	<ul style="list-style-type: none"> - DIGITAL PUBLISHING HAS HAD AN UNPREDICTABLE IMPACT ON THE BUSINESS OF STORYTELLING - ONE DIGITAL SOLUTION ACROSS ALL PLATFORM - DIGITAL MINDS INTERVIEW N°2 - E' IS FOR 'EVERYONE': WHY PUBLISHERS NEED TO GET TO GRIPS WITH TRANSMEDIA STORYTELLING
Pierre Mersch (HKU)	<ul style="list-style-type: none"> - TURMALI - A NEW ONLINE GAME BASED ADVENTURE AND READING SERIES - VIRTUAL GLOBAL DISTRIBUTION - REALITY OR MYTH?

Wesley De Neve (iMinds)	- SELL MORE BOOKS AND COMMUNICATE BETTER USING ONIX: WHY GOOD METADATA IS GOOD BUSINESS - MAGICBOX - MOBILE PUBLISHING AND LEARNING PLATFORM FOR CHILDREN'S BOOK PUBLISHERS
Maria Loi (AIE)	- PUBCODER
Mathilde Sommain (Frankfurter Buchmesse)	- DIGITAL PUBLISHING HAS HAD AN UNPREDICTABLE IMPACT ON THE BUSINESS OF STORYTELLING - DIGITAL MINDS INTERVIEW N°2
Justyna Rygalik-Kolbicz (Polish Chamber of Books)	- MAGICBOX - MOBILE PUBLISHING AND LEARNING PLATFORM FOR CHILDREN'S BOOK PUBLISHERS - PUBCODER
Valentin Negoita (APDETC Romania)	- CREATE THE BOOK OF THE FUTURE (AWARD CEREMONY) - DIGITAL MINDS INTERVIEW N°2 - TURMALI - A NEW ONLINE GAME BASED ADVENTURE AND READING SERIES
Orna o'Brien (London Book Fair)	- ENCOURAGING KIDS TO READ FOR FUN THROUGH THE GO MAD KIDS WORLD, A COMBINED GAMING AND EBOOK PLATFORM - DIGITAL MINDS INTERVIEW N°2 - TURMALI - A NEW ONLINE GAME BASED ADVENTURE AND READING SERIES

Event Reports

Following up the Bologna Children's Book Fair, partners completed the event reports with the goal to provide the editorial team with information useful for the Smart Book enrichment covering the events attended during the Fair.

As an example of the event reports collected after a TISP event, below a short abstract of the reports collected after the Bologna Children's Book Fair and updated in the web repository of projects within *Basecamp*:

ACTIVITY	AUTHOR / URL
 <p>▪ Building an interactive kids book library [App Generation] Presentation of App Generation's solution for everyone who wishes to publish their content on iOS and Android platforms. <i>Kids Interactive Book Maker software</i>, a tool that allows publishers to easily migrate their contents to this new digital world.</p>	<p>Aida V. Dobkevičiūtė (LLA) https://basecamp.com/2438801/projects/4183131/messages/25632920?enlarge=87583725#attachment_87583725</p>
 <p>▪ Beyond Images and text: designing story telling experience for children in an app [Auryn] Auryn presented their solution to enhance storytelling from two dimensional to a multidimensional experience.</p>	<p>Aida V. Dobkevičiūtė (LLA) https://basecamp.com/2438801/projects/4183131/messages/25632920?enlarge=87583725#attachment_87583725</p>
 <p>▪ Children, paper and digital future [NeoLAB Convergence] The convergence of digital technology and children</p>	<p>Aida V. Dobkevičiūtė (LLA) https://basecamp.com/2438801/projects/41831</p>

publications in the near future

31/messages/25632920?enlarge=87583725#attachment_87583725

- **More than paper: Visual effects in the Book of Graph-Art [Timbuktu Magazine]**



From user experience design, to user testing, to marketing. Presentation about what is necessary to know to launch apps for kids.

Aida V. Dobkevičiūtė (LLA)

https://basecamp.com/2438801/projects/4183131/messages/25632920?enlarge=87583725#attachment_87583725

- **Technology In the hands of the artist- The Merripen Press**



Mission [Merripen Press]

Merripen Press demonstrated its intuitive software, which enables artists to convert their picture books into apps.

Aida V. Dobkevičiūtė (LLA)

https://basecamp.com/2438801/projects/4183131/messages/25632920?enlarge=87583725#attachment_87583725

- **The power of personalization: how Sourcebooks is developing new channels, new products and new partnerships with Put Me In The Story [Sourcebooks]**



How this platform, launched to make every child “the star of treasured children’s stories” has allowed Sourcebooks to establish partnerships with major brands like Sesame Street, Hello Kitty, Anne Geddes and the Berenstain Bears.

Aida V. Dobkevičiūtė (LLA)

https://basecamp.com/2438801/projects/4183131/messages/25632920?enlarge=87583725#attachment_87583725

Sergio Mejías (Bubok)

https://basecamp.com/2438801/projects/4183131/messages/24109636?enlarge=81197266#attachment_81197266

- **The business of storytelling**

Discussion between Join Anna Mioni and Eric Huang about both the opportunities and challenges faced by children’s publishers.

Aida V. Dobkevičiūtė (LLA)

https://basecamp.com/2438801/projects/4183131/messages/25632920?enlarge=87583725#attachment_87583725

- **From Print to Digital in Brazil [Cosac Naify]**



The speakers presented Cosac Naify, a Brazilian publishing house known for its high quality design methods, as an example of the challenges that the traditional publishers must face in the digital environment.

Justyna Rygalik-Kolbicz (PIK)

https://basecamp.com/2438801/projects/4183131/uploads/13550105?enlarge=87601088#attachment_87601088

- **PubCoder [PubCoder]**



Presentation of this authoring tool to create interactive books suitable to export to any digital format and language. Perfect for illustration, e-text and non-fiction publications.

Justyna Rygalik-Kolbicz (PIK)

https://basecamp.com/2438801/projects/4183131/uploads/13550106?enlarge=87601090#attachment_87601090

The coverage of events ensured by partners is relevant since it means that TISP is able to intercept relevant contributions for the Smart Book; the notification of interesting potential contributors or content for the Smart Book did take place not only through the event reporting but also in more informal and direct ways such as direct exchange with coordinator or direct contact with interesting contributors/business cases that are then submitted directly to the editorial team.



1.1.3 Participants

Nº OF PEOPLE ATTENDING TISP WORKSHOP	84
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The TISP workshop was attended by 84 registered participants: 25 TISP members and 59 participants not involved in the TISP project.

TISP PARTNER	COUNTRY	PEOPLE
ABK	Bulgaria	Diana Boycheva
AIE	Italy	Cristina Mussinelli
AIE	Italy	Elisa Molinari
AIE	Italy	Maria Loi
AIE	Italy	Giulia Marangoni
AIE	Italy	Piero Attanasio
AMETIC	Spain	Aida Millàn
ANITEC	Italy	Barbara Carnevale
APDETIC	Romania	Valentin Negoita
BOEK	Belgium	Evi Werkers
BUBOK	Spain	Sergio Mejias
CCIS	Slovenia	Zdravko Kafol

DE	Belgium	Elisabetta Bianchini
FBF	Germany	Mathilde Sommain
FEP	Belgium	Enrico Turrin
FGEE	Spain	Jesus Peraita
FGSR	Spain	Juan Garcia Calvo
FGSR	Spain	Luis González Martín
HKU	The Netherlands	Pierre Mersch
iMINDS	Belgium	Wesley De Neve
JGU-BSM	Germany	Katinka Imhoff
LBF	UK	Orna O'Brien
MVB	Germany	Michael Vogelbacher
PA	UK	Seonaid MacLeod
PIK	Poland	Justyna Rygalik-Kolbicz

1.1.4 Results and Conclusions

The workshop held on the occasion of the BCBF was a unique opportunity for exploring issues concerns children and digital reading. The trends in terms of discovery, pricing, market trends and activities in children publishing, or collaborative options between the publishing and ICT in order to offer the most engaging, interactive and fulfilling experience possible, were part of the subjects well highlighted by the speakers.

The analysis of digital habits of children (and of their parents) in terms of content and devices showed some relevant trends and open issues for digital publishing for children such as:

- need for innovative products (a digital version of printed books is simply not enough);
- need to improve discoverability (due to the high competition with other type of content available online);
- the high potential in terms of educational use.

The business cases presented illustrated some cases of success in approaching these trends and tackling these issues, for example in developing products cross-media and offering solutions for discoverability. Cross-media seems to be the keyword to the experiences shared where mixing a narrative/editorial layer to ICT (digital) based products means new ways of enjoying stories and could also innovate teaching and learning.

As for the TISP meeting, it was truly productive with regard to the upcoming launch of the Smart Book website and the actions arising from this circumstance.

1.2 LONDON BOOK FAIR, LONDON (UNITED KINGDOM)

1.2.1 Context



Tuesday - Thursday
8 - 10 April 2014
Earls Court, London

The London Book Fair is defined as the global marketplace for rights negotiation and the sale and distribution of content across print, audio, TV, film and digital channels. Under this overall description, it is possible to find any specific

topic referring the current 'culture of contents' and all the elements we consider that are connected with it.

In their 2014 edition, the LBF showed a vast list of contents focusing on the digital. Conferences, seminars and other events, as well as specific exhibition spaces were devoted to present and explore the challenges, trends and main issues that are shaping the future of book marketplace.

From the first big conference (Publishing for Digital Minds), the daily agenda offered the opportunity to take part in a diversified range of activities related to many of the topics included within the strategic framework of TISP. One of them, e-skills, was selected as the central axis of the workshop organized by the consortium.



1.2.2 TISP initiatives

TISP SEMINAR

Title: **PUBLISHING AND THE ICT SECTOR: HOW SKILLS ARE CHANGING IN THESE DIFFERENT SECTORS TO BE ABLE TO WORK MORE CLOSELY TOGETHER**

Date: **Tuesday April 8th, 2014**

Organizers: **TISP, e-Skills for job, London Book Fair**

Speakers: - **Marcello Vena**, Director of Digital Business RCS Libri
- **Algirdas Stonys**, Director LITRECORDS
- **Laurent De Bernede**, Founder and Head of Sales and Marketing Everlearn
- **Marisa Fernandez Esteban**, EU Policy Officer DG Education and Culture

Chair: - **Emma House**, Director of Publishers Relations Publishers Association

[Event Summary](#) [extracted from the report by Seonaid MacLeod, available in Smart Book]

This seminar represented a live demonstration of the sort of projects that the TISP project aims to convey: innovative, collaborative and unique.

