AUSTRIA Iris Blatterer [London 03/17]

- Government announced initiative:
  § Each pupil after 4th grade will get a tablet
  § Each pupil in 9th grade will get a laptop
  § Funding is under construction, content not a topic of the discussion
- Ministry of Education forces 'Eduthek', a platform which should be a kind of clearing interface. First step: include content made by Ministry and OER-Material
- E-Books within the schoolbook-System:
  § E-Books going along with P-Book (at the moment can be ordered only together or P-Book only): funding by Ministry of Family until 2017/18 only. Then no money anymore. It is “up to the publishing companies” it they offer something until 2018/17. Schools won’t have a budget to order additional E-Books.
  § E-Book + (enhanced E-Book): funding by Ministry of Family 2018/19, unclear situation after this period and no business model available. Approval process has started

BELGIUM Evi Werkers [Vienna 12/16]

- HP/Reprobel and the reparation law: Following the ECJ HP/Reprobel ruling the Belgian legislator decided not to await the Belgian ruling and to prepare a reparation law. The compensation scheme for reprography was revised drastically, ruling out all levies on copy machines. Simultaneously the legislator revised the existing exceptions and levies with regard to use of works to illustrate for teaching purposes. The exceptions were broadened similar to the current EC proposal on the modernization of copyright in the digital single market (no mentioning of short excerpts as a criterion any more). The idea was also launched to lift books designed for teaching purposes out of the scope of the exception and let licences prevail over the exception. The GEWU publishers were consulted and decided after careful consideration that they preferred the current levy scheme over the exclusive licensing scheme. The compensation level was lowered. The authors stand together with the publishers even though the 50/50 split was questioned by politicians.
- Fixed book price: We are entering the final parliamentary stage of the adoption of a fixed book price in Flanders. The current proposal of law foresees a fixed book price for a duration of 6 months for (Dutch) trade books (also in electronic format). Educational, academic, scientific and professional publications are excluded from the scope of application. Limited discounts can be given to consumers (10%) and libraries (25%). The book trade organization Boek.be has challenged the 25% discount for libraries at the Flemish Parliament on 10 November. The adoption of the final text is expected in the course of January 2017.
- Digital deposit: A recent study carried out by the Flemish Heritage Library was recently presented at the Flemish Ministry of Culture, suggesting a legislative initiative to revise the current framework which foresees a facultative scheme of digital deposit. The Flemish PA is on its guard for any extension of the consultation of deposited works other than the consultation of works on the premises of the Royal Library. The Flemish PA, the magazine and press publishers as well as the Royal Library have questioned the competence of the Flemish government on the topic which is clearly state law and the competence of the Royal Library. Any kind of reform of the current deposit law must be limited to the Royal library and the deposit of digital publications in the Royal Library. The availability of books for consultation outside the premises of the Royal Library requires explicit consent of all rightholders involved.
• **Flemish PA split:** The Flemish PA (VUV) is split in two separate associations, each with their own director. The association GAU will represent all trade publishers and importers active in Flanders. The association GEWU will represent all scholarly, academic and professional publishers active in Flanders.

**BRAZIL** Daniela Manole & Karine Pansa  **[London 03/17]**

• Recent Supreme Court decision over tax immunity for E-readers. In Brazil all books, print or digital are immune. The Supreme Court understood that the Constitution also applies to the devices.
• Since January 2016 the law prohibits a publisher to refuse to handle the digital format along with the printed one. Also only publishing houses that offer digital formats can participate in Government bids.
• There are no changes in the Copyright Law yet, although with the new Minister of Culture and Secretary of Culture Economy (Mansur) it is expected there will be more dialogue with the market.
• Governmental purchases of educational resources: due to the big economic crises in Brazil it is expected there will be a low level of bids.

* **DENMARK**

Charlotte Enevoldsen  **[Geneva 06/17]**

• Large public initiative on digitalization of primary/secondary school is being implemented.
• The Danish municipalities are considering more centralized purchase of digital educational material.
• The general data protection regulation, which has been adopted by the EU, is a challenge to the Danish schools with regard to handling of personal data and the use of digital educational material
• In August Danish Publishers will launch a campaign against illegal copying of textbooks in higher education.

