NEVILLEFREEMANAGENCY

The Australian
Book Industry Strategy Group

The BISG Scenarios

FINAL ANALYSIS REPORT
STAKEHOLDER WORKSHOPS

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Executive Summary

As a key part of its consultation and research processes, the Book Industry Strategy Group (BISG) conducted a stakeholder workshop series around Australia in February and March 2011. The series incorporated eight industry workshops which examined issues for key book industry sectors and the book supply chain. The series concluded with a strategic discussion forum which consolidated the workshop findings by examining them within the context of the broad operating environment. In total, over 200 people participated in the Stakeholder Workshop series.

The design of the workshops was organised to provide three perspectives on the Book Industry:

1. to understand how the industry has developed over the last 20 years;
2. to identify the key influences changing the book industry in the next 20 years; and
3. to look at the strategic implications of these key influences and what strategic options might be put in place today to meet the challenges.

The industry groups identified a broad range factors relating to the future of the book industry. However two key influences emerged across the groups – *globalisation* and *the changing format of the book*. These factors were identified by participants as being deeply embedded uncertainties that are critically important to the long-term future of the Australian book industry.

- Will digital media change the dynamics of the book from an object which is bound by a beginning, middle and an end? Regardless of whether it is digital or physical, will it have fixed authorship or become a dynamic and flexible digital object with fluid boundaries? Will the content be ever-changing by the introduction of multi-media hyper-links and the possible co-creation of that content with users?

- In a globalising world, how successful will market forces be in removing trade barriers and boundaries and reducing the importance of the 'local' environment for the book industry?

Stakeholder outputs from the nine workshops were used to create a set of four alternative futures that offer a set of scenarios for the future of the Australian book industry. By juxtaposing the two critical uncertainties – *globalisation* and *book format* - a scenario matrix is created which proposes four diverging futures. These are not extrapolations of current trends, or wild guesses based on a hunch; nor are they predictions. They are in effect accounts of possible futures which can be used as tools for developing more realistic and robust strategies.

The four scenarios are:

1. Rabbit Proof Fence Local focus / Fixed Format

A globalised world as far as networks, media, banking and finance are concerned but one where economic turmoil and environmental concerns provoke trade and national protectionism; a closed approach to geopolitics, trade and industry. Books in their traditional formats are what consumers demand.

2. The Lucky Country Local Focus / Fluid Format

A globalised world where the emphasis on the local and national features are a result of the ability of Australian cultural industries to 'catch the tide' and compete effectively in world markets as consumers turn to the local book industry as the trusted face of publishing. Book formats are changing rapidly with the emphasis on new mixed media and co-generated user content.

3. Cloudstreet Truly Global / Fluid Format

A globalised world in which cloud computing, networks, the book trade and cultural sensitivities are all being conducted across vanishing boundaries. Investment requirements in 'ensemble' book production are high thus limiting the ability of the Australian book industry – particularly independent publishers, to compete.

4. The Power of One Truly Global / Fixed Format

The book, in its traditional guise as a cultural object, is in demand in both 'e' and 'p' formats. Dedicated e-book readers like the Kindle do really well. Online book sales are an increasing feature, as they become the most popular way of purchasing. Australia generally boxes below its weight as younger generations see themselves as global citizens.

All of these futures deliver challenges to the business agenda. The workshop participants provided a rich source of ideas on what the industry should be doing to respond to the drivers of change. However the task now is to focus not only on the futuristic views, but on what should be done today in order to address these changes.

The analysis of issues raised by stakeholders, and the resulting scenarios, has been considered under four key themes: culture, consumers, copyright and competitiveness. Under these banners, ten strategies for whole of industry action have been developed. These relate to Australian authorship; eCommerce; eBooks; customer service; copyright; GST on books; metadata; national book distribution; market research; and global marketing.

1. Introduction

1.1 Stakeholder Workshops

The Book Industry Strategy Group (BISG) has undertaken to consult with a wide group of stakeholders in the Australian industry's supply chain to look at the impact of digital technology and other key influences that are changing the environment in which the industry operates. The focus is not just on tracking current trends but also to look at disruptive changes that may emerge and combine with other change drivers to create radically new challenges.

These challenges have been crystallised by the creation of a set of four alternative futures that offer a set of scenarios for the future of the Australian book industry.

A series of nine workshops were held in February and March 2011, four of which gathered publishers (in Melbourne), printers (in Adelaide), authors and booksellers (in Sydney). Two stakeholder workshops with librarians and educators were held in Canberra and the final two supply chain workshops were in Perth and Brisbane. The eight sectoral workshops were run with a standard agenda. The ninth or consolidated workshop (in Melbourne) brought together the BISG members with a high-profile group of thought and industry leaders largely from outside the book industry and was organised with a separate agenda.

In total, over 200 people provided their valuable time to help create the inputs for the project.

The design of the workshops was organised to provide three perspectives on the book industry:

1. to understand how the industry has developed over the last 20 years;
2. to identify the key influences changing the book industry in the next 20 years; and
3. to look at the strategic implications of these key influences and what strategic options might be put in place today to meet the challenges.[1]

The data outputs from the workshops have then been used as critical inputs for the creation of the scenarios going out to the year 2030 against which a strategic conversation about the future of the book industry might be set.

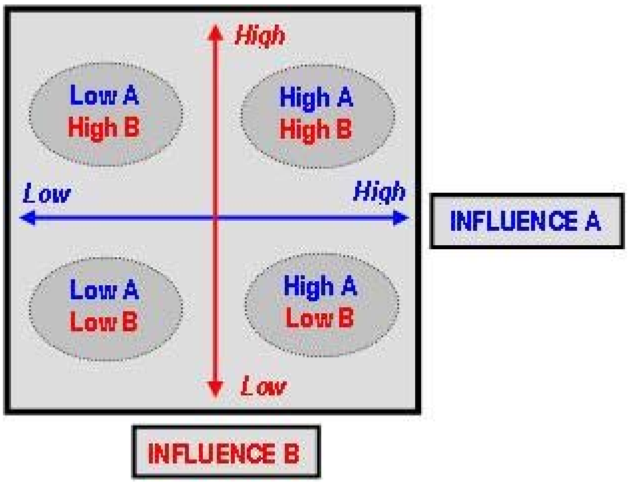
The eight Sectoral Workshops were divided into ten sessions sharing a common agenda so as to provide a common base by which to measure the differences between cohorts. The ninth 'Consolidated' workshop sought to examine general business conditions and determine how the external environment might shape the strategic responses of the BISG.

1.2 The analysis report

The purpose of this Report is to provide the BISG with a stakeholder-informed iteration of the possible alternative futures, or scenarios, in which the book industry supply chain may have to operate in the future. These scenarios are then used to contextualise the strategic implications that each workshop created so that they can be evaluated against the uncertainties of the future. For example there might be a recommendation for the removal of the GST impost on books; the dismantling of parallel importation provisions or the creation of a dedicated e-book platform for the Australian market – but how robust would such strategies be in the alternative futures which may eventuate? All? One? Some? – the answers are significant when it comes to decisions on the strategic investments that the book industry might make on its own behalf, or with government/agency support. Once the relevance and robustness of the strategic implications have been assessed, then strategic options can be prioritised with greater confidence and fewer unknown risks.

1.3 Scenario planning

This project uses the popular scenario planning matrix model pioneered by Royal Dutch Shell for generating alternative futures. The process identifies two sharply contrasting and quantifiable influences that are changing the external environment of the subject and pitches them against each other so as to create four quadrants that combine the variables in exclusive ways. At the point of intersection of the two selected coordinates, there is one scenario where the influences combine moderately with each other. Not always but often this point is like the world of today. As the quantifiable aspects of each influence become more extreme, the differences between the four worlds become increasingly acute. Scenario planning involves using these evolving, different futures to 'road test' strategies and, consequently, each world is evaluated as being situated towards the outer and open corners of each quadrant.



