KOREA’S ALLURE
Incheon will be World Book Capital in 2015. Korea’s publishing industry is a powerhouse in the Asian Pacific region. Eric Yang, president of the Asia Pacific Publishers Association, explains why: It’s education, stupid!

VIRAL CULTURE
With Manga Mania closely followed by the Korean Wave, we ask why Asia’s popular cultures are so infectious. What role do books play? And how does the state influence the creative industries?

CHINA
As China joins the worldwide trend of promoting the creative industries, Jing Bartz, former general manager of Hachette-Phoenix, examines what this really means in the Chinese context.
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Juergen Boos, Director of the Frankfurt Book Fair (centre), with the Book Fair’s most recent partners in Asia: Myong-Woo Jo, Deputy Mayor of Incheon (2nd right), and Eric Yang, President of APPA - the Asia Pacific Publishers Association (right).
© Charlotte Bromley-Davenport
The Frankfurt Academy Quarterly has shortened its name – from now on we are calling it simply the “Frankfurt Quarterly”. We’ve also redesigned the layout – I hope you like it. If you do (or if you don’t), please let us know! What we have not shortened is the content. We still examine our focal topic in the usual depth. In this issue we take a closer look at Asia – or to be more precise, at Japan, Korea, China and Indonesia, which are seen as the most exciting players in the region for publishing. Our cover, by the way, shows Juergen Boos, Director of the Frankfurter Book Fair, with Myong-woo Jo, the deputy mayor of Incheon, the South Korean city that will be “World Book Capital” in 2015.

The creative industries as an economic factor are a relatively new phenomenon in Europe. It was only recently that the EU included them in its Strategy 2020. In Asia, on the other hand, above all in Japan and Korea, the production of cultural goods for the international export market has been steadily perfected since the 1990s. The Manga Mania of the 90s and 2000s was followed by the “Korean Wave”, with K-pop, K-drama and Manhwa-Webtoons. Lately, China and Indonesia have also been joining the trend.

In our Three is a Crowd column we examine three different approaches to the creative industries: firstly there is the “viral” strategy, exemplified by Japan and Korea’s successfull international campaigns; secondly the self-contained approach, embodied by China’s recent move to use the creative industries and cultural products to boost internal demand (and possibly cohesion); and thirdly the urban, touristic approach, such as Indonesia’s push to have four of its cities recognised as UNESCO Creative Cities, among them Bandung.

Under Trending Topics, which revolves around marketing and social media, we take a closer look at how Literature – with a capital L can be exchanged between East and West. Are Chinese social media platforms an appropriate tool for the promotion of contemporary British literature? Sophie Rochester of the Literary Platform thinks so. And Chigusa Ogino of the Tuttle Mori Agency tells us how she manages to enthuse Asian readers for Western literature.

Our Serendipity column is based, as always, on chance encounters. In this issue Juergen Boos, Director of the Frankfurt Book Fair, meets Eric Yang of the Asia Pacific Publishers Association. Their topic: why Asian students are so successful – and the part that Asian publishers have played in their success. Their conclusion? It’s all about education, stupid!

Enjoy your read!

Holger Volland
Vice President, Media Industries


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**28 MAY – 1 JUNE**

Beijing, China

**Conference**

**29 – 30 MAY**

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**A ROADMAP FOR INTERNATIONAL PUBLISHING – A CASE FOR THE FUTURE**

With Juergen Boos (Frankfurt Book Fair) and Felix Rudloff (Bastei Lübbe)

Holger Volland
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**STM IN CHINA: THE PRESENT AND THE FUTURE**

Yingxin Gong
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The Gangnam district in Seoul, South Korea.
(cc) Yoshi; source: Wikimedia Commons.
In our Three is a Crowd column we examine three different approaches to the creative industries: firstly there is the "viral" strategy, embodied by Japan and Korea's successful international campaigns; secondly the self-contained approach, embodied by China's recent move to use the creative industries and cultural products to boost internal demand (and possibly cohesion); and thirdly the urban, touristic approach, such as Indonesia's push to have four of its cities recognised as UNESCO Creative Cities, among them Bandung.
Why Is Asian Culture So Viral?

By Rebekka Kirsch

Thanks to digitisation and increasing numbers of people using mobile devices, Asian trends and pop culture are reaching the West ever more rapidly. Different media are consumed simultaneously; waiting is out and quick consumption is in.

Is the world addicted to manga? No – at least according to Hyoe Narita of VIZ Media, the international offshoot of the major Japanese publishers Shogakukan and Shueisha: “I want the world to be addicted, but I can’t manage it just yet.” It is, however, very easy to consume manga nowadays – you simply have to reach for your tablet, and a seemingly limitless library of comics is at your disposal. Among them are Japanese manga such as Naruto or Bleach, massive best-sellers even outside Asia, and South Korean comics, called manhwa.

Even before their appearance on the international market, readers worldwide can consume comics that have been translated into English – an advantage of globalisation and technological progress. The downside is that the comics can be found on countless illegal scanlation platforms (scanlation = scanning, translation and editing of comics, by fans). The readers pay nothing, and the rights holders cannot earn any income. For the fans, it’s all quite simple: they want to consume comics, but are frequently unable to do so, often due to the issue of rights. Voicing the views of many fans, Jimmy Wales of Wikipedia says, “Digital distribution platforming is an incredible opportunity for the entertainment industry and for Hollywood. And one of the first things they can do is actually let me buy what I wanna buy.”

VIZ Media is trying to respond to the wishes of readers by providing an American version of the magazine Shonen Jump, while Naver has devised an entirely new and financially successful model with its webtoons, and South Korea has overtaken Japan in the export of pop culture. Ultimately, it comes down to one thing: making content available instantly. This is only possible through appropriate planning and reference to trends.

Weird or Not? How Pop Culture Works

Elements of pop culture often have an obvious trigger. Whether they involve music, games, manga, fashion trends or even characters perceived as “cool”, they are often based on rebellion against social structures and strict patterns of behaviour that once, at least, had a social origin, particularly in island states such as Japan.

Hyoe Narita of VIZ Media rejects the “pop culture” label. “Why are only Japanese games, anime, manga and music classed as pop culture? Is Disney pop culture? Is Superman pop culture? Is Asterix pop culture? If these are not, then manga and...”

