

NEW HORIZONS FOR AUSTRALIAN BOOK PUBLISHING: Indonesia, India, and Malaysia

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COPYRIGHT AGENCY PUBLISHER FELLOWSHIP REPORT 2018

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Nathan Hollier, Copyright Agency Publisher Fellowship Report 2020

Introduction

This report is prepared in partial fulfilment of my obligation to the Copyright Agency Ltd, which in 2018 awarded me a Publisher Fellowship to learn about and report on opportunities for and obstacles to Australian book publishing in South and Southeast Asia.

With the Fellowship, which came with a payment of AUD\$15,000, I visited Jakarta for the Indonesia International Book Fair (IIBF), between 12–16 September 2018, and the historic Javanese cultural centre of Yogyakarta, after that. From 5–13 January 2019 I visited Delhi for the New Delhi World Book Fair (NDWBF). And from 30 March–7 April 2019 I attended the Kuala Lumpur International Book Fair (KLIBF).

Prior to these visits I read major works on the history and culture of these nations and the available literature on their publishing industries of the past and the present. During the visits I met with many other publishers and a range of other industry professionals.

As a university press publisher I have a particular interest in trying to improve the visibility of my press brand and, by extension, the brand of my university, in these important and developing student markets. There are opportunities for Australian trade publishers in these territories also, though capitalising on these opportunities will likely require longer term thinking, an interest in cultural exchange which goes beyond the quickly monetarily measurable, a concerted effort to understand particular local conditions, and perhaps even a recognition that, nationally and internationally, future business development for publishers depends on the active cultivation of reading amongst groups who are currently not being given ideal opportunities to read (just as business development generally depends on societies lifting effective demand by overcoming more gross forms of inequality and bringing more consumers into the market).

Indonesia

The major published source of information on the Indonesian book publishing industry is 'The Publishing Industry in Indonesia', one of two short but data-rich 2016 articles on countries being looked at in this report, by Linda Tan Lingard of the Yusof Gajah Literary Agency in Kuala Lumpur, and published in *Publishing Research Quarterly* (32, 2016: 54–57; DOI 10.1007/s12109-016-9446-7).

Tan Lingard notes that the publishing industry in Indonesia is dominated by a small number of large players: Gramedia, Mizam, Agromedia, Erlangga and Penebar. Gramedia has between a third and 40 percent of market share. ([Frankfurter Buchmesse Indonesia briefing](#)) This is apparent in bookshops within the nation. The number of Indonesian publishers, however, continues to grow, as demonstrated by the membership of IKAPI, the Indonesian Publishers Association, growing from 1314 at the time of Tan Lingard's article to 1488 by January 2018. (www.ikapi.org/sejarah-ikapi/)

Tan Lingard reported the publication of nearly 40,000 new titles in Indonesia and a 2013 national industry net worth of USD\$466m. It is clear from a 2017 presentation from Laura Prinsloo, Chairperson of the Indonesian National Book Committee, that the number of titles published and the size of the industry in Indonesia are continuing to grow.

(<https://slideplayer.com/slide/12315744/>) Indonesia publishes roughly a third more books each year than Malaysia and is, again, roughly a third larger in terms of net revenue, but as might be guessed from that, given the respective populations, the number of books published within Indonesia per head of population is low (119 per million, cf. 639 per million in Malaysia and 1176 per million in Australia). (Tan Lingard, 56)

Indonesia, Tan Lingard notes, 'is a signatory of the Bern Convention and WIPO Copyright Treaty but it remains on the IPA's priority watch list'. (56) The Reproduction Rights Organization (PRCI: Perkumpulan Reproduksi Cipta Indonesia) is a not-for-profit operating in the field of copyright protection, chaired by Kartini Nurdin of Obor Publishers.

Though the information provided on Indonesia for the Frankfurt Book Fair in 2015 listed a literacy rate of 7.2 percent in 2011, this seems to have been a mistake, as UNESCO [reports](#) a literacy rate of over 95 percent, with a rate of close to 100 percent in the age group 15–24.

Some fifty percent of all books published in Indonesia are translations (mainly from English, Arabic, Chinese, Korean or Japanese). At the 2018 Indonesia International Book Fair there was an event to celebrate Indonesia having been made the Market Focus nation at the 2019 London Book Fair. An LBF contingent led by Director Jacks Thomas attended the Fair and spoke at the Market Focus event. [Useful information and resources](#) on the Indonesian industry were later added to the LBF site. Also speaking at the event, John McGlynn, of the Lontar Press and Lontar Foundation, suggested that the London Book Fair would grow in importance to become the pre-eminent overseas Fair for Indonesian publishers.

The expectation, then, is that the path of translation of Indonesian books into other languages will in the future be mainly via English. The Lontar Foundation has been an important funder and publisher of Indonesian books into English. Some other publishers I have spoken to, in Indonesia and elsewhere, have been unhappy about this translation path via English, seeing this as taking readers further from the meaning of the original work in its first language.

Education books are nowhere near as dominant in Indonesia as they are within the market in India and are also a smaller component than in Malaysia. Tan Lingard, citing Gramedia statistics, reports a market share of 30 percent for children's and school curriculum books, 12.6 for fiction and literature and 39 percent for other categories including business, self-help, cooking, agriculture and computing. Prinsloo in 2017, citing IKAPI and National Library figures, puts the education book percentage [at about 55 percent](#).

Both Tan Lingard and Prinsloo report a small ebook market in Indonesia. Tan Lingard suggests ebooks comprise 2 percent of total publishing turnover. (57) Prinsloo writes that 'direct spending by consumers for e-books is insufficient for long-term sustainability'. Ronny Kurniawan from Marjin Kiri affirmed to me at the IIBF that print still very much dominates over e. In Ronny's view, it will be twenty years before ebooks take off in Indonesia, as Indonesian readers remain very attached to print books. Prinsloo speaks of the need for publishers to educate the market, but younger readers can be expected to become more familiar with ebooks as the government requires that all textbooks be made available in

electronic form. (Tan Lingard, 56). Ebook production is generally outsourced to companies in India.

There are a number of book fairs in Indonesia, the main one of interest for non-specialist Australian publishers being the IIBF in Jakarta. At this Fair the general absence of an Australian presence is striking, at least to an Australian. The British Council has a stand and supports a delegation of publishers. Claudia Kaiser from the Frankfurt Book Fair is based in Jakarta, a German cultural attaché spoke at a Frankfurt Book Fair reception event (on the value of the free movement of books and ideas across borders), and there were other Germans attending, involved with the Frankfurt Fair or the teaching of German language and culture in Indonesia. There is also a small French presence as part of the promotion of the French language.

Any overview of the publishing environment in Indonesia must register the crucial role of the National Book Committee, set up in 2014 and chaired by Prinsloo from its inception. The National Book Committee is recognised internationally as an energetic and effective advocate for Indonesian writers, readers, publishers and the industry as a whole. The Committee was established to handle Indonesia's 2015 'guest of honour' position at the Frankfurt Book Fair and so obtain the close attention of publishers around the world. IKAPI, one industry insider told me, had had a quite narrow focus, mainly on getting good deals for textbook publishers.