1.4 Understanding the fast paced rate of change

Call it the resilience gap: the world is becoming turbulent faster than organizations are becoming resilient.- Hamel and Välikangas

Gary Hamel's observation confirms the importance of considering the connections between foresight, worldviews and the challenges the book industry in Australia faces, particularly from digital technology. In its quest for resilience, the industry must build functional capacity to deal with turbulence in the environments in which it might have to operate.

It is challenging to take a long-term view when everything around you is changing at what appears to be an accelerating pace and when the day-to-day pressure of engaging with short-term goals is always mounting.

In the two months that the stakeholder workshops were held, five significant signs of 'faster turbulence' have become visible.

1 March 27 2011, Markets eye Saudi tensions, oil price

Share markets may have shrugged off fears over Japan's crisis and Libya's conflict, but all eyes are on Saudi Arabia which could drive oil prices up $US200 a barrel if tensions escalate. Magellan Financial Group's chief executive Hamish Douglass said a major conflict involving oil producers Saudi Arabia, Iran and Bahrain could see oil skyrocket and plunge major economies into recession. "If...it was prolonged and resulted in a major supply disruption, you wouldn't talk about oil going up $US20 a barrel, you're potentially talking about it going up $US200 a barrel," he told ABC TV on Sunday. "That would completely change the dynamics of the world." *Sydney Morning Herald*

2 March 26-27 2011 , IPAD 2 and Smart Phones

When Apple reported its quarterly results in January (2011), iPads together with the iPhone and the iPod touch, accounted for $US17.3 billion in sales. Placed in context, that means two thirds of Apple's revenue is being generated by products which only came into being a little over three years ago… the market for tablets will treble in the coming year. *Sydney Morning Herald*.

3 March 21 2011, Judge Overturns Google Books Settlement San Francisco

Following a federal judge's rejection of a $125 million settlement between Google … and authors and publishers over Google's book-scanning project, the parties continue to try to reach a deal, Wired.com reports. "There's nothing dead about the case or the settlement," Michael J. Boni, lead attorney for the Authors Guild, told Wired.com. "We're just considering what our next steps are. It's gratifying that the publishers have said they're still interested in working something out. That's encouraging." U.S. Circuit Court Judge Denny Chin said the settlement would have been more likely to be approved had it been "opt-in," where publishers and authors would have to proactively authorize their works to be scanned by Google. Judge Chin also concluded that the settlement went too far granting Google control over "orphan works" -- an issue that instead should be decided by Congress. *Digital Media Wire*

4 March 1, 2011, Writing was on the wall for book chains, Sydney Morning Herald

The collapse of Borders and Angus & Robertson and the missteps overseas of mobile phone giant Nokia are telling stories about the failure of strategy. There are lessons here for all businesses. A massive downturn in consumer spending, more Australians buying goods online and a surging Australian dollar have been cited as reasons why REDgroup was placed into voluntary administration. There have been forecasts of the demise of bricks and mortar bookshops.

5 February 8 2011, Smart Phones and PCs, LYON

France (AFP) - Sales of tablets and smartphones will outnumber personal computers this year as consumers begin using a wider variety of devices to access the Internet, according to a study by the Deloitte consulting firm. "Deloitte predicts that in 2011 more than 50 per cent of computing devices sold globally will not be PCs," Deloitte said in its latest Technology, Media & Telecommunications Predictions report. It said sales of smartphones and tablet computers would come to 425 million, well above sales of 390 million PCs. Tablets are expected to rack up 50 million sales and smartphones 375 million.

These turbulent times are in part a result of the dramatic impact of the networked, knowledge-based digital economy that is empowering consumers and social media in unprecedented ways. But it is also a result of the way the world is globalising in unpredictable and disruptive fashion. These two forces are evident in the spectacular growth of Facebook in the last five years and the incursions made into the advent of unfettered globalisation that have seen the ‘long boom’ (1992-2007) dismantled by the Global Financial Crisis and its precursor – the sub-prime fiasco (2007-9).

2. Engaging with the Future of the Australian Book Industry

2.1 Industry input

The Workshops addressed the framing question employed in the project by elaborating on the key influences changing the environment in which the Australian book industry supply chain might have to operate.

Framing Question

How will the book industry supply chain in Australia be affected by digital technologies taking into account the systemic impact on authors, publishers, printers, wholesalers, retailers and consumers?

Workshop participants generated a list of about 90 key influences clustered under the general analysis headings of nature, society, politics, economics, culture and, of course, technology. These were then narrowed down to reduce the list to an active sub-set.[2]

The other common themes selected were:

- many influences relating to globalisation,
- evolving nature of the book as a cultural object,
- copyright in all its forms,
- the impact of generational change and social media,
- the way markets and competitiveness are changing, and
- the enigmatic future of e-books.

The broader list of influences is expanded below. The groupings are not mutually exclusive as factors in one area may have impacts in one or more of the other areas.

2 These are listed in Appendix 1.

1. Book as a cultural concept

Cultural relevance of books; Relevance of books as objects; Erosion of fixed boundaries of cultural objects; Strength of Australian culture and identity; Uniqueness of Australian culture; Technology convergence; Convergence of devices; Ubiquitous broadband; Proliferation of mobile media; Sophistication of mobile technology.

2. Globalisation

Exchange Rates; World economy; Globalisation of markets; New markets/global curriculum; Global penetration of Australians; Globalisation of education & global curricula; Trade agreements; Free trade; Globalisation; Stability of the Internet.

3. Robustness of IP/harmonisation of international law/copyright

Respect for copyright; Globalisation of law; Changing IP; Piracy; Global rights management tools.

4. Generational change

Dynamics of digital creativity; Impact of social media; Media consumption patterns; Instant demand; Demographic & cultural change; Generational change; Future of reading.

5. eBooks and digital technology

eBooks pricing model; Ebook reader for Australia; Ebook library model; Open access movement (and open education resource); Open systems; Open source platform wars.

6. Market competitiveness

Competitiveness of Australian retailers; Competitiveness & efficiency; GST & international taxation; Distribution costs in the supply chain; GST and taxation; Health of Australian manufacturing; Online shopping.

2.2 Four Alternative Futures

The four alternative futures or scenarios for this project have been derived from the industry views expressed at the Stakeholder Workshops.

The key influences sourced by the industry groups that have been selected here are those that were seen by participants as the most important and most unpredictable drivers changing the operating environment in which the book industry in Australia is seeking a sustainable and resilient future.