Janus Benn Sørensen  **[London 03/17]**

• We don’t have exact numbers yet for 2016 but we have an expectation that 50% of the market is digital. It follows the natural evolution of past years growth in penetration of digital material.

• This is the last year with subsidy to the market (public schools get 50% financed by the state when they buy digital material):

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<tr>
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<th>Subsidy funds allocated DKR</th>
<th>Funds used DKR</th>
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<td>2012</td>
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<td>2013</td>
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<td>53</td>
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<td>2014</td>
<td>80</td>
<td>63</td>
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A lot of focus is on LMS at the Educational department level. They see LMS system as being the key to teaching and where all the material should be available. This raises a lot of questions concerning copyright, because the teachers share the content etc.

* ESTONIA Antti Rammo [Geneva 06/17]

A deal has been made between The University of Tallinn and The Ministry of Education and Research to produce a complete set (except language and literature) of digital high school courses (51 total, 1785 lessons) that must be ready in one years time. The content has to include the core text, exercises to minimum of 3 difficulty levels, videos and animations; in addition to every topic a special exercises kit for vocational training. The amount of investment is 1,3 MEUR. Per subject, there is one, maximum of two authors (mainly teachers), the project includes altogether 40 people (only 13 of them producing learning content).

* FEDERATION OF EUROPEAN PUBLISHERS Enrico Turrin [Geneva 06/17]

- Council Recommendation on the European Qualifications Framework for lifelong learning
- 2nd World Open Educational Resources congress
- Latest developments on the Commission proposal on Copyright in the DSM
- Communia’s campaign "Right Copyright for Education"

* FINLAND Sakari Laiho [Geneva 06/17]

The Finnish PA published learning material of Finnish language for adult refugees pro bono. It includes 64 pages public domain PDF on dedicated web-page hauskatavata.fi where you can also listen to pronunciations of the texts and exercises. PA delivered 5,000 copies of printed version to refugee reception centres via Red Cross Finland.

"Hauska tavata! Opin suomea" (means Nice to meet you! I learn Finnish.)

Over 400 words vocabulary: Finnish – Swedish – English – Arabic (and empty space for additional language)

- Finland experienced brief governmental crisis in the middle of June. Government survived and with the good news that promise of Minister of Treasury lowering VAT of digital publications is still valid.
- Finnish PA started to coordinate lobbying and informing its members about coming EU Data Protection Regulation. Handling data of students for purpose of using digital learning materials and for developing products is crucial for publishers.
* FRANCE  Pascale Gelebart  [Geneva 06/17]

- The massive curriculum change implemented over 9 levels (Primary and Lower Secondary) and all disciplines started on September 2016.

  At Primary levels (5 levels): Since French per pupil textbook expenditure at Primary levels remains steadily one of the lowest over Europe, only 18% of the compliant textbooks needed have been acquired on 2016... The only exception is mathematics on 2 levels, where equipment are 65%.

  At Lower Secondary levels (4 levels): Being in charge of textbooks at this level, State decided to distribute textbook acquisition over 2016 and 2017. 3.5 textbooks/pupil were to be acquired on 2016 and 3 textbooks/pupil over 2017.

On 2016, as some private schools decided to wait one more year (because of the elections) and as the Ministry of Education did not fully allocate the budget needed, 3 millions textbooks were missing, and the national average was slightly below 3 textbooks/pupil instead of 3.5.

- On 2017, notwithstanding the missing books of 2016, 3 textbooks/pupil are needed (instead of 3.5). But the Ministry has reduced the textbooks budget by 30%, before the elections, and we don’t know what will be the line of the new Ministry of Education. 2018 is all the more uncertain.

- On digital: Digital textbooks are the first digital resource in use inside school classrooms. Educational publishers won 80% of a national tender over innovative digital resources banks.

- What next?: We've got a new President and a new Parliament: En Marche toward a better education?

GEORGIA  Gvantsa Jobava  [London 03/17]

- Georgia’s book market is still under serious threat due to a 2013 government decision that school textbooks would be printed and distributed free of charge for the school year 2013-2014 by the Ministry of Education and Science, without prior agreement with publishers and authors thereby totally neglecting their rights and depriving them of income. Publishers were prepared to support free distribution of textbooks, but not the violent breach of copyright and intellectual property rights.

