

# Strengthening Latin America-UAE Cooperation in the Publishing Industry

Sao Paulo International Book Fair  
August 26, 2016



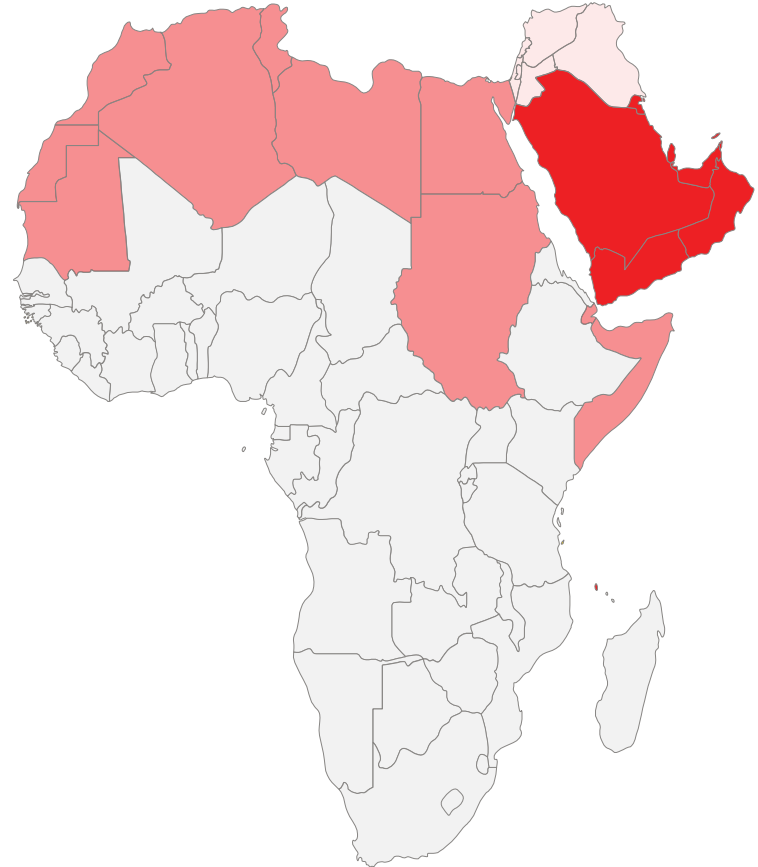
# The Arab World has a population of 370 million; The publishing industry is rapidly expanding due to the region's digitally connected, youthful population

## Arab World Overview

- |   |  |
|---|--|
| <b>The region has a youthful population</b>         | <ul style="list-style-type: none"><li>▪ ~ 370 million, 30% population is under 15 years and 20% between 15-24 years old</li></ul>  |
| <b>... that is digitally connected ...</b>          | <ul style="list-style-type: none"><li>▪ Internet penetration projected to be 55% by 2018, 7% higher than the world average.</li></ul>  |
| <b>... which is highly literate ...</b>             | <ul style="list-style-type: none"><li>▪ Illiteracy has significantly improved over the last decade – with an overall regional illiteracy rate of 15%, which is on par with the global average</li><li>▪ Youth regional illiteracy rate amongst 15-24 year olds is 6% versus 10% globally</li></ul> |
| <b>... and wants access to more diverse content</b> | <ul style="list-style-type: none"><li>▪ Number of books translated into Arabic per year is little compared to population</li><li>▪ Arabic makes up 1% of online content</li></ul>  |

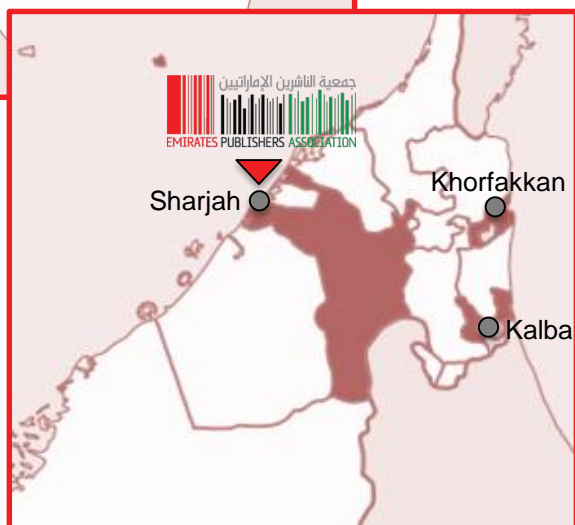
## Arab World Publishing Industry Overview