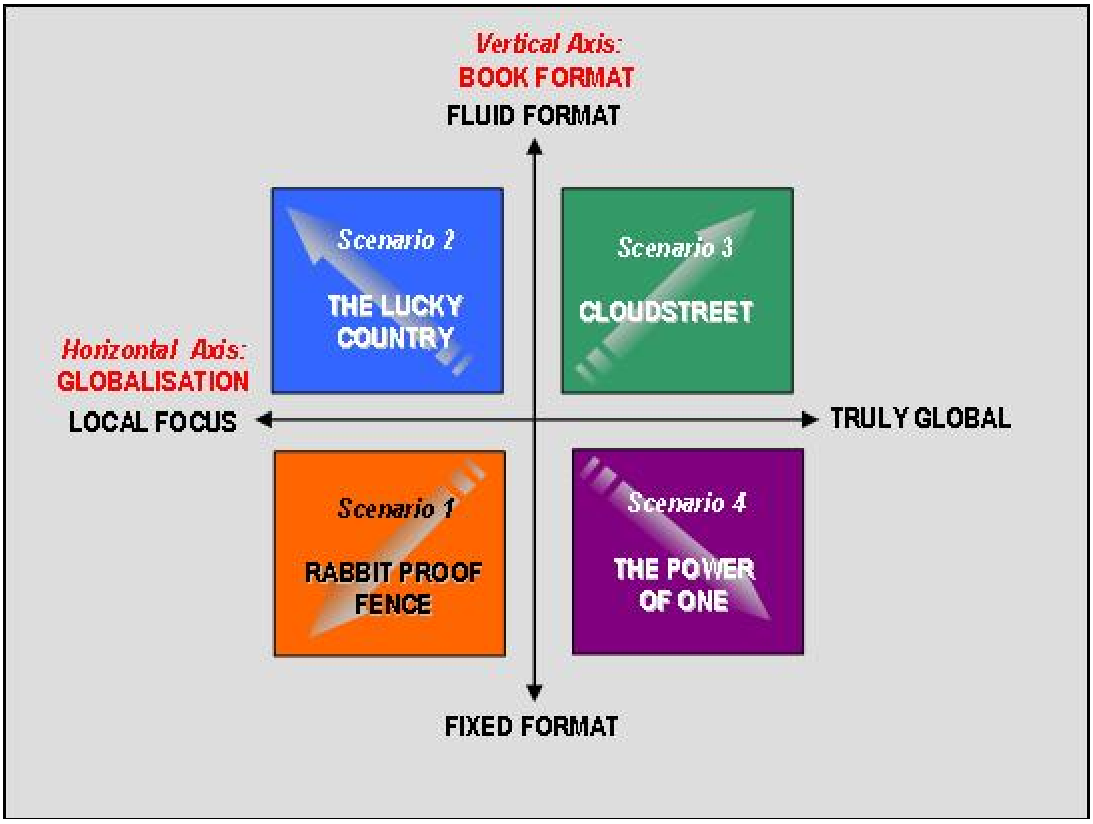
Because of their uncertainty and importance, these are the influences that create the alternative futures.

Horizontal Axis - Globalisation

From the workshop influence clusters outlined above, the influence which has been chosen to drive the horizontal axis is globalisation - with a special focus on the disappearance of the relevance of national borders and local trade boundaries to the book industry at one extreme. At the other, there is a much more fragmented type of globalisation in which the local context takes precedence over global drivers but, nevertheless, is still shaped by a burgeoning digital environment. The stakeholder identified influences of '*globalisation*' (cluster 2), '*IP and copyright*' (cluster 3) and '*market competiveness*' (cluster 6) determine the properties of this axis.

Vertical Axis – Book as a Cultural Object

'Book as a cultural concept' (cluster 1), '*generational change*' (cluster 4) and '*eBook and digital technology*' (cluster 5) have been used to identify the vertical axis for the matrix. This looks at the way the cultural concept of the book is changing from traditional formats at the bottom of the axis to the transformative formats at the top. The workshops showed great interest in the potential for the book to be transformed in the future by the fluidity of its boundaries in a digital environment. The changes being seen include the way multi-media platforms may change the book's content from traditional textual material supported by illustrations to a textual content that is ever-changing and supported by audio, video and content that is co-created by users in collaboration with authors and publishers. This axis therefore, addresses the significant uncertainties relating to the adoption of new technology and its transformative power – driven by generational change, the social media and the future of reading, which – among other things – may change the way consumers engage with books in their many different formats.


Vertical Axis:
BOOK FORMAT
FLUID FORMAT
Scenario 2
THE LUCKY COUNTRY
Scenario 3
CLOUDSTREET
Horizontal Axis:
GLOBALISATION
LOCAL FOCUS
TRULY GLOBAL
Scenario 1
RABBIT PROOF FENCE
Scenario 4
THE POWER OF ONE
FIXED FORMAT

3. Strategic Implications

In order to align the output from the workshops, the top strategic implications generated by the workshops have been divided into four broad themes; that is **Culture**; **Consumers**; **Copyright**; and **Competition**. The raw output data is collected together in Appendix 2.

Although the workshop attendees were not asked to review the strategic implications by scenario (the scenarios, as planned, were generated after the workshops), all the implications discussed here were generated by workshop participants in response to being asked to identify the implication relating to the top change drivers agreed by the group.

Once again the themes are not mutually exclusive as topics have an impact in one or more sectors.

So what do these scenarios mean for the future of the book industry in Australia? What might be done to increase the resilience of the book industry in Australia in order to adapt to a turbulent changing external environment and also to change that environment so as to create a better future for industry stakeholders in Australia?

3.1 Scenario One Rabbit Proof Fence

Local focus / Fixed Format

This is a world in which globalisation is patchy in its impact on the book industry and there is a strong emphasis on the local characteristics of the Australian market. National borders are defended strongly both in terms of territorial copyright legislation and the provision of tax incentives to Australian investors in Australian culture. The book is celebrated both online in e-book and in hardcopy in its traditional formats. Globally, resource shortages and the high cost of energy in particular mean that the physical movement of products and people is greatly reduced and individuals are therefore drawn back to their local communities. It is a world where globalisation slows down, digital technology is restrained and where most social and political policies are focused on their relevance to their community impact.

***Rabbit Proof Fence*: CULTURE**

In this scenario, the cultural focus is local and there is not enough private investment to maintain the book industry at a sustainable level. Government intervention is needed to shore up a small and ailing market in order to preserve Australian cultural identity and protect the Australian voice.

Local communities demand culturally relevant publishing – and this is expressed in an increase in multi-cultural and multi-lingual publications. Accessibility and social inclusion of minorities are embraced. Authors, nevertheless, still need to receive support from government and other cultural agencies as the digital revolution continues to reduce the impact of traditional print sales in the industry total. In this regard, the various membership bodies for authors provide services to help authors professionalise their role as e-books become much more significant.

The role of Australian publishers in Australia - whether independent or multi-national - is strong as they continue to control many aspects of the market and are seen to offer an important voice in a difficult trading environment. Booksellers add value by focusing on the local features of the industry and have reduced the importance of their role as the importers of books from overseas. Parallel Importation Restrictions have survived in this future along with the territorial copyright regime of the last 50 years.

Rabbit Proof Fence: COPYRIGHT

All the futures that we imagine require the revisiting of copyright intentions, outcomes and implementation. This would include the aforementioned need to protect collaborative authorship, to reframe territorial issues and to look again at the creative commons and open source. The territorial focus is, nevertheless, retained in this future.

IP is under challenge because of the hard to manage digital environment, and the belief among many users that if you can access it you own it and can share it. There are limitations in trying to educate users in the ethical use of content because of the pervasive attitude that it's acceptable to upload someone else's content online for free and not recognising that others are making money from it, such as large corporations like Facebook, YouTube and Google.

Rabbit Proof Fence : CONSUMERS

Consumers are sensitive to issues relating to the environment and are guided in their purchasing by ethical issues. Traditional printers have been successful in exposing that the carbon content in the platforms and networks supporting electronic publishing are significant, as the pricing of carbon becomes an integral feature of economic policy. These comparisons have been further enhanced by the development of new materials to carry print which are not dependent on deforestation and by carbon reduced inks.

Despite the focus on traditional formats, this future welcomes portability between formats and places much emphasis on affordability.

