



A VISION FOR TRANSFORMATIVE CHANGE IN THE PUBLISHING INDUSTRY

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Publishers Association

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A Vision for the Future of Publishing in the United Arab Emirates

The publishing and digital content industries can make a significant contribution to the social, cultural, and economic development of the United Arab Emirates.

Since the Islamic Golden Age when Bayt Ul Hikma assembled scholars who translated the knowledge of the ancient world into Arabic, the Arab region has had a strong tradition of acquiring and disseminating knowledge for cultural, social, and economic development. Today, the United Arab Emirates' (UAE) numerous initiatives to revive and renew our publishing industry continues this rich tradition of seeking, producing, and disseminating knowledge. The UAE's publishing industry remains a small but growing sector that can contribute much more to prosperity, national pride, cultural exchange, and innovation. The publishing industry is well placed to help achieve the goals of the UAE Vision 2021, including:

- * Contributing to national efforts to create a sustainable, diversified, high value-added economy;
 - * Improving educational outcomes & Arabic proficiency levels;
 - * Cultivating well informed and actively engaged citizens;
 - * Promoting a cohesive society proud of its identity with a strong sense of belonging;
 - * Building mutual understanding and trust between different cultures; and
 - * Creating high-value employment opportunities.
- * At this critical stage of the publishing industry's development, we must take a step back to review our progress and identify solutions to key challenges that are potentially preventing the industry from moving forward.

Publishing is an approximately 1 billion Dirham sector with 70% of revenue coming from foreign language titles, and 30% from Arabic titles.

Year of Circulation License Granted:



Source: United Arab Emirates National Media Council

The Emirates Publishers Association (EPA) proposes the following ten priorities as a basis for initial stakeholder discussions to gain agreement on the most pressing issues facing the publishing industry & advance joint solutions to move the industry forward. This document is a work in progress, & EPA plans to engage in an ongoing dialogue with key stakeholders on these priorities to enable the publishing industry to fully contribute to the social, cultural, & economic development of the UAE.

01

Aligning Stakeholders Around A Common Vision

With a common vision and increased stakeholder cooperation, the publishing industry can become an influential and integral driver of social, cultural and economic development in the UAE, Arab World, and beyond.

The UAE's growing educational, social, and economic gains over the past four decades have produced an increasingly globalized and educated population eager to consume an array of locally produced and culturally relevant content. This growing demand for localized content has inspired a number of small, entrepreneurial publishing companies to set up shop & incubated an emergent class of authors, illustrators, and creative professionals.

While the scope of the UAE's initiatives to improve the publishing industry is impressive, collaboration & coordination of the stakeholders tasked with implementation is lacking. Several challenges underscore the need for a shared vision & expanded stakeholder cooperation. For example, there are federal & Emirate level initiatives which could benefit from cooperation to reduce overlapping mandates & benefit from scale economies. Several initiatives are aimed at supply side interventions without sufficient attention being paid to distribution. Publishing & translation grants programs fail to incentivize publishers to enter more diverse genres in which there is a shortage of Arabic content. Additionally, the impact of successful initiatives launched at the Emirate level that can benefit from being scaled nationally remain localized.

Some steps to unify stakeholders around a common vision and promote collaboration are already being taken. In 2009, the EPA was established to increase collaboration amongst the UAE's

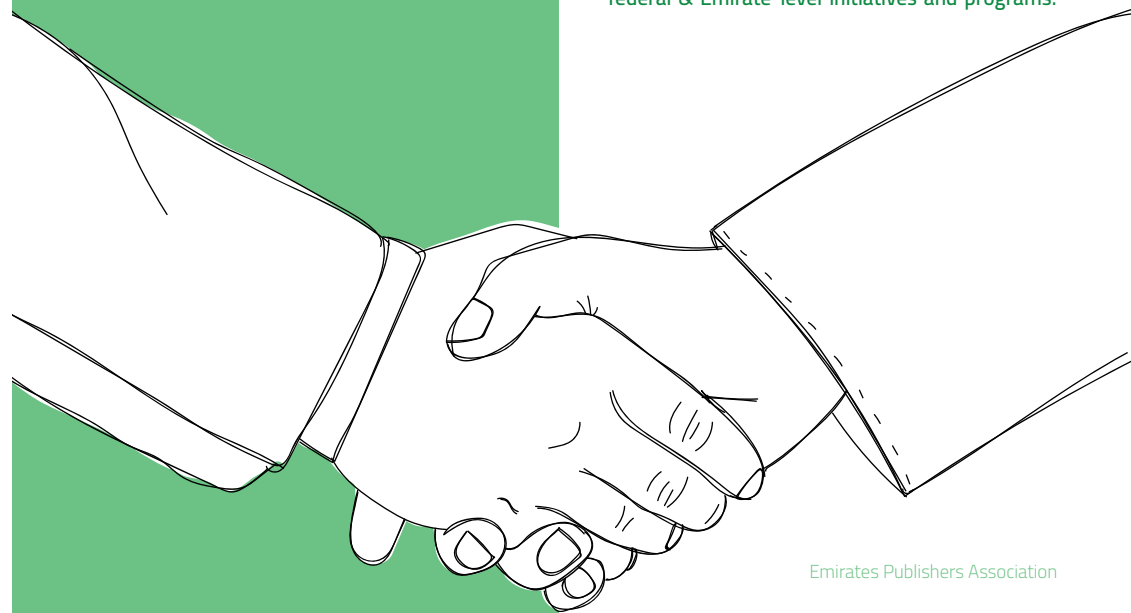
publishing industry stakeholders to address various industry challenges. Today, the EPA is the industry's most prominent advocate and has signed multiple memoranda of understanding with local institutions, regulators, & retailers in the UAE as well as international publishing organizations. Due to the EPA's advocacy efforts to draw national attention to the challenges faced by the publishing industry, a number of federal & Emirate-level initiatives & programs aimed at publishing and building a reading culture have been launched. The initiatives include two of the region's largest book fairs, one of the world's richest literary awards, thematic festivals for children literature & poetry, author and translator grants, & programs to build key infrastructure such as public libraries.

