

Nordic Countries

Report of the Exploratory Mission
June 6–10, 2011

Nordic Countries (Norway, Sweden, Denmark)

Report of the exploratory mission
organized by Livres Canada Books
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Canada 

Introduction

NORWAY

Norway ranked number 5 by the world Organization for Economic Co-operation and Development (OECD) in the *Better Life Index* of the top 10 countries to live in. (<http://momentsofnature.blogspot.com/2011/06/world-organization-for-economic-co.html>)

Books and reading are important in Norway. The Norwegian Booksellers Association and The Norwegian Publishers Association conduct surveys on Norwegian reading habits on a regular basis. The survey conducted in 2010 shows that 93% of the population reads one or more books in 2009, and 74% read books at least once a week. On average, each Norwegian reads 11 books a year. These numbers show Norway has a very high score on a European scale of reading.

Over 5,300 new titles were published in Norway in 2009. Over 40,000 titles are available for purchase. The Norwegian book market has an estimated gross value of NOK 6.2 billion, which equals CAD 1.1 billion.*

As of January 1, 2011, the Norwegian Publishers Association has 88 publishing house members, responsible for approximately 70% of the total revenue. Between 300 and 400 publishing houses publish material on a regular basis. The largest publishing houses in Norway are Gyldendal Norsk Forlag, Aschehoug, Cappelen Damm, Schibsted Forlagene and Det Norske Samlaget.

There are approximately 640 booksellers across the nation, giving the public easy access to booksellers in their district. Many booksellers are connected to a central chain of booksellers. The largest chains are: Ark, Norli, Libris, Notabene, Fri Bokhandel and Tanum. Booksellers accounted for 57.5% of the total book revenue in 2009. Norwegian booksellers are organized through The Norwegian Booksellers Association.

Every year the Norwegian Booksellers Association and the Norwegian Publishers Association arrange a large book sale across the country, the Mammutsalget. In this sale, readers can choose from over 800 titles. These titles are highly reduced in price, as they are not covered by the Bokavtalen, the Norwegian fixed price agreement.

There are two large book club systems: De norske Bokklubbene and Tanums Bokklubber. In total, these book clubs are responsible for approximately 10% of total book revenue in Norway.

Any other sales go through groceries and kiosks and through direct sales to consumers.

For distribution of books to booksellers, there are two essential distribution companies, Forlagsentralen and Sentraldistribusjon. Both companies distribute to all booksellers. The distribution price is fixed in order not to discriminate on distribution to the districts, so that the cost is the same regardless of distance. Books to groceries and kiosks have their own distribution companies. Central distributors for these are Bladcentralen and Interpress.

The ownership structure in the Norwegian book market is recognized by the ownership of three large groups which has ownership of several links in the value chain. The group Gyldendal ASA owns Gyldendal Norsk Forlag, the bookseller chain Ark, 50% of the distribution company Forlagssentralen and 48.5% of De Norske Bokklubbene. The group Aschehoug owns Aschehoug Forlag, the book seller chain Norli plus 50% of Forlagsentralen and 48.5% of De norske Bokklubbene. The group Cappelen Damm owns the bookseller chain Tanum, Tanums Bokklubber and the distribution company Sentraldistribusjon.

The members of The Norwegian Publishers Association and The Norwegian Booksellers Association have to follow the book agreement called Bokavtalen. In this agreement, there are fixed book prices for all books except school books. From January 1, 2011, eBooks and audio books follow the fixed price agreement. The period of fixed price lasts from the year of publishing until May 1st the following year. Through the Bokavtalen, booksellers can subscribe to the books of the members of The Norwegian Publishers Association and receive a special first edition rebate. Through this subscription arrangement, new literature is being made available nationwide.

* CAD 1.00 = NOK 5.60

When it comes to VAT, there has been an exemption for printed books since 1969. From 1995, this exemption has also included audio books. The book business works actively towards the goal that all types of books, regardless of format, should receive the exemption. The government still thinks there should be a full 25% VAT on eBooks.

Since the 1960s, new Norwegian literature has been purchased by the government and been made available to Norwegian public and school libraries. There are five different purchase schemes for literature. Through the purchase scheme for Norwegian fiction, all new fiction, novels, short stories, poetry and plays are purchased in the number of 1,000 (230 titles in 2009). The purchase scheme for fiction for children and young adults guarantees that all new books within this category will be purchased in the number of 1,550 books (135 titles in 2009). Important translated literature is being purchased (100 titles in 2009) and there are pur-

chase schemes for non-fiction for adults (65 titles in 2009) and for non-fiction for children and young adults (29 titles in 2009). The purchase schemes give authors higher royalties for the purchase scheme books, and contribute to giving the authors a predictable financial framework, especially when it comes to the fiction category.