Opportunities | *Indonesia*

As many giants of both popular music and the science of management have noted, opportunities and obstacles can be the same thing, looked at from different perspectives. But to separate these out for the moment, what can be said of opportunities for Australian book publishers in Indonesia?

The Indonesian market is big, in human and in financial terms, and the Indonesian economy is continuing to grow at a faster rate than the Australian. There are over 270 million Indonesians. Roughly sixty percent of them live on the island of Java, an island a little over half the size of the state of Victoria. The capital city of Jakarta, itself, has a population which passed 30 million in 2010: after the Tokyo-Yokohama conurbation it is the world's second or third most populous urban area; Delhi in India is also a claimant of second place. (In August 2019 Indonesian President Widodo announced that the nation's capital city would be moved to East Kalimantan on the island of Borneo.) Indonesian GDP is [roughly three times that of Australia](#), when adjusted for purchasing power parity, and only [slightly smaller than Australia's](#) in nominal terms. GDP growth, even in the currently slow world economic environment, sits at over 5 percent. (<https://www.worldbank.org/en/news/press-release/2019/07/01/indonesia-maintains-steady-economic-growth-in-2019>)

Importantly, a number of Indonesian authors have achieved major recognition in recent years, including Pramoedya Ananta Toer (d. 2006), Eka Kurniawan, Goenawan Mohamad, and Laksmi Pamuntjack. Indonesian writers and writing are becoming more familiar internationally.

The Indonesian government is actively promoting literacy and reading through a national literacy program linked to public and community libraries, making shipment free for book donations, and establishing a Book Council under the Ministry of Education and Culture.

There is also a smart cities program with digital public libraries and creative hubs. And through the National Book Committee there is or are a translation funding program, author residency programs, industry research being undertaken, publisher workshops, and support for international book fairs, literature festivals and rights trading.

(<https://slideplayer.com/slide/12315744/>) At least US\$20 million would have been spent in obtaining the Guest of Honour status at Frankfurt in 2015, it was suggested to me by organisers of a campaign from another country. The National Book Committee works in concert with the Ministry of Education and Culture and its Director General Dr Hilmer Farid (an historian and cultural activist).

With 40 percent of the population aged 24 years old or younger, books for children and young people are obvious areas for possible growth within the industry. The predominance of children and young people within the nation was reflected in attendance at the Indonesia International Book Fair, with children bussed into the Fair throughout and part of the emphasis of the Fair being on the promotion of literacy and reading.

Given the example of Buku Fixi in Malaysia (discussed later in this report), a publishing program seeking to connect in an authentic way with the experiences of Indonesian young people might be hoped to do well. As in Malaysia, there are of course censorship and distribution challenges which might arise, depending on the nature of the content.

University press publishing in Indonesia is well established, with over 200 university presses. (<https://slideplayer.com/slide/12315744/>) There is an Indonesian university presses grouping, and there is a Library and Academic Book Fair and an Academic Book Fair each year in Jakarta.

Print books are exempt from the nation's standard value-added tax (VAT) of 10 percent. With the exception of educational and religious titles, there is an import tax on books of 10 percent. Import duties are also payable, though not on academic titles.

There are good book printers in Indonesia able to produce books at prices which are inexpensive by Australian standards. Print costs will of course vary significantly with the particular project but a unit cost of 20,000 rupiah (c.AUD\$2) would be a rough estimate for a run of 1000 C format books with perfect binding. Pure print on demand is now also available in Indonesia through for example Nulisbuku. A run of 1000 would be high for an Indonesian small publisher, though not for overseas based publishers, such as Typhoon, operating in the region.

The problem of book piracy in Indonesia appears to feed into an interest in producing a quality printed product. For some Indonesian publishers, at least, who aspire to literary quality, there is a sense that the physical object should reflect this aspiration. In Robby Kurniawan's words: 'Writing is hard. So we should appreciate it.'

Distribution arrangements and terms in Indonesia are recognisable for Australians. Retailers take roughly 40 percent of the retail price and distributors at least ten percent. With distribution recognised as a particular challenge for Indonesian publishers, across provinces and islands and with sometimes questionable infrastructure, particular opportunities exist for selling online and via social media. One small publisher said to me that online sales, coupled with direct marketing, is 'the only way one can hope to make a profit in Indonesia these days.' Facebook leads the way, but all of the major social media applications have a high penetration within Indonesia. (<https://www.statista.com/statistics/284437/indonesia-social-network-penetration/>)

Prominent bookstore chains in Indonesia include Gramedia, Kharisma, Periplus, Book & Beyond, Gunung Agung, Togomas, Tisera and Paperclip.

Though the penetration of internet usage within Indonesia remains relatively low, at 56 percent, the nation's 150 million internet users spend an average 8 hours and 36 minutes online every day and are amongst the world's most avid online shoppers. This suggests a potential for massive continued growth in online sales. ([Emily Wong, 'How Indonesians embrace the digital world', Jakarta Post, 18 March 2019](#))

Newspapers and the news media, such as the publications *Tempo*, *Kompas*, and the English-language *Jakarta Post*, do give attention to books, to roughly the same extent as 'comparable' publications in Australia. As an example, in early September 2018 *The Jakarta Globe* published '[Reading Indonesia: 30 Books That Will Help You Understand the Southeast Asian Giant](#)'. But as with 'traditional' media in Australia and most other parts of the world, these publications in Indonesia are facing pressures from new and social media and, according to some industry insiders, the book review pages in Indonesia are shrinking.

As in India, mobile libraries have recently been developed in Indonesia to bring books to poorer people, mainly, in non-urban areas. This is an initiative supported by government and by publishers, who can be acknowledged, as having provided the donation, with a stamp inside the book.

In recent years also the National Book Committee has administered the LitRi Translation Funding program, for translating works from Indonesian into other languages. According to Jemma Purdey, Series Editor of the Herb Feith Translation Series with Monash University Publishing, the maximum payment of USD\$7,000 would 'just about' cover a local translator's fee on a 'standard' sized book.

The National Book Committee has supported a strong Indonesian presence in Frankfurt in recent years and Indonesia has emerged as the largest trader of rights in Southeast Asia.

Obstacles | Indonesia

Since Reformasi and the end of the President Suharto era, in the late 1990s, many groups previously unable to speak freely within society have become more able to do so. This has been recognised internationally. As there has been progressive social development, however, there has also been regressive, with the growth of fundamentalist forms of Islam which had previously been quite alien from mainstream Indonesian tradition. (See Merle Ricklefs' magisterial historical account *A History of Modern Indonesia Since c.1200*, Stanford University Press, 2001) The very strong (almost overwhelming, one might say) presence of the Saudi Arabian book publishing contingent at the IIBF suggests the ongoing contest over religious interpretation and belief, within the country. Book publishers are aware that LGBTQT rights are threatened, there is religious intolerance ... criticising Islam carries with it the threat of being charged with blasphemy ... there is an enduring difficulty in speaking about the 1965 violence, in which hundreds of thousands of people associated in some way with communism were murdered, and the accusation of 'communist' remains incongruously potent.