To keep up with the pace of the country's rapid development & evolving demand for new & diverse forms of content from our youthful, technology-embracing, digitally-empowered population, there is now a pressing need to integrate efforts to support the industry's promising future. By creating a common vision and gaining stakeholder support, we can ensure the establishment of an enabling infrastructure & environment for the UAE publishing industry to thrive.

The challenges faced by UAE publishers, while significant, can be overcome with cooperation. The publishing industry can achieve much more if the various stakeholders involved share a well-defined vision to steer collective efforts.

To address this challenge, the Emirates Publishers Association will:

- * Develop a thorough stakeholder analysis of industry members, government agencies, consumers, retailers, & other key institutions to understand the key interests of stakeholders and the challenges they face.
- * Encourage key publishing industry stakeholders to develop a nation-wide publishing agenda that prioritizes needs & challenges, identifies strategies for advancing the industry, assigns responsibilities, defines performance metrics, & establishes an implementation timeline.
- * Launch a stakeholder relations campaign to establish common ground with key stakeholders and promote legislative reforms to meet the evolving needs of publishers.
- * Publish an annual report on the state of the UAE's publishing industry to ensure the effectiveness of federal & Emirate-level initiatives and programs.



Becoming the Hub of Arabic Publishing

The UAE is well positioned to become a regional and global publishing hub due to its accessibility, business friendly environment, and thriving cultural landscape.

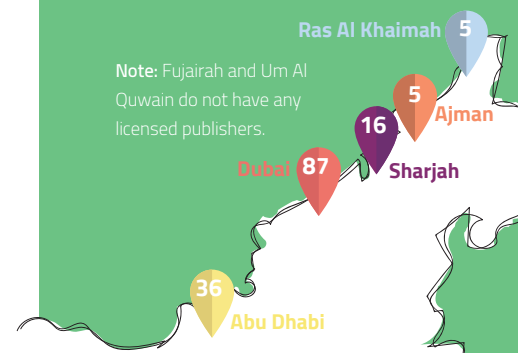
Over the past few years, a number of publishing and content creation companies have emerged in the UAE, but different segments of the publishing ecosystem remain weak. Weaknesses in the complex publishing and content creation value chain, which starts with artistic creation and ends with consumption, have prevented the UAE's emergent creative industries from meeting increased demand for Arabic content from local and regional markets.

A significant and growing array of programs at the federal and Emirate levels have focused on increasing the quantity and quality of Arabic content, promoting UAE publishers, and enhancing distribution channels. These include the Abu Dhabi and Sharjah Book Fairs, the creation of several awards such as the Sheikh Zayed Book Award, the digitization of several libraries such as the Abu Dhabi National Library and other public libraries like the Umm Suqeim Library, and the launch of several translation initiatives such as Kalima.

More must be done to integrate authors, translators, publishers, distributors, and retailers into a well-functioning cultural cluster. This will require stakeholders to work together to lower the number of permissions needed to operate, expand access to capital for newly created publishing companies, and promote the export of locally produced content. With several free zones dedicated to publishing and related creative industries, improvements in the business enabling environment can also position the UAE as a global hub for international and regional publishers, distributors, and other complementary creative sectors.

The UAE has 149 publishers licensed by the National Media Council. The majority of publishers are in Dubai and Abu Dhabi.

Publishers Licensed by the National Media Council by Emirate:



Source: United Arab Emirates National Media Council.