Den norske Bokdatabasen (DnBB) is historically the leading bibliographic agency in the Norwegian market. The company offers a wide range of information services base on the meta-database Den norske Bokdatabasen. Lately, operations have expanded to include distribution of eBooks. Distribution of eBooks is offered with technical DRM or social DRM. DnBB is currently developing an eBook reader (web app) for the Norwegian market. DnBB is owned by the leading publishing houses, booksellers, and distributors in the Norwegian market. The company is located in Oslo.

Norwegian literature abroad

NORLA (Norwegian Literature Abroad, Fiction & Non-fiction) is a government-funded, non-commercial foundation that promotes Norwegian literature to other countries. The office was founded in 1978. NORLA facilitates contact between Norwegian authors and publishers and foreign publishers, translators, universities and others interested in Norwegian literature abroad. NORLA is in close contact with translators of Norwegian literature, arranges seminars in Norway and abroad for translators and publishers and offers travel grants for Norwegian authors and their translators.

Foreign publishers of Norwegian books may apply for a translation subsidy. Up to half of the translation costs may be financed by NORLA.

Between 2,000 and 2,500 books by Norwegian authors have been published in more than 50 languages with grants from NORLA since 1978. In 2010 NORLA received an overwhelming number of applications for translation grants, setting an all-time high of 351 applications. Subsidies for translation into 45 different languages were granted to 329 applications. Of these, 26 were translations into French, the same number as translations into English, only surpassed by Danish with 28 translations. Twenty-two applications came from Germany.

Background

(<https://www.cia.gov/library/publications/the-world-factbook/geos/no.html>)

Two centuries of Viking raids into Europe tapered off following the adoption of Christianity by King Olav Tryggvason in 994. Conversion of the Norwegian kingdom occurred over the next several decades. In 1397, Norway was absorbed into a union with Denmark that lasted more than four centuries. In 1814, Norwegians resisted the cession of their country to Sweden and adopted a new constitution. Sweden then invaded Norway but agreed to let Norway keep its constitution in return for accepting the union under a Swedish king. Rising nationalism throughout the 19th century led to a 1905 referendum granting Norway independence. Although Norway remained neutral in World War I, it suffered heavy losses to its shipping. Norway proclaimed its neutrality at the outset of World War II, but was nonetheless occupied for five years by Nazi Germany (1940–45). In 1949, neutrality was abandoned and Norway became a

member of NATO. Discovery of oil and gas in adjacent waters in the late 1960s boosted Norway's economic fortunes. In referenda held in 1972 and 1994, Norway rejected joining the EU. Key domestic issues include immigration and integration of ethnic minorities, maintaining the country's extensive social safety net with an aging population, and preserving economic competitiveness.

Population

4,691,849 (July 2011 est.)

Economy

The Norwegian economy is a prosperous bastion of welfare capitalism, featuring a combination of free market activity and government intervention. The government controls key areas, such as the vital petroleum sector, through large-scale state-majority-owned enterprises. The country is richly endowed with natural resources—petroleum, hydropower, fish, forests, and minerals—and is highly dependent on the petroleum sector, which accounts for nearly half of exports and over 30% of state revenue. Norway is the world's second-largest gas exporter; its position as an oil exporter has slipped to ninth largest as production has begun to decline. Norway opted to stay out of the EU during a referendum in November 1994; nonetheless, as a member of the European Economic Area, it contributes sizably to the EU budget. In anticipation of eventual declines in oil and gas production, Norway saves state revenue from the petroleum sector in the world's second largest sovereign wealth fund, valued at over US\$500 billion in 2010. After solid GDP growth in 2004–07, the economy slowed in 2008, and contracted in 2009, before returning to positive growth in 2010.

Exchange rate

CAD 1.00 = NOK 5.60

SWEDEN

Sweden ranked number 3 by the world Organization for Economic Co-operation and Development (OECD) in the *Better Life Index* of the top 10 countries to live in. (<http://momentsofnature.blogspot.com/2011/06/world-organization-for-economic-co.html>)

Four Swedes out of ten are daily book readers, and six out of ten read books every week. All studies of reading habits show distinct correlation between reading habits and sex, age and education. More women/girls than men/boys read books, younger than older people, and more with a higher education than lower. 46% of women read a book on an average day, only 30% of men do. It is hardly surprising that children of school age read more than adults. Among adults reading declines with age. Among people with higher education almost half, 49%, read a book on an average day, but only 23% among people with lower education. Only 4% say that they listened to book (CD or cassette) on an average day.

One explanation for the Swedish reading habits is the tradition. High reading ability, strong newspapers and libraries in most every municipality are

others. In addition people's basic habits change very slowly.

The reduction of VAT on books from 25% to 6% in 2002 was an immense injection for the book trade. It made all books 15% cheaper overnight and it was a major news item for several months, promoting books better than any advertising could have done.