“Digital distribution platforming is an incredible opportunity for the entertainment industry and for Hollywood. And one of the first things they can do is actually let me buy what I wanna buy.”

Jimmy Wales
anime shouldn’t be called pop culture either.” Manga is a more prevalent part of everyday life and the media landscape in Asia. It is considered quite normal to read comics. Yet there are also extremes in Japan, such as the fans dubbed “otaku”, who are often completely immersed in their fantasy worlds. In the meantime, the enthusiasm of the hardcore “otaku” fans has crossed over into the mainstream.

“GROSS NATIONAL COOL”: POP CULTURE AS AN ECONOMIC DRIVER

In 2002 the journalist Douglas McGray coined the term “Japan’s Gross National Cool” meaning the growth in soft power and economic momentum due to Japan’s pop culture, especially Japanese pop (J-pop). In 2005 anime and manga also made a significant contribution to Japan’s GDP. Nomura Research Institute estimated the market for comics and videos at USD 2.5 billion in 2004. Other analysts have come up with much higher figures; if merchandising products and phenomena such as Maid Cafés (for costume players or cosplayers) are added, the figure could be as high as US$18 billion. In 2010 these figures and the growing competition from South Korea’s pop culture “wave” prompted the Japanese government to establish a Creative Industries Promotion Office, run by the Ministry of Economy, Trade and Industry (METI), under the name “Cool Japan”. According to the researcher Yunuen Mandujano, who wrote about this in his 2013 book The Politics of Selling Culture, “it would be in charge of designing and applying plans and measures to promote cultural industries as a strategic sector, facilitating their expansion inside and outside Japan”.

This expansion is geared towards international markets, as the Japanese market appears to be saturated. Major Japanese publishers have set up international offshoots: VIZ Media launched the first print version of the hit Japanese magazine Shonen Jump on the US market in 2003. With three issues selling over 300,000, this earned VIZ Media the Comic Product of the Year Award. However, given digital developments, in 2012 it was decided to publish the magazine as a digital version only.

PRICE DECLINE IN ASIAN POP CULTURE

Sales figures for manga comics and anime DVDs have fallen not only in Japan, but also worldwide. As early as 2010 industry insiders were lamenting the “freefall” of Japanese anime, blaming it on repetitive plots,
the one-sided focus on niche markets (such as “little girls”) and low pay for artists, who have been switching sides in their drives to become games developers. At the same time, the number of smartphone owners and platforms that stream anime and offer manga scans is increasing. Could this be a coincidence? Probably not, as willingness to pay is on the low side among the predominantly young target group. Due to piracy and streaming sites, this group has become accustomed to free content.

Japan has succeeded in building a compelling alternative digital business model; after all, it has been gaining experience in the mobile business ever since the flip phones of 2002. In the meantime, mobile consumption has become possible through e-books, e-readers and tablet PCs, while publishing houses like Shogakukan react to trends accordingly. But media competition is a hot topic even in Japan and Asia, as Bunsho Kajiya of Shogakukan Singapore notes, “The publishing industry in Japan has been shrinking. Current total sales are going back to the level of thirty years ago. Books and magazines are competing with mobile phones in a scramble for the user/reader’s time.” As a result, adapting existing business and content models for the mobile market is not enough to keep pace with the digital age.

**SOFT POWER ATTACK: WHY THE “KOREAN WAVE” HAS BEEN SO SUCCESSFUL**

In South Korea the smartphone has reached market saturation of over 100%. South Korean companies such as Samsung are geared towards global markets, unlike Japanese businesses, which often devise products for the domestic market.

The South Korean company Naver has focused on mobile consumption and established a model tailored for comic fans and rapid consumers—webtoons, or comics that consist of very long, full colour panels. These should have a self-contained story and are not available in print form. The unique thing about them is that they are free. The model for webtoons is based on manhwa artists, who are still unknown. By publishing their works on a weekly basis, they can not only create a name for themselves, but also negotiate a successful contract with Naver. In order to gain publicity, webtoons can be found on other platforms for free. Naver also
has South Korea’s foremost search machine, with an over 70% market share, while offering books and licensed comics to read for a flat rate or for Naver coins.

Of course, it remains to be seen whether artists and publishers will be able to fund this no-cost-based South Korean model sustainably. Hyoe Narita of the Japanese offshoot VIZ Media does not believe that it is possible: “Manga is created by a manga-ka [manga artist or cartoonist] and the editor. A car is created by engineers and teams. Does General Motors sell cars for free? It’s the same thing.” Nevertheless, the option of flat rates and free comics for purely digital consumption is a good way of adapting to the increasingly rapid and digital consumer society. “At the very least, we need to try to create digitally generated manga and books while adopting the digital age,” says Bunsho Kajiya of Shogakukan Singapore.

South Korea is also adapting to the changing rules of the game in the music sector. Unlike Japan, where the once hugely popular J-pop genre is seeing declining sales, South Korea is actively making its own pop culture famous all over the world. K-pop has not only reached the West, but has already conquered East and Southeast Asia, including Japan and China. This has been achieved as the result of years of planning by South Korean production companies, boosted by state funding. Since the 1990s South Korea has endeavoured to export K-pop, its own pop culture. The “South Korean wave”, Hallyu, reached Europe and the USA long before Psy and Gangnam Style, and the number of search requests for K-pop overtook those for J-pop as early as 2010 (see diagram).

The success of K-pop is driven not only by individual artists, but also by state-run agencies like the Korean Creative Content Agency, which market South Korean “cultural products” internationally, together with South Korean TV series, cooking and media such as manhwas and webtoons. There are several reasons why it has seen such global success, as Simon and Martina of Eatyourkimchi explain. These two lively teachers moved to South Korea from Canada in 2008 in order to teach English, and today they make their living from videos about South Korean culture, covering everything from K-pop to stylish cafés and quirky items that can be bought only there. Simon and Martina understand what matters to fans: they not only explain, but also entertain. This is something that South Korea’s music – Bunsho Kajiya –

Bunsho Kajiya is a speaker at this year’s Story-Drive Asia conference. He is managing director of Shogakukan Asia, based in Singapore, set up in 2013 as a 100% subsidiary of the Japanese parent company. This was founded in 1922 and is the largest publisher in Japan of general books, encyclopaedias, magazines and manga, with gross annual revenue of ¥ 110 billion and about 750 employees. photo: private

– PICTURE 5 –

Manhwa webtoons – free digital comics from South Korea – have also become available on the internet in English translation. Here is a scene from “Orange Marmalade” by Seek Woo. Source: www.webtoonlive.com
industry has done to perfection. Simon Stawski of Eatyourkimchi describes the success of K-pop as follows: “I think it’s just a matter of people looking for something different, and K-pop really fitting the bill. It’s not Western pop, but it’s still highly accessible, and has a lot of elements of Western pop.”