To address this challenge, the Emirates Publishers Association will:

- * Conduct a creative industries cluster study in partnership with the Ministry of Economy, chambers of commerce, and relevant free zones to map key sectors such as publishing and digital content, identify gaps and weaknesses in value chains, and resolve bottlenecks that prevent growth.
- * Engage with relevant Emirate-level and national authorities such as the National Media Council, Ministry of Economy, and Ministry of Culture, Youth and Community Development to streamline the process of a starting a publishing company.
- * Analyze the challenges faced by companies in the creative industries to engage with key stakeholders at the national and Emirate-level on specific policies and initiatives to improve the business enabling environment.
- * Work with relevant ministries to consider instituting a matching grants program focused on publishers to implement business improvement practices focused on export competitiveness.
- * Develop a targeted investment promotion strategy aimed at attracting regional and international publishers to UAE free zones or partnering with established local companies.

03 Improving the Legal Framework for Publishers

An enhanced legal framework will allow the publishing industry to play a vital role in enabling the UAE's aspiration to become among the most innovative nations in the world.

The UAE is a global leader in protecting intellectual property rights. In addition to world-class federal regulations, the UAE is a signatory to all major international copyright treaties and conventions. Despite the intellectual property protections offered in the UAE, few publishers choose to register their works.

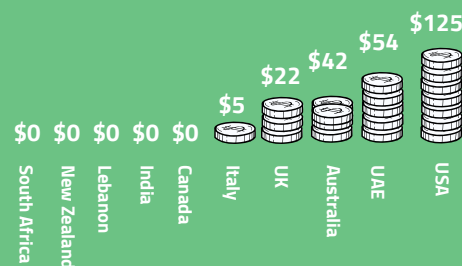
There are several measures which can be taken to strengthen copyright laws to more effectively protect publishers and contribute to innovation. Integrating protection of intermediaries and notice and takedown provisions into current laws would protect content intermediaries and ensure the internet can contribute fully to the diffusion of knowledge. Extending specific rights to reuse government funded copyrights for non-commercial purposes would provide open access to research and data carried out by the government itself and grant funded academic research. Extending the length of protection that copyright laws provide would bring UAE laws into alignment with global benchmarks. Enacting appropriate exceptions and limitations in anti-circumvention laws would further promote legitimate uses of copyrighted works.

A Reproduction Rights Organization that collectively represents the creative industries would enable authors, publishers, and content creators to focus more on their work than on rights management.

In line with national efforts to enhance government service delivery, the UAE has devoted significant efforts to integrating and streamlining government services. Unfortunately, publishers still face a time consuming and complex process to register their companies and take products to market. Future growth of the publishing sector will require streamlining company registration and title approval processes through a one-stop shop that enables publishers to register new businesses, attain and renew circulation licenses, apply for a copyright, and obtain International Standard Book Numbers (ISBN). Applying the same focus on efficiency and service improvement as has been implemented for other government services can make it easier for publishers to quickly and efficiently bring products to market.

The cost of obtaining an ISBN is set at the national agency level. In some countries, national agencies receive governmental or other funding which enables them to provide a free service to publishers. The cost of obtaining ISBNs has been cited by UAE publishers as a reason why they choose to obtain ISBNs from other Arab countries and for low usage. Several countries now offer free ISBNs to reduce costs for small publishers.

Cost of ISBNs in Selected Countries



Source: National ISBN agencies of applicable country

To address this challenge, the Emirates Publishers Association will:

- * Launch a stakeholder relations campaign to promote copyright law reforms that adequately protect the work of authors, content creators, & publishers.
- * Support Ministry of Economy efforts to establish an intellectual property rights center, which may mature into a Reproduction Rights Organization, that takes into account the concerns of authors, publishers, & digital content producers.
- * Work with relevant ministries to establish a one-stop shop for publishers to register new businesses, attain and renew circulation licenses, apply for a copyright, and obtain ISBNs.
- * Support the National Media Council's efforts to amend the circulation licensing process to accommodate eBooks and digital content.
- * Encourage the Ministry of Culture, Youth, and Community Development to adopt a lower-cost ISBN scheme and offer publishers the opportunity to purchase in bulk.

Increasing Diversity and Quality of Arabic Content

Increased efforts to publish quality Arabic books and digital content in a wider array of genres, subjects, and formats are required to meet rising consumer demand.

UAE publishers tend to focus on genres such as education, practical information, heritage, and children's books that have strong historical demand. However, responding to evolving consumer tastes and preferences will require publishers to branch out into new, more diverse genres. Helping UAE publishers and digital content producers meet local demand for quality Arabic content and reach international audiences will also require a better understanding of consumer demand, support in marketing and disseminating content, and industry agreement on consistent proofreading and editing standards to ensure translated works reflect an industry-wide focus on quality.

There are several initiatives in the UAE aimed at increasing the diversity and quality of Arabic content. The Abu Dhabi Authority for Culture and Heritage's Qalam program nurtures young Emirati writers, while its Kalima program is translating classic and contemporary international works into Arabic. The Abu Dhabi Tourism and Culture Authority, through its Spotlight on Rights initiative, provides translation grants.