- This year the government had to announce new selection of textbooks for school year 2017-2018, because next year textbooks for 1-6 school years won't be valid any more. It means that publishers and authors had to prepare new textbooks based on a new program created by the Ministry of Education and Science. It means that the government "needs" authors and publishers again and they have started negotiating with us. Since September 2016 until today we (publishers association (GPBA), textbooks publishers, authors, lawyers) have had up to 30 meetings with the Minister of Education and Science (Alekandre Jejelava) or deputy minister (Teimuraz Murghulia), discussing the new conditions of the new agreement that should be signed among Georgian publishers and the Ministry.

- Up to December we thought that agreement with the government this time should be possible. But soon in January the situation dramatically changed again. The Minister of Education announced that he wished to negotiate with us according to the conditions we agreed on during these meetings since September, but as he said, we had to forget about those meetings and agreement conditions, because the government had not enough money to negotiate with us in a proper way, to buy textbooks from publishers in a proper way. So they decided to announce the tender and they prepared the document (agreement) that explains all the steps of rules how to select new textbooks and they have sent it to publishers for signature. Here are some details from the document:
  a. The tender will be announced in two parts. First part for content and the other for printing service. It means that if the textbooks prepared by one publishing house wins the tender in the part of content, it doesn’t mean that this publishing house will be allowed to print his own textbooks. The publishing house has to participate in another tender to receive the permission for printing as well. But we believe that it will be quite impossible to win in the printing tender as well, and the winner will be one or two huge printing houses which already have had huge orders from the government to print the textbooks of 20 Georgian publishing houses. Here comes again doubts about corruption and someone’s personal financial interests.
  b. The minimum required to win the tender in the part of content will be 85 points. But the government says that even if the applicant receives 100 points, but the price offered by the tender
will be more expensive than the price offered by the applicant who received 85 points, the Ministry can easily choose the textbook which received 85 points and the textbook which received 100 points never reaches the schools. That means that there is no rule over how the government makes decisions about textbooks that receive 85 or more points. There are no guarantees. It means that the most important thing is price and not the quality.

- On 28th February during the meeting with the Deputy Minister of Education and Science and discussing this new agreement, publishers could not convince the government to change the unbelievable rule about selecting the textbooks by tender (in two parts). As they found out there is no sense to continue discussions, up to 20 publishers (all of those who were attending the meeting except the representatives of Macmillan, who are distributing their English language textbooks for Georgian schools and have always worked with the Georgian government under very normal conditions and always has been very different from what the government is offering to Georgian publishers) left the meeting in the form of protest. On 10th March there was held another meeting separately with textbook authors in the Ministry where the government tried to convince them to collaborate with them (we think that in case of publishers' joint protest, they discuss to negotiate directly with authors). But it happened that the authors (the huge part) like publishers have left the meeting in the form of protest. They say that it made no sense for them to continue discussions there because the ministry has already made its decisions and they are convinced that it is the will and decision of whole government.

- Up until today there is no news of what the government is planning to do to announce a new selection of textbooks, because they are forced to announce under their own rule which they have already abrogated for school year 2017-2018 and are planning to distribute old textbooks which won't be valid any more. Publishers are standing on their position together and very firmly. They say that they have nothing to lose any more and they refuse to work on creating new textbooks under ambiguous rules offered by the government. As it was long ago predicted, for this moment the situation is deadlocked. Almost every day Georgian media (TV, Radio, Newspapers) is speaking about this issue. Still no news from European Court of Human Rights about their decision if they are planning to discuss our case or not.

GERMANY Andreas Baer [Vienna 12/16]

- New initiative: 5 billion Euros for IT-equipment for schools?
- Federal IT Summit
- Copyright issues:
  - new exception for teaching and science: pending
  - new copyright contract law: stuck
  - legal clarification that publishers may receive compensations: unclear
  - related rights for publishers: no national initiative
- New OER-Info center will start work

GREECE Association of Greek Publishers and Booksellers (ENELVI) [Vienna 12/16]

- Under the provisions of the Greek educational system schoolbooks are distributed to students free of charge. Every student studying in a public school receives one textbook for each subject as well as one workbook (if one is provided for a given subject); at the same time, students studying in a private school have to buy those same books in the market at a very low cost. As a result, all students studying within the confines of the Greek state are taught from the same textbooks.