- |   |   |
|---|---|
| <b>Traditional hubs ...</b>                               | <ul style="list-style-type: none"><li>▪ Egypt, Syria, Iraq are emerging from conflicts which have severely affected industry growth</li></ul>                 |
| <b>... are being complemented by new hubs ...</b>         | <ul style="list-style-type: none"><li>▪ United Arab Emirates has implemented several industry support efforts</li></ul>                                       |
| <b>... but supply of engaging content lags demand ...</b> | <ul style="list-style-type: none"><li>▪ Exports remain focused on the region while imports have surged from more diverse markets</li></ul>                    |
| <b>... and market access remains complex</b>              | <ul style="list-style-type: none"><li>▪ Fragmented, complicated distribution chain that is increasingly being opened up to international publishers</li></ul> |



*The 22 Arab World countries can be roughly segmented into 3 regional subgroupings: the Gulf Cooperation Council, Levant and Iraq, and North Africa and the Maghreb*

# The UAE offers considerable advantages for international publishers as both an operational base to access developing markets and as a sales destination



## Investment Benefits for International Publishers

### Business-friendly Government and Regulations

- One of the most secure and business-friendly regulatory environments

### Competitive Cost of Doing Business

- Cost-efficient alternative to other locations

### Skilled Workforce

- Home to some of the region's finest higher education institutions

### Market Access and Infrastructure

- At the nexus of Europe, Africa, and Asia with world-class infrastructure

## Publishing Industry Support Programs

### Free Zones

- 10+ free zones dedicated to creative industries, including Sharjah Publishing City, the world's first free zone dedicated specifically to publishing

### National and Regional Reading Promotion Strategy

- Dedicated \$30 million for national reading strategy and significant humanitarian spending to promote reading in the Arab World

### World-renowned Book Fairs

- Sharjah International Book Fair and the Abu Dhabi International Book Fair, which now rank among the largest book fairs in the world

### Targeted Industry Support Programs, Grants, and Awards

- Several programs at the national and Emirate levels to support bilateral cooperation, authors, translators, publishers, distributors, and retailers

### Specialized Programs for Translation and Rights Agreements

- Specialized grants programs and awards to fund the translation of titles to and from Arabic as well as finance international rights agreements

# There are 149 publishers in the UAE; The Emirates Publishers Association (EPA) is a national organization that represents the publishing industry

## Publishers are distributed across several emirates ...

Number of publishers licensed by the National Media Council by Emirate



## The Emirates Publishers Association is a leading voice for change

- In 2009, the Emirates Publishers Association (EPA) was established to increase collaboration among publishing industry stakeholders to address various industry challenges
- Today, it is the industry's most prominent advocate which engages with regulators, industry stakeholders, and international publishing organizations
- Due to the EPA's advocacy efforts a number of Federal and Emirate-level initiatives and programs have been launched
  - ✓ Two of the region's largest book fairs
  - ✓ One of the world's richest literary awards
  - ✓ Thematic festivals for children literature and poetry
  - ✓ Author and translator grants
  - ✓ International cooperation programs

## EPA has 10 key priorities that guide its work

- 1 Aligning key stakeholders
- 2 Expanding markets
- 3 Improving copyright and legal framework
- 4 Expanding consumer choice
- 5 Enhancing access to Arabic education materials
- 6 Encouraging reading for pleasure
- 7 Addressing distribution challenges
- 8 Modernizing libraries
- 9 Celebrating heritage
- 10 Developing creative industry skills

## There are three main routes to access the UAE and other Arab markets



1

### English Export Editions

English-language books translated from original language exported to UAE with rights sold to UAE or Arab publisher or a distribution partnership

2

### Arabic Export Editions

Arabic-language books translated from original language exported to UAE with rights sold to UAE or Arab publisher or a distribution partnership