The Mohammed Bin Rashid Al Maktoum Foundation supports Emirati writers through its Dubai International Writing Program.

The UAE Board on Books for Young People has partnered with the Goethe-Institut on a project

called Made in UAE which supports Emirati children's books writers, illustrators, and publishers. Despite the impressive number of initiatives focused on broadening the availability of Arabic content, many of these initiatives have not gone far enough to help publishers diversify into less traditional genres.

As one of the most digitally connected countries in the world, the UAE's youthful, technology-embracing, digitally-empowered population presents a significant opportunity for publishers and digital content creators to diversify into digital formats such as eBooks, apps, video, audio, infotainment, gaming, and e-learning. Responding to this demand with quality, localized, Arabic content will require many of the UAE's publishers to reconsider their business models to move beyond print towards digital formats that integrate digital and print content, are available on tablets, smartphones, and eReaders, and which supplement print editions with online content.

A recent consumer study shows that readers want a wider range of Arabic books and digital content. Preferred topics and genres vary by age group with readers becoming more interested in politics, religion, culture, and history as they become older. The narrow genre focus of UAE publishers satisfies only a small segment of the market indicating a significant potential for the industry to broaden its topic and genre focus to meet latent demand.

Preferred Topics and Genres for Reading By Age Group:

Suspense, Fantasy, Science Fiction, Classics	12-19
Cultural, Romance, Action, Horror	20-24
Religious, Cultural, Romance, Thriller	25-34
Religious, Cultural, Biographies Politics	35-44
Religious, Cultural, Arabic Literature, Historical	45+

Source: Mohammed bin Rashid Al Maktoum Foundation.

To address this challenge, the Emirates Publishers Association will:

- * Issue an annual report on consumer trends to inform the genre decisions of publishers and help them better respond to emerging opportunities.
- * Develop industry-wide translation standards which grade translations based on a scoring system to ensure industry-wide quality consistency and export competitiveness.
- * Work with relevant ministries and stakeholders to increase the number of initiatives that promote the exchange of translation rights for UAE-produced books and digital content.
- * Assist publishers to develop business cases for genre expansion and content development and seek grant funding from key stakeholders to minimize the risk of growth.
- * Work with key stakeholders to launch a national book and digital content industry development program that assists publishers moving from print-based business models to business models that support digital products.

Developing Quality Arabic Teaching & Learning Materials

Quality, culturally appropriate Arabic teaching and learning materials will enable more effective teaching and learning.

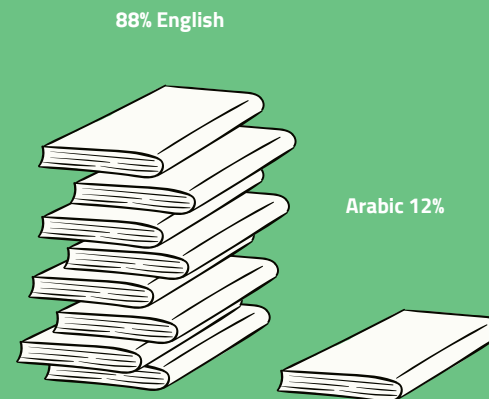
Print and online learning materials encapsulate the values of nations and are used to transfer knowledge and social norms to younger generations. Therefore, we cannot continue to rely upon the importation and translation of educational materials from abroad.

In developing quality, culturally appropriate Arabic teaching and learning materials, UAE educational publishers are critically important. Given their access to authors, pedagogical expertise, and experience with leading-edge technologies, publishers are uniquely positioned to support relevant ministries and government authorities in enhancing the quality of Arabic teaching and learning materials.

Recent government led initiatives such as the Ministry of Education's Interactive Digital Learning Material program, Horouf, and other author support programs such as Qalam have all contributed to enhancing teaching and learning materials. However, the role of educational publishers must be expanded to allow for earlier involvement at the planning stage of future programs to ensure improved alignment of educational materials with national curricula.

While many UAE publishers have begun to focus on publishing books and digital content for children, there still remains a shortage of quality Arabic educational materials. Addressing this challenge will require harnessing technological advancements in the development and dissemination of learning materials, expanding the publication of Arabic textbooks and e-textbooks for learners to use in the classroom or at home, developing print and online teacher support aids, creating curriculum supplements that enable flipped learning, and producing digital resources that complement lesson plans.

A recent study found that the majority of children in the UAE prefer reading in Arabic. However, a lack of genre diversity in Arabic children's books and online content forces children to consume English publications and media. The trend of young children increasingly consuming English-language content is negatively impacting Arabic proficiency levels of youth.