K-pop music videos have high production values, with slickly choreographed dancing. Unlike J-pop, the videos are available free of charge via multiple channels such as TV and YouTube, which allows them to reach millions more online users and potential (paying) fans. Merchandising products are sold in large quantities across Asia and concert tours are rolled out all over the globe. Hyoe Narita of VIZ Media believes that Japan can learn a lesson from this: “Korean culture never entrances the world because of its quality. But it has a very strong passion for business. As long as Japan continues with its kind of crazy conservative approach and imperialist mind-set, its culture won’t be able to maximise its power.”

**FROM K-POP TO K-DRAMA: SOUTH KOREAN CULTURAL TECHNOLOGY**

K-pop has produced more pop culture strands: stars from successful bands often act in films or TV series, also dubbed K-dramas. “Korean dramas are really big in Korea, and they’re spreading online at a comparable rate to K-pop. In fact, we find that, when people grow out of K-pop, they transition into K-dramas,” says Simon Stawski of Eatyourkimchi, showing how easy the step from one pop culture to the next really is, as they overlap. Mangas are also often made into series with real actors. These productions, such as “Hana yori dango” or “Hana kimi”, are a massive hit in Asian countries. On

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Simon and Martina Stawski from Eatyourkimchi. They will both be speakers at StoryDrive Asia.

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**“WE FIND THAT, WHEN PEOPLE GROW OUT OF K-POP, THEY TRANSITION INTO K-DRAMAS.”**

Simon Stawski

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Internet search requests for “K-pop” and “J-pop” show that South Korean pop overtook its Japanese counterpart a long time ago.
the Dramafever portal, Asian series that are adapted from manga are additionally categorised as "manga live action".

Culture as a global product under the “Made in Korea” name is, above all, the result of a decision made at the very top. In 2011 President Lee Myung-bak, a former Hyundai manager, announced that he wanted to make South Korean culture a “global brand”. He expressed a wish for the country to move “away from the periphery of Asia and into the centre of the world”. Strangely, despite this cultural export offensive with regard to digitisation, South Korea does not have a completely firm footing when it comes to the digital world: Reporters without Borders still lists the country as “under surveillance” when it comes to censorship.

In the West there is also a trend towards media multi-channelling, as borne out by film adaptations from books, such as Divergent, The Book Thief and Harry Potter. The global success of a book culminates in adaptation for the cinema. However, Asia has perfected the system through a completely new understanding of cultural products and their viral nature.

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StoryDrive Asia is an all-media platform in Asia dedicated to exploring new forms of collaboration and business models across media boundaries. In 2012 and 2013, the Frankfurt Book Fair and the German Book Information Center (Beijing) have successfully organized StoryDrive China at Beijing’s CIFTIS Fair. In 2014 the conference has been expanded and renamed StoryDrive Asia, in order to encourage more transmedia exchange and trade inside Asia. The motto of StoryDrive Asia 2014 is: (RE)SHAPE YOUR STORY. Leading minds from all over the world, especially from major Asian markets, will illuminate the future of media and entertainment.

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**WHAT ARE CHINA’S CREATIVE INDUSTRIES?**

By Jing Bartz

According to a recent report, compiled jointly by the Book Information Centre (BIZ), Beijing (the Beijing office of the Frankfurt Book Fair) and the Chinese trade periodical the China Publishing and Media Journal (CPMJ), by August 2013, “the production of the Chinese cultural industry had increased by 60 times in just 10 years, from RMB 30 billion in 2003 to RMB 1,807 billion, accounting for 3.84% of GDP. In the same period, ongoing integration and cooperation between various sectors such as culture, technology, finance and real estate were observed.” Book publishing is increasingly included under the wider “creative industries” label, not least by government institutions. But what exactly is meant by China’s creative industries?

When a high-ranking Chinese media delegation met German creative industry representatives in Berlin this spring, both sides felt confused. The Chinese found the German creative companies too small, while the Germans thought the online games presented by the Chinese were too boring, even though they generated millions of euros in revenue on the Chinese market.

What are we talking about when we discuss China’s creative industries? They are certainly different from the creative industries in the UK, France or Germany. Although an official definition is still a work in progress, in 2012 the Chinese National Bureau of Statistics added “design” as a new creative sector, alongside press and publishing, TV and film, live performance, Internet and mobile communication, games, advertising, exhibitions and various production activities.

In 2014, mobile Internet is a hot topic in China. The 2012-2013 Chinese E-book-Reading Survey Report, released by Nielsen Research in April, noted that mobile devices account for 91% of all reading equipment. China is probably the only country in the world where people read e-books primarily on mobile phones. For this reason, Amazon, which uses a uniform Kindle app globally, had to create a special app for Chinese mobile users when they launched Kindle in China a year ago. Amazon has now become a major force in Chinese e-book sales.

According to the Nielsen report, in 2013 72% of Chinese e-book readers were owned by 15 to 34-year-olds, and 27% by 35 to 64-year-olds, a 19% increase from 2011. This trend may explain why publishers are trying to produce more appropriate mobile content in addition to the dominant local young adult stories, and why online and mobile gaming companies...
are considering the development of more “serious games” to attract the well-educated Chinese middle class, when at leisure. In addition, Phoenix Publishing & Media Group, a leading publicly traded state enterprise in China, recently spent RMB 260 million (around EUR 30 million) to acquire two gaming companies, which allows the publisher to quickly access new content business.