- Planning has been underway recently for major changes in the educational system, especially in primary and secondary education. Slightly modified plans of previous cabinets have been reintroduced by the government, with said plans becoming a subject of public discourse. The changes planned are of a scope that makes the final two classes of secondary education (i.e. the 2nd and 3rd class of the "Lyceum") function in a manner similar to the International Baccalaureate (IB), without any changes planned however concerning the practice of using a single official state-issued schoolbook.
Changes in schoolbooks: The Ministry of Education will proceed with an extended program of implementing changes in schoolbooks, with the school year 2018-2019 serving as the timeframe of their presentation and implementation. The writing of two new Mathematics schoolbooks for the primary school is already underway. However, while in recent years the assignment of writing new schoolbooks was decided by competition and was integrated into the NSRF, owing to the lack of relevant NSRF the Ministry of Education will choose the writers among teachers working in public schools. About 20% in total of the books currently taught in schools are liable to be replaced. However, there is still no discussion of either abolishing the practice of having one schoolbook per subject or of implementing a system that would allow for each teacher to choose the textbook from which their students would be taught.

ENELVI believes that this system should be changed. The single official state-issued schoolbook should be replaced by books created by various publishers, so that teachers should be able to choose from a wider range of books. The distribution and pricing system is a matter of negotiation with the government.

HUNGARY Ildikó Török [Vienna 12/16]
- Along with several public background institutions, OFI (Education Research and Development Institute), the previously established big governmental textbook publisher is going to be ceased but its functions will be split into three: most probably EMMI (Ministry of Human Resources) will carry out the administrative tasks, and the educational research development and the textbook publishing will be shared by the higher educational institutions and KELLO (Library Supplier) in a way. The Secretary of State of the Prime Minister's Office clearly stated that publishers would not return, the national and centralized textbook published would stay instead in the mayor part of the market, and the government will not give in for the pressure dictated by the “textbook lobby”.
- The new National Core Curriculum is going to be implemented by the autumn of 2019 instead of the originally scheduled launch for 2018. Though it has not been mentioned, one of the reasons for the delay might be that the government is not willing to encumber the elections of 2018 with the education-related debates.
- Schools can apply for tenders up to 34.4 billion Forints (approx. 109 M EUR) to improve digital competence within the framework of an EU project, as reported by the Government Commissioner responsible for the improvement of digital educational content. There is going to be an opportunity for teacher training, vocational training, tool purchases, and for the procurement and installation of communicational classroom devices by winning the prize within the framework of the Human Resources Development Operative Program (EFOP).

ICELAND Heidar Ingi Svansson [London 03/17]
- The state-owned publishing house, „Menntamálafnun“, still has a monopoly for Elementary Schools or from 7 to 16 years of age.
- Free market is for the High School level or 16 – 19 years of age. Sales are steadily declining with mostly two publishing houses, IDNU and Forlagid, still struggling on in the market.
- No strategic policy exists for digital publication for all school levels.
- VAT on all books including educational books was raised in 2015 from 7% to 11%.
- The Icelandic PA is lobbying against a new Minister of Education to totally reform the business environment for the book publishing industry in general but with special emphasis on the educational sector.
**IRELAND** Brian Gilsenan [Geneva 06/17]

- The Minister of Education has issued an 'order' to all schools to phase out the use of "workbooks that cannot be re-used" by 2018. The IEPA have written to him seeking clarity on the definition of 'workbooks', asking on what research this radical decision has been based etc. We have quoted Tim Oates' research in our detailed letter and have engaged the teacher unions to help to have this surprise decision reversed.
- The Government have announced funding for IT resources in the classroom, for the first time since the crash in 2008.
- Ireland's new Prime Minister ('Taoiseach') is a 39 years old. He is a gay man, and the son of an Indian doctor, who came to Ireland in the 1980s with his Irish wife. He is the youngest guy ever to hold the office. Ireland has come a long way in the past 30 years or so, I'm proud to report.