Marcello Vena, Director of Digital Business at RCS Libri presented two projects that the company has been working on. With seventeen years of digital innovation experience across three continents (Europe, US & Asia), encompassing the roles of designer, entrepreneur, venture capitalist, management consultant and general manager, he now manages the digital trade book business of RCS Libri, one of the largest European book publishers and owner of Rizzoli, Bompiani and Fabbri Editori. Rizzoli recently released La Grande Fiabe Narrate, a beautiful collection of fairy stories in EPUB 3 format where the narrative comes to life thanks to texts recited by the actors, the music and sound effects, small animations and illustrations in colour. The e-books are released once a week for twenty weeks, reminiscent of the Charles Dickens newspaper serials.

For weary, bored travellers, RCS has also teamed up with NTV to offer passengers on the Italo train network access to a free digital library while travelling. Train-users will be able to read books from devices installed on board and through their personal devices.

Laurent de Bernede was the second to take the stage as funding partner of Everlearn, and currently head of Sales and Marketing for the firm for which is involved in a number of technology

start-up initiatives as both an investor and mentor. PrepMyFuture, Everlearn's parent company, has partnered with Ellipses to aid learning by developing an online, adapted learning platform designed to help students revise for standardised tests. The platform aids students through a combination of easy-to-navigate interfaces, usable analytics and extensive collaboration to ensure that the content fits the platform. The tool adapts the difficulty and content of its presentation to suit the level of each user individually, in order to optimise his or her study time and progress. Bernede alluded to the changing skillset of publishing, saying that 'publishers are becoming more and more digital sales and marketing people'.

Afterwards **Emma House** gave the floor to **Algirdas Stonys**, a founder and CEO of TeleSoftas the first Lithuanian mobile development company. Litrecords, a subsidiary of TeleSoftas specialising in interactive e-books, has created the app *Hour of the Wolf*, a powerful steampunk adventure novel and the biggest Science Fiction / Fantasy best-seller in Lithuania of all times. Stonys brought his author, Andrius Tapinas, on stage to talk through the creative process. Tapinas spoke of how, as a gamer himself, he was able to bring gaming elements to the publishing process, and connect the content with younger people easily. Involving interactive maps, gaming elements and immersive elements (including 'steam' appearing from the iPad and the screen 'cracking' if a character hits it with his sword), this was an example of transmedia storytelling at its best, and particularly pertinent in London Book Fair's first year of hosting a Gaming Pavilion, in association with UK Interactive Entertainment (UKIE) to showcase this kind of opportunity for collaboration.

Marisa Fernandez Esteban, EU Policy Officer, spoke about how good cooperation between the two sectors ICT and publishing can plug the e-skills gap and contribute to the prosperity of the EU as a whole and as well possibly what they can offer to foster this trend.

In the dialogue between the speakers and the audience on how the digital innovation in publishing is influencing the skills of professionals both in the book and ICT sector that more and more interact, some interesting elements emerged. Mr Vena, asked about where his company found the necessary skills for technological innovation replied explaining that, being a large publishers they had set their own IT department but they also deal frequently with external technical partners. He nonetheless remarked that innovation should be first of all inside the company in terms of ideas and open mind; only on this basis you will then find the necessary skills to implement innovation and these may be internal or external. One aspect he remarked is the importance of establishing an effective dialogue with IT providers and especially start-ups. With regard to the latest, Mr Vena believed it was important to use their same language (this not being obvious for some publishing houses) and to talk with them independently from the sector they were operating. Matching ideas with what it's feasible (both from the technical and business point of you) might prove not to be a fast process and an open mind is necessary to understand what can fulfil your innovation goals. Mr

de Bernede observed that new training was needed (and requested) by publishers also in the marketing and sales sector and how intermediate professional profiles such as project manager for content were more and more involved to develop joint partnership between a publishing and IT company for new products. Of course for younger generation, more accustomed with technology, cooperation with IT partners might be easier as the author Andrius Tapinas already noted during the workshop.

As an overall conclusion, it was remarked how the increasing convergence of ICT and publishing could boost the acquisition of e-skills by young people but it was recommended that publishing sector should promote more the opportunities that could be offered to young generations to work in the book sector using digital skills. The “digital” dimension of the book sector is not being enough known with respect to other sectors.

TISP’s dedication to and knowledge of small innovation projects, and its place as a support network for ICT partners and publishers alike was highlighted by the range of approaches, outputs and partnerships on show in the seminar.

ATTENDANCE TO OTHER ACTIVITIES IN LBF

After the consortium meeting that followed the workshop, TISP partners participated to a guided tour accompanied by David Roche, member of LBF Advisor Board.

The tour gave the occasion to visit the areas of the Book Fair where digital innovation was hosted such as the Tech Central where tech focused exhibitors can be found and that also include specific initiatives such as Campus@LBF, a dedicated area for start-ups, PS@Tech for all – for Publishing Solutions providers and two theatres for showcases.

Also in the case of LBF, an exhaustive analysis of the professional events and conferences were made in advance to the workshop. .

The outcome document included a selection of sixty events whose contents were related to the topics that TISP has defined as strategic areas of work.

Once it was delivered to the members of the network, they filled out the online form to choose the activities shown in the following list. As for the Bologna Childrens’ Book Fair, events report produced afterward were stored in the collaborative platform Basecamp while partners also acted directly contacting potential contributors to the Smart Book or notifying interesting content to the Coordinator and partners by email.

PERSON / ORGANIZATION	ACTIVITIES TO ATTEND
Christoph Bläsi (JGU-BSM)	<ul style="list-style-type: none"> - BIG-PICTURE STRATEGY: RIDING THE SECOND WAVE OF DIGITAL PUBLISHING - SEMANTIC TECHNOLOGY FOR PUBLISHING: IMPROVING INSTITUTIONAL MEMORY
Vilma (Misiukoniene)	<ul style="list-style-type: none"> - Conference: PUBLISHING FOR DIGITAL MIND - Conference: WHAT WORKS? EDUCATION - THE FUTURE OF COPYRIGHT AND LICENSING: A GLOBAL CONVERSATION - MOVING TOWARDS A 'RIGHT CLICK' WORLD: COPYRIGHT IN THE DIGITAL AGE
Wesley De Neve Ghent University iMinds (Multimedia Lab)	<ul style="list-style-type: none"> - Conference: PUBLISHING FOR DIGITAL MIND - THE WAR FOR TALENT: CAN PUBLISHING ATTRACT THOSE WITH THE FUSION OF SKILLS IT NEEDS FOR THE FUTURE? - SEMANTIC TECHNOLOGY FOR PUBLISHING: IMPROVING INSTITUTIONAL MEMORY
Frank Salliau (Boek.be)	<ul style="list-style-type: none"> - Conference: PUBLISHING FOR DIGITAL MIND - HOW TO WORK WITH BOOKTUBERS – A NEW GROUP OF ONLINE BOOK LOVERS
Maria Loi (AIE)	<ul style="list-style-type: none"> - PUT ME IN THE BOOK! RESPONSIVE DIGITAL STORYTELLING FOR THE INTERACTIVE READER - THE FUTURE OF COPYRIGHT AND LICENSING: A GLOBAL CONVERSATION - BIG-PICTURE STRATEGY: RIDING THE SECOND WAVE OF DIGITAL PUBLISHING
Anna Lionetti (mEDRA)	<ul style="list-style-type: none"> - BUILDING A DIGITAL PUBLISHING BUSINESS IN THE APP STORE - PUT ME IN THE BOOK! RESPONSIVE DIGITAL STORYTELLING FOR THE INTERACTIVE READER - GLOBAL BOOK MARKET - THE KEY TRENDS IN THE DIGITAL AND PRINT BOOK SPACE - BUSINESS IMPROVEMENT FOR INDEPENDENT BOOKSELLERS - THE PROVISION OF STUDENT RESOURCES IN 2014: OPEN ACCESS, COPYRIGHT, ETEXTBOOKS AND MOOCS - THE PROFIT IN KNOWING' – USING SEMANTICS IN EDUCATION AND ACADEMIC PUBLISHING - MEASURING AND ADAPTING TO NEW CHANNELS FOR CONTENT DISCOVERY
Giulia Marangoni (AIE)	<ul style="list-style-type: none"> - SEMANTIC TECHNOLOGY FOR PUBLISHING: IMPROVING INSTITUTIONAL MEMORY
Nina Klein (Frankfurt Book Fair)	<ul style="list-style-type: none"> - SELLING DIRECT AND BUILDING YOUR COMMUNITY
Jesus Peraita (FGEE)	<ul style="list-style-type: none"> - Conference: BIC SUPPLY CHAIN SEMINAR - INTERACTIVE VIDEO BOOKS. NEW INTERACTIVE TECHNOLOGIES FOR INDIVIDUALISED TEACHING AND LEARNING - THE CHALLENGE OF HIGHLY ILLUSTRATED CONTENT IN AN EBOOK
Enrico Turrin (FEP)	<ul style="list-style-type: none"> - THE PROVISION OF STUDENT RESOURCES IN 2014: OPEN ACCESS, COPYRIGHT, ETEXTBOOKS AND MOOCS - SEMANTIC TECHNOLOGY FOR PUBLISHING: IMPROVING INSTITUTIONAL MEMORY

	<ul style="list-style-type: none"> - INTERACTIVE VIDEO BOOKS. NEW INTERACTIVE TECHNOLOGIES FOR INDIVIDUALISED TEACHING AND LEARNING - WHAT SELF-PUBLISHING CAN TEACH PUBLISHERS – TIME IS MONEY - RULE 14: USING BIG DATA TO DRIVE CONTENT AGGREGATION - MEASURING AND ADAPTING TO NEW CHANNELS FOR CONTENT DISCOVERY
Luis González (Fundación GSR)	<ul style="list-style-type: none"> - Conference: PUBLISHING FOR DIGITAL MIND - PUBLIC LIBRARIES GO DIGITAL
Valentin Negoita (APDE TIC Romania)	<ul style="list-style-type: none"> - BIG-PICTURE STRATEGY: RIDING THE SECOND WAVE OF DIGITAL PUBLISHING - MOVING TOWARDS A 'RIGHT CLICK' WORLD: COPYRIGHT IN THE DIGITAL AGE - KEY FACTORS TO CONSIDER IN PRODUCING MULTI-PLATFORM CONTENT
Michael Kirchner (Frankfurt Book Fair)	<ul style="list-style-type: none"> - MAPPING & UNDERSTANDING INTER. EBOOK MARKETS: FIGURES-TRENDS IN EUROPE & EMERGING MARKETS
Aida V. Dobkeviciute (Lithuanian Publishers Assoc.)	<ul style="list-style-type: none"> - THE CHANGING FACE OF PUBLISHING - THE FUTURE OF COPYRIGHT AND LICENSING: A GLOBAL CONVERSATION - MAPPING & UNDERSTANDING INTERN. EBOOK MARKETS: FIGURES-TRENDS IN EUROPE & EMERGING MARKETS - WHAT SELF-PUBLISHING CAN TEACH PUBLISHERS – TIME IS MONEY

1.2.3 Participants

Nº OF PEOPLE ATTENDING TISP SEMINAR	81
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The TISP workshop was attended by 78 participants: 21 TISP members and 60 participants not involved in the TISP project.