Film is another economic driver of China’s creative industry. Official country restrictions cap the annual import of foreign films at 64 features, says Amy Liu, vice president of Chinese research and consulting company EntGroup and one of this year’s speakers at the StoryDrive Asia conference. While international film companies recognise the revival of the Chinese film market, a Chinese buyer at the 2014 Berlinale film festival offered a warning that only three Western genres truly have a chance in China: science fiction, romance and action. Entertainment seems to be the highest priority for modern Chinese cinemas. Can any other doors be opened for international companies? Amy Liu recommends the co-production model, as well as the provision of training for Chinese staff in areas of fund-raising, creative working and process control.

However, according to the 2012-13 China Creative Industry Report compiled by BIZ Beijing and CPMI, the Chinese box office reached RMB 21.5 billion (around EUR 2.5 billion) in 2013. This success can be partly attributed to Chinese real estate billionaire Wang Jianlin, who has developed Wanda Plaza shopping malls in cities across China, each of which includes a 3D cinema. The combination of shopping, eating and cinema-going has developed into a popular urban lifestyle for young Chinese.

The heavy involvement of the real estate business is a typical aspect of...
China’s creative industries, one that strongly reflects government policies. If a construction project includes cultural elements, like a cinema or a bookstore, the entire development is eligible for a special land price and tax incentives. In many cases, municipalities even introduce targets and measures to stimulate the creative industries. This has been the case with the development across China in the last few years of 2,500 “culture and creative parks”, and the same number of theme parks. It is not surprising, therefore, that the property group Wanda has established a cultural arm: Beijing Wanda Culture Industry Group. With registered capital of RMB 5 billion and total assets of RMB 31 billion, the company is China’s largest cultural enterprise, according to a 2013 news report from China Daily.

Opinions are divided, however, regarding the profitability of this brand new business area: a recent survey by the Culture Industry Academy of Beijing University revealed that 70% of the new parks are making a loss, which can be attributed to a lack of strategic thinking and too much haste in forming cultural clusters. Chinese classics are currently being re-enacted in theme park form as well. One example is the Dream of the Red Chamber, for which, in 2012, a “global search for candidates” was launched, seeking actors willing to live and perform in the park. The most important criteria were to “have firm belief and deep fondness for Chinese mainstream culture, stick to mainstream values and willingly take on the mission of cultural transmission.”

According to the Report on the Development of the Chinese Culture Industry (2014) issued by the China Academy of Social Sciences (CASS) in April, the amount of investment in the Chinese creative industries in 2012 was RMB 1.96 trillion (EUR 226 billion), an increase of 28% over 2011. CASS warned against a structural surplus, however, as a serious imbalance can be observed in the investment boom, in which investments in fixed assets are 13 times greater than in intangible assets. Undervaluing intangible assets is a problem around the globe – are intangible assets not...
crucial to the creative industries?

According to Yu Dan, best-selling author and media studies professor, the Chinese creative industries suffer from a lack of creativity. She attributes this problem to China’s education system, which struggles to nurture creative talent. Her critics also blame it on a lack of awareness of intellectual property and insufficient legal protection. Yu Dan’s book, Confucius from the Heart (2009), has officially sold six million copies, yet the estimated number of pirated versions is around 20 million. The authorities have been unable to control the ongoing piracy.

Mark Siemons, a journalist in Beijing writing for the German Frankfurter Allgemeine Zeitung (FAZ), has followed the development of the Chinese culture industry intensively over the last five years. Inspired by German philosophical theorists Theodor W. Adorno and Max Horkheimer, both members of the influential Frankfurt School, and formulating a critique of the culture industry, Siemons asked in an article last summer whether industrialisation is really a good thing for culture. Is it worth aspiring to a state where there is no differentiation between literature and marketing, propaganda and games?

In the midst of dynamic changes, China now probably has less time for philosophy. At the end of 2013, the Chinese government announced an ambitious target for China’s cultural and creative industries, to contribute five per cent of the country’s GDP in 2015, an increase of 3.48% on 2012. As part of this plan, more emphasis will be put on the integration of culture and technological innovation, an initiative that will further the development of products like WeChat, a text, voice messaging and social media app by Tencent Inc., that has gained 600 million global users.

Over the next few years, the Chinese creative industries will offer an abundance of exciting opportunities for international companies. But to return to the question we asked at the outset, we will have to adjust our creative industry mindsets first, because this sector looks very different in China.
The Ministry of Tourism and Creative Economy has launched a campaign to have four Indonesian cities acknowledged as Creative Cities by UNESCO. Are these hopes for the creative industries justified? We take a closer look at Bandung.

Princess Acra floats on her white tiger through Bandung. She fights against evil spirits at several levels, attempting to save her city. Acra wears a batik sarong, her weapon has a Sundanese name and her opponents are familiar from traditional stories. “INheritage” is currently the most popular computer game from the company Tinker Games. “We mixed Indonesian traditional culture with modern visual artworks and music, with the mission of introducing Indonesian culture to the world using video games as the media of penetration,” says Ajie Muhammad Santika of Tinker Games. Now 24 years old, he was born and brought up in Bandung; Muhammad is convinced of the creativity of his home city – whose architecture also features in the game. Bandung is in the process of joining the UNESCO Creative Cities Network. The metropolis in West Java, with its approximately 2.2 million inhabitants, is well-known for its clothing industry based on batik art and for design. The traces of its Dutch colonial past are still visible today in many places; with its art deco buildings, Bandung was once known as the “Paris of Java”.

In an interview with Monocle in 2013, Ridwan Kamil explained that “the Dutch founded Bandung because of the cool weather – it creates groups of thinkers, musicians and creative people because it allows for more contemplative situations. We like to hang out and this is a mid-sized city so there’s an easiness to moving around and meeting people.” Kamil has been an active contributor to the creativity of the city for many years, firstly as an architect and urban planner, and then as a co-founder of the Bandung Creative City Forum (BCCF). This non-profit organisation brings together artists and creative groups.

For nearly a year now, the 42-year-old Kamil has dedicated himself to an even bigger project: he is currently the mayor of Bandung. In this capacity, he continues to favour direct exchanges. He communicates with citizens using social media such as Twitter and Facebook, among other channels. He expressly invites them to join in finding collaborative solutions to problems. To ensure that all residents feel included, he alternates the language of his posts between Indonesian and Sundanese – and on Thursdays they are always in English.