3

### Online Direct Sales

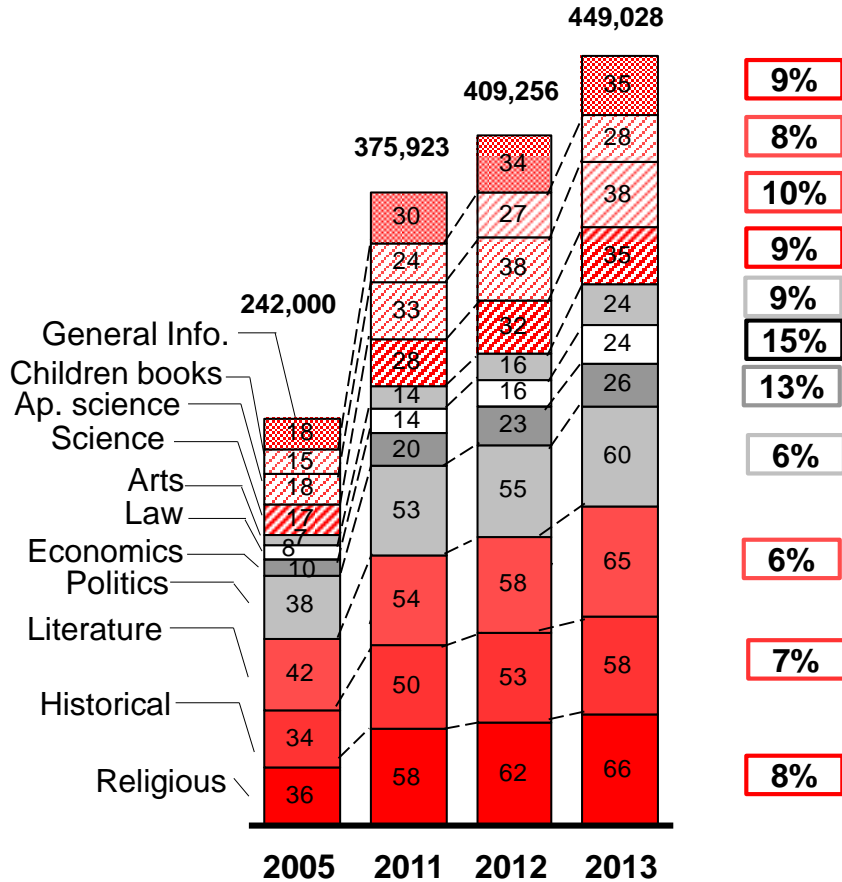
Translated or original language editions of international books bought directly via online retailers by UAE and Arab readers