Rabbit Proof Fence : COMPETITION

There is a strong need for books in all formats to be portable and affordable in every future. Where e-books are concerned, in 'Rabbit Proof Fence' the relevance of creating an Australian e-book platform is high. The market mix of e-books and p-books is contestable in all futures. Although e-books in 2011 had been around for some 12 years, it is only in the last three that they began to increase market share. This increase became more marked over the next decade but the point at which it might level out is unknown. In this project, it has been assessed that the mix between 'e' and 'p' is far less important than the mix between traditional and radical formats for the book.

Ironically, the conditions which saw the abandoning of parallel importation in the fully globalised futures are the very same ones which prompted government in all futures to deregister books from their GST impost. The motivations for action on GST were different, however, as in the first case the government was seeking to align Australia with the global community whereas in the second, it was a straightforward case of self-protection.

3.2 Scenario Two The Lucky Country

Local Focus / Fluid Format

In this world, Australia has become a fully paid up member of the global community, reaching out to seek new markets for education and its media while retaining its distinctive identity in the digital mix. There are exciting new trends in book formats where the trails blazed by the burgeoning apps market have transformed the way consumers respond to and demand radically new book formats. Take-up of single format devices, was short-lived as convergent technology gave all the credits to multi-platform, multi-modal book formats. Despite the transforming impact of the new technology, Australian cultural interests are able to hold their own against Asian, European and American brands and far from being a defensive and protective rear-guard action against globalisation 'made in Australia' stands for much more. Australia is a global nation.

The Lucky Country : CULTURE

This world strongly endorses the focus on the importance of Australian culture in a globalising world. 'Australian' has a metaphorical power that makes Australian content a potent commodity in the domestic market. Far from requiring interventionist protection in this future the activities of the market provide increasingly adequate compensation for the investments being made by the book industry. The local focus works particularly well for publishers and booksellers and printers maintain a hold on their niche market in the global mix.

Australian publishers from all backgrounds do very well because the local market emphasis combines with a strong economy both at home and overseas. Global players are heavily focused on mass-market and high investment educational content that appeals to the growing demand for information that transforms traditional packaging – whether in digital or hard copy. Australians are global citizens with a great deal of pride in their national identity.

Although their number has reduced significantly since the 2010s, booksellers find a role in adding value for local communities by collaborating with publishers in the fostering of meaningful local content. Great emphasis is put on the development of skill levels among authors who are under continual pressure because of the radical digital world in which their readers reside – readers who 'want it now' and are impatient with the old traditional ways.

Traditional printed books in the trade publishing fields do relatively poorly in this future as smart phones and tablets rise in popularity – a trend which is driven not just by technology but by changing attitudes to the use of physical space.

The Lucky Country : CONSUMERS

Australian bloggers and tweeters have become important features of this digital publishing future. Their viral power has raised the profile of authors and of those publishers who have cultivated direct communication with readers of their output. Everyone is into 'Brand Australia' in one form or another as a way of achieving visibility in a radical digital world. Consumers expect to have direct access to authors. As a result, author profiles become the new starting point for brand development with consumers who increasingly see local booksellers and publishers as the trusted face on the Internet where integrity and authenticity are now valuable currency.

In education, the focus on multi-media content for learning has increased the capital needed to develop new products. Australian publishers now collaborate with the deeper-pocketed global multi-nationals to provide the local social 'connectivity' that local brands require.

The Lucky Country : COPYRIGHT

Publishers and authors come to realise that the focus on educating consumers to respect copyright is less effective than a focus on intermediaries – particularly ISP's and device manufacturers. A new legislative framework is needed that accepts the vanishing boundaries in an online global marketplace and targets the direct transaction points that could be used to generate copyright payments to creators and their agents. These included new blanket licences and subscription models, the introduction of copyright fees being added to the price of devices and payments for their users' copyright access being made by ISPs.

Government also becomes actively involved in international copyright management. Some authors who have no trust in the digital environment try to hang onto their e-rights, but growing levels of piracy defeats them.

These scenarios also see the expansion of multi-media publishing and the corresponding need for copyright regimes that integrate multi-media exploitation within single products. Copyright practice from the film industry becomes very relevant for publishers.

There is a strong argument for the creation of a new copyright registration process with more sophisticated database and monitoring systems that enable convergence between Australian and international standards.

The Lucky Country : COMPETITION

Booksellers now have a chance to compete with the global suppliers and begin to build their market offer as a result of favourable conditions – a level playing field. Local pricing of imports competes more effectively as a result and makes a difference to the outcomes for booksellers particularly in 'Rabbit Proof Fence' and 'The Lucky Country'. As far as the other futures are concerned, the challenge to compete with discounted books coming into Australia, postage and handling free, is less easily met and it is likely that booksellers would reluctantly relinquish that part of the market.

Australian e-book platforms are required in the two futures that successfully stress the importance of Australian culture in a globalising world; and none more so than in this future with its lively economy and the interest in the traditional formats of book publishing.

Pricing concerns in Australia which are most relevant in the futures that explore the importance of the local aspects of globalisation are not just those relating to the same book in the same format being available at different prices. There are also concerns about the comparative prices of 'e' vs. 'p' formats and the attempt by publishers to control e-book prices adopting an agency pricing approach. These latter concerns are also very significant in all the future worlds. This future is also the one in which there is most to gain by improving the efficiency of order processing and distribution of physical books and e-books but also the digital workflow of fast-changing virtual formats.

3.3 Scenario Three Cloudstreet

Truly Global / Fluid Format

Technology change drivers create a dramatically different Australia from the world of 2011. Take the cloud associated with cloud computing. Add to this the remarkably successful smart phones and tablets and a new era came to hand. Not only has globalisation broken down the traditional boundaries between nation states and promoted radical cultural convergence but also it has expunged the sense of the local and of place. PCs with their isolated hard-drives are museum items. We live now in a world dominated by the convergence of smart phones and tablets linked to huge data repositories in the clouds. Significantly, the cultural melting pot has not produced the world according to the US, as the role of Asia and in particular of China and India, has been formative. English is nevertheless the global language for education providing rich opportunities for educational publishers to develop their businesses. And the traditional book has been relegated by multi-modal, multi-platform digital objects.

Cloudstreet : CULTURE

The local aspects of globalisation all but disappear in 'Cloudstreet'. Now the strategic need to support interventionist action by government and cultural agencies is heightened as the book industry in Australia fights to maintain and sustain its role. This task is made more difficult by the transformational approach to content in a world where the cultural strength of the traditional book in any format is weakening.

For authors the problems of achieving visibility are pressing. The sheer volume of global textual information and the disappearing boundaries between nation states make the cultural role of Australian authors a questionable resource. Publishers become conflicted as to their role as they can no longer rely on traditional market-dynamics.

The emergence of the author-publisher with an ever-diminishing cost-base seeking local success is evident but the exigencies of being noticed are ever-present. Independent publishers are hard-pressed in 'Cloudstreet'

A 'Cloudstreet' future is one without boundaries. Traditional reading platforms and practice are diminishing as social media and generational change take digital technologies into new places. This is a future that looks very different from today or any of the other three scenarios. This may necessitate a need for more intervention if market forces do not deliver sustainability and investors in the book industry are denied the certainties that would normally be sought.

Cloudstreet : CONSUMERS

This world is highly influenced by the direct impact of technology and is a radical future. Cloud computing has taken hold and the PC is surpassed in popularity by the convergence of multi-purpose smart phones and tablets. The dynamics of the book have been transformed and the market for the book as a fixed cultural object is greatly diminished. Everyone has the capacity to set themselves up as authors and publishers as they seek to harness the power of bloggers, tweeters and social media activists to get attention. Interactivity is highly developed, as consumers want to 'engage' with authors, publishers and other users.