TISP PARTNER	COUNTRY	PEOPLE
iMINDS	Belgium	Wesley De Neve
IVSZ	Hungary	Klara Heilingbrunner
FEP	Belgium	Enrico Turrin
mEDRA	Italy	Anna Lionetti
BOEK	Belgium	Frank Salliau
FGSR	Spain	Luis Gonzalez
FBF	Germany	Michael Kirchner
PA	UK	Seonaid Macleod
SPA	Slovenia	Miha Kovač

LLA	Lithuania	Aida Dobkevičiūtė
MVB	Germany	Michael Vogelbacher
AIE	Italy	Maria Loi
AIE	Italy	Piero Attanasio
AIE	Italy	Giulia Marangoni
AIE	Italy	Cristina Mussinelli
FGEE	Spain	Jesus Peraita
APDE TIC	Romania	Valentin Negoita
DE	Belgium	Patrice Chazerand
JGU	Germany	Christoph Blasi
BCBF	Italy	Roberta Chinni
INFOBALT	Lithuania	Vilma Misiukoniene

1.2.4 Results and Conclusions

After the workshop an open debate between TISP partners took place on the e-skills' topic. Piero Attanasio and Cristina Mussinelli (AIE) were responsible for moderating a very participative discussion where attendees shared their opinions on issues such as: What are the crucial skills which are needed by publishers? Which skills publishers already can provide? How to support the development of such skills?

Several members of the meeting shared their own business cases and some experiences about e-skills identification, as well as training models useful to generate the desired capabilities. Overall the need for benchmarking at EU level was highlighted as well of the need for European resources devoted for the purpose. Finally agreement on the following areas of action was found:

1. Cataloguing e-skills

e-skills in the publishing sector cannot be limited to those related to production of ebooks; to identify training needs some effective instruments could be the dialogue and exchange between training organizations for publishers already established or the direct involvement of stakeholders of the book sector as some experiences of TISP partners showed.

2. Identifying and promoting the knowledge of success cases

Where a company succeeds in innovating, the skills analysis of people that were inserted in the company to contribute to that innovation may be useful to identify the areas where more training is needed.

For what concerns attracting e-skilled people into the publishing sector, TISP members agreed with the conclusion made in the workshop that more communication with the IT sector is needed; it is

necessary that opportunities for ICT professionals are made clear and promoted among them and in the job market.

The discussion on e-skills both in the workshop and in the TISP partners meeting that followed highlighted the relevance and impact that training and adequate availability and access to well qualified e-professionals may have on the process of innovation of publishing companies. This issue cannot be tackled only at local level but an EU dimension is needed to allow benchmarking between different countries since the market should be approached globally. In addition to this, a more effective communication between IT and publishing sector can drive more solid cooperation and exchange. A stronger visibility of opportunities arising for ICT professionals in the publishing sector could enhance its attractiveness for career.

1.3 FRANKFURT BOOK FAIR, FRANKFURT (GERMANY)

1.3.1 Context



The Frankfurt Book Fair is the main worldwide publishing industry's trade fair, as the statistics show: 7,300 exhibitors from more than 100 countries, 280,000 visitors and over 4,000 events to attend, including some organized by key

players from other media industries, as films and games. The diverse events were grouped under the umbrella of the main programmes:

CONTEC Frankfurt, a conference that explore solutions for offering platform-independent reading experiences that are sustainable, consumer-oriented and profitable. The event was developed through more than 70 creative networking sessions based on the dialogue and the exchange of experiences and opinions, around the views of 150 speakers who examined the issues and trends of the international publishing and media industries.

According to the official information from the FBF final press release, the Business Club, where CONTEC is integrated, brought together around 3,000 visitors from more than 50 countries to take advantage of its array of conferences, consultations and networking services.

Other essential parts of the programme were the sessions included within **StoryDrive**, the international forum for trends and innovation for the media and entertainment industries, with

short talks from specialists which motivated the participation in personal one-on-one conversations with the speakers.

Besides these big two sections, the **Hot Spot** exhibition areas with a lot of plug & play multimedia stands, had an intensive activity. Almost 100 tech-based innovators from all around the world made use of them for service providers. In words of Juergen Boos (Director of FBF) ‘There’s probably nowhere else that shows more effectively just how many new ideas – how many new companies – there are at the Book Fair’.

1.3.2 TISP initiatives

TISP WORKSHOP

Title: **EU STAKEHOLDER WORKSHOP: WHAT DO PUBLISHERS NEED IN ORDER TO INNOVATE?**

Date: **Wednesday October 8th, 2014**

Organizers: **TISP, NEM, Frankfurt Book Fair**

Speakers: - **Alessandro Senesi, Javier Hernández-Ros, Harald Trettenbrein**, European Commission (DG Culture and DGConnect)
- **Dawid Piaskowski**, CEO, Booklikes (Poland),
- **Ian Harper**, CEO, The Bradfield Company (UK)
- **Helmut Pesch**, BasteiLübbe, Director E-Publishing (Germany)
- **Andrea Angiolini**, Editorial Director of publishing house Il Mulino, Pandoracampus
- **Jean-Dominique Meunier, Enrico Turrin, Frank Salliau, Christoph Bläsi**, representatives of TISP and NEM (New European Media)

Chair: - **Nina Klein**, Director Corporate Content, Frankfurt Book Fair

[Event Summary](#) [report by Enrico Turrin, available in Smart Book]

The development of this workshop included three main contents:

- Overview of the European Commission’s funding opportunities for innovation in the creative industries (publishing in particular)
- Presentations of some experiences of innovative projects by European publishers, with a view to focus on the conditions that make success possible in this field with regard to access to research and financing.
- Brief presentation of the results of the TISP/NEM survey ‘R&D needs in European publishing’.

PART 1

Holger Volland, Vice-president of the Frankfurt Book Fair, welcomed the participants and introduced the event as a special one for the FBF, as it brought together technology and publishing to discuss what to do to work more closely together, an area of cooperation on which the Fair has been putting a lot of emphasis. Mr. Volland said that there were two ways to look at publishing: it could be seen as a dying sector, since the print market seems unlikely to grow, and it's rather shrinking gradually; but it could and should be seen as an expanding sector, and more than ever so, as digital provides new ways of dealing with content – and e-book markets are indeed on the rise all over Europe.

Nina Klein (Director Corporate Content of the Frankfurt Book Fair) introduced the first group of panelists from the European Commission and briefly outlined the TISP project; she also stressed the relevance of the topic of ICT and publishing and the role of the EU in supporting their integration, which had led the Frankfurt Book Fair to host such a workshop for the first time.

Alessandro Senesi (DG Education and Culture, Deputy Head of Unit in charge of the cultural aspects of the Creative Europe programme, European Commission) provided an overview of Creative Europe, a funding scheme run by his DG to support the cultural and creative sectors (among which he acknowledged the prominence of book publishing), going as far as they can, given that culture is a national competence. Indeed, Mr Senesi explained that despite an increase in the programme's budget for the period 2014-2020, there are limits to its scope: Creative Europe supports cross-border cooperation, to complement national initiatives, promote exchanges and cooperation activities, and so on, but always focusing on initiatives with an impact across borders. Among the activities supported that are relevant for publishers, he listed the European Union Prize for Literature (co-organised by the Federation of European Publishers, the European Writers' Council and the European and International Booksellers Federation), which aims at putting European talent in the spotlight (this year's winners had been announced at the Fair that very morning); a scheme that provides grants for translations of literary works and supports their promotion (the aim is to help translate some 5,000 books in 7 years, through annual calls for proposals); and various cooperation projects in the field of literature.

Javier Hernández-Ros (DG Communication Networks, Content and Technology, Head of the Creativity Unit, European Commission) explained that his Directorate General (formerly called Information Society) dealt essentially with connecting technologies and content, and while jokingly wondering what it would be called next [it will be DG Digital Economy and Society], he stressed the importance that the topic will have in the new European Commission, due to take office on 1 November. The new Commission will in fact have a Vice-president in charge of the Digital Single Market (the Estonian Andrus Ansip) and a Commissioner for the Digital Economy and Society (the

German Günther Oettinger), who will follow the Directorate General's daily work. Moreover, Commission President Jean-Claude Juncker has announced a copyright proposal within 6 months from the start of his office and specified, in his letters of mandate to Mr Ansip and Mr Oettinger, that their tasks will include the promotion and support of cultural and creative industries – such explicit mention being made for the first time in that setting. Thus, the digital world and the creative sector will be high on the Commission's agenda, according to Mr Hernandez-Ros.