Is it helpful to have a creative professional as the city’s highest official? Ajie Muhammad of Tinker Games believes so. “I think Ridwan Kamil is one of the best mayors in Indonesia right now,” he says. “He has strong leadership skills, persistence, and willingness to make Bandung become a champion city in the world. One of his breakthroughs is [that] he
is using creative ways to solve the urban problems.” For instance, Kamil sold his official car as he travels by bike anyway, and with the money saved he has financed a new refuse collection vehicle. He has instigated the creation of new parks, and every Sunday he visits poor families to listen to their problems – for which he then tries to find new solutions.

So Kamil is still doing the same thing he started with Bandung Creative City Forum (BCCF). The BCCF is not only about overcoming problems, it is also about community exchanges in general. Naturally, with Indonesia being Guest of Honour at the Frankfurt Book Fair in 2015, this also includes literature. “At Simpul Space, where we have regular community gatherings coordinated by the Simpul Institute (one of our main programmes), there is also a literacy club for the youth, and occasionally book discussions for women, young people, and so on,” says Fiki Satari, the new Chairman of BCCF. “Reading clubs and independent bookshops have contributed to our events,” he adds. Traditionally, shadow plays, which are currently experiencing a revival, and oral storytelling have both had an important role in Indonesian culture.

BCCF Chairman Satari also owns the clothing brand AirplaneSystm, which he has managed since 1998. So what does he think we Europeans can learn from Indonesia, and from Bandung in particular – is there some special kind of Indonesian creativity? “A number of factors have influenced the characteristics of Bandung as a creative city,” he says. “But our main capital [consists of] people, ideas and place.” As 70% of Bandung’s citizens are below the age of 40 – he explains – the large pool of young, energetic people forms a major part of the city’s capital; ideas are important because most of those young people are well educated and possess curiosity; and place plays a part because there are numerous locations in the city where communities can express themselves.

The BCCF itself is one of the important places. But other institutions also have an important role in the creative boom. In the Indonesian context this is reflected in the titles of ministers, with, for example, a Minister of Tourism and Creative Economy. Additional support for the Creative Cities’ idea comes from the government, institutions like the British Council, and above all about 50 institutes of further education. Of the universities, the Bandung Institute of Technology (ITB) – popularly known as “the MIT of Indonesia” – is viewed as the most important.

Tyovan Ari attests to the significance of ITB – and not just because he regularly gives seminars there. Ari, who describes himself as a “technopreneur”, spends most of his
time in the capital, Jakarta. “Jakarta is good for business and Bandung’s good for creativity,” he says. Among the places laying the foundation for this is ITB, where it is possible to study almost any subject. Mayor Kamil qualified as an architect here; others study business administration, engineering or fine arts.

When it comes to succeeding as a “Creative City”, how important are the roles of the government and the municipal administration, or of institutions like the British Council and ITB? “They’re very important,” says Ari, “but the government can’t do all the work alone, without support from the public and private sectors.” Ari’s career began while he was still in senior high school. “I started my company with just 10 US-dollars as capital. I’m not from a rich background, my parents earned less than 100 dollars a month at the time,” he remembers. Indeed, they couldn’t afford the money for his school fees. “Just to buy a book, I wouldn’t eat for a week.”

That’s why Ari decided early on that he would earn his own money. He started by running a local news website for the residents of Wonosobo. Later, he designed websites and developed software for companies. Soon he was getting commissions from ministries, and not long after that, even from the president of Indonesia. For him, the successful young entrepreneur created a highly confidential “reporting and coordination system, with which the president could also access the information using his mobile device.”

All this, which sounds like a career spanning decades, happened in just a short space of time. Tyovan Ari is only 23. He has already fulfilled one of his dreams: “At the beginning I told myself, someday I’ll go to Silicon Valley, I will learn there and I will take a picture in front of the Google office. And, yes, finally it’s happened.” Now he has other dreams, and he’s inspiring his own students at the University of Bandung to follow theirs. “For me, life is: Dream. Believe. Action. If you have a dream you should believe in your dream and go outside of the building, take action!”

And the white tiger in the computer game, on which the figure of Acra glides through the city? That is the symbol of the city, appearing on its coat of arms. The tiger is crouched, ready to spring; with this spirit, Bandung may well soon be the next UNESCO Creative City.

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The theme park devoted to the Chinese classic *Dream of the Red Chamber* was designed by Japanese architect Arata Isozaki. © Jiangsu Red Chamber Dream World
Under Trending Topics we take a closer look at how literature – with a capital L can be exchanged between East and West and what innovative forms of marketing there are. Chigusa Ogino of the Tuttle Mori Agency in Japan tells us how she manages to enthuse Asian readers for Western literature and why this task is getting harder and harder in Japan. We ask: Are Chinese social media platforms an appropriate tool for the promotion of contemporary British authors like David Mitchell? Sophie Rochester of the Literary Platform thinks so. And: The chinese classic The Dream of the Red Chamber will reach its readers via a giant theme park and an international marketing campaign.
To do their jobs well, rights professionals, scouts and sub-agents must constantly keep an eye on reading and publishing trends in all corners of the globe. There are periods when the give and take of rights sold vs. rights acquired is skewed in favour of one particular country or region, but is it possible to identify and predict these cycles? And do these imbalances speak to impenetrable cultural differences, or are there ways to bridge the gaps?

A TIME OF SELF-REFLECTION
IN JAPAN

The 1980s and 1990s marked the heyday for rights sales to and from Japan, strengthened by the explosive popularity of manga in Europe, the USA and in other countries in Asia. Chigusa Ogino, director of the Tuttle-Mori Agency in Japan, says that her agency has been selling manga titles all over the world since 1992. Though the international manga market has trailed off over the last 10 years, some series continue to attract a cult following, one example being Eiichiro Oda’s One Piece, which has more than 340 million readers worldwide.

“Now we constantly reach more than 30 languages for any given major hit manga title published in Japan,” says Ogino. In the years that followed manga’s first international success, some major Japanese comic publishers even began setting up in-house rights divisions and established US subsidiaries, such as Shogakukan’s Viz Communications. (To find out more about the worldwide appeal of manga, see the article “Why is Asian Culture so viral?” in this issue of FQ).