In 2017, two English-language translations of books on the 1965 violence, which had previously been published in Bahasa Indonesia in Indonesia and were now being released

through Monash University Publishing's Herb Feith Translation Series, were summarily banned from Indonesia and the Ubud Writers Festival. The events which were to be held with these books were cancelled. An Ubud event I attended that year, that was linked to another book on 1965, published by Indonesian publisher Jurnal Perempuan, was broken up by police. Human rights journalist, author and Indonesia commentator Andreas Harsono says the government remains sensitive to negative international attention: 'when these books are published in English it's a problem.' There are reports that it has become harder recently for researchers and journalists from outside of Indonesia to gain entry to the country, with respected, established scholars being turned back at customs in Jakarta.

Copyright piracy is a serious issue for publishers in Indonesia. In August 2019 the Yogyakarta Publisher Consortium (KPJ) [called on President Widodo to require law enforcement agencies to properly enforce the law on book piracy.](#)

Tan Lingard describes the book distribution network in Indonesia as 'poor'. (57) This is perhaps to be expected within a nation of 17,000 islands (around 6000 of which are inhabited), with hundreds of different languages (although also, thankfully, Bahasa Indonesia throughout) and weak infrastructure in some areas. There does not appear to be a distributor able to provide a satisfactory service to the publishing industry as a whole. Arrangements are ad hoc and publishers are, broadly speaking, unsatisfied with their options. Periplus is the biggest distributor but is mainly focused on airports. I asked one industry insider if there was a distributor she would recommend. The short answer was 'no'. Another publisher described his company's distribution, with admirable frankness, as 'shit'.

The standard sales model in Indonesia is consignment, rather than sale or return, with the publisher usually bearing the cost of returning unsold copies and checking them for damage, in addition to the costs of delivery. Many book retailers don't carry English language books and some publishers reported that those retailers who do, tend to try to drive harder bargains with the publisher.

Bureaucratic processes can be challenging. In Tan Lingard's assessment: 'Finding the right partners in Indonesia is important to guide one through the maze of bureaucracy and cultural differences.' (57) Visitors are greeted on arrival in Jakarta by a previously unannounced US\$30 visa charge, which must be paid in cash. (If you grumpily withdraw this money from an ATM, do remember to collect your bank card as well. 😊)

India

By far the best and most comprehensive account of book publishing in India is *Publishers on Publishing: Inside India's Book Business* (All About Book Publishing, New Delhi, 2018), edited by Nitasha Devasar, Managing Director, Taylor & Francis India. Books on the Indian publishing industry, Devasar points out, are few and far between. This is an understatement and the conversation Devasar has initiated in this work is of great value and significance. Sixty-five key participants in the Indian industry discuss how to resolve practical issues, best pursue growth and more broadly, if also more briefly and obliquely, the industry's actual and ideal contribution to the social, cultural, political and economic development of India. To bring together a broadly representative group of publishing professionals in any nation would be an achievement; to do this in India, given the industry's, and the nation's, size and diversity, is especially impressive.

India of course contains roughly a quarter of the world's population and globally has radiated out its influence through astronomy, mathematics, philosophy, religion and literature, in all directions. Nonetheless it is also a post-colonial nation facing many of the social and economic challenges common to other formerly colonised nations and some peculiarly its own. The Indian higher education system is the fourth largest in the world and the book publishing industry in India is overwhelmingly focused on educational publishing (with this comprising roughly 94 percent of the overall market), but India's share of scholarly output in 2013 sat at only 4 percent. There is only one Hindi-language peer- and blind-reviewed journal of social and political science for that language's 450 million speakers. There is, so far as I have been able to find, only one, small, Indian university press: Jadavpur University Press in Calcutta. Copyright piracy, direct and indirect censorship, and bureaucratic complexity, are unavoidable challenges for publishers in India.

But India has become a massive provider of outsourced knowledge processing (KPO) to other nations, partly on the basis of its relatively cheap labour or, as Anil Chandy, Vice President, Major Reference Works at Springer Nature, puts it in Devasar's book, its 'cost leadership'. No fewer than sixteen million Indians are estimated to work in KPO and allied jobs, with over 90 percent of published books around the world having some Indian input. And beyond this, book publishing itself within India is growing strongly. Devasar reports a compound annual growth rate (CAGR) of 20 percent between 2012 and the release of Nielsen's landmark 2015 report on the Indian book publishing industry.

The picture of the Indian book publishing industry that emerges in Devasar's work is one in which major international trade and education publishers (OUP, Hachette, PRH, CUP, Macmillan, Pearson, Devasar's T&F, and some others) maintain offices, and new overseas investment and involvement (notably from Sage) is developing. These foreign publishers are publishing more Indian authors for the national but also, in places, international markets. More, local, independent publishers are emerging, and there is strong growth of translation rights trading between the nation's major languages. Experimentation with new, digitally informed business models, is apparent. There is a proliferation of increasingly prominent and successful publishing fairs and literary festivals, with Jaipur simply a phenomenon. There are new, impressive, training programs for publishers and editors, and now India-based literary agencies. And there are extraordinary individuals like Himanshu Giri from Pratham Books and Geeta Dharmarajan of Katha, who are working tirelessly and seemingly effectively to stimulate the habit of reading and raise literacy levels among the nation's poor and impoverished.

Vikrant Mathur, Nielsen's Books Director, India and Asia Pacific, confirmed at the New Delhi World Book Fair in January 2019 that these high Indian growth rates have been maintained. And in his presentation there he added some further, compelling statistics: the CAGR for trade books in India across 2017–2018 was 8.5 percent, with the overall rate being dramatically lifted by a rate of over 20 percent in education books. India is the sixth biggest book publisher in the world and has gone past Britain to be the second biggest English print book market in the world. The nation has over 21,800 physical bookstores and over 9000 publishers across sixteen languages. In 2015 more than a third of the Indian population was receiving some form of education; with more than 197 million students involved in primary, more than 61 million in secondary, and upwards of 30 million in the tertiary sector. English-language books are in the majority within the trade publishing sector (56 percent in 2015) and dominate the children's book market (59 percent) and professional / business titles (90 percent). The export of printed books from India has actually dropped across 2015–2018, by 20 percent, while imports to India have risen during that same period by 57 percent. A

2015 Nielsen survey found that 31 percent of respondees in India said they never read, whereas only 2 percent in the UK said this was true of them.

Opportunities | *India*

The compilation of data on the Indian market is improving. Nielsen [launched BookScan India in October 2010](#). At the 2019 World Book Fair, Mathur from Nielsen said the company's 2015 report was very high level and they were planning to add more detail in an updated report, possibly to be released in 2020. More than half of the costs of the preparation of this report were met by the Indian Publishers Association, suggesting an admirable capacity for collaboration and organisation within the national industry.

Consumer confidence in India is currently the highest recorded anywhere in the world. Thomas Abraham, Managing Director of Hachette India, points out that 'what can't be denied' about India 'are the demographics of age, and market size, and gradually growing spending power'. ('Balancing Creativity and Commerce', in Devasar, *Publishers on Publishing*, 266)

Two thirds of the Indian population are under the age of 35 and, as noted above, there is both strong growth and potential for continued growth of published titles into this market.