# UAE readers are seeking more diverse, original content; This is an opportunity for international publishers ...

## Books Available at the National Library by Genre

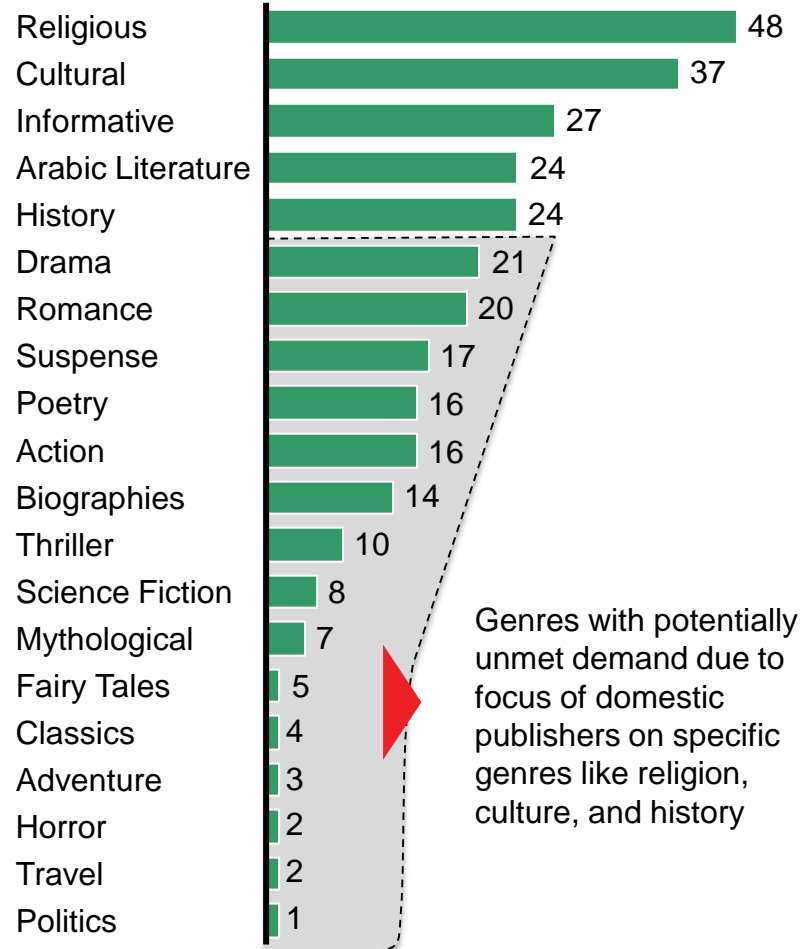
Number of books in thousands

**%** CAGR 2005 – 2013



## Preferred Genres for Reading

% of readers who prefer book genre



# The EPA supports international publishers in accessing these opportunities and establishing operations in the UAE in three key ways

## 1 Trade Promotion

### Specific Support Offered to International Publishers

- **Book Fair Attendance Facilitation:** EPA facilitates the attendance of publishers at UAE book fairs and can advise on other regional trade shows to attend
- **Foreign Rights and Licensing Support:** EPA facilitates the participation of publishers in professional programs that bring together rights professionals from across the world to buy and sell of translation and distribution rights
- **UAE Attendance at International Book Fairs:** EPA supports the attendance of Emirati publishers at key global book fairs.

## 2 Grants and Awards

### Grants

- Sharjah International Book Fair Translation Grant Program
- ADTCA Spotlight on Rights Grant Program
- ADTCA Kalima Translation Program

### Awards

- Turjuman Sharjah Translation Award
- Sheikh Zayed Book Award
- Sharjah Award for the Best International Book
- Sharjah Children's Book Award

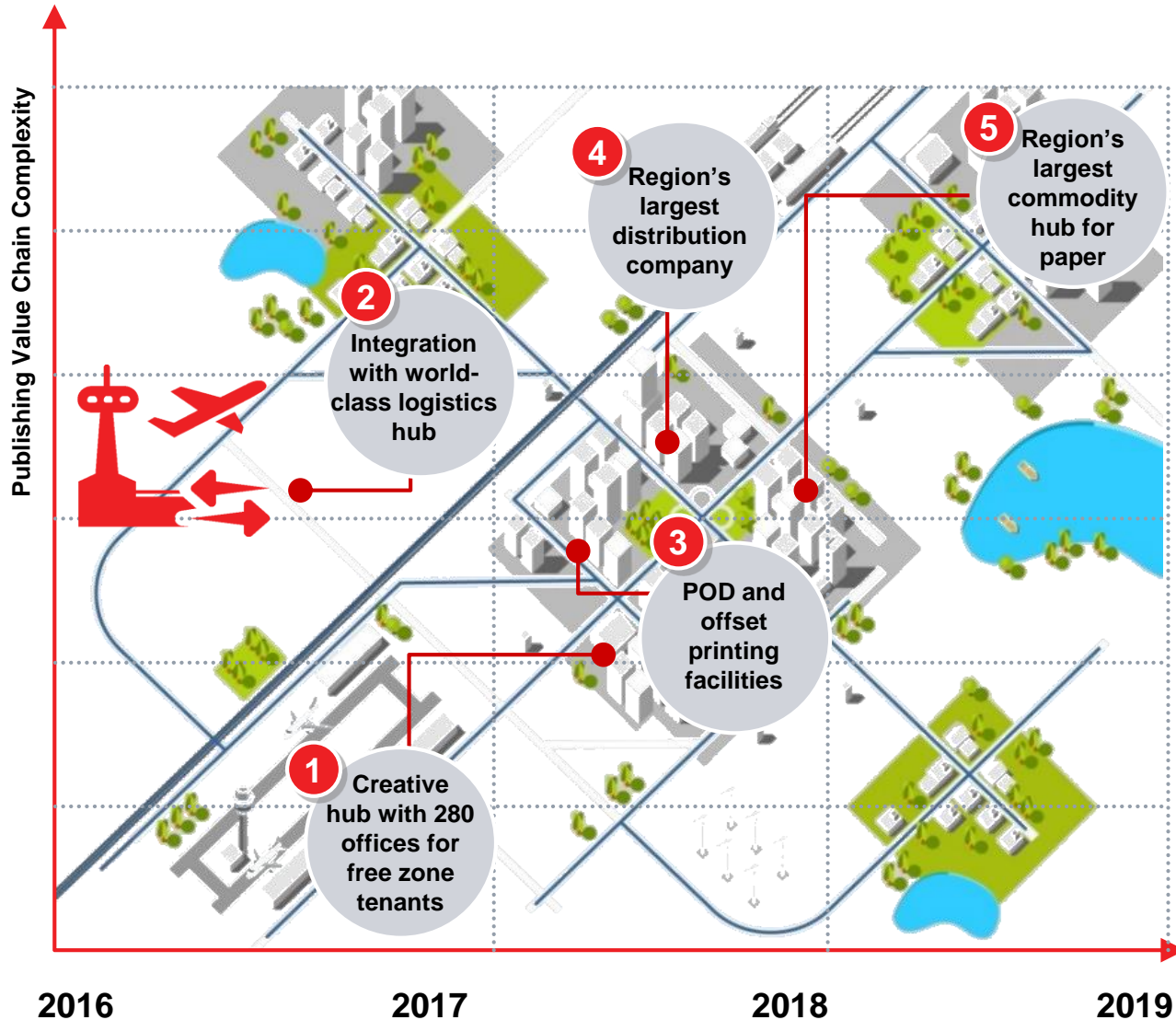
## 3 Investment, Intelligence, and Matching