The role of the 'consumer of the future' is seen by all to be very different from that in the past. Supply chain operators will need to be much better informed as to the social needs they are meeting on behalf of consumers – not just locally but in a globalising world, elsewhere. This entails better price transparency and greater understanding of need for 'value-adding'. The 24 x 7 x 365 world blurs all the traditional boundaries.

In 'Cloudstreet' multi-national publishers survive well as there are significant costs involved in supporting mass-market publishing with a global presence and the creation of 'multi-everything' publications - particularly in educational publishing. Independents have a role, too, as the demand for trusted and often local trusted sources of information increases – a feature that appears to be important in all the imagined futures.

Cloudstreet : COPYRIGHT

In the scenarios where local values are retained, Australian copyright provisions are, nevertheless, being aligned to international standards by the introduction of a copyright registration process with more sophisticated database and monitoring systems. Digital Rights Management (DRM) struggles to keep up with new learning models and the re-purposing of digital content in the digital environment in all futures – particularly 'Cloudstreet'. A related concern is the failure of copyright to keep pace with the collaborative content generation environments that are so prominent in both 'Cloudstreet' and the 'The Lucky Country' scenarios. Intellectual property has been designed to meet the copyright interest of individual authors of works in one format but has not addressed the impact of collaborative dynamic authorship in multiple formats of content that changes everyday.

Cloudstreet : COMPETITION

Pricing concerns in Australia are not just those relating to the same book being available at different prices, but also the comparative prices of 'e' vs. 'p' formats and the ability of publishers to control e-book prices adopting an agency pricing approach. These latter concerns are also very significant all the future worlds we have embraced.

The rewards for getting competition right in this future are high because the performance of the book industry is almost completely market-driven. For example, publishers who become more flexible in the way they engage directly with their customers by creative book packaging (chapters, samples etc.) will have an edge over their competitors.

The concerns about disintermediation have been addressed by the emphasis in this future that flexibility of approach will create opportunities to add-value in new and distinctive ways – whether you are an author, publisher, bookseller or printer.

These approaches will enable the book industry to be successful in Australia despite the power of the big global players.

3.4 Scenario Four The Power of One

Truly Global / Fixed Format

Surprisingly, a world in which globalisation has consistently removed boundaries and encouraged the movement of people around the globe, has retained its love-affair with the book as a clearly defined cultural artefact. A book is a book is a book. Authors, publishers and booksellers have strengthened their role by accepting that the enjoyment of books has always been a niche with their devout supporters occupying a relatively narrow social band. Putting aside the market for global mass – market blockbusters, this is true of those people who read books for entertainment as opposed to those who read for instruction. The e-book readers that are dedicated to the traditional book format have been successful and the demand for print has been surprisingly buoyant. The fashionable demand for tablet-based books has been ephemeral and tablets have had a stronger negative impact on the market for hard copy magazines than on the sales of print novels and general non-fiction.

The Power of One : CULTURE

Independent publishers find opportunities for making some impression in this world despite the strength of globalisation because this is a world where traditional books survive albeit with a changing mix between ‘p’ and ‘e’. The economy is strong enough and traditional publishing values are evident in the way books are created, developed and brought to market. At the same time the empowerment of consumers and the magic of digital technology are strengthening rather than weakening the resilience of the supply chain.

Participating in global markets does offer big rewards and despite the difficulties of securing a toehold, government and the cultural industries now have to work together to brand Australian content for global recognition and credibility.

The Power of One : CONSUMERS

Whatever the formats and platforms, issues relating to ownership become apparent. The collaborative consumption movement that got underway in the early 2010s suggested that it is smart to share not buy. As cloud computing becomes stronger, the motivation to buy becomes weaker. This is a transformative influence driving change and is linked to globalisation. Access, not ownership. The shift has deep strategic implications for the book industry, particularly as digital reading platforms – whether single-format or multi-format - become more successful. This trend looks to be a certainty, not just in this scenario but also in all the imagined futures.

Digital skills development and training are important services in the future. These can be part of the educational infrastructure at secondary, tertiary and VET level; as well as industry based, run by associations or private providers. Courses could be aimed at all industry participants as well as individual consumers.

The Power of One : COPYRIGHT

Strategies aimed at generating a better future for the book industry combine with those that demand nimble adaptation to changing market conditions. The toughest challenge, as market dynamics change, is the declining respect for copyright which creates a need to search for new business models in a highly globalised environment. The relative stability of the definition of the book in this scenario is offset by Australia's weak position in the global copyright market, which is dominated by multi-national publishing pressure groups with little on-going investment in Australia.

The global marketplace dominates as the effectiveness of territorial protection of copyright diminishes. The digital future exacerbates the confusion between 'free' and 'fee' in copyright access. New approaches are needed for the use of copyright material and fair payment – a balance between 'lock down' and free use.

The Power of One : COMPETITION

The traditional supply chain is transformed by digital networks at every step. A digital future offers authors branding opportunities as they connect directly with their readers; it offers consumers the opportunity to transparently compare prices and maximise choice. Booksellers have the opportunity to engage with their customers and suppliers in ways that were inconceivable 20 years ago. The strategic force of these developments is contingent on the quality of the metadata in the system – metadata about book content, price, availability, order processing, distribution and delivery.

The need for metadata integrity in all futures is accompanied by the need for improvements in distribution across the whole supply chain. In the futures where 'local' is as important as 'global' the industry needs national warehousing, a white label e-book platform and the abolition or reform of parallel import regulation to recognise a global market. In any future Australian book pricing needs to be globally competitive.

Publishers who are also distributors may need to consider more flexible models of packaging products (chapter excerpts, samples) while considering on-sale techniques to enhance purchases per visit and encourage uptake – thus, embracing options offered by new technology.

4. Challenges to the Business Agenda

The outcomes from the eight sectoral workshops have been used to develop the scenario plans, identify the most important and unpredictable drivers of change, shape alternative futures and develop the strategic implications of the scenarios.

However, strategies generated from within the industry must inevitably be shaped by the experiences of participants external to the book industry. What do outsiders have to say about this analysis and these experiences and ideas?

The final session in the stakeholder workshop series explored the views of strategic thinkers and business leaders external to the book industry in combination with a panel of book industry representatives. The group as a whole was asked to discuss a key question:

How important is it for Australia to have its own book industry?

- *If it is important, what must we do to secure the future of our industry?*
- *If it is not important, what are the implications of losing it?*

In addition, individual participants were presented with a question tailored to integrate their specific expertise with an issue related to the challenges being faced by the book industry.

Participant comments are reflected in this section.

External input: CULTURE

Government investment should perhaps be focused on frontline content creators combined with assisting existing distributors to defend existing business models and profit margins.

The possible collapse of the Australian book industry (as is seen in the 'Cloudstreet' and 'The Power of One' futures) should be examined by the government with a view to potential subsidies such as those provided by the French government for its book industry. Once again the lack of homogeneity of the book industry is relevant. There are three distinctive sectors:

1. The mass market book publishing industry, which apparently accounts for 55% or more of the total industry and includes all popular genres like mass market fiction, popular non-fiction, children's, travel, food, etc.;
2. Educational publishing, which apparently accounts for around 40% of the total industry; and
3. "Literary" publishing, predominantly high-end fiction and literary non-fiction, which accounts for the remaining 5% of the industry.

Each sector has its own quite separate and largely different structures, issues and challenges, and aggregating them into a single 'Australian book publishing industry' could be misdirected in discussions with government and counter-productive for each sector. Government should be asked to develop specific funding programs targeted at the protection and enhancement of Australian culture. Some participants suggested that the industry may benefit from a National Book Council.