المصدر: مؤسسة محمد بن راشد آل مكتوم

To address this challenge, the Emirates Publishers Association will:

- * Work with the Ministry of Education, other relevant ministries, Emirate-level government entities, the Arabic Language Advisory Committee, and teachers to review curriculum standards and identify opportunities for publishers to develop complementary educational materials.
- * Engage with the Federal National Council's Education, Youth, Media, and Culture Committee and other relevant government entities with the aim of expanding the use of technology in the classroom.
- * Partner with the Ministry of Education, Abu Dhabi Education Council, and Dubai's Knowledge and Human Development Authority to develop online teacher development and support platforms in Arabic to disseminate resource materials.
- * Collaborate with the Abu Dhabi and Sharjah Book Fairs to provide training to publishers on new publishing technologies in the education .

06 Encouraging Reading for Pleasure

Encouraging reading for pleasure can improve the educational success of our children and inspire citizens committed to fulfilling their role in building our nation.

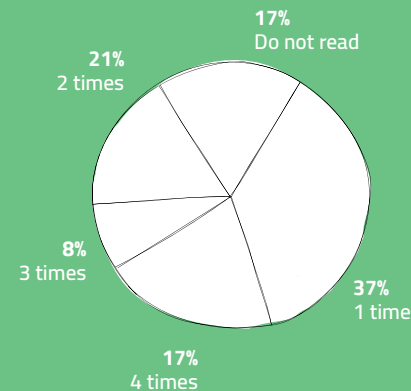
Several studies of UAE readers have found that a national culture of reading for pleasure is still in its early stages. Reading, while considered important to education and personal development, is generally viewed as a duty rather than as a pleasurable pastime.

In building a culture of reading for pleasure, several UAE initiatives have been launched to instill positive reading habits from an early age. Abu Dhabi's Kitab Bus program is a multi-stakeholder partnership to operate a national mobile library which travels to urban and rural areas to encourage children to read. The Sharjah Government's Knowledge Without Borders initiative and the Mohammed bin Rashid Al Maktoum Foundation's My Family Reads program are distributing books to Emirati families across the country to highlight the importance of reading to early childhood development. However, there remains a significant number of children who continue to view reading as difficult and boring and primarily for the purposes of studying rather than as an enjoyable way to spend time.

Parents & family members have a particularly important role to play in encouraging children to read for pleasure. Parental involvement in their child's literacy practices is the single most important factor in shaping children's reading attitudes and behaviors. However, recent studies show that comparatively few parents in the UAE read to their children or encourage their children to read. We must work together to make every home in the UAE a place where parents read to their children. For a culture of reading for pleasure to take root, we must also work harder to create a society in which citizens see themselves as participants in a community that views reading as an enjoyable activity.

Approximately 54% of students in the UAE read 1 time per week or not all. Many UAE youth view reading as difficult and boring and primarily for the purposes of studying rather than as an enjoyable way to spend time. Targeted interventions are required to change the attitudes and behaviors of UAE youth to create a culture of reading for pleasure.

How Often Students Read In A Week:



Source: Sheikh Saud bin Saqr Al Qasimi Foundation

To address this challenge, the Emirates Publishers Association will:

- * Work with relevant ministries and stakeholders to develop a nationwide reading rewards programs to increase reading motivation and reinforce reading for pleasure as a national value.
- * Engage the Ministry of Social Affairs to include reading indicators into the Family Cohesion Index for monitoring national progress towards the goals established in UAE Vision 2021.
- * Work with relevant ministries and stakeholders to develop a national awareness campaign to educate parents about the importance of reading to their children and encouraging early positive reading habits.
- * Scale the Knowledge Without Borders and My Family Reads initiatives nationwide to provide Emirati families across the country with a library of books.
- * Continue supporting various efforts to provide free and discounted books and educational materials, particularly Arabic publications, to schools and libraries.

Improving Distribution and Retail

Book fairs and physical stores remain consumers' preferred shopping channels, but multi-channel sales and service experiences will be critical to adapt to new reading behaviors and the migration to digital publishing.

A fragmented and complicated distribution chain forces UAE publishers to rely on limited distribution channels to market and sell their products. While annual book fairs are preferred by consumers because they offer thousands of books covering a wide range of genres, UAE retailers are struggling to meet evolving customer experience expectations. Consumers have very little information about new releases. Bookstores do not offer sufficient variety in Arabic titles. In-store merchandising and promotion strategies favor imported English-language products.

The UAE's increasingly, digitally- connected, multi-channel buyers also have high expectations for convenience, information, and service which are not being met by publishers and retailers. A variety of initiatives to improve the consumer retail experience and adapt to emerging digital distribution channels have been implemented. Since 2008, Abu Dhabi's Kitab initiative has been working on a regional book distribution system to increase distribution opportunities for Arab publishers. Kitab has also provided training to publishers on digital publishing, pricing, print-on-demand, and online merchandising to enable publishers to adopt business-to-consumer

distribution strategies. The EPA is working to establish a limited distribution company for its members. In association with International Children's Book Day, the UAE Board on Books for Young People negotiated with leading book retailers to offer in-store promotions on new children's releases. Several entrepreneurial companies in the UAE have also taken steps to support the dissemination of Arabic content through digital platforms.