As Mathur explained to me, because there is so much competition to advance within the education sector in India, there are many tests required in order for students to get into universities and / or the public service. This is the test prep market, which is growing especially rapidly. International publishers such as Wiley, OUP and CUP are moving into this market, along with established players like Ratna Sagar, based in New Delhi.

Print sales in India continue to rise and do not appear to have been undermined by ebook sales. Within the institutional market, it is only at the very elite level – of IIT and a few others – that there is an e-preferred policy. Fifty percent of the books of Taylor & Francis India are print. Springer India moved away from print for its books but then moved back into print. Manohar, publishing for this market, price their books accordingly, taking account of disciplinary differences. Prices of IRS1495 (AUD\$32), not overwhelmingly cheap by Australian standards, are common for hardback titles. Juggernaut, which began as a trade publisher selling ebooks to mobile phone users, made the decision to shift its focus to print books. Some reputable independent trade publishers don't bother with ebooks, on the rationale that, the ubiquitous mobile phone notwithstanding, digital penetration in India is too low.

In India, while there are of course great internal differences, there is a strong culture of book reviewing. The main 'serious' newspapers providing book reviewing are the *Indian Express*, *The Hindu* and *The Telegraph*. The online site www.scroll.in is also important and valuable. The Hindi newspaper *Dainik Jagran* ('Daily Awakening') includes a weekly chart of bestsellers. Even small and radical publishers, such as Navayana (devoted to addressing the plight of India's Untouchables caste), can receive considerable review coverage. (It helps, in the case of Navayana, to have a former journalist at the helm, in the form of S. Anand.)

As perhaps suggested by the phenomena of decreasing exports and increasing imports, noted above, it is the case in India that foreign, and especially Anglo-American, businesses are perceived to be relatively prestigious. At a 2019 New Delhi World Book Fair event on

academic book publishing, Sanandan Chowdhury, from Sampark, said Anglo-American business names were still more highly regarded in publishing than Indian names.

Though it could be argued that speech is becoming less free in India in the current political climate, with a Hindu nationalist party in national government, India still overall should be recognised as a nation in which there is relative freedom to speak and publish, certainly by comparison with many other Asian and postcolonial nations. In India, Marxist books are prominently displayed; something that, at the moment at least, would never happen in Indonesia.

Printing in India is inexpensive by Australian standards. If not generally quite as cheap as in China, it certainly is as cheap if supplying for the Indian market (i.e. leaving aside freight). And, as I have seen, the quality of book printing in India has improved dramatically in recent years. There are also very good quality print on demand providers, such as Repro (the largest PoD provider in India), and Cinnamon, in Goa. Ramesh and Ajay Jain (father and son) from Manohar Books (publishers, distributors, retailers), have embraced a PoD model in recent years. Their PoD hardbacks seemed to be of as good print quality as any, anywhere.

In some areas, and under particular conditions, there is cheap office space available for publishers in particular zones, such as Shahpur Jat. The independent publishers Yoda Press, Navayana and Tulika are all based in this little area of New Delhi.

Bookstore and distribution percentages are within a 'normal' range for Australian book publishers: bookstores take about 40 percent and distributors between 10 and 20 percent on top of that. The two main distributors in India for trade books are IBD (India Book Distributors) and Prakash Books, though Become Shakespeare has compiled a [useful list](#) of other major firms. Variety Book Depot distributes illustrated books, mainly. Many publishers have an account with the Crossword Chain of bookstores, which prefers to deal with publishers directly.

It might be questioned whether or not this is indeed an opportunity for publishers but ... it is much more common in India for the publisher's relationship with a distributor handling the territory of India to be not exclusive. Distributors can have exclusive rights to distribute a particular title but not another. Yoda Press titles are distributed by Atlantic as well as some other distributors, aggregators and retailers, such as Leftword Books in Delhi, which handles Yoda's sales through Amazon. Navayana titles are distributed by IBD (India Book Distributors) as well as by IPDA (Independent Publishers Distribution Alternatives, a collective with Navayana, Tulika and six others). None of the publishers with IPDA are exclusively distributed by them. Tulika Books works with IPDA and Atlantic. They have a tie-up with Repro for PoD and online and Leftword Books for online distribution.

A number of publishers in India, such as South Asia Books and Manohar Books, act as wholesalers and / or distributors for other publishers. Manohar Books distribute, for Routledge, Springer and Palgrave, those titles that fit the Manohar list. In at least some cases, this relationship also works the other way, with, for example, some Manohar titles being distributed outside of India through Taylor & Francis.

In India, publisher and distributor website ecart sales can be relatively high. Online sales for Yoda are 50 percent of their revenue. Physical bookstores do a lot of aggregating for Amazon, via distributors and publishers. According to one publisher, this aggregating of online sales by local retailers is the most distinctive feature of the market in India. Bari and

Sons at Khan Market, the biggest social science bookstore in Delhi, do a lot of fulfilment for institutions.

A number of book fairs and festivals promote readership and sales in India each year. The NDWBF is prominent among these. In 2019 the Fair was held in a smaller body of buildings than usual, beside its usual home in the Pragati Maidan, as that space is being reconstructed. The Pragati Maidan is expected to be ready to house the Fair again in 2022 or 2023.

Every hall of the Fair has 'author corners', and it features both big name local authors, such as Arundhati Roy, and a range of other writers and publishing professionals from India and around the world. There is also an invite-only 'CEO Speak' event on the first Sunday morning. But as with the Indonesia International Book Fair and the Kuala Lumpur International Book Fair, the NDWBF is primarily a retail sales event. Publishers like the Fair partly because at the Fair they can, in the words of one publisher, 'liquidate any old stock'. The Fair is held over 13 days. On its final weekend the event becomes jam-packed and the crowds are such that the security guards have to stop people from coming in. The atmosphere is a bit like that of a busy bookstore in Australia in the lead-up to Christmas, but on a more grand and intense scale. There were over one million visitors to the Fair in 2019. Theft is an issue, with the major publishers having their own guards to oversee entry and exit from their stands. Schools and Libraries come to the Fair on Tuesdays and Wednesdays and do bulk purchases.

There are some B2B meetings, but they generally happen informally, in restaurants.

Mathur, and Neilsen, are committed to expanding the Fair. From 2020 they were to conduct a survey of the Fair participants. Mathur raised with me the possibility of providing extra support for Australian publishers to attend and even the idea of a single desk for Australian university presses.

As is now well known, the Jaipur Literary Festival has grown into a huge success in international terms, with prominent writers and publishing industry participants from around the world attending, alongside more than 100,000 other visitors each year. There is an invite only 'Bookmark' B2B meeting program component at Jaipur, organised by Neeta Gupta, Publisher at Yatra Books.

The Publishing Next conference, organised by bookshop owners Leo and Queenie Fernandes, in Goa, promotes discussion of ways of strengthening the industry and since 2011 has delivered the Publishing Next Industry Awards. The Awards are run as a not for profit.

