

The Australian Publishers Association (APA) welcomes the Minister's invitation to provide input into the formation of a new national cultural policy. This submission should be read in concert with those from our members and those from Books Create Australia (BCA), the ASA, the ABA, and ALIA.

How publishers add value: the work of Australian publishing and the APA Publishers work to bring the best of all written works to the world. They add value through expert processes of selection (in some cases via peer review) and through editorial improvements, production, promotion, distribution, and sale. Our members' works include not just the latest novels or beloved Australian classics, but effectively the corpus of culture and knowledge: biographies, cookery and gardening books, how-to-guides, histories, young adult fiction, picture books, science books, scholarly journals, and so on. The APA represents more than 200 Australian publishers producing more than 90% of Australia's \$2 billion annual book industry turnover. Overall, around 20,000 new Australian books, of all kinds, are published each year. Many tens of thousands more international titles are released in Australian editions or imported into the Australian marketplace. The Australian book industry maintains the availability of more than 1.2m book and serial titles to serve the needs of Australian readers—including families, students, educators, researchers, and industry.

The Australian publishing industry and its benefits to the nation: The Australian publishing industry is a modern forward-looking industry that is integrated into global publishing and reading culture. The industry and its products deliver massive positive externalities to the nation: fundamental social, educational, economic and scientific benefits. Accordingly, **books are the most important of all cultural forms, and reading is the most important of all cultural practices.** Books and mass reading brought the modern world into being and continue to sustain it. Through reading parents help their infants grow and progress. Through literacy we learn and we function in the world. Reading is associated with high levels of personal and national development. Through the reading of books (and other published materials) in the home, educational institutions, and businesses we wrestle with ideas, history, knowledge, science, national identity, civic responsibilities, and our understanding of ourselves. When more Australians read more often, it's not just of benefit to them, it improves our society and benefits all of us: there is a clear national interest in the vitality of the book and publishing industries.

There are opportunities to further boost the social and economic dividends that the book industry delivers:

- The circulation and reading of materials produced by trade, educational and scholarly publishers are a bulwark against low quality information encountered on social media: publishers are champions of research, debate, depth, and 'truth'.
- Self-directed reading adds to the nation's educational and economic outcomes and helps build resilience in individuals and within communities.
- Books are a cost effective way to take the nation to the world, both via cultural diplomacy and through international sales.
- Government support for digitisation of the supply chain (as has happened in Canada and Germany) – including facilitating the multi-directional flow of information between authors, publishers, distributors, booksellers, libraries, event organisers, book clubs and readers – would bring efficiencies to the industry and drive participation in reading.
- Better aggregate and detailed industry information – about size, jobs, markets and impact – would improve our efficiency and social, educational, and economic outcomes.
- Government consultation and collaboration with educational, scholarly and journal publishers will deliver better learning materials to the nation and facilitate the use of research in civic debate and by industry; accordingly, all sectors of publishing would benefit from consideration as a significant creative industry.

But we also face risks to Australia as a nation of readers and to our book industry: During the worst of COVID, many Australians were reminded of the value of reading, but the nation faces **significant risks** to its reading culture and to its publishing capacity:

- When asked, most Australians profess a love of reading, but it is clear that there are groups who are becoming non-readers, such as many men—and there are key ages where the nation is losing readers, particularly secondary age students who are irresistibly inculcated into social media. We are at risk of creating a class-based divide between resource-rich educated Australians who read and a non-reading group who can be characterised by low education and low resources.

- Publishers face supply-chain risks relating to transport costs, and printing and paper capacity and costs: many of these issues relate to the crucial development of more sustainable approaches to publishing that will necessarily demand change from authors, publishers, distributors, booksellers, libraries, and readers.
- The shift from bricks and mortar bookstores to online platform retailing affects 'discoverability' for new titles and new authors: new Australian authors in particular benefit from support and expert *hand-selling* in physical outlets. In a reductive online environment, discovering Australian authors and highlighting their work can be challenging.
- Copyright and respect for the interests of creators and rights holders are under threat.
- Many distinctive Australian voices, including our First Nations' authors, cannot be easily brought to domestic or international markets without support from government.
- Australian educational publishers create and sell world-leading learning resources and content, but are hampered by red-tape and (what appears to be) hostility from some educational bureaucracies.
- The Australian publishing workforce needs to change to become more diverse if the industry is to best reflect and serve a changing nation.

Responses to the Minister's 5 pillars (in addition to responses in the Books Create Australia Submission):

Recommendation 1: We need a plan, a policy forum, and funding for books and reading: Despite the centrality of writing, publishing and reading to our world—including to our social, economic and educational capacity—Australia has no plan for books and reading. **We need an industry-based approach to policy making that is consolidated into a national plan and overseen by an appropriate instrumentality. In order to ensure that the nation enjoys a healthy book industry and reading culture, we need to provide structure to the discussion between the government and the book industry about industry and community needs.** We welcome the Minister's broad conception of culture, and encourage an approach to policy making for publishing, literature and reading that connects arts to culture to education to industry to public health and to science.

Response to Pillar One: First Nations

Recommendation 2: Government support targeting first nations' writers, mentorships, publishing and rights/export development. (See the submission from Books Create Australia for detail).

Response to Pillar Two: A place for every story

Recommendation 3: Targeted support for independent publishers via project and annual funding would facilitate independent publishing's role as a 'greenhouse' for new writers and new ideas. In the past decade Australia Council funding for independent publishing has suffered precipitous declines, undercutting the value independent publishers bring through their investment in future writers and through the thoughtful adventurousness of their publishing lists. Small but regular project funding would enable publishers to diversify the range of voices we hear. Likewise, operational funding for key independent publishers is an inexpensive way to guarantee the diversity of our written culture.