**ITALY** Giulia Marangoni and Irene Enriques [Geneva 06/17]

- In Italy we have national standardized tests (INVALSI) of Italian and Maths at key stages 2, 5, 8 and 10 of the national curriculum. These tests are aimed at assessing the effectiveness of the learning process, and the quality and efficiency of the educational system. Starting from 2018-19:
  - INVALSI tests of Italian and Maths will be introduced also at key 13.
  - INVALSI tests of English as a second language will be introduced at key 8 and key 13. They are comparable to international exams, but they are free for the students.
  - INVALSI tests are now on paper; they will be computer based.
- Examinations at key 8 and key 13 ('Esame di Stato') will change as follows, starting from the end of 2017-18 school year:
  - the exam at the end of key 8 will be simplified: the national standard test INVALSI will not be part of the exam anymore. This will have some impact on the market for books and software for preparation of the INVALSI tests.
  - the written proofs of 'Esame di Stato' will be different, although it is not yet clearly stated what the differences will be. The oral test begins now with a cross-curricular theme chosen by the candidate; it will begin instead with a presentation of what the candidate has done in the 'Alternanza Scuola-Lavoro' project (see next bullet point). This has an impact both on the textbooks and on the service that publishers can give to schools.
- The 'Alternanza Scuola–Lavoro' (School-Job Alternating), included in 'La Buona Scuola' (The Good School), the recent school system reform by the Ministry of Education, provides that students at key stages 11, 12, 13 of upper secondary schools (age 15-18) have a job experience during the school year (200 hours in three years for lyceums, 400 hours in three years for technical institutes): this means that every year 1.500.000 students are involved. The objective is to foster the collaboration between school and industry to help students develop new skills to facilitate their transition to work.
- In this context, the Italian publishers association (AIE), together with the national associations of librarians (AIB) and booksellers (ALI), developed a comprehensive project named 'Libri Fuori Classe', offering students the possibility to work, for a defined period, within an organization in the book supply chain (publishing houses from different market segments, libraries, bookstores). An agreement between the Ministry of Education and the project proponents is under definition and will be signed soon.
- A key aspect of the project is the set-up of a web portal (www.librifuoriclasse.it) featuring educational resources for students to learn about the book world core concepts, the production process, the importance of intellectual property, the role and the work done by the different operators in the book supply chain. Publishers and the other partner associations strongly believe in this project, as an important opportunity to introduce the books world to students in an engaging and innovative way and, ultimately, to stimulate the interest of young generations in books and reading. The project will be launched at the beginning of the next school year (September 2017).
**NETHERLANDS** Stephan de Valk  *[Geneva 06/17]*

- As a consequence of the Marrakesh treaty GEU has decided to take an active role in stimulating their members to adopt ‘accessibility by design’: to take care from the very beginning of designing learning material.
- The Dutch government has adopted a law to protect pupil’s privacy by introducing a pseudonym; public and private organizations, amongst them educational publishers, cooperate in implementing so; GEU, the Dutch PA, gives a lot of support to their members.
- The EU-proposal on VAT will give room to lower tax rates on digital learning materials; to realize so the GEU is in close contact with both the Ministry of Education and Finance.
- The GEU and several publishers decided to a legal recourse in the case where learning routes where copied. In first instance the claim was rejected with the argument that ‘compose a learning route’ is not a creative process and deserves protection.
- The GEU has signed a public-private manifesto to improve the digital infrastructure in PE and SE.