- **Free Zone Selection and Incorporation Support:** EPA assists publishers in choosing the right free zone or other incorporation route to meet business objectives
- **Market Research:** EPA offers trade statistics, demand trends, import and export processes, company contacts, and tender opportunities
- **Business Matching Support:** EPA provides business matching services to facilitate trade with international publishers and arrange exploratory meetings

# Sharjah Publishing City will open in late 2016 to provide international publishers a regional hub for market entry and growth

Sharjah Publishing City will be the world's first publishing free zone

## Key offerings for intl. publishers



- 1 Creative Hub**
  - Access to titles with proven track record for rights and distribution deals
  - Access to literary translators
- 2 Logistics Hub**
  - World-class infrastructure to reduce time/costs of reaching new markets
- 3 Printing Hub**
  - State-of-the art on demand printing and offset facilities
- 4 Distribution Hub**
  - Marketing and sales support to sell and market to an even wider customer base
  - Support in negotiating licensing arrangements with publishers
  - Support in reaching regional retail partners and wholesalers
  - Access to export promotion programs, grants, and rights trading programs
- 5 Paper Hub**
  - Procurement assistance to regionalize supply chain and collective purchasing to reduce the costs of paper



# There are several Latin American countries which could benefit from strengthened cooperation with the UAE and Arab World

Several countries with sizable Arab communities could benefit from increased Latin America-Arab World translation and rights deals ...



Estimated Arab Diaspora Size in Latin America

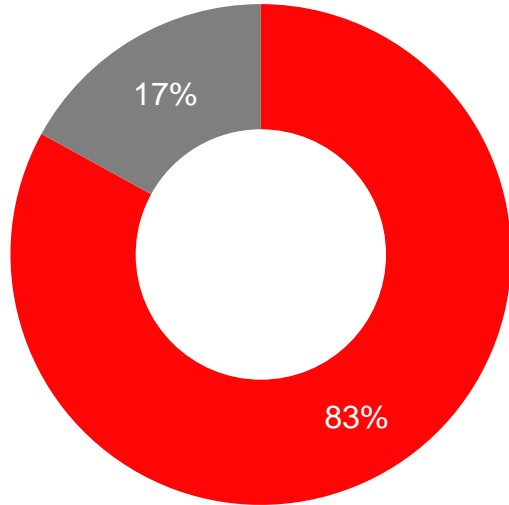
Country	Est. Diaspora*
Argentina	3,500,000
Belize	Not available
Bolivia	13,000
Brazil	12,000,000
Chile	800,000
Colombia	280,000
Costa Rica	30,000
Ecuador	100,000
El Salvador	150,000
French Guyana	1,400
Guatemala	220,000
Guyana	Not available
Honduras	200,000
Mexico	1,000,000
Nicaragua	6,000
Panama	16,000
Paraguay	15,000
Peru	21,000
Suriname	2,700
Uruguay	55,000
Venezuela	600,000
<b>Total</b>	<b>19,010,100</b>