Obstacles | *India*

Indian systems of operating tend to appear highly bureaucratic to Australians. This is true of businesses in India from the smallest to the largest (or to the large, as I cannot claim to have seen the largest). Though this is only a personal observation, it does seem clear that it is characteristic for there to be many hands in the supply chain, whether that chain is delivering vegetable biryani at a book fair, via a ticket booth not necessarily located very close to the booth where the biryani is cooked and served, or books to a business partner in a particular Indian state, via freight, postal and government vehicles, forms, regulations, communications, negotiations and sometimes seemingly contradictory official requirements.

There are many wanting to work and the right to offer work can be closely guarded, being as it is, in itself a source of profit.

Obtaining a visa to India is no straightforward matter (and sets one back around AUD\$200 if the purpose of the visit includes business). The government of India has in recent years outsourced the issuing of visas, which, from all accounts, has made these processes more complicated still. Partly this is because, in what seems a very characteristic expression of Indian capitalism, there are now many online companies imitating, rather convincingly, the company licensed to handle these applications, and offering to deliver visas. Their model appears to be to present themselves as the official visa agency, obtain the documents and other information required for a visa, and then deliver the visa after handling the application themselves.

I managed to not apply through one of these 'alternative' visa suppliers, but my application process did involve confusing phonecalls to embassy officials and more than one visit to Melbourne's official visa agency, in Swanston Street.

A mentioning of health issues cannot be avoided. As I flew into Delhi the weather forecast on my phone said simply 'Smoke'. (In fairness, the pollution in Jakarta was also quite extreme, giving me a persistent cough before I faced the fact, which I also later faced in Delhi, that exploring by foot was impracticable.) January is far from the worst time for pollution in Delhi but it was, nonetheless, a daily news story: the pollution is up, the pollution is down, it's going to pass with expected rain, it's come back for reasons the state government is investigating. Such pollution, caused by vehicles and personal and industry burn-offs, mainly, has serious, negative health effects. Air pollution in India kills around two and a half million people a year and New Delhi's pollution is recognised by the World Health Organisation as the worst of any major city in the world. Locals I spoke to were more than sceptical about the frequently announced government plans to combat this pollution issue.

Gastric illness is very common amongst travelers to India. There are other illnesses in India that Australians need to be especially careful about as well. On medical advice I had Hepatitis A and Typhoid shots before travelling and took anti-malaria tablets while I was there.

Online information about getting in from New Delhi Airport is replete with warnings about taxi scams. On the footpaths in New Delhi informal mechanics perform impressive operations of sump draining and motorbike or car engine stripping. Motorbike riders, understandably tired of the busy main-road traffic, sometimes consider the footpath a smoother and more amenable riding option. The evident poverty of the people on the street, the smell, the hazy sky and pollution in the air and the noise of trucks and cars and motorbikes and tuk tuks, were, added together, more confronting than I'd expected.

The taxation system in India is complicated and can be confusing. For example, the goods and services tax (GST) which in recent years has replaced already existing value added taxes (VAT) is applied to different products and services at different rates. Physical books published in India are exempt from GST, but there is GST on ebooks (now at 5 percent, having originally been applied at 18 percent) and on royalties and printing (12 percent). From July 2019, print books imported into India attract a 5 percent duty. Even before the imposition of this duty, importing books into India could be a bureaucratic nightmare. In the case of rights sales into India, there can be payments to government which Indian publishers can be obliged to pay and inclined to pass on to the overseas rights seller or buyer, but which won't necessarily have appeared in the rights contract.

Censorship does exist in India and appears to be becoming more pronounced. Laws against insulting others' religion and against stimulating conflict between groups can be interpreted broadly. S. Anand, publisher of Navayana Books, said a dozen of his books could be banned. Navayana's then forthcoming RM Ambedkar title *Beef, Brahmins and Broken Men* was one that Anand expected to be controversial.

As in many other parts of the world, including of course Australia, rights to free speech can come into conflict with laws of defamation. *A Feast of Vultures: The Hidden Business of Democracy in India*, a 2016 work on corrupt relations between businesses, bureaucrats and politicians in India, by investigative reporter Josy Joseph, resulted in a defamation case against Joseph by Naresh Goyal, founder of Jet Airways, whom Joseph had suggested had connections with underworld figure Darwood Ibrahim. The case drags on at crippling expense, for Joseph at least.

Along with direct censorship there is of course indirect censorship. One publisher told me that the reason there is no university press sector to speak of in India is that the government would never fund a press which is or might be critical of it. And a funded body, such as a university, would know that criticising its funder, the government, would be unacceptable to government. In India, the social role of the university press is in some ways filled by local, independent firms, such as Navayana, Yoda, and Tulika.

The print distribution system in India, perhaps inevitably, expresses larger, complicated bureaucratic patterns. For example, Taylor & Francis India have back office staff who research the profile and needs of the institutions they're selling to. Their sales reps then visit these institutions, taking in whatever brochures and purchasing system the institution requires. The institution then orders through its local supplier, who orders through another supplier, who orders through another (Manohar), who has an account with Taylor & Francis India.

The firms in between Manohar and the institutional client are too small to have an account with Taylor & Francis but as Devasar noted to me, the possibility of there being gaps of information exists at each of these stages of supply. According to an online check, there are over 800 universities in India, 37,000 colleges and 11,500 'stand-alone institutions': clearly too many for a company like Taylor & Francis to have individual accounts with.

Retailer and distributor payment terms are long by Australian standards. Payment terms are minimum 90 days but can be 120 days and longer, even up to a year. This of course affects cash flow, which was a particular concern raised with me by Indian small publishers.

Sale or return terms are now standard. One publisher lamented: 'Unsold stock is returned sometimes even after 18 months, and books often come back to publishers in appalling condition. About 10 years ago you could still get distributors to agree to a cap on returns – 15 percent or 20 percent of the total stock they took – but that's no longer possible.'

Some of the industry participants I spoke to perceived that there is a shortage of 'good' bookstores, alongside Bahrison's (which is now a chain), willing to stock specialised titles.

Though rents can be low, as noted earlier, they can also be high. Khan Market, where the main Bahrison's store is located, [has some of the most expensive retail rental prices in the world](#). From an Australian perspective this is difficult to fathom.

Book prices in India are low by Australian standards and, while this point can be argued about, this is a problem for the profitability of publishing in the country. Indian publishers I have spoken to have echoed the complaint of Australian publishers that consumers expect

prices to be very low, while they are happy to spend more money than books cost, on, for instance, restaurants and bars. The industry professionals I spoke to, however, believe book prices in India will continue to rise.

As with the industry around the world, sales numbers for individual midlist titles are dropping with the seemingly exponential growth of the number of titles published. A genuine bestseller in India is 10,000 copies. Midlist sales are down to about 1000. Publishers are responding by publishing more books, a tried and, on the whole, true, strategy.

With the education sector growing rapidly, publishers feel themselves to be locked out of key parts of the market for secondary-school educational books and other resources. The government, through the National Council of Educational Research and Training (NCERT), is also a publisher, and dictates that schools in the 9–12 years use NCERT's publication resources. The price of these resources is very low and they are all in two-colour, not four-colour.