More can be done to improve and integrate distribution channels to enhance the consumer buying experience and produce significant new value for the publishing industry. The migration to digital publishing is rapidly transforming the publishing distribution landscape from a physical retail-dominated paradigm to one of integration and balance among multiple retail channels. This will require retailers to integrate consumer's online digital experience with the physical, in-store experience. Publishers will also need to adopt digital distribution channels as well as develop products for digital platforms.

Customers are demanding seamless, multi-channel sales and service experiences, but retailers and publishers have been slow to respond. Many of the UAE's top book retailers have merchandising and promotion strategies that favor imported English-language products and in-store purchases. For example, only one of the UAE's leading book retailers offers a wide selection of Arabic books on its online sales platform.

Number of Digital Arabic Titles Offered by retailers:

Magrudy's	9,750
Jashanmal	40
Kinokuniya	0
Virgin Megastore	0
BooksPlus	-
Borders	-

Source: Online sales channels of leading UAE book retailers

To address this challenge, the Emirates Publishers Association will:

- * Conduct a detailed analysis of the merchandising and promotion strategies of prominent book retailers to develop a set of best practices to improve consumer retail experiences.
- * Develop partnerships with major book fairs and retailers to collect retail sales information from point of sale systems to provide reliable sales information for booksellers, publishers, and other stakeholders.
- * Work with relevant ministries to publicly release statistics which would be helpful to the growth of the publishing industry in association with the federal open data initiative.
- * Develop a business-to-consumer sales portal for EPA members to market their titles directly to consumers.
- * Support existing efforts to develop a regional book distribution system to increase international distribution opportunities for UAE publishers.

Transforming Libraries

Libraries are important community centers that promote self-development and social cohesion, but they are currently underutilized and need support adapting to the digital age.

Libraries serve an important role in providing easily accessible sources of knowledge and bringing communities together to learn, socialize, explore their heritage, and educate their children. If libraries can reinvent themselves, their impact on individuals and communities will be significant. A recent study showed that less than half of UAE residents regularly visit public libraries. Another survey of high school students showed that only one-third of students regularly visit school libraries. A shortage of accessible libraries, outdated facilities, lack of collection diversity, and improperly trained staff are frequently cited as reasons for low visitation.

Over the last two decades, the UAE has made significant gains in upgrading its library system. In the late 1990s, UAE libraries were among the first in the region to move to an electronic indexing system. In 2001, children's learning centers which emphasize educational and cultural activities were established in several public libraries. The University of Sharjah and the Arab Libraries Federation hosted one of the first regional gatherings of librarians, and the UAE's national university system was the first in the region

to implement an inter-library loan program. These initial achievements have since been complemented by more recent initiatives to expand and Arabize collections, implement innovative programs to expand library access to underserved communities, and respond to increasing demand for digital resources. Such initiatives include the digitization of content and implementation of e-services for increased accessibility by public and university libraries like Umm Suqeim Public Library and New York University Abu Dhabi's library.

To more effectively meet the needs of communities, UAE libraries need to evolve beyond the traditional concept of the library as a restricted, quiet space to become community hubs where citizens learn skills and engage in new experiences. This will involve expanding digital services and integration of gathering spaces such as galleries, technology centers, meeting rooms, and retail shops. Libraries need more space for people to work collaboratively and engage in creative expression that fuels innovation. Transforming libraries will also require expanded efforts to bring library services to citizens via mobile services, kiosks, delivery, and loan programs.

The UAE's public library system serves over 500,000 visitors annually.



Number of visitors of the library systems:

Dubai Public Libraries 286,688

National Library 135,473

Sharjah Public Libraries 54,000

Ministry of Culture, Youth and

Community

Development Public Libraries* 40,350

Source: Dubai Statistics Center, Directorate of Libraries at the Department of Culture and Information in Sharjah, Ministry of Culture, Youth and Community Development

Note: * Includes public libraries in Abu Dhabi, Ajman, Fujairah, Ras Al Khaimah, and Um Al Quwain

To address this challenge, the Emirates

Publishers Association will:

- * Work with relevant ministries and stakeholders to conduct a national library facility needs and use assessment to develop a strategy to transform UAE libraries.
- * Convene publishers and key stakeholders to develop a system to provide librarians with information about new releases.
- * Support national and regional groups that can train and bring librarians together to discuss best practices such as the Special Libraries Association Arabian Gulf Chapter, Information Literacy Network, and Abu Dhabi Librarians.
- * Support the implementation of the Emirates National Catalog of Libraries initiative.
- * Work with relevant ministries to develop a public awareness campaign to promote library visitation and increase community awareness of library facilities and services.

Building National Pride & Intercultural Understanding

The Publishing industry is critical to preserving and celebrating the UAE's national heritage and fostering cross-cultural understanding.