Mr Hernandez-Ros then briefly presented the Horizon 2020 programme, a large funding programme of the European Commission focused on research and innovation in a broad sense, inviting publishers to find actions potentially beneficial to them in the programme. In particular, several calls for proposals and action lines support the use of ICT in the cultural and creative industries: the ICT 18 call "Support the growth of ICT innovative Creative Industries SMEs" closed in April 2014 with good results in terms of participation (the selected projects will be announced soon), and the current Work Programme includes the ICT 19 call "Technologies for creative industries, social media and convergence"; horizontal actions are also envisaged, such as the SME Instrument (also known as 'Disruptive Innovation'), which funds feasibility projects and research and innovation activities on a continuous basis (no need to wait for specific calls); and an instrument is in the pipeline that will support access to finance for SMEs in the creative sector, which will be managed by the European Investment Fund. Mr Hernandez-Ros repeated his invitation to all those in the business needing support for innovation to look at all opportunities available and also to make their views known to the Commission, to be visible as a sector and propose their ideas [this is indeed one of the aims of collaborative initiatives such as TISP and NEM: to gather a significant number of stakeholders and make proposals to shape the research and innovation agenda of the EU in the creative industries domain].

Harald Trettenbrein (DG Communication Networks, Content and Technology, Deputy Head of the Converging Media and Content Unit, European Commission) explained the complementarity between his unit and that of Mr Hernandez-Ros, saying that his had traditionally focused more on policy (mainly audiovisual and media), dealing with issues like copyright and VAT on digital cultural products (the unit supported the campaign for reduced VAT on e-books), and looking into the impact that Commission's actions could have on cultural and creative industries. Mr Trettenbrein acknowledged that there were no specific regulations on publishing such as those that apply to the audiovisual sector.

Mr Trettenbrein said that the main trends in the audiovisual sector (interactivity, personalisation, immersion) could apply to publishing as well and that with calls like ICT 19 the Commission was trying to help creative industries to deal with these trends and be competitive. The focus is on collaborative projects (except for the SME Instrument): ICT 19 for example requires at least 3

partners to set up a project. The call has 3 strands: research and innovation actions (RIA), innovation actions (IA) and coordination and support actions (CSA); while RIA have a strong research component aimed at advancing the state of art, IA focus on pilot projects, large scale demonstrations, initiatives close to the market, new services (interactivity and convergence, immersive environments, search), and CSA are meant to create platforms to convey stakeholders' views. Mr Trettenbrein declared that the Commission had not just discovered cultural and creative industries and that the current framework simply reinforced existing policies with a more explicit mandate and made the commitment more concrete.

Mr Senesi added that also Creative Europe, while being a new funding scheme, did continue the work of the previous Culture and Media Programmes, not marking a new approach but an enhancement of the existing framework, and specified that his area of competence would also envisage a financial guarantee scheme for SMEs. He recalled the common objectives of all these initiatives, as identified in the EU treaties, that tell the Commission to support cultural diversity – the Commission tries as well to help creating jobs and growth via the creative industries.

Questioned about support for all stages of content production (as opposed to just the initial phase), Mr Hernandez-Ros acknowledged how calls were drafted openly and presented many opportunities and that there was room for suggestion on how ICT-based projects could help the creative sector to develop; he added that also Structural Funds had to be in part devoted to 'smart investments', including the cultural and creative industries.

PART 2

The following session presented several cases from European innovators, moving from theory to practice and stimulating reflections on what kind of support innovative players would need to succeed.

The first case, introduced by **Andrea Angiolini** (Editorial Director of publishing house Il Mulino, Italy), was *PandoraCampus*, a multi-publisher digital platform for higher education, which offers many university course books in their entirety (something quite new), in addition to interactive content and additional features to help university students with their studying and professors with their teaching. The books offered are fully digital; the platform, which puts them into a pedagogical context, is based on standards (thus open to integration of content from various sources – and the content is interoperable and portable). The business model is also innovative: there are different access models, for single chapters, books and course packs. Focus on the reader, active content, plenty of educational resources and additional services are the building blocks of this initiative, which was launched after some intense R&D and a year of experimenting and getting feedback from focus groups. Partially funded by a regional support programme, the

project was developed in cooperation with the University of Bologna and carried out technically for the most part by the ICT team of Il Mulino.

Mr Angiolini made some remarks on the landscape of higher education publishing in the digital age and the scope for supporting innovative publishers at EU level. Without some degree of intervention, the scenario might as well end up with no EU players, taken over by big companies rooted in other sectors (ICT, retail) based on a ‘winner takes it all’ mechanism not uncommon in the internet economy; moreover, the offer of services could end up being at the same time too complex (in terms of mechanisms) and too poor (in terms of content). The main needs for support in the sector are: ICT literacy in the educational environment (users need to be able to use technology), simplicity (EU projects are often too complex, they need to be shorter and smaller), envisaging a good mix of publishing and ICT, focusing not only on research but on the industry’s specific features.

Mr Hernandez-Ros said that the Commission was indeed working in order to simplify the process of participation in projects, and acknowledge the point of having to develop new products and services, but not so new as to not have a potential market in the present; he also confirmed that supports initiatives were aimed at ICT and publishing, not just at ICT.

Ian Harper (CEO of The Bradfield Company, UK) presented *Inanimate Alice*, the flagship title of his company. This is an exploration of new ways of reading, an interactive narrative created for the screen that mixes audio, video, animation, game and text to tell the story of a girl who wants to become a computer game designer. The project received some initial funding from the Australian government (it launched there first), but it has been expanding, both geographically (it is available in seven languages now and recently the Arts Council UK provided some support) and in terms of content (the series has now 6 episodes, and more are planned), as well as usage (*Inanimate Alice* has been downloaded 3 million times and has engaged 30,000 teachers).

Mr Harper expanded on the potential for *Inanimate Alice* to help enhancing new and traditional forms of literacy in the classroom, since learning is a lot about narratives, and argued that this model could be used to develop learning curricula around its concept. Mr Hernandez-Ros stressed that ICT could indeed be used to develop new ways of teaching (as suggested in the Commission Communication ‘Opening up Education), as well as a tool for creativity. He said that the Commission was not usually in the business of content creation directly, but praised the example as a case of ICT allowing innovation of important practices.

Dawid Piaskowski (CEO of Booklikes, Poland) presented *Booklikes*, the “world’s n° 1 blog platform for book lovers”, created to address the need by authors and publishers for places to market their

books “outside of the Amazon world”. Faced with the absence of a single place to reach out to book bloggers in particular (whose popularity is skyrocketing), and of a complete solution for book lovers and book bloggers alike, Booklikes was launched in May 2013 in the US and the UK, then in a few more countries (like Germany) and is now present in more than 10 countries (it takes only about 5 days to enter a new national market). It is an easy tool that allows creating one’s own reading website, and can be customized; 45,000 active bloggers are using it now and the number is rapidly growing. The decision to start in the US was due to the presence of a single large market there and to the higher availability of capital for startups.

Mr Hernandez-Ros praised the innovative ways of using technology in publishing, calling for a more optimistic attitude with regard to startups in Europe (he quoted Spotify, Skype and other examples); he recalled that the new Commission would have a Vice-president for the Digital Single Market and aim to create an environment to foster content and technology. Mr Trettenbrein confirmed that the Digital Single Market was a priority, a “power mission”, and said that the EU had a disadvantage in terms of market development, beyond its regulatory fragmentation, namely its cultural and linguistic fragmentation, but he argued that this could and should also become an advantage, as cultural diversity was also something to build upon. Mr Hernandez-Ros quoted Vice-president Kroes’ statement that the Digital Single Market existed already but was illegal, and that it should be made legal.

Helmut Pesch (Director E-Publishing at BasteiLübbe, Germany) illustrated the rapid growth of his publishing house in the e-book market; the company founded its digital division in May 2010 and now has a catalogue of 4,000 e-book titles and 200 apps and has an in-house developers team. Its strategy was based on a focus on entertainment, on targeting digital-born readers (this led to developing a multimedia novel launched in several languages in 2011), trying to remain creative and innovative, cooperating with other sectors across media (TV, film), listening to customers and experimenting constantly. Mr Pesch admitted trying to obtain public funding, but he said it had been an “administrative nightmare”.

The business cases illustrated several topics among those identified by TISP as the most relevant for cooperation between ICT and book publishing, as well as among those indicated by the TISP recommendations as suitable for policy support: the experiences presented highlighted the importance of collaboration with research institutions, the role of external funding (public and private) as an enhancer (provided that access to funds is made simple), the potential of innovative products (interactive, multimedia, etc.) and business models, in particular (but by no means only) in the educational sector and the need to develop digital skills, as well as the role of a level playing field in the online world.

PART 3

The session consisted in a short presentation of the NEM initiative by **Jean-Dominique Meunier** (Chairman of NEM), who explained the European Technology Platform’s aim to help to shape the EU’s research and innovation agenda with a focus on creative industries and converging media and its positioning as a cluster of platforms, associations, clusters and projects; this was followed by a short presentation of TISP by **Enrico Turrin** (Deputy Director of the Federation of European Publisher), who focused on the TISP Smart Book as a resource to highlight interesting business cases of ICT-publishing innovation as well as to find inspiration and potential partnerships, and on the TISP policy recommendations.

The event was closed by the presentation of the results of a joint *TISP/NEM survey “R&D needs in European publishing”*, which explored what companies from book publishing and the adjacent creative industries need in order to innovate (there were some 120 responses). **Frank Salliau** (Senior Researcher, iMinds, Belgium) and **Christoph Bläsi** (Professor at the Institute for Book Studies of Johannes Gutenberg University, Germany) outlined the main findings of the survey, according to which access to finance is the biggest obstacle to innovation for European publishers (especially SMEs); the respondents, the majority of which would be willing to undertake collaborative projects, ranked digital distribution, file formats and multimedia and interactive content as the main areas to focus R&D in order to boost digital publishing. The survey also provided several examples of successes and failures related to innovation in book publishing.

ATTENDANCE TO OTHER ACTIVITIES IN FBF

In addition to the workshop, a guided tour was organized after the event that accompanies the workshop participants through the areas of the Book Fair most devoted to digital and innovation (such the [Hot Spots](#)), meeting some technological companies exhibiting.

After the usual process of analysis and selection of the most interesting activities for the consortium, the planned attendance to events of the fair was the one shown in this listing, though it may not be considered exhaustive of the actual participation of partners to Frankfurt Book Fair events.