As is well known, piracy is a problem in India. This is rather poignantly demonstrated by the sellers of photocopied books set up on rugs along the walkway to enter the New Delhi World Book Fair. Contributors to Devasar's book stress the evil of piracy. There is a site which I won't name but which is hardly secret, which makes content available for free and is seemingly impossible to shut down. In the view of some publishers, this badly affects sales. It is 'like stealing in public', says an exasperated S. Anand.

Though the NDWBF is on the whole a valuable event for the industry in India, there is little rights trading. Some argue there should be 2–3 days set aside for rights trading, especially between publishers of the different Indian languages. And small publishers can find attending the NDWBF prohibitively expensive. Some fear this problem will be made worse by the shift to the new Pragati Maidan, with the cost of attending expected to rise.

Finally, some industry members, such as Shivanga Sharma from OUP India, believe public funding of libraries should be higher. Abraham, MD of Hachette India, has noted persuasively that this active building up of readership is 'key', and a task the industry needs to pay much more attention to. ('Balancing Creativity and Commerce', in Devasar, *Publishers on Publishing*, 266) This is certainly true and, as certainly, is not only true of the industry in India.

Malaysia

The most important work on the book publishing industry in Malaysia remains a short 2016 article by Linda Tan Lingard ('The Publishing Industry in Malaysia', *Publishing Research Quarterly* 32, 2016: 58–63; DOI 10.1007/x12109-106-9445-8).

Tan Lingard notes that Malaysia is a signatory of the Berne convention and copyright is protected in law. Malaysia has a young population, which she says 'points to a demand for books for children, teenagers and young adults'. Tan Lingard was the founder of the Children's Picture Book Association of Malaysia. In 2016, textbooks and books for children constituted 47 percent of the total number of books published. Education is free in Malaysia and the leading Malaysian publishers are in the Education sector. (61)

In Malaysia the largest market by language is the Malay, followed by the Chinese, and then the English market, which is the most competitive but in which book prices are highest. Language, literature and religion stand out as the most common categories in which books are published, according to Tan Lingard's figures, taken from the National Library. Management, mathematics, education and natural science come next. (61–62)

General management titles were popular for translation into Malay. (61–62)

According to Tan Lingard, ebooks are or at least were becoming more important for academic books and trade fiction titles. (61)

In the four years since the publication of Tan Lingard's article, the industry in Malaysia has continued to develop and adapt to new conditions, which have in some ways been challenging. At the May 2019 Kuala Lumpur International Bookfair, Adam Wong Bin Abdullah, from the University of Malaya Press, suggested the publishing industry as a whole was 'in a holding pattern'. The number of members of the Malaysian Book Publishers Association (MABOPA) has [dropped from 195 to, in 2020, 183](#), and a member's survey to be released in March 2020 is expected to show that the market size has gotten smaller over the previous few years.

Arief Hakim Sani Rahmat, current President of MABOPA, says the downturn has been consistent across all languages in the Malaysian market. He identifies the Malaysian government's bringing to an end of its book voucher program (worth about RM300m, or AUD\$100m, annually), generally slow consumer spending, and lower government investment, as the main causal factors of this.

The Malaysian ebook store eSentral, founded in 2011, is now well established. According to Wikipedia it is the biggest ebook repository in Southeast Asia, though I haven't found solid evidence for this claim. (For background on the company see 'Books go digital', *New Straits Times*, 1 Feb 2012: accessible via the Factiva database.) Ebook sales, with Google Play the main vendor, are growing in some segments, such as romance novels, but there is not broad-based growth. One publisher was sceptical about the potential for ebook growth: 'In Malaysia people don't want to read ebooks. Even digital natives.'

Traditional forms of piracy – the production of photocopied books – are diminishing, but digital piracy is growing and, according to Arief, growing 'very fast':

- a. education materials shared via chat groups;
- b. online sharing of comics;
- c. scanned PDFs of local books are now available on an online marketplace.

There is no data on ebook piracy in Malaysia, but Arief suspects the use of ebooks in Torrent is 'pretty huge'.

Malaysian online bookstores, such as mphonline, popular online, bookurve, bookcafe, smo online and bookxcess, have become increasingly active within an online retail environment for books which has become ever-more crowded, as Southeast Asian online marketplaces such as Shopee, Lazada and Tokopedia have moved into books.

The three staples of the Malaysian publishing market remain Islamic religious titles, romance fiction, and education books. Malay language titles remain predominant. Amir Muhammad, founder of Buku Fixi ('fixi' means, roughly, 'fiction', in Bahasa), said non-fiction

works do better in English than fiction titles but they have found English-language publishing less profitable.

That said, the first book in Buku Fixi's 'noir' series sold 16,000 units, which Amir regarded as 'quite good' for an English language book. It seems possible, then, that although the market for English-language books is crowded with imports, overall competition within the industry in Malaysia is not as high, and sales not as fragmented, as Australian publishers might regard as the norm. Adding to this perception, for me, was the perception also that there was more vertical integration across the industry than now existed in Australia, with some publishers also acting as distributors and retailers, distributors acting as publishers and retailers, and retailers involved in publishing and distribution.

The main Malaysian chain bookstores remain and, reportedly, remain strong, though they face the same [challenges of the wider industry](#), such as [rental prices](#) and a slowdown of consumer spending. Of these chains, Popular has the most stores, followed by MPH, which has about half as many, and Times and Borders each have about a tenth the number as Popular. I was surprised to see the Borders stores, given the highly publicised collapse of Red Group in 2011, but [the Malaysian Borders franchise, alone in the world, survived](#).

'Popular' stores are separated with English on one side and Malay on the other; and stationery is a staple. The English section commonly contains, fiction, fiction by local authors, cookbooks, languages, 'self enrichment', health and parenting, mystery and crime, non-fiction, biography, politics and current affairs, management, business, travel and maps, leisure, with 'promosi' and 'rekomendasi' sections in the middle.

There are also retailers that are strong in their own region. These are mostly local brands, including SMO bookstore in the east coast of Malaysia, Hasani Bookstore in the northern area, Smart Bookshop in the state of Sarawak, and MBS in the state of Pahang.

Bookxcess is a very large store (sitting on nearly three and a half thousand square metres), calling into question the wisdom that the age of the book superstore is finished. Established in 2016 in the town of Cyberjaya, Selangor, which is part of Malaysia's Multimedia Super Corridor, Bookxcess also claims to be the first bookstore in the world to be open 24 hours a day. It has become a major online book retailer and is the primary sponsor of the Big Bad Wolf book fair, a massive sale of print books at often highly discounted prices which is now held roughly each month in Malaysia. The [BBWF](#) is now also staged in other nations in the region, such as the Philippines, Thailand and Indonesia.

Many of the other independent bookstores in Malaysia often sell stationery and school supplies in addition to books.