External input: CONSUMERS

One of the distinctions which was used to create the scenarios - that between the book as an object and the book as content – was raised in this session. In the worlds where digital content is presented in new formats and the book takes on a fluid less bounded structure, consumers will increasingly be going online and the number of physical bookshops in Australia will decline significantly. This distinction does not faze publishers who put consumer needs and return on investment above any particular distribution channel. Consumers in all futures become increasingly empowered - a key social phenomenon of our times which suggests book industry professionals need to think more broadly about how they engage with readers.

The consumer of the future will require the book industry to look at what consumers want and act on that because if the industry places hurdles in the way of consumers - those consumers will just find a way to get around the hurdles in order to purchase what they want, wherever they might find it.

If the eBook is just another format then the often-cited focus on the disintermediation of publishers (the consumer buys the product because of the author and not the publisher) makes sense, but only when the multiple formats for the book follow traditional lines. The statement that 'only writers and consumers are needed in the supply chain' does not ring true in the 'Cloudstreet' and The Lucky Country' futures because of the expensive ensemble characteristics of multi-media/format publishing which would be particularly evident in mass-market and educational markets. Literary publishing would be less affected but, this is only a very small market sector.

Of course not all consumers are in general markets. Students form a critical market and there is a strong need to improve and broaden resources available to students.

External input: COPYRIGHT

Finding the right protective balance for users, creators and their intermediaries is a major challenge. It is recognised that the impact of protection is a double-edged sword. Over-zealous protection may both encourage the defection of consumers to pirated supply on the one-hand and reduce the viral impact of a networked environment on the other. As was observed by participants, 'piracy is essential to brand growth'. This has been particularly noticeable in the music industry where 15 years ago, some proponents were arguing for the crucial role that record piracy played as a key driver of live performance sales. Weak protection however, leads to market problems by failing to provide the security that investment in online sales and marketing requires.

The view that the Copyright Act is functioning well was presented but amendments in the 30/90 day rules need clarifying. There is little doubt that the global futures expressed by 'Cloudstreet' and 'The Power of One' will present strong cases for reform. As the law becomes such an important meeting place for all protagonists in the supply chain and the markets they serve, then perhaps the creation of an Australian Copyright Authority, along the lines of the ACCC, is a coming need. Competing globally also means removing frictions in the Australian supply chain and creating minimum remuneration platforms for authorship.

External input: COMPETITION

Participants highlighted the importance of statistics and collaboration in developing online markets. Local market knowledge is an irreplaceable asset in 'The Lucky Country' and 'Rabbit Proof Fence' scenarios and is one feature of the resilient publishing and retail sector identified at the meeting.

Although there are recognisable opportunities for the Australian book industry in a globalising world, a case can be made for government to invest in showcasing Australian books in global markets. Australian writers urgently need exposure in international markets

The survival of the book industry is about transitioning to new business models and to scrap old thinking. Territoriality in all its forms might be a handicap in that it constrains the supply side of the business while on the demand side customers are way ahead in their global focus.

The nature of government intervention in the book industry was discussed and there was a strong view expressed that the government should not intervene to prevent or distort competition unless the community benefits outweigh the costs/tensions. The consumer will hold the power and the industry will have to meet the consumer's needs; not the other way round. The channels of distribution are changing and content must be available. The government help must be direct to the industry and not restrict the choice or empowerment of consumers.

It was noted that all book industry sectors are working on thin margins and that government structures are needed to underpin the development of Australian infrastructure.

5. Whole of Industry Strategies

This section summarises the conversations in all the workshops - once again the strategic themes of culture, consumers, copyright and competition are being used to cluster the views expressed. The topics illustrated are those which gained widespread support across all the workshops. The strategies have been classified in relation to the four scenarios as follows:

'Yes' are strategies robust in all four future scenarios.

'Maybe' are strategies robust in two or three future scenarios.

Strategies: CULTURE

Strategy 1: Australian authorship

Expanded support for Australian authorship, not just in terms of direct funding but also to help improve professional skills for producing quality content in all book formats. Note that authorship recognises not just literary authors but individuals and teams creating digital content in education and for the mass-market (Yes).

Strategy 2: eCommerce

Government funding and support for industry skills development for e-commerce/digital production and content development (Yes).

Strategies: CONSUMERS

Strategy 3: eBooks

Creation of an Australian e-book platform to meet the needs of providing a culturally focused service to Australian citizens (Maybe).

Strategy 4: Customer service

In recognition of the changing demands of (young) users, develop programs to improve customer skills and industry efficiencies (Maybe).

Strategies: COPYRIGHT

Strategy 5: Copyright

Development of a copyright regime which addresses the tensions between global and national requirements and aligns existing and future copyright requirements (Yes).

Strategies: COMPETITION

Strategy 6: GST on books

Bring Australia in line with most OECD countries by removing the impost of GST on books (Maybe).

Strategy 7: Metadata

Standardisation of metadata to improve efficiencies and remove frictions within the supply chain (Yes).

Strategy 8: National book distribution (physical/online)

Creation of a national distribution network to rationalise the logistical side of the supply chain (Maybe).

Strategy 9: Market research

The traditional interface between publishers and intermediaries (librarians, educators, booksellers) has distanced them from the end user. In a digital world this relationship changes with empowerment of the consumer. Publishers need much better information about their customers and steps are needed to improve the quality of market research (Yes).

Strategy 10: Global marketing

Australian authors and publishers need to raise their profile in the international market place and online and government support is needed to help showcase Australia (Maybe).

FACILITATOR'S OBSERVATIONS

The mandate to search for increasing competitiveness, efficiency and productivity in the way the supply chain performs in the book industry is a given. But the nature of the connection between these measures of performance and innovation is not. Without innovation that is based on understanding the real nature of the social needs being fulfilled, intervention will fail to make a difference. If the future presented in 'Cloudstreet' were to emerge then any investments to rationalise distribution and bookselling based on traditional practice in Australia will be threatened.

Despite the natural reluctance of Australian legislators to review copyright yet again, the scenarios expressing changes in the external global environment combining with the acceleration in the development and adoption of new technology, seem to suggest the need for a radical rethink is a pressing one. Indeed, three of the four future scenarios suggest so.

For example, the recent affirmation of parallel importation is relevant in some of the future scenarios but not all. If the world trends towards the forms of globalisation that are contemplated in 'Cloudstreet' and 'The Power of One', it is unlikely that a 'whole of industry' strategy on territoriality will be forthcoming. Nevertheless, the impact of territoriality is to reduce the competitiveness of the Australian supply chain although admittedly providing some security for Australian authors.

The argument developed that, with the growth of digital communications, only writers and consumers are needed in the supply chain – publishers, bookshops and printers are becoming unnecessary - is contestable. While the digital world changes the relationships between players in the supply chain it does not eradicate the need for the 'value-adding' that great publishers, booksellers and printers contribute. What is not contestable is that the physical location of these players is unpredictable. The publishers don't have to be in Australia and if they are then the other players can still be anywhere else.

The insensitivity of distributors in Australia to the impact of exchange rate fluctuations is a major cause of the rise in popularity of providers such as Amazon and The Book Depository. This insensitivity is alone cause for dismantling PIR. Price is (almost) everything. In all futures, distribution needs to be rationalised in Australia to make the supply chain more competitive vs. Amazon and The Book Depository. Aspects of rationalisation will be market-driven but there is an urgent need for the major players to collaborate to improve service levels, reduce costs and create uniform standards regarding performance goals, reporting and customer service. A consolidated negotiation with Australia Post to rationalise freight costs would be advantageous.