PERSON / ORGANIZATION	ACTIVITIES
Anna Lionetti (mEDRA)	<ul style="list-style-type: none"> - BIG DATA'S CRYSTAL BALL: INDUSTRY PREDICTIONS FROM A DATA GURU - HUG THE ALIEN (Presentation of projects in Digital Publishing area) - THE ROLE OF DESCRIPTIVE METADATA & CONTROLLED VOCABULARIES

	<ul style="list-style-type: none"> - METADATA WORKFLOW IN E-BOOK ACQUISITION PROCESS - SELL MORE BOOKS AND COMMUNICATE BETTER USING ONIX - WHAT IS A PUBLISHER NOW? OPPORTUNITIES FOR THE POST-OPEN ACCESS ERA - OPEN ACCESS: WHO HOLDS THE POWER? - PUBLISHING IN ERA OF BIG DATA: MINING THE EQUITY HIDING WITHIN YOUR LIST - RULE 14: BIG DATA SOLUTIONS FOR THE PUBLISHING - IS E-EDUCATION MARKET READY FOR INTEGRATION? - ITALIAN ACADEMIC EJOURNALS: IL MULINO ON TORROSSA - EDITEUR STANDARDS – CONSERVATISM OR A RALLYING POINT FOR FUTURE ADVANCES?
Julia Baum (mvb)	- NEW PUBLISHING MODELS TO PROMOTE ESTABLISHED PUBLISHING VALUES METADATA WORKFLOW IN E-BOOK ACQUISITION PROCESS
Frank Salliau (iMinds)	<ul style="list-style-type: none"> - EDITEUR EPUB 3 NOW - SUPPLY CHAIN TRACK TBC (EDITEUR)
Evi Werkers (Boek.be)	<ul style="list-style-type: none"> - STOP CALLING IT CONTENT! (Wake Up call) - TIME IS MONEY: UNDERSTANDING CONSUMER HABITS (Panel) - GETTING BEYOND THE BOOK CREATING A NEW DIGITAL READING EXPERIENCE WITH INNOVATIVE MOBILE TECHNOLOGY
Annemie Speybrouck (Boek.be)	<ul style="list-style-type: none"> - STOP CALLING IT CONTENT! (Wake Up call) - REBELS OF PUBLISHING (Pecha Kucha Presentations)
Aida V. Dobkevičiūtė (Lithuanian Publishers Association, LLA)	<ul style="list-style-type: none"> - BIG DATA'S CRYSTAL BALL: INDUSTRY PREDICTIONS FROM A DATA GURU - PUBLISHING TRENDS AND STATISTICS (Global Book Monitor) - STOP CALLING IT CONTENT! (Wake Up call) - SELL MORE BOOKS AND COMMUNICATE BETTER USING ONIX - FUTURE OF THE PUBLISHING ENVIRONMENT - IS E-EDUCATION MARKET READY FOR INTEGRATION? - WHY ACADEMIC PUBLISHERS SELL BOOKS' CHAPTERS?
Seonaid Macleod (Publishers Association)	<ul style="list-style-type: none"> - RIGHTS, TRANSLATION AND DISCOVERY IN THE DIGITAL AGE (Business breakfast) - GENERATION BUSINESS MODEL. CUSTOMER-ORIENTED BUSINESS MODELS FOR PUBLISHERS AND MEDIA COMPANIES (expert table 1)
Tomasz Kaliński (Wydawnictwa Szkolne i Pedagogiczne Sp. z o.o.)	<ul style="list-style-type: none"> - THE CURRENT TRANSFORMATION OF THE GLOBAL BOOK BUSINESS (Talk with Brian Murray) - HOT SPOT DIGITAL INNOVATION - HOT SPOT EDUCATION
Christoph Bläsi (JGU-BSM)	<ul style="list-style-type: none"> - BIG DATA'S CRYSTAL BALL: INDUSTRY PREDICTIONS FROM A DATA GURU - STOP CALLING IT CONTENT! (Wake Up call)
Valentin Negoita (APDETIC Romania)	<ul style="list-style-type: none"> - BEYOND BETA: PUBLISHING START-UPS MAKING AN IMPACT IN THE MARKETPLACE - NEW BUSINESS MODELS: CASH COW OR THE ROAD TO BANKRUPTCY? - HOT SPOT DIGITAL INNOVATION - HOT SPOT EDUCATION

1.3.3 Participants

Nº OF PEOPLE ATTENDING TISP WORKSHOP	73
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The TISP workshop was attended by 73 participants: 26 TISP members and 47 participants not involved in the TISP project.

TISP PARTNER	COUNTRY	PEOPLE
CCIS	Slovenia	Miha Kovač
LBF	UK	Orna O'Brien
APDE TIC	Romania	Valentin Negoita
FEP	Belgium	Enrico Turrin
PA	UK	Seonaid Macleod
JGU	Germany	Christoph Blasi
BUBOK	Spain	Sergio Mejías
AIE	Italy	Maria Loi
AIE	Italy	Giulia Marangoni
AIE	Italy	Piero Attanasio
AIE	Italy	Cristina Mussinelli
FBF	Germany	Nina Klein
FBF	Germany	Holger Volland
BCBF	Italy	Roberta Chinni
mEDRA	Italy	Paola Mazzucchi
ABK	Bulgaria	Diana Boicheva
iMINDS	Belgium	Frank Salliau
DE	Belgium	Patrice Chazerand
LLA	Lithuania	Aida Dobkeviciute
BOEK	Belgium	Evi Werkers
BOEK	Belgium	Annemie Speybroeck
FGSR	Spain	Javier Fierro Gomez
INFOBALT	Lithuania	Vilma Misiukoniene
PIK	Poland	Bartłomiej Pucek
PIK	Poland	Tomasz Kaliński
MVB	Germany	Julia Baum

1.3.4 Results and Conclusions

Overall the workshop was openly recognised by the participants both from the book sector and from the EC as an occasion of open dialogue and fruitful exchange that could help the institutions to keep abreast of the needs and challenges of the creative industries and of the book sector in particular, thus enabling them to build appropriate support and funding to boost innovation and new alliances with the ICT sector.

The encouragement made by the officials of the Commission to keep these initiatives alive will certainly provide inspiration for future meetings.

2. INFORMATION AND DOCUMENTS GENERATED BY TISP PARTNERS

2.1 DOCUMENTS PUBLISHED ON THE SMART BOOK

The launch of Smart Book has meant a significant step forward, resulting in a quantitative and qualitative increase of the dissemination actions of TISP. The website serves as a show case for the TISP partners, who present some of their key assets and most relevant initiatives through the business cases. The website has been conceived also as a channel to share knowledge and experiences that enrich the truly essence of the consortium and spread its mission of research and innovation aimed to promote collaboration between publishers and the technology industry through reviews of relevant events, deepenings, studies, interviews.

Since the synergy between the events and the topics, the Smartbook enrichment evolves accordingly and serves as content hub for the contents related to TISP activities.





In particular, for each event, the editorial team of the Smartbook takes care to collect contents and contacts and coordinate with partners in order to produce resources related to the event and the subject addressed in the most suitable format.

In occasion of each event the Smartbook features a review which narrates the debate and the outcomes of the workshop/seminar; in addition to this, business cases are collected, either those showcased during the TISP event and others coming from the participation to other activities of the hosting Book Fair. This is valid also for other type of contributions that are published on the Smart Book like deepenings or studies. The enrichment of the Smart Book around (but not limited to) the subject addressed in the event continues with the assets provided by each partner and other external contributors.

Below some examples of the contents developed over the year that are closely connected to the activities and issues raised at book trade events and that can be useful to understand the enrichment strategy applied in the Smart Book.

Bologna Children's Book Fair



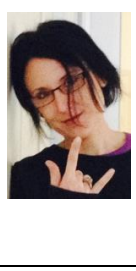

As for the Bologna Children's Book Fair, the Smartbook features a review of the TISP Masterclass, an interview to two of the speakers of the session (Irene Angelopulos and Giulio Caperdoni), a business case collected at the Masterclass (Magicbox), a deepening about the development of apps related to the Dust or Magic Masterclass.


	<p>Story-telling and story-seling. Key trends from Bologna Children’s Book Fair</p> <p>Review</p> <p>By Enrico Turrin (FEP)</p> <p>A detailed summary of the professional workshop organized by TISP, AIE, Editech and BCBF. The programme can be found in annex.</p> <p>http://www.smartbook-tisp.eu/resources/story-telling-and-selling-key-trends-from-bologna</p>
	<p>GoogleGlass4Museums: a story of reverse engineering and digital storytelling</p> <p>Deepening</p> <p>By Irene Angelopulus (Mubo) and Giulio Caperdoni (Vidienne)</p> <p>An interview to these two professionals whose respective companies have cooperated to create GoogleGlass4Museums, a project which combines publishing and technological assets. The product was presented in Bologna at the Masterclass ‘Story-telling and story-seling. Digital kids between transmedia experiences and market trends’.http://www.smartbook-tisp.eu/resources/827</p>
	<p>Magic Box</p> <p>Business case MagicBox is an end to end cloud based mobile publishing and distribution platform for publishers. It empowers publishers to create, manage and distribute digital content seamlessly across different devices, operating systems and browsers. The platform was presented during the TISP Masterclass</p>
	<p>Touch Press: developing apps for children of all ages</p> <p>Deepening</p> <p>By John Cromie (Touchpress)</p> <p>A conversation around the process behind the creation of apps with the Chief Technology Officer of Touch Press that was made taking advantage of his presence in the Generation Remix Masterclass held on March 23rd at BCBF 2014.</p> <p>http://www.smartbook-tisp.eu/resources/behind-touch-press-developing-apps-for-children-of-all-ages</p>

London Book Fair

As for the London Book Fair, the Smartbook features the review of the event, an interview to Marcello Vena, speaker of the workshop, an interview to the TISP member Paola Mazzucchi about


the topic addressed by the TISP workshop, a deepening by Diane Roßlenbroich on e-skills, a deepening from Marisa Fernández Esteban who participated at the workshop, the Ontotext business case collected during the London Book Fair.