While there are no clear statistics showing the balance between titles translated into Japanese and those sold by Japanese publishers for translation into other languages, Ogino estimates that works in translation represent less than 10% of the entire Japanese market. Given that one in every four books published in Japan is a manga title, Ogino believes that Japanese publishers are nowadays selling more rights than they are buying.

“We are experiencing a shrinking market in terms of translations in general,” she says, and adds that most of the titles translated into Japanese are from English (US and UK), with far fewer titles being acquired from Europe or other Asian countries. Some foreign series have stood the test of time in Japan. The Moomins from Finland provide a good example, in the year that Finland – and the world – celebrate the 100th birthday of their author, Tove Jansson (including at Finland’s Guest of Honour appearance in Frankfurt). There are, however, several reasons why Japanese publishers are acquiring fewer and fewer

By Siobhan O’Leary
titles for translation. Of these, one stands out in particular.

According to Ogino, Japanese readers have become much more introspective since around 2000. “The readership in Japan has been focusing more on its domestic authors and titles and interests, and finds it less interesting to learn what’s taking place outside of Japan,” she says, adding that this is a stronger trend in Japan than in Korea or China. Post-war baby-boomers, who were fascinated by American culture, are getting older, and the younger generation is more interested in home-grown culture. “In simple terms,” says Ogino, “those mega best-selling titles around the world never take off in Japan, even if they do get published, and we end up being the only country where a given title is not widely popular.”

But are Japanese readers really less interested in what is going on in the world than they were before? Or is this actually what a “healthy” balance between rights sold and rights acquired should look like? Is there a distinction between pop culture and literature in terms of the titles that succeed in the Japanese market? Not according to Ogino, who notes that there are some very literary manga titles as well. The trends have changed, for sure, but the market is anything but stagnant.

**BRIDGING THE CULTURAL GAP WITH CHINA THROUGH SOCIAL MEDIA**

With the Chinese publishing industry having generated over twelve billion US-dollars in 2013, this is a market that all foreign publishers want to understand better. That was the motivation for the launch of the Found in Translation initiative last August, which seeks to identify and ultimately promote ways of overcoming the barriers faced by UK authors and publishers trying to enter the Chinese market. The difficulties they face are puzzling, given the tremendous international success of much of the UK’s creative content. What is that the UK publishers – and by extension, other foreign publishers – are failing to understand about cultural norms in China? Or is the problem a
different one, and is this a hopeless cause? A cultural gap doomed never to be bridged?

The twelve-month research project is funded by the Arts and Humanities Research Council, and is being undertaken jointly by the innovation charity Nesta and The Literary Platform, in partnership with the British Council and Douban, one of China’s biggest social media channels (200 million users per month), which is primarily focused on cultural content: films, books and music.

The project began with the launch of one of the UK’s most respected novelists, Cloud Atlas author David Mitchell, into the heart of China’s social networking scene. Extracts from two of Mitchell’s short stories, The Gardener and The Massive Rat, were published on Douban and readers were invited to produce their own translations. In the end, around 200 entries were submitted. A team of experts chose their three favourites, which were then put to a public vote. The winning translation is to be published later this year on Douban’s Read platform.

The Found in Translation team will publish a report later this year, using data they have gathered relating to the cultural preferences shown by the translators and voters, and how they interacted with Mitchell’s stories. As Sophie Rochester, CEO of The Literary Platform explains, “The report aims, for the first time, to map out the full Chinese publishing landscape in the digital era – from China’s traditional publishing system, looking at how digital is transforming systems and processes, through to China’s Online Literature platforms and mobile reading market. [It] considers how major digital transformation, which covers disruption of the translation processes and gatekeepers, and the impact of sophisticated reader engagement, could be creating new opportunities for British writers and publishers.”

For Chinese readers, social media is an important tool for finding out about foreign writers – in both the traditional print and e-book markets. However, publishers can still do more to market foreign titles through these channels. “Social media platforms play a critical role in forming Chinese consumers’ preference for cultural products like books,” says Hasan Bakhshi, Director of Creative Economy, Policy and Research for Nesta. “Our analysis of the Douban platform data is revealing how different groups engage with fiction in different ways, [it] will generate important insights for how British writers can develop an audience for their work in China.”

Perhaps more importantly, the initiative also aims to identify what interest, if any, the translation competition sparks in other British writing – in both cultural and commercial terms. While more specific data will be released later this year, one thing is already clear: the act of translating has the ability to engage readers and bridge cultures like almost nothing else. Even the imperfections of the translations submitted by some participants provide insights into to why fiction – particularly literary fiction – sometimes has such a difficult time crossing cultural boundaries.
It works the other way too: A Chinese classic goes (more) global

First published in the 18th century, The Dream of the Red Chamber is, by most accounts, one of the greatest works of Chinese literature ever written – and it even made it onto the Telegraph’s recent list of “10 best Asian novels of all time”. This epic novel (twice the length of War and Peace!) has even been published in 32 languages (including English), but in many ways it has been neglected by the world beyond China. The company Jiangsu Red Chamber Dream World is looking to change that.

In addition to releasing an interactive app to make the book more accessible to both a Chinese and an international audience, the company is going to great lengths to promote this work worldwide. “We have plans to promote our (digital book) internationally, and we interact closely with various bookstores, sellers and readers worldwide,” said Jin Wang, who heads up the company. Although the firm is concerned about overcoming cultural boundaries, it has prepared videos, music dramas and other forms of art and merchandise to increase interest among international readers. It has also conducted surveys of international readers and was encouraged by the results. “We have been invited by many famous museums, book fairs and bookstores, including the Goethe House and Shakespeare Memorial,” says Wang, “and we have plans to promote (the work Dream of the Red Chamber) worldwide this coming October.”