Despite rapid socio-economic transformation, the UAE has maintained a balance between modern life and preserving foundational cultural and traditional values. However, cultural sustainability can only be achieved through intergenerational awareness. By providing enriched learning experiences and opportunities for creative development at a young age, publishers have an important role to play in educating youth to take an interest in their cultural heritage and identity. The publishing industry is critical to preserving and promoting distinctively Emirati cultural forms of expression like music, poetry, dance, and storytelling. At the regional and international levels, the publishing industry enables artistic talents to become cultural ambassadors to expand markets for UAE cultural industries & reinforce the UAE's image as a cultural hub.

Several agencies are promoting Emirati culture & intercultural dialogue through initiatives that focus on publishing. The Abu Dhabi International Book Fair and Al Ain Reads Book Show offer a range of cultural activities including lectures, literary debates, and educational sessions that target a range of age groups. In collaboration with the Ministry of Education, Dubai Culture is launching dedicated cultural centers at public schools to supplement curricula with information on cultural heritage, values, and traditions. The UNESCO-Sharjah Prize for Arab Culture has honored several Arab authors, poets, and

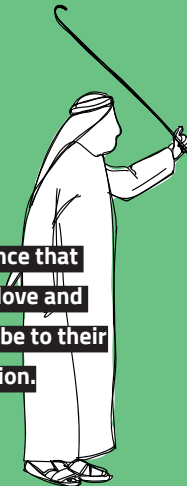
artists for their work in increasing knowledge of Arab art and culture.

To maximize impact, the various publishing initiatives focused on building national pride & encouraging intercultural understanding need to be enhanced, integrated & promoted within a national framework. Through the increased integration into the planning of federal and Emirate-level cultural strategies, publishers can play a much larger role in improving the quality of life & well-being of citizens, fostering creativity, & supporting cultural diplomacy. Publishers must be integrated into programs that use culture to enhance young people's learning & sense of national identity. Publishers can also play an expanded role in encouraging greater interest in culture by documenting Emirati cultural heritage. An increased emphasis on developing distinctive cultural content will also attract international cultural institutions & events to the UAE, promote mutual understanding, & position the UAE as a vibrant, global cultural hub.

The UAE has been successful in registering several cultural heritage practices on the UNESCO List of Intangible Cultural Heritage of Humanity. Publishers have an important role in encouraging greater interest in culture by documenting Emirati cultural heritage practices.



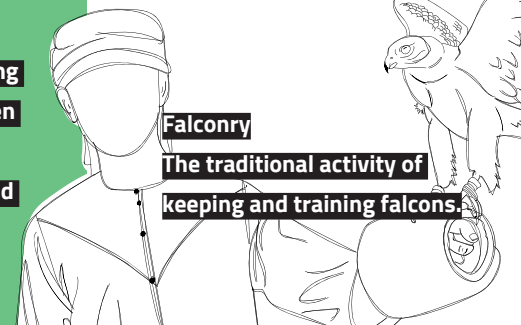
Al Taghrouda
Traditional Bedouin
chanted poetry.



Al Ayala
A traditional dance that
symbolizes the love and
loyalty of the tribe to their
country and nation.



Al Sadu
A traditional form of weaving
practised by Bedouin women
in rural communities to
produce soft furnishings and
decorative accessories for
camels and horses.



Falconry
The traditional activity of
keeping and training falcons.

To address this challenge, the Emirates Publishers Association will:

- * Partner with relevant ministries to introduce intergenerational programs that foster learning and exchange between older and younger generations.
- * Work with relevant ministries and stakeholders to integrate the publishing industry into national and Emirate-level cultural strategies focused on building national pride and encouraging intercultural understanding.
- * Engage with relevant ministries and stakeholders to develop and pilot interactive, cultural curricula to enhance youth participation in culture.
- * Support national engagement with UNESCO to implement the Convention for the Safeguarding of Intangible Cultural Heritage and include the UAE's written and oral traditions on the Representative List of Intangible Cultural Heritage of Humanity.
- * Continue supporting various efforts to position publishers and artists as cultural ambassadors and which provide opportunities for cultural exchange with other countries.

Developing Skills for Creative Industries & Cultivating Artistic Talent

The creative and cultural industries are an important and growing part of the economy and must be supported by the development of a highly qualified workforce.

The UAE's emerging publishing, digital content, and related creative industries require a workforce equipped with world-class skills. However, due to the youth of the creative industries, there are limited specialized education and training programs to develop the skills required by employers. The large number of SMEs in the creative industries and rapidly evolving technologies pose additional challenges to ensuring ongoing workforce skills sufficiency. Existing negative perceptions about specific types of technical education and career paths critical to the growth of the creative industries will require increasing awareness & understanding of available career options and overcoming societal perceptions on the value of careers in the creative industries. Over the past few years, several initiatives aimed at building creative skills & developing artistic talent were launched. Twofour54's tadreeb offers a wide range of courses in fields, such as digital media, game design, visual and web design, and animation, critical to the development of creative industries. The Dubai International Writers' Center is an international hub for writers to exchange knowledge and experience. The UAE Board on Books for Young People hosts capacity building workshops for Emirati and

Emirates-based children's book writers, illustrators, and publishers. However, further efforts to align the education system and other national and Emirate-level training initiatives with sector developments and the needs of employers is necessary.