	<p>Publishing & ICT: how to work more closely together</p> <p>Review of the TISP workshop</p> <p>By Seonaid MacLeod (Publishers Association)</p> <p>A brief report of the seminar prepared by TISP and e-Skills for Jobs on occasion of the London Book Fair. The programme can be found in annex.</p> <p>http://www.smartbook-tisp.eu/resources/publishing-ict-how-to-work-more-closely-together</p>
	<p>Tradition and innovation: the recipe for success</p> <p>Deepening- Interview to one of the speakers of the TISP workshop</p> <p>By Marcello Vena (Allbrain)</p> <p>Interview to Marcello Vena about the topics presented during the TISP workshop workshop .</p> <p>http://www.smartbook-tisp.eu/resources/tradition-and-innovation-a-recipe-for-success</p>
	<p>How I jumped in between publishing and ICT and lived happily ever after</p> <p>Deepening</p> <p>By Paola Mazzuchi (mEDRA and AIE)</p> <p>Interview to Paola Mazzucchi on the e-skill topic covered during the TISP workshop.</p> <p>http://www.smartbook-tisp.eu/resources/how-i-jumped-in-between</p>
	<p>Inside Bastei Entertainment: inquisitiveness and excitement for new projects</p> <p>Deepening</p> <p>By Diana Roßlenbroich (Bastei Lubbe)</p> <p>Interview to Diana Roßlenbroich (Bastei Lubbe) about the e-skills topic, following up the Apocalpsys business case a serial novel designed and developed for digital devices by Bastei Lubbe.</p> <p>http://www.smartbook-tisp.eu/resources/inside-bastei-entertainment-inquisitiveness-and-excitement-for-new-projects</p>

	<p>How to plug the e-skills gap?</p> <p>Deepening</p> <p>By Marisa Fernández Esteban (European Commission)</p> <p>Talk from this EU Policy Officer during the workshop organized by TISP at the London Book Fair. The exposition reviewed some of the programs and initiatives established by the European Union to promote cooperation between publishers and ICT so that publishing can plug the e-skills gap and contribute to the prosperity of the EU as a whole.</p> <p>http://www.smartbook-tisp.eu/resources/how-to-plug-the-e-skills-gap</p>
	<p>Ontotext</p> <p>Business case</p> <p>The description of Ontotext, a business case collected during the London Book Fair addressing the standards and interoperability topic, which creates software and services that use semantic technology to bring together metadata and content to search, navigate and analyze information in more productive ways.</p> <p>http://www.smartbook-tisp.eu/business_cases/ontotext</p>

Frankfurt Book Fair

As for the Frankfurt Book Fair, the Smartbook features the results of the “R&D needs in European book publishing” survey, the review of the event, the business case of Pandoracampus and Inanimate which were presented in the workshop and were already available at the launch of the website, a deepening on Big Data by Vincenzo Russi (Messaggerie) based on the speech he gave during the Contec conference held during the Book Fair.

	<p>Survey “R&D needs in European book publishing”</p> <p>By TISP</p> <p>A qualitative survey from TISP and FBR conducted among European book publishers. The study asked about needs and barriers limiting their possibilities and ability to innovate. Access to finance is perceived as the biggest obstacle to innovation. The document summarizes some of the main results and shows finance as the biggest obstacle. The document is included in Annex.</p> <p>http://www.smartbook-tisp.eu/resources/survey-rd-needs-in-european-book-publishing</p>
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	<p>What do publishers need in order to innovate?</p> <p>Review</p> <p>By Enrico Turrin (FEP)</p> <p>This document describes in depth the development of the EU stakeholders workshop held in Frankfurt and that was conducted by Frankfurt BF, TISP and NEM.</p> <p>http://www.smartbook-tisp.eu/resources/what-do-publishers-need-in-order-to-innovate</p>
	<p>Pandoracampus</p> <p>Business case</p> <p>The Pandoracampus platform, addressed to academic studies, was featured in the Smartbook since the launch and was presented during the FBF TISP workshop.</p> <p>http://www.smartbook-tisp.eu/business_cases/pandoracampus</p>
	<p>Inanimate Alice</p> <p>Business case</p> <p>As for Pandoracampus, the Inanimate Alice business case was featured in the Smartbook since the launch and was presented during the FBF TISP workshop.</p> <p>http://www.smartbook-tisp.eu/business_cases/inanimate-alice</p>
	<p>Big data without big investments: quick, scalable, lean and effective</p> <p>Deepening</p> <p>By Vincenzo Rossi (Messaggerie)</p> <p>An in-depht article about Big Data based on a presentation given during the EDItEUR track in the Contec conference.</p> <p>http://www.smartbook-tisp.eu/resources/big-data-without-big-investments-quick-scalable-lean-and-effective</p>

2.2 DOCUMENTS FILED IN BASECAMP

These materials are wide-ranging and have been created for different purposes: book trade related events and activities organized by TISP, press releases and other materials for dissemination, postcards, meeting minutes, etc.

2.2.1 Analysis and selection of activities from book trade events.



- **Bologna Children's Book Fair 2014 Analysis**

https://basecamp.com/2438801/projects/4183131/messages/22780061?enlarge=76196941#attachment_76196941

- **London Book Fair 2014 Analysis**

https://basecamp.com/2438801/projects/4183131/messages/23876184?enlarge=80324950#attachment_80324950

- **Frankfurt Book Fair 2014 Analysis**

https://basecamp.com/2438801/projects/4183131/messages/31822024?enlarge=112146941#attachment_112146941

2.2.2 TISP workshops and meeting agendas.



- **Programme of TISP workshop at BCBF 2014**

https://basecamp.com/2438801/projects/4183131/messages/22585186?enlarge=75494962#attachment_75494962

- **Programme of TISP seminar at LBF 2014**

https://basecamp.com/2438801/projects/4183131/messages/23870377?enlarge=80303399#attachment_80303399

- **Programme of TISP workshop at FBF 2014**

https://basecamp.com/2438801/projects/4183131/messages/31960400?enlarge=112212971#attachment_112212971

2.2.3 Press releases.



- **Survey “R&D needs in European book publishing”**

https://basecamp.com/2438801/projects/4183131/messages/32296516?enlarge=113578652#attachment_113578652

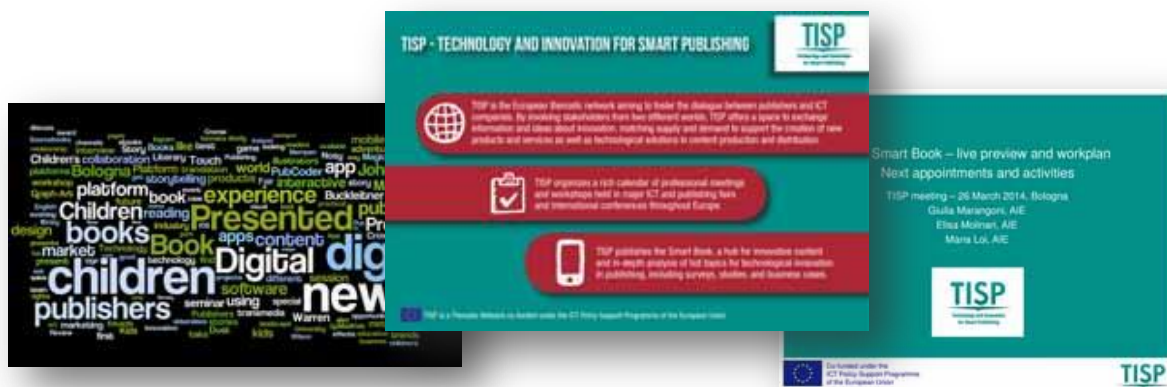
- **TISP Policy recommendations**

https://basecamp.com/2438801/projects/4183131/messages/28649356?enlarge=98888994#attachment_98888994

- **Launching of the Smart Book**

https://basecamp.com/2438801/projects/4183131/messages/24059091?enlarge=81019366#attachment_81019366

2.2.4 Other documents.



- **Tag cloud (Bologna 2014)**

https://basecamp.com/2438801/projects/4183131/messages/22780061?enlarge=76196942#attachment_76196942

- **TISP Smart Book Postcard**

https://basecamp.com/2438801/projects/4183131/messages/31495785?enlarge=110397272#attachment_110397272

- **Presentation for TISP meeting at BCBF 2014**

https://asset1.basecamp.com/2438801/projects/4183131/attachments/80140822/72385bdcec24af266529d21ef537b9dc0010/original/TISP_Bolognav.1.3.pdf

- **Invitation to the EU Stakeholders Workshop (FBF 2014)**

https://basecamp.com/2438801/projects/4183131/messages/29008068?enlarge=107778290#attachment_107778290

- **Invitation for the R&D Needs Survey**

https://asset1.basecamp.com/2438801/projects/4183131/attachments/107071495/3620dfd1c4e51252161da99ae21b94350010/original/140904_invitosurvey_en_tisp.pdf

3. CONCLUSIONS

Many parallelisms stand out in drawing conclusions from the analysis of the book trade events covered within the framework of the TISP project, when looking at what had emerged after the previous year. First and foremost, once again it is obvious that the publishing sector is highly interested in the wide range of solutions and opportunities that ICT can offer.

This interest, which seems to ever increase, was once more evident right off the bat, given the sheer magnitude of the presence of ICT in all the major European book fairs, with operators, exhibitions and countless debates and analyses. As the Bologna Children’s Book Fair launched the Bologna Digital programme and allocated more exhibition space to technological solutions for publishers, the London Book Fair featured a long list of ICT-related events, starting with the first big conference Publishing for Digital Minds, and the Frankfurt Book Fair, more and more technology-oriented, opened with the CONTEC conference and hosted in its innovation Hot Spots almost 100 ICT-based innovators from all over the world.

The importance of ICT for publishing, the basis of the TISP experience, remained a guiding principle in the second project year as it had been in the first. After all, the experience of book trade events confirmed how ICT is embedded at all stages of the book value chain and increasingly in the interface with the end user. The latter aspect explains the continuous growth of the e-book market – another element emerged from the events, and not only, together with the acknowledgment that there has been a steady expansion but not an explosion; this has stimulated reflections very much linked with those inherent in TISP.