Sources: Cankar, L. (2013). Global Arab World Migrations and Diasporas. Arab Studies Journal, 21(1), Arab Studies Institute, Tadmouri, G. (2012). Genetic Disorders in Arabs. Centre for Arab Genomic Studies, Dubai, United Arab Emirates, press accounts, \* Note: Estimates on the size of the Arab diaspora in Latin America vary significantly with some estimates claiming over 25-30 million people

# The UAE makes up the majority of total import trade volume between Latin America and the Arab World while only accounting for 16% of exports

## Latin America Imports From the Arab World

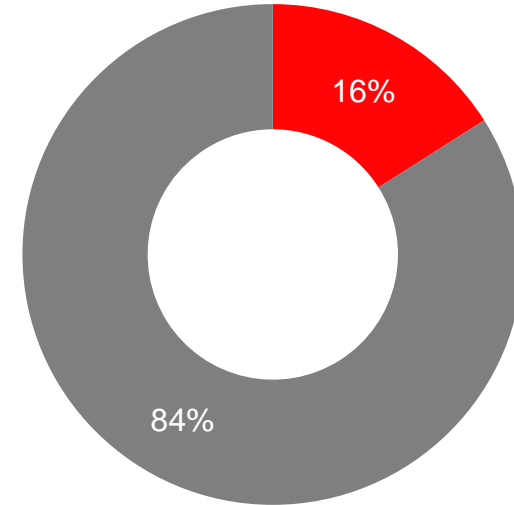
Total Imports from Arab World (2014): \$861,650



■ Share of Imports from the UAE  
■ Share of Imports from other Arab countries

## Latin America Exports to The Arab World

Total Exports to Arab World (2014): \$59,314



■ Share of Exports to the UAE  
■ Share of Exports to other Arab countries

- Taking into account the sizable Arab diaspora in Latin America, there is significant room for growth in exports from the UAE and the Arab World
- Publishers from the UAE and Latin American countries can also capitalize on existing relationships to expand access of Latin American exports to the Arab world through the UAE

Source: United Nations Commodity Trade Statistics Database

Note: Trade statistics are based on the customs reporting of the country of import due to inconsistencies in the United Arab Emirates reported data

# There are several ways we can work together to strengthen Latin America-UAE trade and cooperation

## Potential Areas of Opportunity for Enhanced Latin America-UAE Cooperation

### 1 MOUs / Trade Agreements

- MOUs between EPA, Sharjah Book Authority, and Sharjah Publishing City and national publishing associations, bilateral trade associations, and government agencies to promote enhanced trade between Latin America and the UAE

### 2 Trade Promotion

- Enhanced participation of Emirati and Arab publishers at key book fairs in Latin America potentially facilitated by national publishers associations
- Foreign rights and licensing support programs to facilitate the buying and selling of translation and distribution rights between UAE and Latin American publishers at book fairs in Latin America

### 3 Twining Grants and Awards Programs

- Grants and awards programs specifically focused on translation of titles from Latin American countries into Arabic and Arabic titles into the major languages of Latin America

### 3 Investment, Intelligence, and Matching

- Enhanced market intelligence on Arab diaspora and non-diaspora markets to highlight opportunities to Emirati and Arab publishers
- Business matching support for Emirati and Arab publishers interested in market opportunities to engage with Latin American publishers as well as potentially establish more permanent market presences

# Thank You

The Emirates Publishers Association's International Relations Department offers free information and advice to publishers considering a presence in the United Arab Emirates on

- Regional market trends
- Business incorporation in free zones like Sharjah Publishing City
- Book fair attendance
- Buying/selling foreign rights in the UAE and Arab region
- Industry support programs, awards, and funding opportunities
- Potential regional retail and distribution partners

**You can contact the International Relations Department at:**

internationalrelations@epa.org.ae

Telephone: +971 6 593 3323

Emirates Publishers Association  
Tel: +971 6 525 2088  
Sharjah, United Arab Emirates  
<http://www.epa.org.ae>



# Appendix

## UAE exports to Latin America have fluctuated over the last several years; However, there is significant room for growth