Throughout the strategic conversation which this project has undertaken is the tension between improvements that require government intervention and those which are best left to market forces.

Nevertheless, whatever the final recommendations made by BISG, it seems to the facilitator that we will need to create some infrastructure to make things work.

This might include the following elements:

CULTURE: Expanding the role and funding of the Australia Council Literature Board and linking its activities with the powerful book-industry funded CAL Cultural Fund.

CONSUMERS: Creating university/TAFE/and industry based training and diploma schemes for digital production and content creation.

COPYRIGHT: Creating an Australian Copyright Authority with its feet firmly grounded in commerce as well as the law.

COMPETITION: Creating a National Book Council with a special focus on book marketing in a global environment. (The NBC could be built from BISG when the latter's role ceases).

6. Summary

The stakeholder workshop scenarios provide a framework for evaluating the strategic concerns for the Australian book industry.

In every industry, there are people with the vision, energy and passion to engage with the big picture and the future and to look for the strategies that might deliver long-term success. The BISG stakeholder workshops presented this opportunity to over 200 committed book industry professionals and invited thought leaders over a two-month period in the early part of 2011.

Their role has never been more important than in this richly productive process in exploring current book industry views and mapping them against the uncertainties of the future at a critical moment in its development in Australia.

Foresight methodologies such as the scenario planning techniques used in this research are never ends in themselves. They create awareness about the turbulence of the environments in which an industry operates and preparedness for the trends, critical uncertainties and wildcards that shape them. New events will change this awareness and over time require the creation of new scenarios for the future.

The critical uncertainties driving the BISG scenarios for the future of the book industry in Australia are novel in that they have avoided designing futures using well-worn clichés such as whether we go digital or not, or whether we go global or not.

The future is global and is digital and the interesting questions which this project asks are ‘what kind of global? What kind of digital?’

Oliver Freeman Sydney
April 2011

7. Appendix

Workshop Participants

AUTHORS and AGENTS WORKSHOP

2 February 2011 - Sydney

4. Ms Louise Adler	BISG Member
5. Mr Jim Alexander	CAL
6. Mr Richard Bawden	Neville Freeman Agency
7. Ms Averill Chase	The Authors Agent
8. Ms Margaret Connolly	Margaret Connolly & Assoc
9. Ms Jacinta di Mase	Jacinta di Mase Management
10. Ms Julie Ditrich	Australian Society of Authors
11. Mr Simon Groth	Queensland Writers Centre
12. Ms Sophie Hamley	Cameron Creswell Agency
13. Ms Susan Hayes	Australia Council
14. Mr Angelo Loukakis	BISG Member
15. Ms Pippa Masson	Curtis Brown (Australia)
16. Ms Jeni Mawter	Author
17. Mr Garth Nix	Nix Entertainment
18. Mr Hugh Pattinson	Uni of Western Sydney
19. Mr Steve Payne	BISG Liaison
20. Mr Rob Pullan	Author
21. Ms Mary Ann Reid	Australian Copyright Council
22. Ms Susan Rogers	Office of the Arts
23. Mr David Ryding	NSW Writers' Centre
24. Mr Peter Saul	
25. Ms Lynne Spender	Author
26. Ms Lyn Tranter	Australian Literary Management
27. Mr Sherman Young	Macquarie University

BOOKSELLERS WORKSHOP

3 February 2011, Sydney

1. Ms Louise Adler	BISG Member
2. Mr Joel Becker	Australian Booksellers Association
3. Mr Steven Cain	BISG Member
4. Ms Jane Caton	University Co-op Bookshop
5. Ms Kate Colley	Bloomin Books
6. Mr Graeme Connelly	BISG Member
7. Mr Steve Cox	Dymocks
8. Mr Derek Dryden	Better Read than Dead
9. Ms Heather Dyer	Fairfield Bookshop
10. Mr David Gaunt	BISG Member
11. Ms Patricia Genat	ALS Library Services
12. Mr Adrian Hardingham	Abbey's Bookshop
13. Mr Tony Horgan	Shearers Bookshop
14. Mr Steve Jones	Kinokuniya Bookstores
15. Mr Daniel Jordan	Collins Group
16. Mr Jethro Marks	The Nile
17. Mr Simon Milne	Leading Edge Books
18. Mr Tony Nash	Booktopia
19. Mr Jon Page	Pages & Pages
20. Mr Steve Payne	BISG Liaison
21. Mr Steve Robinson	QBD The Bookshop
22. Mr Mark Rubbo	Readings Books & Music
23. Mr Peter Saul	
24. Mr Adam Schmidt	DNAML
25. Ms Catherine Schulz	Fullers Hobart
26. Mr Steve Traurig	Booktopia
27. Mr Scott Whitmont	Lindfield Bookshop

PERTH SUPPLY CHAIN WORKSHOP

9 February 2011, Perth

1.	Mr Ricky Arnold	Department of Culture and the Arts
2.	Ms Liz Burke	Murdoch University
3.	Ms Sharon Flindll	Writing WA
4.	Mr Oliver Gatty	State Library of WA
5.	Mr Warren Grellier	WA Department of Education
6.	Mr David Harrison	Murdoch University
7.	Ms Suzie Haslehurst	Magabala Books Aboriginal Corp
8.	Ms Anita Kelleher	Designer Futures
9.	Mr Jason Lake	Imprints Booksellers
10.	Mr Brian McGuinness	RIC Publishers
11.	Ms Tina McIntosh	DBCDE
12.	Mr Clive Newman	Fremantle Press
13.	Mr Paul Nieuwhof	Printing Industries Association of Australia
14.	Ms Wendy Rush	Australian Literacy Educators' Association
15.	Mr Geoff Strempel	State Library of SA
16.	Ms Alison Sutherland	State Library of WA
17.	Ms Terri-Ann White	UWA Publishing

PRINTERS WORKSHOP

11 February 2011, Adelaide

1.	Mr Philip Andersen	BISG Member
2.	Ms Lorraine Cassin	BISG Member
3.	Mr Barry Davis	Hyde Park Press
4.	Mr Andrew Easton	Alpa Books
5.	Mr Alan Fahy	BISG Member
6.	Mr Adrian Fleming	Kodak Australia and New Zealand
7.	Ms Karen Goldsmith	Graphic Arts Merchants Association of Australia
8.	Mr Alan Goulburn	Allkotes
9.	Mr Ben Jolly	Griffin Press
10.	Mr Dan Kelly	Watson Ferguson & Company
11.	Mr Peter Lane	Lane Print Group
12.	Mr Craig Larner	AMWU
13.	Professor Goran Roos	
14.	Mr Michael Schulz	SOS Print & Media Group
15.	Mr Hagop Tchamkertenian	Printing Industries Association of Australia
16.	Mr Brett Turnley	BPA Print Group
17.	Mr Carrick Wilkie	Opus Print Group
18.	Mr Steve Wilkinson	Protectaprint
19.	Mr Innes Willox	Australian Industry Group
20.	Ms Kathy Wilson	Ricoh Australia
21.	Mr Gordon Wilson	Griffin Press
22.	Mr Allan O'Connor	Adelaide Thinkers in Residence / University of Adelaide
23.	Ms Anne Rhodes	Adelaide Thinkers in Residence / University of Adelaide