To some extent, it can be argued that TISP not only witnessed the continuous rise of the debate on ICT and publishing, but contributed actively to it, considering the large participation of external stakeholders to the TISP events, as well as the interest raised by the Smart Book, launched during the year in question, which also intensified the exchange of experiences within and outside the consortium.

All in all, as the integration of technology and publishing (already very deep) progresses, it is clear that there is still scope for deeper and wider collaboration. On a high level, this still means that there is room for dialogue and enhancing the mutual knowledge of the ICT and publishing sector as well as creating concrete partnership opportunities. The level of attendance of TISP events and of interest in the topics proposed remains proof of this fundamental element of the TISP project.

The main role of a larger uptake of ICT in book publishing was confirmed as that of enhancing business. Publishers keep looking for solutions to improve their commercial performances, while

start-ups and new players, but also large established operators are looking with interest at the potential of developing products and services for the book sector. And if it transpires at many events that the economic crisis has taken its toll on the book industry, it is also clear that the sector remains large, vibrant and robust and worth investing, and the potential of the e-book market is as attractive if not even more attractive than before.

As in the previous year, the message from book trade events highlights challenges and opportunities at the intersection of ICT and book publishing and allows to identify a wide range of more specific topics, which understandably overlap to quite an extent with those identified within TISP as the most relevant for the project.

The book trade events and some related activities by the TISP consortium (such as the survey carried out on the R&D needs of publishers) led to confirming the general relevance of the topics selected in the first year and those emerged from the events, but also to a certain degree of refining and rebalancing (and also the further need thereof).

It is obvious that business models are a top priority for publishers, and beyond the will to develop new ones to address changing markets, there is a clear interest in ICT solutions to improve digital distribution, reaching the reader more effectively and designing attractive products (not least by exploring interactive features and trans-media storytelling). There is appetite for innovation, which does not need to bring along disruption, but definitely improvements in several areas. Actually, ICT is only an enabler – though of transformational magnitude, granted – that industries interested are free to accommodate to their own needs and along their own strategy for phasing in.

As the potential of ICT to improve the production processes and internal workflows of publishing houses emerges more and more as another priority, the need for e-skills in the sector becomes also more obvious, as digital capacities are increasingly attractive for the publishing industry; how to acquire those e-skills and how to attract adequate human resources are fields for further consideration. In addition, experiences have proved that partnerships along the value chain (with booksellers, telecom companies, ICT providers – including start-ups) can be a key to success.

Purely technological areas are still seen as possible building blocks for further progress in various fields (not least sales enhancement), thus warranting consistently the interest of publishers: e-book formats, metadata, semantic web technologies, standards and interoperability, all the way to the potentialities of big data, linked also with market research, user and usage information.

The digitisation of education remains an area where developments are expected, be it due to the potential for personalised learning products, the fragmentation of learning resources, the increasing overlap with the world of videogames ('gamification'), etc. This challenge has basically

two facets: the next generation has to be conversant with digital technologies as they permeate the whole economy (according to France's Colin & Collin report, the core digital sector contributes 5.2% of France's GDP, industries transformed by ICT another 12% and those whose productivity is enhanced by ICT another 60%; sectors unaffected by the digital revolution thus contribute only 22% of the GDP, which puts them in a clear minority as future employers); besides, digital technology is heavily documented as a key enabler of knowledge appropriation whether in formal, non-formal or informal learning environments. Accordingly, education to and via ICT looks compelling. This overlaps to some extent with children's publishing, one of the most resilient sectors as well as one of those with the highest potential for enhancing products via ICT. Reading on mobile devices continues growing and is more and more streamlined in production processes. Publishers increase their presence in and use of online communities and social media. For many, exploring ways to enhance accessibility to books for the visually impaired is a primary goal.

It has also become clearer that publishers could use a greater access to finance – to further adopt or develop innovative technologies, processes, products and services – as well as to research in a number of relevant areas. It is also clear – and not surprising – that this need is generally stronger among SMEs. Public funding programmes could definitely play a role from this point of view, both by making resources available and by facilitating access to them by SMEs.

So, if experience has confirmed once again the relevance of the preliminary analysis conducted by the TISP consortium in identifying a range of significant topics worth exploring in the framework of the project, it has also prompted reflections on how to add value and consistence to the selection. This is reflected in the strategy devised to refine and enrich the policy recommendations issued this year.

Discussions and reflections on enhancing the integration of ICT and publishing, especially with a view to boosting the e-book market, raise of course issues related to the various challenges that publishers face in this field, which have different kinds of relationship with technology. Maintaining profitability is always essential, and so is the viability of business models; the discoverability of books online remains central, as do the quality of the consumer experience and efficiency in distribution. ICT can contribute also to creating a level playing field in the online marketplace, while the discrimination of VAT rates between digital and print books remains the main exogenous variable somehow related to ICT and publishing.

TISP acted for another year as an integrated platform to foster exchanges and contacts between the ICT and publishing communities, an area where cooperation is essential, as well as to make high level recommendations to policy-makers, given the importance of specific and sustainable policies and programmes at EU level to support the growth of the digital publishing sector.

4. BOOK TRADE EVENTS IN 2015

For the third year of the project, 2015, TISP international events have been already fixed during the following major bookfairs and international venues:

- Bologna Childrens' Book Fair (30 March-2 April 2015)
- The London Book Fair (14-16 April 2015)
- The 2nd European Digital eDistributors Meeting (11th June 2015)
- Frankfurt Book Fair (14-18 October 2015)

For what concerns the first two events, the key elements of the TISP seminar have been already fixed. For what concerns Frankfurt Book Fair, possible options related to TISP will be discussed in the first part of 2015 once the planning of the program of the Book Fair for 2015 is more advanced. As for the 2nd Digital eDistributors Meeting, the most relevant aspects are set already in collaboration with Fande (Spanish Distributors Federation).

The detailed programmes of TISP events, once available, will be promoted through the Smart Book and the other communication channels of the network.

We summarize below the overview of the appointments already defined.

- **Bologna Childrens' Book Fair (30 March-2 April 2015)**

The TISP event will be part of the Master Class programme as in 2014. Starting from recent surveys on kids cross-channel habits, the seminar will address the topic of cross-media innovation in products involving companies active in the field.

Kids media consumption has been recently debated but it remains extremely difficult to evaluate. Traditional media have to compete and coexist with mobile devices, games and videos, hybrid forms of stories and contents integrated across multiple platforms as kids are used to cross-channel consumptions and simultaneous media usage. How do these trends affect the market and the strategies of content providers? How are they redefining the publishing, gaming and video industry? Which are the companies that found the most effective way to engage with kids (and satisfy the parents)? Where lies cross-media innovation in products and concepts?

The workshop will provide a thorough review of these trends as well as the presentation of most successful case histories in this field.

- **The 2nd European Digital eDistributors Meeting (11th June 2015)**

This event is part of MADIREW (Madrid Digital Innovation for Reading Week) . The three previous days (8th,9th and 10th of June) there will be a convening of innovative leader librarians from Latin America and Spain at Casa del Lector with the collaboration of B&M Gates Foundation (work language: Spanish).

The next day, 12th of June there will be a meeting for startup digital publishers at Casa del Lector, organized by Fundación GSR with Factoría Cultural as showroom for disruptive experiences proposed by young publishers.

Keywords of the 2nd European Digital eDistributors will be book supply chain, e-commerce, ebook distribution, new roles of libraries and librarians, institutional markets and new audiences.

The event will discuss the European solutions for the e-book distribution for the challenges related with the readers' evolving behaviour and the librarian and education system requirements.

The panel will include the most relevant e-distributors throughout Europe will with the collaboration of FANDE (Spanish Federation of Book Distributors). There will be a special focus on new audiences and the institutional (libraries and schools) markets as an opportunity.

During this event the formal constitution of the European Digital Distributors Group will take place.

5. ANNEX

Survey “R&D needs in European book publishing”

Access to finance is biggest obstacle for innovation / Growing interest in international cooperation

Innovation is of great importance to book publishers: almost three quarters (77%) of the over 120 respondents to a Europe-wide qualitative survey said they are developing new products and services. However, there are several barriers limiting the ability of publishers to innovate. Access to finance is perceived as the biggest obstacle to innovation (almost half of the respondents indicated that it is as the main barrier), followed by a lack of scale and a lack of infrastructure. Legal issues are viewed as less significant; and a number of respondents pointed to the need for a new mindset that embraces innovation.

These are some of the main results of the qualitative survey, which was conducted among European book publishers by the EU-funded network Technology and Innovation for Smart Publishing (TISP), in cooperation with the [Frankfurt Book Fair](#). Over 1,000 publishers were contacted; 360 reacted with interest, and 120 publishers from across Europe submitted a detailed response to the questionnaire. The respondents stem from all walks of publishing – educational (36%, multiple answers were possible), academic (33%), STM (12%), trade (both fiction and non-fiction, 65%), children’s books (25%), etc. They include small and medium-sized enterprises (SMEs) (56%) as well as large enterprises (25%) and start-ups (13%).

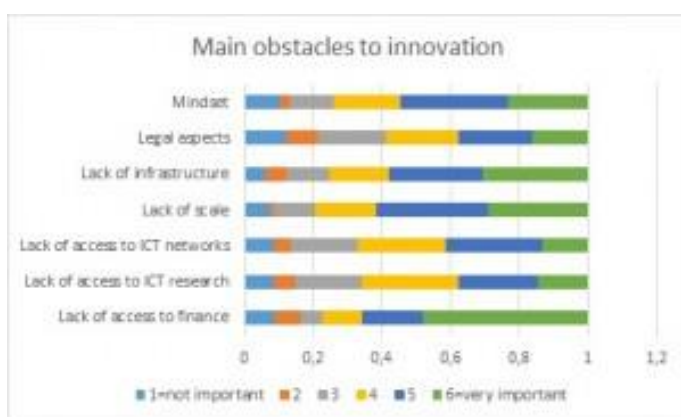


Figure 1: Main obstacles to innovation. 16% of the respondents do not devote any resources to R&D, 18% have a dedicated R&D department. The majority (41%) covers its R&D needs in-house, but without a dedicated R&D department; instead, other departments like sales or business development take on the role. Only 8% rely on external service providers for their R&D needs, and only 6% cooperate with universities or other research institutions.