The Chinese are looking to expand into Malaysian book publishing and its markets. They are sending extraordinarily large book publisher delegations to Malaysia ... fifty publishers at a time ... who don't speak English or Malay but have events in Mandarin. The Chinese provide grants for translation and rights deals described by MABOPA representatives as 'very cheap'.

The incorporation of religion within popular culture, such as in the 'Ana Muslim' book series phenomenon, can be hard for Australians to easily grasp.

In September 2018, Kuala Lumpur was [named the UNESCO World Book Capital for 2020](#), on the basis of its 'strong focus on inclusive education, the development of a knowledge-based

society and accessible reading for all parts of the city's population'. A year of celebrations will start on 23 April 2020, World Book and Copyright Day.

Opportunities | *Malaysia*

MABOPA is an organised, switched on and hard-working organisation, keen to develop markets and business within but also outside of Malaysia. Arief, and the MABOPA Secretary Sheikh Faisal Sheikh Mansor, at the KL International Book Fair in 2019, were open to including an Australian-organised event for the 2020 KL Book City celebrations. Arief says that he hopes to see two things develop from KL's achievement of having become a UNESCO World Book City: 'First, a reading promotion campaign, resulting in the revival of book reading interest among the urban population of Malaysia. [Second, the] build up of new libraries in Kuala Lumpur. Especially community libraries in the public housing area. We need new libraries in the lower income area to give the kids chance to read more books, and directly improving their academic results.'

There is a recognition within Malaysia and its leadership of the value of books. The University of Malaya, in one palpable expression of this understanding, is investing in its bookshop to make it a cultural focus for the University.

The Malaysian government has actively supported the publishing industry in recent years. For instance, it provided a book voucher scheme for students and a tax rebate for consumers on books. PerbadananKotaBuku (Book City Corporation), which does not appear to exist anymore, was a government agency which made available translation grants with (in 2016), a cap for works being translated into languages other than Malay, of MYR2,500 (AUD\$898 @ 17 Feb 2020). Arief and Sheikh, at the 2019 KLIBF, were surprised at the relative absence of government support for the industry in Australia, as the Malaysian government has been more economically interventionist generally than the Australian in recent decades. (This interventionism has in various respects served it well, as discussed by Clinton Fernandes in *Island Off the Coast of Asia: Instruments of Statecraft in Australian Foreign Policy*, Rowman and Littlefield and Monash University Publishing, 2018.) MABOPA is currently calling for a reinstating of some of these forms of government support and for support in new areas, and there is a drive within the region for a new ASEAN book publishers group.

There is support for university press publishers through the Malaysian university press publishers association, MAPIM, under the Ministry of Education. In April 2019 MAPIM had thirty-one members, comprised of twenty-two universities and nine research institutions. It has existed in one form or another for some forty years.

The re-election of Mahathir as President, in 2018, against great odds, represented a triumph for Malaysian democracy. Encouragingly, for publishers, books on these issues published by politically engaged publishers, like Gerakbudaya, surged in the run up to and wake of that election. This suggests a continuing and developing market for books on Malaysian public issues, which will hopefully be strengthened by a more free publishing environment and an approach to education that is more balanced in disciplinary terms (which is to say, less weighted in favour of scientific and vocational education). While the government's decision to do away with exams for years 1–3 has been a problem for parts of the industry supplying educational material to those children (and according to some people I spoke to has upset

the 'Tiger Moms'), the government's decision to follow the educational example of Finland would seem to be good for the industry in the medium and longer term.

As Tan Lingard noted in her 2016 article, Malaysia's young population does suggest opportunities for publishers targeting younger readers. At the 2019 KLIFB one of the most successful publishers attending, in terms of sales, was Buku Fixi, which publishes edgy fiction for young people: works that often contain violence, sex (and not just 'straight' sex), and an interest in the supernatural. The owner and founder of Buku Fixi, Amir Muhammad, told me he had recognised this shortage of such works available for young Malaysians.

There are a number of very effective book sales fairs in Malaysia. For a lot of local publishers, Adam Wong Bin Abdullah says, the Kuala Lumpur International Book Fair is their big sales event for the year. Fair banners are visible around the Fair area and beyond. Busload after busload of visitors are brought in each day, with the buses being parked in long rows while the Fair continues until around 9pm. A'watif Ahmad, Deputy Director of Publications, Head of Acquisition and Editorial Division, Universiti Sains Malaysia in Penang, said for them the Fair is 'useful, especially for sales in the south of the country'. Amir said Buku Fixi had had a good year at the 2018 Fair, with 29,000 unit sales, and sales in 2019 were keeping pace with that. Buku Fixi were aiming for higher sales at the 2019 Fair.

The Big Bad Wolf Book Sale is growing. Although this began as an event for publishers to clear out unsold stock at heavily discounted prices, Arief suggests this Sale is 'evolving ... to a more "regular" book fair'. About fifty local publishers actively participate in the Big Bad Wolf sales.

The Malaysian publishing industry is quite closely connected in to the Singapore and Indonesian markets, meaning that partnering with publishers in Malaysia can bring access to these markets also. Gerakbudaya, for instance, distribute in Indonesia through all of the major chains.

There is some evidence of publishers in Malaysia seeking to expand their reach beyond these more localised markets. There is a healthy number of Malaysian publishers at the Frankfurt Book Fair each year. Malaysia is a focus area for the Frankfurt Book Fair, which engages with the nation through its Vice President Business Development, Claudia Kaiser, based in Jakarta. Adam Wong Bin Abdullah says at the University of Malaya Press they are turning their focus to monographs (as opposed to specialist and textbook titles) and to the reading world outside of Malaysia.

Publishing in Malaysia operates in ways that are familiar to Australians. Distribution channels are well established. Distributors take 55–60 percent of the book sale value, inclusive of the retailer's percentage. As noted above, the book retail sector is well established and strong: Universiti Sains Malaysia Press, publishing 80 percent research books, along with textbooks and some other works, gain most of their sales are through the retail sector. Some retailers – such as MPH, which is also an important distributor – do bring in a lot of overseas titles. Malaysian consumers are used to buying ebooks from overseas publishers, which dominate this segment of the market. In some cases, publisher website ecart sales are rising. Malaysian consumers are used to social media marketing: social media is now the main review forum for Malaysian readers.

As noted above, the Malaysian ebook market appears to be under-developed. This was noted to me by several Malaysian publishers. The same can be said for the market for audiobooks. The Audible product is available in Malaysia but, in Sheikh's words, 'not

localised'. This may change soon, however, with Audible and Storytel now hiring people in Malaysia, Indonesia and Singapore. The local option Tlinge has also been operating for a number of years.

The book printing industry in Malaysia is diverse and mature and produces products of good quality at comparatively affordable rates. Printing in Singapore is regarded in Malaysia as an expensive option. The University of Malaya Press, the oldest and largest and on most measures the most successful of the university presses, also has a printery, which does digital runs for their titles, for the most part, with a run of 500 to start with. Pure PoD is available from a number of providers. Other reputable book printers are Vinlin (who do all of the printing for Gerakbudaya) and Sinaran Bros in Penang (who do most of the printing for Universiti Sains Malaysia Press). Gatefold covers are common and cheap to do by Australian standards. Unit cost estimates I obtained were MYR10 on a 656p C format title with perfect binding and, from another printer, MYR3 on a B format title with a run of 4000. Another profitable printer I spoke to estimated their costings as about half those obtainable in Australia, inclusive of freight costs.