LIBRARIES WORKSHOP

16 February 2011, Canberra

1.	Ms Jane Alexander	Brisbane City Council Library Services
2.	Ms Jerelynn Brown	State Library of NSW
3.	Ms Christine Butler	State Library of Victoria
4.	Ms Rebecca Carruthers	Deakin University Waterfront Campus
5.	Dr Warwick Cathro	National Library of Australia
6.	Mr James Cheatley	Attorney-General's Dept
7.	Mr Graeme Connelly	BISG Member
8.	Mr Steve Cork	Australian National University
9.	Mr Ross Duncan	Public Libraries Australia
10.	Mr Ellen Forsyth	State Library of NSW
11.	Ms Patricia Genat	ALS Library Services
12.	Mrs Darlene Hill	Australian School Library Ass'n
13.	Mr Geoff Hinchcliffe	National & State Libraries Australasia
14.	Ms Judy Hutchinson	Parliament House Library
15.	Ms Helen Kon	National Library of Australia
16.	Mr Matthew Burless	ACT Library and Information Service
17.	Ms Janetta Mascilongo	Australian Libraries and Information Association
18.	Mr Dean Mason	enakt
19.	Ms Lynn McIntosh	Randwick Library Service
20.	Ms Lynette Nixon	PricewaterhouseCoopers
21.	Ms Lisa Richards	Department of Innovation, Industry, Science and Research
22.	Ms Jan Richards	Central West Libraries
23.	Ms Susan Rogers	Office of the Arts
24.	Mr John Schipp	Council of Australian University Libraries
25.	Ms Margaret Skillman	Department of Families and Housing, Community Services and Indigenous Affairs

EDUCATORS WORKSHOP

17 February 2011, Canberra

1. Mr Jim Alexander	Copyright Agency Ltd
2. Ms Kathy Bail	UNSW Press
3. Ms Janet Baker	Open Universities Australia
4. Mr Jose Borghino	Australian Publishers Assoc
5. Ms Judith Bowtell	Arts NSW
6. Mr Eiko Bron	McGraw-Hill Australia
7. Ms Delia Browne	Ministerial Council for Education, Early Childhood Development and Youth Affairs
8. Mr James Cheatley	Attorney-General's Department
9. Mr Graeme Connelly	BISG Member
10. Dr Robin Derricourt	
11. Ms Colleen Foley	NSW Department of Education and Training
12. Ms Julie Goodall	ACT Department of Education and Training
13. Ms Stacey Hattensen	Education Services Australia
14. Ms Sharon Kerr	Macquarie University Accessibility Services
15. Ms Gabrielle Mackey	Department of Education, Employment and Workplace Relations
16. Mr Rodney Martin	ERA Publications
17. Mr Dean Mason	enakt
18. Ms Tess McDonald	Department of Innovation, Industry, Science and Research
19. Mr Marc Niemes	eLearning Industry Association of Victoria
20. Mr David O'Brien	Cengage Learning Australia
21. Mr Mark O'Neil	Cambridge University Press Australia & New Zealand
22. Mr Peter Saffin	Macmillan Education
23. Mr Colin Steele	ANU Epress founder
24. Mr Stuart Tait	Education Services Australia
25. Mr Peter Van Noorden	Oxford University Press
26. Ms Elizabeth Weiss	Allen & Unwin

27. Ms Jema Williams	Youth InterACT
28. Mr Stephen Wilson	e:lit

SUPPLY CHAIN WORKSHOP

22 February 2011, Brisbane

1. Mr Michael Aird	Keeaira Press
2. Mr Greg Bain	University of Queensland Press
3. Mr Martin Borchert	Queensland University of Technology
4. Mr Guy Coaldrake	Coaldrake's
5. Dr John Cokley	Strictly Literary
6. Mr Bill Concannon	Mary Ryan
7. Mr Tom Crago	BISG Member
8. Ms Lauren Daniels	Interactive Publications
9. Ms Kate Eltham	Queensland Writers Centre
10. Mr David Gaunt	BISG Member
11. Ms Tiffany Johnson	1010 Printing
12. Ms Helen Livingston	University of SA
13. Mr David Scott	Woodslane
14. Ms Fiona Stager	Avid Reader
15. Dr Cori Stewart	Arts Queensland
16. Ms Benny Thomas	Exisle Publishing
17. Ms Suzy Wilson	Riverbend Books

PUBLISHERS WORKSHOP

1 March 2011, Melbourne

1.	Ms Louise Adler	BISG Member
2.	Mr Jose Borghino	Australian Publishers Assoc
3.	Mr James Cheatley	Attorney-General's Dept
4.	Mr Graeme Connelly	BISG Member
5.	Ms Gabrielle Coyne	Penguin Group Asia Pacific
6.	Ms Zoe Dattner	Small Press Undergound Network Community
7.	Mr Peter Eichhorn	UNSW Press
8.	Mr Alan Fahy	BISG Member
9.	Mr Sandy Grant	BISG Member
10.	Dr Nathan Hollier	Monash University Publishing
11.	Mr Dennis Jones	Dennis Jones & Associates
12.	Mr Lorena Kanellopoulos	ANU E-press
13.	Ms Michelle Laforest	Harlequin Enterprises (Australia)
14.	Ms Mary Lancaster	Word Design Interactive
15.	Ms Susannah McFarlane	LemonFizz Media
16.	Mr Michael Moynahan	Harper Collins Publishers Australia
17.	Ms Susan Murray-Smith	Sydney University Press
18.	Mr Kevin Ormsby	Royal Melbourne Institute of Technology Publishing
19.	Ms Mary Ann Reid	Australian Copyright Council
20.	Mr Mark Robertson	Wiley-Blackwell Asia-Pacific
21.	Ms Susan Rogers	Office of the Arts
22.	Ms Margie Seale	Random House Australia
23.	Ms Margaret Skillman	Dept of Families and Housing, Community Services and Indigenous Affairs
24.	Mr Emmett Stinson	BISG Member
25.	Mr Stephen Ungar	Hinkler Books
26.	Ms Kirsty Wilson	Text Publishing Co

NEVILLEFREEMANAGENCY

CONSOLIDATED WORKSHOP

Wed 9 Mar 2011 at 185 Pelham Street, Carlton, Victoria

1. Ms Louise Adler	BISG Member
2. Ms Kim Anderson	The Reading Room
3. Mr Philip Andersen	BISG Member
4. Mr David Barnett	BISG Member
5. Mr Eric Beecher	Crikey.com
6. Mr Paul Budde	Paul Budde Communication
7. Mr Steven Cain	BISG Member
8. Ms Lorraine Cassin	BISG Member
9. Mr Graeme Connelly	BISG Member
10. Ms Jenny Darling	Australian Literary Agents Association
11. Mr Alan Fahy	BISG Member
12. Mr Richard Flanagan	Author
13. Prof Michael Fraser	Communications Law Centre
14. Mr David Gaunt AM	BISG Member
15. Mr Ross Gibb	BISG Member
16. Mr Sandy Grant	BISG Member
17. Ms Susan Hayes	Australia Council
18. Mr Brian Johns AO	Copyright Agency Ltd
19. Mr Alan Kohler	Business Spectator
20. Ms Ana Kokkinos	Filmmaker
21. Mr Angelo Loukakis	BISG Member
22. Ms Susan Mann	Education Services Australia
23. Mr Julian Morrow	The Chaser
24. Mr Malcolm Neil	Kobo Australia
25. Mr Stephen Palmer	Lonely Planet
26. Mr Nicholas Pullen	HWL Ebsworth Lawyers
27. Ms Juliet Rogers	Allen & Unwin Publishers
28. Mr Graeme Samuel	Australian Competition & Consumer Commission
29. Mr Emmett Stinson	BISG Member

30. Mr Michael Webster	Royal Melbourne Institute of Technology University
31. Mr Christopher Zinn	Choice Magazine