Import Country	2009	2010	2011	2012	2013	2014
Argentina	\$143,370	\$36,193	\$12,729	\$86,994	\$325,041	\$376,911
Belize	\$0	\$0	\$0	\$0	\$0	\$0
Bolivia	\$48	\$0	\$0	\$532	\$8,738	\$1,385
Brazil	\$99,020	\$75,666	\$126,539	\$89,311	\$124,898	\$47,664
Chile	\$7,944	\$13,698	\$2,703	\$548	\$109	\$2,360
Colombia	\$9,791	\$0	\$0	\$0	\$0	\$0
Costa Rica	\$12	\$1,474	\$14	\$194	\$79	\$0
Ecuador	\$0	\$0	\$1,977	\$0	\$0	\$0
El Salvador	\$0	\$0	\$0	\$0	\$0	\$0
French Guyana	\$0	\$0	\$0	\$0	\$0	\$0
Guatemala	\$250	\$51	\$486	\$0	\$0	\$802
Guyana	\$0	\$0	\$77	\$1	\$0	\$500
Honduras	\$0	\$0	\$0	\$85	\$0	\$38
Mexico	\$394,568	\$1,174,116	\$708,655	\$484,328	\$764,557	\$285,468
Nicaragua	\$0	\$0	\$29	\$14	\$0	\$0
Panama	\$0	\$0	\$0	\$0	\$154	\$0
Paraguay	\$244	\$0	\$0	\$0	\$0	\$0
Peru	\$56,559	\$46,090	\$523	\$2,254	\$13,490	\$1,518
Suriname	\$0	\$0	\$0	\$0	\$0	\$1,330
Uruguay	\$0	\$0	\$0	\$0	\$1,414	\$0
Venezuela	\$1,204	\$0	\$3,586	\$1,623	\$160	\$0
<b>TOTAL</b>	<b>\$713,010</b>	<b>\$1,347,288</b>	<b>\$857,318</b>	<b>\$665,884</b>	<b>\$1,238,640</b>	<b>\$717,976</b>
<b>% Incr.</b>	<b>-</b>	<b>189%</b>	<b>64%</b>	<b>78%</b>	<b>186%</b>	<b>58%</b>

Source: United Nations Commodity Trade Statistics Database

Note: Trade statistics are based on the customs reporting of the country of import due to inconsistencies in the United Arab Emirates reported data

## UAE imports from Latin America remain extremely low in light of the significant size of the Latin American publishing industry

Export Country	2009	2010	2011	2012	2013	2014
Argentina	\$1,333	\$2,952	\$127	\$2,671	\$1,395	\$678
Belize	\$0	\$0	\$0	\$0	\$0	\$0
Bolivia	\$0	\$0	\$0	\$0	\$0	\$0
Brazil	\$599	\$0	\$1,305	\$488	\$6,571	\$5
Chile	\$0	\$1,215	\$0	\$0	\$0	\$164
Colombia	\$965	\$0	\$67	\$0	\$0	\$0
Costa Rica	\$0	\$0	\$114	\$41	\$495	\$0
Ecuador	\$0	\$0	\$0	\$0	\$0	\$0
El Salvador	\$0	\$0	\$0	\$0	\$0	\$0
French Guyana	\$0	\$0	\$0	\$0	\$0	\$0
Guatemala	\$0	\$0	\$81	\$140	\$0	\$0
Guyana	\$0	\$0	\$0	\$0	\$0	\$0
Honduras	\$0	\$0	\$0	\$0	\$0	\$0
Mexico	\$65	\$4,107	\$26	\$342	\$714	\$8,879
Nicaragua	\$0	\$0	\$0	\$0	\$0	\$0
Panama	\$0	\$0	\$0	\$0	\$0	\$0
Paraguay	\$0	\$0	\$0	\$0	\$0	\$0
Peru	\$424	\$250	\$66	\$64	\$0	\$0
Suriname	\$0	\$0	\$0	\$0	\$0	\$0
Uruguay	\$0	\$0	\$1	\$0	\$0	\$0
Venezuela	\$94	\$0	\$0	\$0	\$0	\$0
<b>TOTAL</b>	<b>\$3,480</b>	<b>\$8,524</b>	<b>\$1,787</b>	<b>\$3,746</b>	<b>\$9,175</b>	<b>\$9,726</b>
<b>% Incr.</b>	<b>-</b>	<b>245%</b>	<b>21%</b>	<b>210%</b>	<b>245%</b>	<b>106%</b>

Source: United Nations Commodity Trade Statistics Database

Note: Trade statistics are based on the customs reporting of the country of import due to inconsistencies in the United Arab Emirates reported data