While the UAE has made progress in building the necessary infrastructure to support creative talents, a significant obstacle to industry development will be attracting would-be artists, writers, poets, Immakers, and musicians to pursue artistic careers. This can only be achieved through the creation of a dynamic, collaborative, and supportive community of artists. Because so many of the potential career paths in the creative industries are new, increased collaboration between government, businesses, and other key stakeholders will be required to define specific occupations that face skills shortages and design specialized education and training programs to resolve shortages and mitigate skills gaps. Programs to attract youth to emerging creative industries are also necessary.

A recent survey of Emirati students and graduates from top universities shows that few are considering careers in creative industries. The growth and potential of the creative industries in contributing to the UAE's social, cultural, and economic development will require attracting more Emirati citizens to emerging creative industries.

Employer Popularity Ranking - by Graduates' Region of Origin:

Abu Dhabi

- 1- Mubadala
- 2- Abu Dhabi National Oil Company
- 3- Masdar
- 4- Emirates Nuclear Energy Corp.
- 5- Abu Dhabi Executive Council
- 6- Abu Dhabi Media Zone Authority (twofour54)
- 7- Abu Dhabi Water & Electricity Authority (ADWEA)

Dubai

- 1- Mubadala
- 2- Emirates Aluminum
- 3- Abu Dhabi National Oil Co.
- 4- Emaar
- 5- Al Tayer Group
- 6- Etisalat
- 7- RTA

To address this challenge, the Emirates Publishers Association will:

- * Work with relevant ministries to conduct a feasibility study to evaluate the need for specialized secondary schools that would focus on developing young artists, writers, poets, filmmakers, and musicians.
- * Conduct a study of the early stages of the creative value chain for key cultural industries to determine the sufficiency of support offered to artists, writers, poets, filmmakers, and musicians.
- * Work with relevant ministries & employers to establish creative industry skills councils to anticipate the need for skills in specific creative sectors and achieve a better match between the education and training system and labor market needs.
- * Partner with relevant ministries & other stakeholder to conduct a national employment skills survey of promising cultural industries to identify skills gaps & shortages.
- * Work with relevant ministries and other key stakeholders to provide information about the future trajectory of creative industries and promising career paths to attract students to emerging creative industries.

Moving from Vision to Implementation

Implementing this ambitious vision will require a true multi-stakeholder partnership committed to transforming the publishing industry.

This vision details a bold and unprecedented agenda of priorities and proposed initiatives to transform the publishing industry. The scope of proposed initiatives are intentionally broad to leave room for further refinement into detailed project plans focused on achievable results in cooperation with key stakeholders. Certain initiatives which promise significant impact without involving complex implementation challenges will be prioritized to build momentum for addressing more complex industry challenges and establish mutual trust between implementing stakeholders. Ultimately the EPA's focus is on convening stakeholders to fundamentally transform the publishing industry and position the UAE as the hub of Arab publishing.

Although the publishing industry has come a long way, together we must make a fundamental shift from often uncoordinated decision making towards joint planning and action to address the significant challenges holding back the publishing industry. Moving from vision to implementation will not be easy. There will be setbacks such as missed targets,

initiatives that may stall, stakeholders with opposing agendas, resistance to change, and emerging challenges that could not have been foreseen. Despite these likely setbacks, we must deliver to ensure the publishing industry can fully contribute to the social, cultural, and economic development of the UAE.

While the EPA can provide strategic leadership and direction in realizing this vision, it cannot transform the publishing industry on its own. The circulation of this vision doesn't signify the end of the planning and consultation process but the start to an ongoing dialogue. As we move towards implementation, we will work in full partnership with civil society, the private sector, ministries, and government agencies. We will continue to invite input before making decisions, encourage cooperation in delivery, seek regular feedback, and measure our implementation progress.

About the Emirates Publishers Association

Established in February 25, 2009, the Emirates Publishers Association (EPA) is a non-profit organisation dedicated to serving and developing the publishing industry in the United Arab Emirates (UAE) and to advancing the role of Emirati publishers through training and mentorship programmes and by improving publishing-related conditions and laws. EPA also aims to represent Emirati publishers at regional and international events, exhibitions and seminars on publishing.

EPA works to disseminate the UAE's intellectual output throughout the Arab world and worldwide. It focuses particularly on translations from and into Arabic, and the protection of intellectual property and related rights.

EPA is a member of the Arab Publishers Association and a member of the International Publishers Association (IPA).

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Emirates Publishers Association



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EMIRATES PUBLISHERS ASSOCIATION