**NORWAY** Wanda Voldner  *[Geneva 06/17]*

- **Renewal of elementary and secondary school curriculums:** The Government has launched a process of renewal, which will come into force by autumn 2020. The Norwegian PA follows the process closely, in order to assure that educational publishers are able to produce new materials on time and secure sufficient funding.
- **Strategies for digital learning on national and local level:** This autumn, the Ministry of Education and Research will launch a digital strategy for primary and secondary education. The Norwegian PA follows the process closely. Important issues are digital infrastructure, the teacher’s digital competencies and to ensure a well-functioning market for digital learning resources.
- **Public funded Open Educational Resources:** The last 10 years the PA has objected to National Digital Learning Arena (NDLA), which is a public funded production and purchase enterprise for digital learning resources. NDLA has monopolized the market for digital learning resources for secondary schools, and are now considering to expand. In 2017 the PA has joined forces with ed-tech companies, teachers and student organizations, and other interested parties, and are in a dialogue with some of the municipalities who are currently funding NDLA.
- **Stable textbook market:** The 2016 statistics shows a stable textbook market – both in digital and print. In the years to come we are expecting a slight decline, as the schools are waiting for a renewal of the curriculums. Digital share is 12% in the elementary school, while it is 10% in the secondary school.

**PHILIPPINES** Dominador Buhain  *[Dominador Buhain]*

- In 1995, after 20 years of lobbying by the private sector the Book Publishing Industry Development Act. (RA 8047) was passed. Section 10 relates to participation of the private sector in the publishing and printing, but remains inoperative. RA 8047 was passed to break the government monopoly of publishing and printing of textbooks for the public school students, which comprise approximately of 95% of elementary students and 52% of secondary students.
- The National Book Development Board or NBDB, which is the government agency tasked to implement the law and which is supposed to serve as the voice of the private sector and which was originally attached to the Office of the President, was placed by a mere executive order instead of legislative enactment (under the principle of separation of powers) under the administrative supervision of the DepED. Thus the envisioned role of NBDB of monitoring the DepEd on government publishing and private sector participation was in effect nullified. DepEd Order No.53 was issued that would virtually give public schools instead of the private publishers to prepare their own textbooks in contravention of RA 8047.
EPF Country Reports: aggregated update for Geneva 270617

- Lately there have been complaints that books prepared by private publishers are being appropriated by the public schools without the knowledge and consent of private publishers in view of the absence of knowhow on the part of public schools to come up with their own publications.
- To cement the government’s attempt to remove the private sector participation in the benefits by the General Appropriations Act (GAA) they lately removed the erstwhile provision that private sector shall receive the financial benefits thereto and instead it would now be the Instructional Material Division (which is supposed to have been abolished already) which would receive the appropriation.
- Although Filipinos appear more proficient in articulating English they have the tendency to be arrogant but without depth, thus findings by the Commission of Higher Education would indicate that the use of the mother tongue by other ASEAN countries in their textbooks and related materials could produce deeper contents.

PORTUGAL Henrique Mota [London 03/17]

- Portuguese economy is growing for the 2nd consecutive year, after 5 years (2009 to 2014) of difficulties and even some periods of recession. There is confidence in the future and forecasts are all positive.
- Public investment is quite low so government educational initiatives are small and with low impact. There is no relevant digital educational program and most of the initiatives are pilot cases.
- Government decided to buy and loan textbooks on all 4 years of elementary, which may have serious impact on schoolbook market. Schools can’t change books for six years and publishers’ income may be badly hit, as prices are low. In addition, a large number of local bookshops may go out of business because they are largely supported by revenues from schoolbooks.
- The educational market in Portugal faces a shrinking dimension, as nativity rates have been decreasing during the last 12 years. The number of students will be decreasing heavily in the future, and statistics point out a 20% decrease in the next decade, which will dramatically impact on every aspect of the educational market.
- Portuguese students performed well in the recent PISA and TIMM’s results, achieving for the first time better results that the EU average.
- There were some changes in assessment with the government deciding to end the 4th and 6th grade exams.

SOUTH AFRICA Mpuka Radinku (PASA) [London 03/17]

- Copyright Bill: The biggest threat to South African publishers in the education market is the current Copyright Amendment Bill. This Bill will be introduced to parliament in the first half of 2017.
- Provisions: The new copyright legislation will not only introduce the ‘communication to the public’ right, recognition for the protection of TPMs and copyright management information and exceptions for the visually impaired and other disabled, but also (listing only those that directly affect publishers):
  - extended fair dealing exceptions, including fair dealing for education, possibly ‘fair use’
  - blanket ban on contracts overriding exceptions
  - State ownership of works funded by the State and State control over works considered to be orphan works
  - term limitations on the assignment of copyright
  - compulsory licences for translations into South African languages
  - compulsory licences for works not available in commerce in South Africa
  - exceptions for libraries.
- Lobby plan: PASA is working on a plan to lobby South African legislators not to enact the contentious provisions in the Bill, for reasons that were stated in the PASA submission to the Department of Trade and Industry. Part of the plan is to conduct a study of the impact assessment of the Copyright Bill in South Africa to use it to lobby the lawmakers.
EPF Country Reports: aggregated update for Geneva 270617