Recommendation 4: Valuing Australian content in schools and teaching institutions, and valuing the journal publishers featuring Australian research. Australian students comprehend who we are as a people through contact with Australian stories. The APA endorses the recommendation in the recent report of the Standing Committee on the Arts that there be a minimum threshold of Australian authored texts in the Australian curriculum. Australian stories and content, in all their diversity, must be central to the learning materials used by Australian students at all levels of education. The value added by quality learning resources needs to be better taken into account in analysis of educational performance and in the evaluation of the relative costs of aspects of education (including the complex GST and HECS arrangements at a tertiary level). Likewise, journal publishers in Australia, particularly publishers producing content on Australian topics including agricultural science, history, identity, flora and fauna are vital to a representation of and understanding of Australian life.

Response to Pillar Three: The Centrality of the Artist

Recommendation 5: The government prioritises a copyright regime that ensures creators and rights holders (including publishers) are appropriately remunerated for the sharing, use, and copying of their works, including by governments, the education sector and taxpayer-funded institutions. Copyright protects artists' dignity and remuneration, and it underpins the functioning and sustainability of the creative industries. Effective copyright is vital to facilitate publishers' investment in new cultural content: it is the key to better and new jobs in the creative industries (See submission from the Copyright Agency for further information).

Recommendation 6: Reform of Lending Rights including introduction of digital lending rights: As patterns of library use change, the current exclusion of ebooks and audiobooks from PLR and ELR schemes leaves out authors and publishers whose books are borrowed electronically. Australia needs up-to-date, world-class lending rights schemes

that extend PLR and ELR to digital formats and increase the overall pool of payments to authors and publishers. Publishers support the widest dissemination of content in concert with appropriate remuneration and consultation about use. (See submissions from ASA & ALIA for further information)

Response to Pillar Four: Strong Institutions:

Recommendation 7: One-off government support to retool the information infrastructure supporting the national supply chain will 'future proof' the industry and grow reader participation.

The digital revolution has opened up possibilities for authors, publishers, booksellers, libraries and readers, but the limited capital available to most Australian publishers means the industry is yet to maximise the potential of new business-to-business and business-to-consumer solutions. Support for the digitisation of the supply chain—including facilitating the multi-directional flow of information between authors, publishers, distributors, booksellers, libraries, event organisers, book clubs and readers—will bring efficiencies to the industry, drive reading participation, project the Australian story globally, and generate better data about the industry—its size, jobs, markets and impacts. As has happened in Canada and Germany, government support for industry collaboration (to develop the technical infrastructure undergirding small and medium enterprise) would improve the efficiency and effectiveness of the industry in delivering social, educational, and economic outcomes.

Recommendation 8: Government must approach publishing as a creative industry facing unique disruptions, risks and opportunities. We welcome the national cultural policy as representing a continuation of the commitment of earlier Labor governments to the arts. The APA and its members would also welcome the revival of earlier policy work, such as the BISC and BICC, which developed government approaches to the publishing industry's unique roles and conditions. As listed at the outset, the digital disruption of publishing is ongoing; and it has already changed the face of educational and scholarly publishing. There is a global imperative for publishing to become more sustainable, more diverse and to retool its processes to produce books 'formats 'accessible' to those readers with physical disabilities. Government has a role in assisting industry to negotiate these changes. A creative industries approach would properly see publishing as a diverse sector where trade publishers, educational publishers and the publishers of research face shared and differentiated challenges.

Recommendation 9: There is a need for government support for the key publishing, literary and reading NGOs (including the APA) which collectively constitute the sector's infrastructure. One of the imperatives of the APA is to act to ensure the publishing industry better serves the nation, including by promoting local reading levels and by supporting publishers to reach domestic and global readers seeking Australian content. But the APA, like many literary NGOs – including writers' festivals, writers' centres, children's literature organisations, and professional bodies – has faced a destructive decade of uncertainty and cuts in the support of literary infrastructure. Greater certainty, better coordination between levels of government, and higher funding will improve the social and economic outcomes of the literary and book sector.

Response to Pillar Five: Reaching the Audience:

Recommendation 10: Australia Reads: an ongoing national reading campaign A nation that regularly reads quality books (both fiction and non-fiction) is healthier, happier, and smarter. Unfortunately, while many Australians profess a love of reading, and reading makes up a vital part of many people's everyday worlds, there are concerning trends. While some groups, particularly women and educated people, are reading more, there are indications of declining reading participation among younger people, men, and particularly among people without access to education or resources. Australian authors, publishers, booksellers and librarians need support to engage new readers in a lifelong habit and to make Australian books more discoverable. An on-going national reading campaign – that supports writers in libraries and bookshops, research into reading, digital book clubs, and promotional platforms – is key to ensuring we remain a nation of readers.

Recommendation 11: Taking Australian voices to the world and the development of global markets Recent buying trends and subsequent research point to the potential of regional and global markets for Australian cultural and educational content. Whether it be the sale of overseas publication rights for novels or promoting digital access to Australian learning materials, the government has a role to play in facilitating overseas market growth. Government investment – through support for residencies, exhibitions at book fairs, funding for Australian publisher delegations or training programs for overseas rights sales – will strengthen the profile of Australian authors and writing in international markets. (For further information see the submission—Australia Council research—from Jan Zwar and Paul Crosby at Macquarie University)

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The APA is a not-for-profit peak body for a vital cultural industry. This is a public submission.