Finally, for publishers considering opportunities in Malaysia, it can be noted that rents in KL and Malaysia generally are relatively cheap, even for booksellers, with the partial exception of mall rental.

Obstacles | *Malaysia*

In Malaysia, as in many other post-colonial nations, the humanities and social sciences have not been valued by government as highly as the 'harder' sciences and more vocational education. In terms of the development of demand for books, this is a significant problem, as was noted to me by Charles Brophy and Chong Ton Sin from Gerakbudaya.

The mass media in Malaysia do not generally give books a lot of attention. If there's an important, major work, the newspapers will take notice, but otherwise they're not usually terribly supportive. It is mainly the Sunday papers and mainly the non-English-language Sunday papers, that have books pages. A'watif Ahmad at Universiti Sains Malaysia Press says there is 'not much' support for book publishing from the mass media: 'They're more interested in politics.'

There is not a strong culture of independent bookselling in Malaysia. Mall bookshops get the foot traffic but perhaps not the best buyers of books and some publishers argue the booksellers in these shops don't know a lot about books as a product. I was told a lot of shops start up outside of the malls, because of the cheap rent, but then find that the revenue is still too low and, after six months or so, wind up. There was a perception that booksellers don't commonly support local publishers or authors as strongly as they might.

As noted above, some retailers are under stress. Some booksellers are slimming down to focus on education products. Kinokuniya, I heard, would be the only store in Malaysia to stock Australian books at Australian prices.

While the majority of retailers work with publishers on a sale or return basis, it is not unusual for retailers to require consignment terms. Consignment is growing as a model, especially for stock provided for book fairs. Booksellers can even try to return books after more than one year.

Library budgets in Malaysia are under pressure.

There is a taste, within the market, for heavily discounted books, resulting in part from the Big Bad Wolf Book Sale. Prices have dropped in recent years alongside the prevalence of heavy discounting. Pricing can also be complicated. There can be different prices for east and peninsula Malaysia. And the lack of certainty around government policy towards vouchers and tax concessions has almost certainly hurt the industry.

In Malaysia, as in Australia, it must be acknowledged, there is some censorship. A journalist told me that more politically engaged publishers, like Gerakbudaya, are taking a risk. But Brophy and Chong Ton Sin at Gerakbudaya said they have not been targeted for breaking censorship laws, though they published books on the 1MDB scandal across 2016–2017. The only book they've done that was actually banned was a Malaysian language title on the communist uprising, which argued that this was not a communist uprising but an independence struggle. Seemingly mirroring the situation in Indonesia, it is mostly books in the local language that the censors and government are focused on or commonly most concerned about. One publisher told me that biographies of certain figures can be controversial, and that this can be 'a bit of a headache'. Others told me that while freedom of expression improved after the most recent change of government, there is some conservative pushback.

Cultural conservatism can induce its own censorship. Some stores, even amongst the chains, won't stock works their managers regard as sexually 'immoral'. While some novels by Therami Faisal have been banned, his most recent novel, *The Professor*, published in 2020 by Gerakbudaya, and focusing on LGBT rights, religious fundamentalism, societal conservatism and government authoritarianism, has not.

While I was in Kuala Lumpur the Monash University website was blocked and website access generally was patchy. A journalist told me that television broadcasting in Malaysia runs on a five minute delay so censors can cut anything they're not happy with. The censors watch in a room with all of the channels broadcasting. The journalist said 'I don't watch films in Malaysia because the jump cuts make working out what is happening, difficult'. After the recent change of government, he said, the newspapers generally switched allegiance straight back to Mahatir, but they, even *The Star*, 'the "people's paper"', are pretty cowed.

The Malaysian government places a requirement on university presses to publish 60 percent of their titles in Malaysian Bahasa. One publisher lamented 'a nationalist fervour runs through all of the universities here'.

There is not currently a substantial volume of direct rights trading across these nations, to speak of. Most of the rights trading done by Malaysian publishers is of Islamic works, with Indonesia. One publisher said 'The serious publishers are no longer coming' to the KL International Book Fair, because there's not much trading. 'You mean there are fewer international publishers?' I asked. 'Yes'. Sage, Wiley, Elsevier and the Singapore-based World Scientific did have stands.

Conclusion

Until the 1970s the horizons of Australian book publishing were largely determined by the industry's and nation's development as part of the British empire. The legal, commercial,

and technological frameworks within which Australian publishers operated were mainly developed and administered in Paternoster Row, London, the heart of Britain's worldwide book publishing empire. This is of course no longer the case, as Australian publishers routinely engage directly with industry partners in the US, Europe and Asia, especially China. Some Australian publishers have sought to develop links in India, and these have been strengthened in recent years by Australia Council sponsored publisher delegations into and out of that country. The Ubud Festival, the brainchild of Janet De Neefe, has since 2004 been a major forum for interaction between Australian and Indonesian writers, readers, and other members of the book world. [Reading Sideways Press](#), based in Melbourne, focuses on publishing Indonesian books into Australia.

Nonetheless, it is perhaps worth Australians remembering that when Captain Cook sailed around the top of what was to become known as Cape York, after charting the east coast of Australia for the first time and miraculously escaping death after hitting the Great Barrier Reef, he and his crew on *The Endeavour* knew they could seek help from the Dutch settlement at Batavia, today's Jakarta, which had been established *more than one hundred and fifty years' previously*, in 1619. And the first printing press in what would become Indonesia produced its first publication, a kind of almanac called a '*tjitboek*', in 1659, around 129 years before the first printing press would arrive in Australia with Captain Arthur Phillip's 'first fleet'. (Ahmat B. Adam, *The Vernacular Press and the Emergence of Modern Indonesian Consciousness (1855–1913)*, Southeast Asia Program, Cornell University New York, 1995.) Most Australians gained a lot from the country's development as a British nation, but one of the costs of this British identity has been a comparative lack of interest in the peoples and nations of the region (this is no less true, unfortunately, in relation to the first peoples and nations of Australia itself). The tyranny of distance which powerfully shaped Australian life was in part an expression of isolation that was self-imposed. With Australia's turning to the US, after Britain, as its primary world ally and social model, this self-isolation, in some ways, continues.

There are further opportunities for Australian book publishers in our region, as I have tried to indicate in this report. As touched on at the outset, however, in pursuing these it will be well to remember that 'the economy' is an abstraction and, in practice, inseparable from political and cultural dimensions of life. To operate effectively in the substantial, massive and gargantuan markets of Malaysia, Indonesia and India, we need some understanding of local conditions, beliefs, and ways of thinking and feeling, and to work on building relationships of mutual respect with people, in these nations, willing to meet us, get to know us, and do business with us. Many such people do exist, in all of these nations. It has been a great privilege to get to know, and to start to do business, with some of them.

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Nathan Hollier, Melbourne, 2020.