- **Digital material**: The Education Ministry in basic education is still investigating ways to introduce digital materials into schools. Two provincial education departments - Gauteng and Western Cape - are gathering information on how to get digital materials into schools. In 2015, sales of digital materials grew to R37.7%. We expect this market to grow even though its growth is from a low base.

- **Improvement in 2016**: Publishers in the education market saw improved income in 2016 - even though the final stats have not yet been completed - as compared to 2015, where the numbers were at an all-time low going down from R2.4 billion the previous year to R1.7billion. This was mainly due to a decline in government spending, as well as lack of submission opportunities.

**SWEDEN** Rickard Vinde  [London 03/17]

- **PISA-rebound**: Sweden rebounds somewhat in latest PISA-test. Confirmation that 2011 reforms – stricter national curricula, grades given earlier, more national tests – have started to work.

- **Interest in textbook policy**: Local school boards interested in adopting a textbook policy, a systematic approach to evaluating and acquiring publishers’ materials.

- **Work on single sign-on and standards**: National standards for access to student data are adopted. Facilitates use of digital textbooks. Undermines the entry of Apple-like middlemen.

**TURKEY** Zeynep Atiker  [Geneva 06/17]

- In Turkey, compulsory education is K-12 (4+4+4). According to end of 2016 data, educational publishing in Turkey is 51.44% of all publishing. Curriculum works are done by the government and are continuous. This year, curriculum of grades one, five and nine are being changed. The Ministry of National Education (MoNE) continues distributing free of charge textbooks, and the books are distributed via carrier companies. Free of charge textbooks are purchased by the MoNE. There is an approval system for textbooks, and teachers themselves cannot pick the books to be studied. However, it is not obligatory for every approved book to be purchased by the Ministry. Private sector is not given the necessary importance in the purchase of textbooks, and the MoNE continues its publishing activities. There are restrictions towards the use of supplementary textbooks and ELT books at schools.

- Educational exceptions already form the basis of unauthorized reproductions at schools. At schools, unauthorized reproduction of books by photocopying and distribution to students continues. In the draft proposal copyright amendment bill released in May, educational exceptions are proposed to be broadened.

- Fatih Project, a technology project of the MoNE, has been only partially and insufficiently applied in terms of hardware. In terms of content, a considerable progress has not been achieved, because there is no special budget for content.

- Educational publishing and publishing in general are not included in the development plans of the government and there is no state support to raise the quality of education.

- During the State of Emergency in Turkey, which has been ongoing since July 2016, the MoNe has given notifications that textbooks should be cleaned out of any elements associated with the terror organization.

**UNITED ARAB EMIRATES** Rawan Dabbas  [Vienna 12/16]

- Education 2020 “The UAE’s focus on education is backed by Dh9.8 billion, allocation in the 2014 federal budget. Dh6 billion of this is being spent on improving general education and Dh3.8 billion on academic excellence programmes in local universities. To implement government policy, the UAE Ministry of Education developed Education 2020, a series of ambitious five-year plans designed to bring significant qualitative improvement in the education system, especially in the way teachers teach and students learn. The MOE is introducing advanced education techniques in accordance with best practices, improving innovative skills and developing the self-learning abilities of students. These reforms focus on better preparation, greater accountability, higher standards and improved professionalism. Smart
learning programmes, new teachers' codes and evaluations systems, as well as curriculum revision, including teaching maths and science through English, are all part of the strategy.”