But, of course, generating interest overseas is not worth much without a healthy following at home. That’s why Red Chamber Dream World is launching a national tour this May and June, even inviting actors from the Dream of Red Mansions TV series, as well as the great-granddaughter of famous Chinese scholar Kang Youwei to promote the book with them. The greatest attraction of all, however, will be a theme park based on the book designed by the world-renowned Japanese architect Arata Isozaki. The park, which is currently under construction but near completion in the Jiangsu province, will feature actors who will live in character and mirror the hierarchy of characters within the novel itself – a truly immersive experience (and one that goes hand in hand with China’s new strategy for the creative industries – read more about that in our article “What are China’s creative industries?” by Jing Bartz).
Parents' day at a Kindergarten in Japan
Photo: (cc) Emran Kassim
Our Serendipity column is based, as always, on chance encounters. In this issue Juergen Boos, Director of the Frankfurt Book Fair, meets Eric Yang of the Asia Pacific Publishers Association. Their topic: why are Asian students so successful – and what part do Asian publishers play in that success? Their conclusion? It's all about education, stupid.
According to the PISA education study, the seven highest-performing countries are all in Asia. Juergen Boos, director of the Frankfurt Book Fair, and Eric Yang, head of the Asia Pacific Publishers Association (APPA), discuss the reasons why Asian “tiger mothers” seem better prepared for educational competition than their Western counterparts – and which aspect of this success is due to educational materials from Asia.

Frankfurt Quarterly: Asia is well ahead in all things related to education, as a look at the latest findings of the OECD’s PISA study confirms. Why is this?

Eric Yang: This is a historical fact. Traditionally Asians are very focused on giving their children an education, something that has been affected for many centuries by the teachings of Buddhism and Confucianism. In the nineteenth century these Eastern influences mixed with Western ones. Formerly isolated, under pressure from the West – especially the USA – Japan opened up after 1850. The various Japanese “diplomatic missions” were a symbol of this, especially the famous Iwakura Mission, which involved Japanese scholars travelling to Europe in order to learn about Western countries’ success. Based on this, the Japanese remodelled their culture on Western values. When Japan became one of the leading industrial nations after World War II, China and Korea tried to emulate the Japanese success. A little later, during Korea’s economic boom, which lasted from 1961 to 1996 (also labelled “the Miracle of the Han river”), other Asian countries started to emulate Korea in turn: Indonesia, Thailand, Burma, Mongolia and others all clearly understood the value of education for their children. Today, Seoul is dubbed the “bandwidth capital of the world” and is catching up with other Asian cities, such as those in India that started the race for digitization as early as the 1970s. Ed.

Consequently, Asian publishing now enjoys strong ties with the West, but also with Asian countries. APPA intends to strengthen these interconnections. The publishing industry worldwide is now led by the USA and some European countries. We want to set up a similarly powerful network for the Asia-Pacific region. For example, until now, the content for most educational materials used in Asia has been obtained from Western markets. We need local content, because it is important for students to learn things related to their own culture.

“ASIA HAS A STRONGLY GROWING, YOUTHFUL POPULATION, AND ASIAN COUNTRIES HAVE UNDERSTOOD THE IMPORTANT ROLE OF EDUCATION.”
Juergen Boos

“We need local content, because it is important for students to learn things related to their own culture.”
Eric Yang
the translation of Asian works for the English language market.

What can publishers worldwide learn from their colleagues in Asia?

Eric Yang: The Asian emphasis on education is mirrored in the publishing industry, where the educational market is very strong. Asian educational materials are different from those in the West. The biggest difference—and the key reason for the Asian publishers’ success—is the emphasis on after-school teaching materials. The three biggest educational publishing companies in Korea, for example, all built their success on the production of very progressive after-school products: Daekyom (“Big Education”), Kyo Won Creative (which occupies 49th place on the Publishers Weekly list of the 60 biggest global publishers) and Woongling (“Think Big”).

The revenue of each of these companies exceeds EUR 100 million per year. A similar approach is taken by the Japanese company Kumon, the world’s leading supplementary education provider with over four million students from almost fifty countries. Kumon works with personalized online materials and personal tutoring.

The publishers’ strategies have changed Korean parents’ lives. Before, parents used to spend a lot of time learning with their children, but since the three big educational publishers set up their supplementary educational programmes, parents have started sending their children to afternoon school institutions rather than investing their own time.

Recently, the governments of Korea and Japan entered the supplementary education market. This was because the growing importance of the private education system was leading to greater inequality between citizens. The two countries started to use public TV stations instead of private companies, to teach all subjects to people of almost all ages. In Korea, the government invested in the public broadcasting station Education Broadcasting System (EBS), which
has ambitious plans to become the world’s biggest education provider. Nevertheless, Korea’s preschool and primary school markets are still largely left to the three private publishers.

Juergen Boos: Asia has a strongly growing, youthful population, and Asian countries have understood the important role of education. The state is often the most important buyer of educational content. What is also exciting is the seamless integration of technology and content. In Korea, for example, there is a growing number of cyber universi- ties specialising in online education and offering innovative forms of teaching, such as Massive Online Open Courses (MOOCs). This natural way of integrating technology and all types of media into teaching and learning seems to be typical even for small children’s education. [See also Company profile: Egg Publishing]

The West can learn a lot from this adaptability, but also the value of education for society. In Korea, the education market constitutes about 65% of the overall publishing market. I also think that Asian “tiger mothers” and Western parents have a lot to learn from one another [Battle Hymn of the Tiger Mother was the title of the book by Chinese-American author Amy Chua, which prompted a heated debate around the world in 2011. Ed]. Perhaps this will help us all develop an education system that is both effective and enjoyable – and which doesn’t lead to the high suicide rates amongst pupils and students that we currently see in Korea. Meanwhile, the Asian region as a whole is becoming increasingly self-confident, developing strategies for the production and export of its own intellectual property – which is also an exciting prospect for Western publishers.

Indonesia will be Guest of honour at the Frankfurt Book Fair in 2015, China was in 2009, and Japan was in 1990. Would it be beneficial in future to feature the whole Asia-Pacific region
more prominently at events like the Book Fair?

Juergen Boos: Yes, we are currently working on our own Asian focal area in Hall 4 at the Frankfurt Book Fair 2015. For the first time, all the Asian countries will be highly visible and presented right in the centre of the exhibition area. The main underlying factor in this development has been the great interest shown in the Asian region around the world, as well as the fast-growing business between Asian companies. This new position at the Book Fair will bring Asia closer to the German and English-speaking markets, and also to the Education and Science, Technology and Medicine (STM) publishing areas.