67% of the respondents claimed that they “envisage getting involved in a collaborative approach, e.g. an R&D project in cooperation with other European companies and research institutions”. All large enterprises responding to the questionnaire said they would be willing to cooperate; they were followed by start-ups and SMEs. The respondents explained their increasing willingness to collaborate with the insight that the global market requires engagement “with others [to...] be able to achieve our goals”. Scale was a key issue for the respondents, who see the need to compete in a

market dominated by “a few hugely wealthy corporations on the West Coast of the USA”. Cooperation is seen as a means of sharing risks – of gaining “access to talent not present in the company” and bringing “diverse skills together”. At the same time some of the respondents claimed that the European market, which is divided into small markets defined by linguistic areas, makes international cooperation preferable to local cooperation: “It is better to share knowledge with colleagues who do not aim for the same commercial market”.

The leading response to the question of where the R&D needs were greatest was “digital distribution”. On the basis of a list proposed by TISP experts, the respondents were asked to rate possible R&D areas from 1 (not important) to 6 (very important). The results were as follows:

- digital distribution – average rating: 4.94 (closest to 6 = very important)
- file formats – average rating: 4.88
- interactive content – average rating: 4.78
- multimedia content production – average rating: 4.7
- e-commerce – average rating: 4.66
- market research and market testing – average rating: 4.65
- copyright licensing – average rating: 4.64
- discoverability tools – average rating: 4.55

Finally, respondents were also invited to freely formulate their own comments, in order to elaborate on their responses or add aspects they thought were missing. One respondent said: “We need distribution infrastructures where the terms of doing business together are not dictated by absurdly huge companies. Obviously, this needs alternative distribution structures, where research is needed in order to build equally smart services.” EU-funding was seen by some as a possible instrument to enable access to finance and research, yet there were also reservations, for instance: “One big issue with EU and innovation is, again, scale and speed. If the process to get and use funding is too cumbersome, it won’t work. Innovation means having rapid access to small amounts of money, with reasonable reporting requirements.”

The survey was evaluated by a team composed of [iMinds](#) (Belgium/Flanders), the [Italian Publishers Association](#) (AIE), [Gutenberg University](#) (Germany), the [Federation of European Publishers](#) (FEP), [Frankfurt Book Fair](#).

- **Programme of the TISP Workshop at Bologna Children’s Book Fair 2014**



in association with



Story-telling and story-selling.

Digital kids between transmedia experiences and market trends

Wednesday March 26th, 2014

**Room Suite, Service Centre
10.30 – 12.30**

As the borders between playing, reading and learning are narrowing and new forms of storytelling get in the hands of new generations, children behavior towards digital technologies keeps evolving, affecting products, strategies and workflows. But how? What’s the relationship between children and digital reading? Which are the trends in terms of discovery, pricing, and activities in children publishing? How do the publishing and ICT world collaborate in order to offer the most engaging, interactive and fulfilling experience possible?

To answer these questions, the TISP project, in collaboration with Editech, presents “**Story-telling and story-selling. Digital kids between transmedia experiences and market trends**”.

The workshop will feature the results of #NatiDigitali, a survey regarding the relationship between children and digital reading in Italy, promoted by AIB (Italian Libraries’ Association), AIE (Italian Publishers’ Association), Filastrocche.it e Mamamò.it, in collaboration with Fattore Mamma.

Nielsen Book will present the most updated trends in children books and ebooks with a particular reference to the European market.

The seminar will furthermore feature case studies where publishing houses and ICT companies will discuss issues and strengths of their partnership, competences involved and innovative products highlighting the results achieved through their collaboration.

Speakers

- **Roberta Franceschetti**, Mamamò
- **Irene Angelopulos**, Founder Mubo
- **Ann Betts**, Managing Director Client Services Nielsen Book International
- **Giulio Caperdoni**, COO Vidiemme
- **Mike Gaunt**, CEO Go Mad Kids
- **Sameer Reina**, Magic Box
- **Elena Favilli**, Founder Timbaktu

The seminar will be chaired by **Cristina Mussinelli**, consultant for digital publishing at AIE.

- **Programme of the TISP Seminar at London Book Fair 2014**



**Publishing and the ICT sector:
how skills are changing in these different sectors to be able to work more closely together**

The London Book Fair, Tuesday April 8th, 2014

Cromwell Room, EC1

11.30 – 12.30

Publishers are building their digital skills capacity, and ICT companies are building their knowledge of the publishing sector, embodying editorial skills within their organizations.

Together as these skills grow, publishers and ICT companies have a greater understanding of each other's businesses and will lead to increased co-operation. This panel will explore how Publishers and ICT companies are developing their skills and what kind of projects and outcomes this is leading to.

This event is organized in the framework of the European project TISP in cooperation with the e-Skills for Jobs 2014 campaign aimed at promoting the development of digital skills and raising awareness of the education, training, jobs, and other opportunities that are available to people who know how to effectively use digital technologies.

Speakers

- **Marcello Vena**, Director of Digital Business RCS Libri
- **Algirdas Stonys**, Director LITRECORDS
- **Laurent De Bernede**, Founder and Head of Sales and Marketing Everlearn
- **Marisa Fernandez Esteban**, EU Policy Officer DG Education and Culture

The seminar will be chaired by **Emma House**, Director of Publisher Relations Publishers Association.

- **Programme of the TISP Workshop at Frankfurt Book Fair 2014**



Detailed programme:

EU stakeholder workshop: What do publishers need in order to innovate?

How can the EU support research and innovation in publishing/ in the creative industries?

European innovators tell their tale. A range of new EU funding programmes (e.g. Horizon2020, Creative Europe) have been introduced, targeting the creative industries. This workshop will connect stakeholders from publishing, technology and the adjacent creative industries at the European level. It will involve a discussion of what the publishing industry needs in terms of access to research and finance.

When: Wednesday 8 October 2014

2.00 – 4.30 pm: workshop

5.00 – 6.00 pm: optional guided tour “Innovation@Book_Fair”

Where: exhibition site, Frankfurt Book Fair, Hall 4.C, room Entente

Format: workshop (max. 50 persons)

Topics: digitization, book markets, multimedia/cross media, mobile solutions, EU, funding

Organizers: Frankfurt Book Fair, Nina Klein, Director Corporate Content, Associate Partner, klein@book-fair.com

Partner: **Technology and Innovation for Smart Publishing (TISP)**

Speakers

- European Commission (DG Connect, DG Culture)

- European innovators in book publishing

- Representatives of the EU-funded project **Technology and Innovation for Smart Publishing (TISP)** and the European Technology Platform **New European Media (NEM)**

language: English only

with:

- European innovators from book publishing

- EU commission: DG Connect, DG Culture

- representatives of TISP and NEM

moderator: Nina Klein

format: very short pitches and presentations, moderated discussion with ongoing Q&Q by the audience/ fishbowl elements

Agenda:

what?	how long?	when?
1. Welcome by Holger Volland, Vice President, Frankfurt Book Fair	3 min.	2 pm
2. European Commission (EC): 2014-2020: New EU funding programmes Horizon2020, Creative Europe: What are the overall aims? What are the opportunities for the creative industries? speakers from the EC: <ul style="list-style-type: none"> • Directorate General for Education and Culture (DG Culture): Alessandro Senesi, Deputy Head of Unit, , Directorate E – Culture and creativity, Creative Europe Programme - Culture Unit , mail: Alessandro.SENESI@ec.europa.eu • Directorate-General for Communications Networks, Content and Technology (DG Connect): Javier Hernández-Ros Unit G2, "Creativity", Head of Unit, mail: Javier.Hernandez-Ros@ec.europa.eu • Directorate-General for Communications Networks, Content and Technology (DG Connect): Harald Trettenbrein, Deputy Head of Unit, Converging Media and Content, harald.trettenbrein@ec.europa.eu moderated discussion with a set of prepared questions, ongoing Q&A with the audience	47 min.	2.03 – 2.50 pm
<i>coffee break & networking opportunity</i>	10 min.	2.50 – 3 pm
2. European book publishing innovators share their tales: Where have they succeeded in combining ICT and creativity, and what failures have they experienced? What do they need in terms of access to research and financing, and support from the European Commission, in order to make their lives easier? Speakers: <ul style="list-style-type: none"> • Dawid Piaskowski, CEO, Booklikes (Poland), • Ian Harper, CEO, The Bradfield Company (UK) • Helmut Pesch, Basteilübbe, Director E-Publishing (Germany) • Andrea Angiolini, Editorial Director of publishing house il Mulino , Pandora 	45 – 60 min.	3 – 4 pm



Campus (Italy)		
format: short presentations (max. 5 min), moderated discussion with a set of prepared questions, ongoing Q&A with the audience		
<i>short break</i>	5 min.	4 – 4.05 pm
<p>3. Technology and Innovation for Smart Publishing (TISP) and New European Media (NEM): Who we are and what we want: Recommendations for the European Commission's funding programmes for the upcoming funding period 2016 – 2017</p> <p>speakers:</p> <ul style="list-style-type: none"> Jean-Dominique Meunier, President, New European Media (NEM) (France) Enrico Turrin, Technology and Innovation for Smart Publishing (TISP), Federation of European Publishers (FEP) (Belgium/ Italy) <p>&</p> <p>Results of a TISP/ NEM survey "R&D needs in European publishing": What do companies from book publishing and the adjacent creative industries need in order to innovate?</p> <p>Speakers:</p> <ul style="list-style-type: none"> Frank Salliau, Senior Researcher, iminds (Belgium) Christoph Bläsi, professor for book studies at the Institute for Book Studies of Johannes Gutenberg University (Germany) <p>format: 3 min. pitches by speakers, moderated discussion, ongoing Q&A with the audience</p>	15 min.	4.05– 4.20 pm
<p>4. Vote by the audience & feedback</p> <p>What are the next steps?</p> <p>format: vote for prepared topics/ short feedback: next steps</p>	5 – 10 min	4.20 – 4.30
<p>5. Official end of event</p> <p>Time for further discussion & networking at the venue</p>		4.30 – 5 pm
<p>6. Guided tour "Innovation@Book_Fair"</p> <p>with: Michael Kirchner & Nina Klein, Frankfurt Book Fair</p>		5 – 6 pm