- Ministry of Education signs a new 7 year agreement with McGraw Hill to provide a world-class education [http://gulfnews.com/news/uae/education/ministry-of-education-announces-new-curriculum-1.1908029] it is unclear what effect this will have on educational publishing. As the UAE is moving more and more towards a knowledge-based economy, and investing reading and writing; it is exciting to wait and see what will come out of this. In the last year alone, coinciding with the UAE’s Year of Reading, the country has

- E-learning and accessibility? [http://gulfnews.com/news/uae/society/learners-on-why-they-choose-e-learning-1.1883136] More and more studies are showing that in fact some students do prefer e-learning to books due to the freedom in when and where they can access their materials and study at their own pace. This does not however mean that the UAE is facing a problem in educational content moving online. It is simply becoming more accessible. As long as issues of copyright are addressed early on, this might not be a horrible thing.

- Freedom of Expression to become part of the UAE’s cultural agenda in a very important move, the UAE signs an agreement to ensure equality for all religious groups. This equality needs to start with educational institutions. [http://www.thenational.ae/uae/uae-signs-agreement-to-ensure-equality-for-all-religious-groups]

* UK Emma House/Chloe Smith [Geneva 06/17]*

- **General election 8 June:** The Conservatives have retained power, but with a reduced majority that has forced continuing negotiation over a deal with Northern Ireland’s Democratic Unionist Party (DUP) to support the government in key votes. Education Secretary Justine Greening MP keeps her place, as does Minister for School Standards Nick Gibb MP, but the government’s weakened position will make it harder to pass controversial legislation. This could apply to plans to reintroduce grammar schools, and reform school funding.

- **School funding:** The PA publishing yearbook for 2016 showed an increase in the value of UK publisher sales of schoolbooks over the year by 5% to £336mil. – but EPC statistics to date show a pronounced decline across primary sales in 2017, reflecting schools’ uncertainty over how school funding will be organized in future. Secondary sales remain positive, but the level of spending growth has been weak.

- **Frontier Research:** Economics consultancy Frontier Research is working on large-scale economic research to underline the PA’s over-arching communications strategy, Publishing: Creating the Future Economy. The research will generate four reports - a large piece on the overall contribution of the publishing industry to the UK economy, and the other three on An Educated Workforce (focusing on educational publishing), Sharing Knowledge (academic publishing), and Investing in Creativity (consumer publishing).

- **No tax on learning campaign:** PA has secured member agreement for a campaign against VAT on e-books, but at EU level, where taxation issues require unanimity, there is no overall agreement on proposals to allow greater flexibility in deciding the VAT level on e-books which should apply. The UK maintains they cannot move on VAT because of the EU, which could have implications for how PA presents this campaign.

- **Maths Mastery:** The first list of textbooks to be selected by an independent panel of experts in support of the Department for Education’s new 4-year Maths Mastery programme at primary level in England is still awaited. The process was stalled by pre-election purdah, and it is thought DfE has found it more complex than they had anticipated. The PA has asked for a member briefing on learnings and the timetable for the next round of tendering after the list is announced.

- **Textbook Challenge:** PA’s campaign for each school child in England to have access to textbooks in the main subjects continues at [http://www.textbookchallenge.uk](http://www.textbookchallenge.uk), with sign-ups for the campaign, quotes, social media promotion at #textbookchallenge, and links to the website still very welcome. Before the election The PA called on the incoming government to ensure that all publicly funded schools dedicate a proportion of their budgets to providing textbooks, and that every school has a well-resourced library.
* USA Jay Diskey [Geneva 06/17]d

- According to AAP statistics, net sales of K-12 instructional materials totaled $2.80 billion in 2016, which is a decrease of $330 million from 2015. Approximately 50 percent of the sales are print textbooks.
- Federal education programs may be in for significant budget reductions as the Trump Administration attempts to fund a $20 billion school privatization initiative by cutting other programs.
- A recent Education Week survey of 1,000 U.S. educators found growing support for education services and products developed by technology companies. When asked which one of the following companies is most likely to improve student achievement in local schools the educators responded as follows:
  - 52%: Google Education
  - 13%: Apple Education
  - 9%: Scholastic Education
  - 7%: McGraw-Hill Education
  - 6%: Pearson Education
  - 6%: Microsoft Education
  - 5%: Houghton Mifflin Harcourt
  - 1%: Amazon Education