Eric Yang: Yes, definitely. If there is any possibility of presenting the whole of the Asia-Pacific region together, this would open up a new era. It would be a good opportunity.

How is the Book Fair involved in East Asia – and are there any plans for the future?

Juergen Boos: We have very strong commitments in the region. We’ve been working on a prestigious expert programme with the Taipei Book Fair; in Tokyo, we are hosting an event in June on the theme of globalisation; and in China we are planning an STM-focused programme at the Beijing International Book Fair. We are currently involved in negotiations in Singapore and Jakarta about a programme of further education. Together with the city of Incheon in Korea, we have just agreed on collaborative efforts to strengthen the publishing industry there. Incheon will be UNESCO World Book Capital in 2015.

Last but not least, our StoryDrive Asia conference is being held in Beijing for the third time. This has already become the most important meeting place in the region for cross-media and transmedia storytelling. And, of course, it is due to our great interest in Asia-Pacific that we recently became the very first Western member of APPA.
**MAY WE PRESENT? COMPANY PROFILE:**

**EGG PUBLISHING & ENGLISHEGG**

**BUSINESS AREA:** educational content for pupils, English language learning, early age groups

**EMPLOYEES:** 500, in 50 institutes throughout South Korea

**ANNUAL REVENUE:** USD 30 million, mainly from books and other content

**PARTNERSHIPS:** international expansion since 2013; currently Egg Publishing is about to sign contracts with players in six or seven countries, among them a major distributor in the USA.

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**EGG PUBLISHING CEO, MINWOO SONG, TALKS ABOUT THE SOUTH KOREAN EDUCATION MARKET AND HIS OWN COMPANY:**

Interest in English and other foreign languages is particularly high in South Korea. The largest share of this market is aimed at the 3-5-year-old age group, a market segment worth around a billion US-dollars. This figure reflects the education fever among Korean parents. EnglishEGG is a company that makes and publishes content that can help children learn English at an early age – often alongside their mother tongue. Our content focuses on frequently used expressions, and it emulates the ways children think in the USA. This makes it unique.

We have the content tailor-made, and use music as a powerful tool. For musical input we cooperate with composers and performers of Broadway musicals, whose songs help kids remember whole stories when they sing along. Our books, audio books and videos are closely interconnected, not only in terms of content, but also in their design. We are currently ranked at no. 1 for young children’s English education here in Korea, and our goal is to become no. 1 in the world.

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**MEET MINWOO SONG**

YOU CAN MEET MINWOO SONG OF EGG PUBLISHING AT THE FRANKFURT BOOK FAIR, 8–12 OCTOBER.

Find out more at the company website: [WWW.ENGLISHEGG.CO.KR/ EN/](http://www/englishegg.co.kr/en/)

JOIN THE CONVERSATION:

WHAT IS APPA?

APPA stands for the Asia Pacific Publishers Association. It was founded in 1993.

14 MEMBER COUNTRIES: Brunei, China, East Timor, Indonesia, Japan, Korea, Malaysia, Pakistan, Papua New Guinea, the Philippines, Singapore, Sri Lanka, Thailand, Vietnam

ASSOCIATE MEMBERS: Taiwan International Book Fair, Frankfurt Book Fair (joined in 2014 as the first Western member of APPA)

PRESIDENT: Mr Eric Yang, CEO of RHK and Tabon Books, former vice president of the Korean Publishers Association and founder of the Eric Yang Literary Agency.

THE REGION: The Asia-Pacific region spans a large geographical area, stretching northwards to Mongolia, southwards to New Zealand, eastwards to the island states of Oceania, and westwards to Iran. Countries range in area and population from some of the biggest and most populous in the world, including China and India, to smaller island states such as Nauru and Tuvalu in the Pacific Ocean.

The region is home to more than 4.2 billion people, or 61 per cent of the world’s population (UN ESCAP, 2011). As a result, development gains here will have a significant impact on global education prospects. Of the region’s total population, 17.9 per cent are youth. The Asia-Pacific region features a great diversity of ethnic, linguistic and religious groups, and than 3,500 languages are spoken. Over the past two decades, the region has sustained high economic growth rates, exceeding those of other regions. Consequently, it has become known as the “growth centre“ of the global economy.
Jing worked in China from 2003 to 2013. She first headed the German Book Office (GBO) of the Frankfurt Book Fair in Beijing, where she facilitated numerous large-scale projects between German, Chinese and international players in the publishing and cultural sectors. She also set up Frankfurt Book Fair’s fully-owned subsidiary in China. Later, as General Manager of Hachette-Phoenix, she established Hachette Livre’s first joint venture in China. Since summer 2013 she has been living with her family in Hamburg.

Siobhan is an independent consultant, translator and writer based in Berlin. She previously worked in the Foreign Rights department of the Crown Publishing Group (Random House) in New York and at the boutique publishing consulting firm Market Partners International. She has contributed to several trade publications, including Publishing Perspectives and Publishing Trends, and delivered talks focused on both the US and German book markets at the Digital Minds conference in London, Editech in Milan, and at the Frankfurt Book Fair.

Nina is chief editor of the Frankfurt Quarterly. Nina is a historian (M.A.) and a trained journalist. She finished her MBA studies in 2013, with a thesis on new business models in publishing. Nina was a print and radio journalist in Germany for over ten years before moving to Poland. There she worked as a radio journalist and as director of the Warsaw Book Information Centre (2004–2007). She joined the Frankfurt Book Fair team in 2008 as director of public relations. Since 2012 Nina has been an independent communications & business development consultant in Brussels and Frankfurt.

Rebekka studied book sciences and economics at the University of Erlangen-Nuremberg. She learned about the Japanese market during an exchange year in Japan and a short study scholarship and internship with the Kinokuniya book store. Rebekka is now an account executive with We Are Social Germany. She also campaigns for the future of the book industry with her project BuchKarriere - Dein Platz in der Buchbranche (Book career – your place in the book industry).

Alva is a freelance journalist and author who explores the world from Berlin. She regularly reports on the book industry and has been writing about trends in publishing for the Frankfurt Book Fair Blog since 2011.
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