The deregulation of the Swedish book industry on April 1, 1970, was the day when the Swedish book prices became free, meaning that retailers were from that day on free to set their own prices, without any influence from publishers. But several other important things happened at the same time: the commission system was abolished, the Publishers Association could no longer decide who had the right to be a bookseller, and the terms for returns and credit were changed.

Already in 1961 (almost 10 years before the deregulation) bookstores took care of 46% of total book sales, other retailers 11%, libraries and organizations 9%, and direct sales from publishers accounted for 34%. Publishers sold directly through reprint book clubs, door-to-door and mail order. Schools and libraries bought almost all their books through the bookstores.

In the last 50 years the whole retail trade in Sweden has changed dramatically (as has the retail trade in most countries). Many small stores cater-

ing to local needs have disappeared, and their places have been taken by a decreasing number of big stores, often run by chains. This structural development has been slower and less disruptive in the book market. This is of course due to the protection offered by the fixed price system and the gradual transition to free pricing, and to some extent to the subsidies aimed at helping the bookstores survive. Today more than 90% of the population in Sweden has a bookstore in their municipality or urban district.

Swedish literature abroad

The book trade handles primarily local products. Books in Swedish are to a very great extent sold in Sweden. There is some export to Finland, where a couple of hundred thousand people still have Swedish as their mother tongue. In Denmark and Norway people read more books in Swedish than the other way around, and in Copenhagen and Oslo you easily find current Swedish books. Books are also exported to university libraries and academic institutions in different places around the world where Swedish is taught.

Books are naturally imported into Sweden. About 90% of the imports come from the US and the UK. Books in German, French and Spanish make up most of the rest. Much of the import is academic books, primarily textbooks for students at universities, and for the university libraries. But the import also includes professional books, handbooks and fiction. The market share of imported books is increasing, but it is probably not more than 10% of total book sales in Sweden.

For the members of the Publishers Association exports make up 3% of total sales. That share is probably smaller for publishers who are not members. The export is not mainly books, but translation rights. Swedish literature sells well in neighbouring countries: Germany, The Netherlands, France and, lately increasingly, in the US and the UK. Revenues from abroad are a growing source of income for Swedish authors.

International co-production has been of great importance for the publishing of children's books in Sweden. Hundreds of titles annually this way reach readers in many countries. Books for adults are naturally also co-produced, but for those Sweden is importer rather than exporter.

During the last 10 to 15 years a new form of internationalization has occurred: Swedish acquisition of publishers abroad (Bonniers) and a growing interest among foreign publishers to invest in the Swedish book market (Liber/Wolters Kluwer). Most likely this development will continue.

Background

(<https://www.cia.gov/library/publications/the-world-factbook/geos/sw.html>)

A military power during the 17th century, Sweden has not participated in any war for almost two centuries. Armed neutrality was preserved in both world wars. Sweden's long-successful economic formula of a capitalist system interlarded with substantial welfare elements was challenged in the 1990s by high unemployment and in 2000–02 and 2009 by the global economic downturns, but fiscal discipline over the past several years has allowed the country to weather economic vagaries. Sweden joined the EU in 1995, but the public rejected the introduction of the euro in a 2003 referendum.

Population

9,088,728 (July 2011 est.)

Economy

Aided by peace and neutrality for the whole of the 20th century, Sweden has achieved an enviable standard of living under a mixed system of high-tech capitalism and extensive welfare benefits. It has a modern distribution system, excellent internal and external communications, and a skilled labour force. In September 2003, Swedish voters turned down entry into the euro system concerned about the impact on the economy and sovereignty. Timber, hydropower, and iron ore constitute the resource base of an economy heavily oriented toward foreign trade. Privately owned firms account for about 90% of industrial output, of which the engineering sector accounts for 50% of output and exports. Agriculture accounts for little more than 1% of GDP and of employment. Until 2008, Sweden was in the midst of a sustained economic upswing, boosted by increased domestic demand and strong exports. This and robust finances offered the center-right government considerable scope to implement its reform program aimed at increasing employment, reducing welfare dependence, and streamlining the state's role in the economy. Despite strong finances and underlying fundamentals, the Swedish economy slid into recession in the third quarter of 2008 and growth continued downward in 2009 as deteriorating global conditions reduced export demand and consumption. Strong exports of commodities and a return to profitability by Sweden's banking sector drove the strong rebound in 2010.

Exchange rate

CAD 1.00 = SEK 6.60

DENMARK

Denmark ranked number 6 by the world Organization for Economic Co-operation and Development (OECD) in the *Better Life Index* of the top 10 countries to live in. (<http://momentsofnature.blogspot.com/2011/06/world-organization-for-economic-co.html>)

In 2002, a total of 30 million books—or six for every member of the population—were sold in Denmark. Of these, one in every five was in English, perhaps indicating a dangerous trend. Statistics for 2009 show that the book market, like other sectors, had suffered a reduction of 9.1% in sales although the fourth quarter suffered less drastically with a fall of only 5.8%. These figures cover both the private and public sectors, including a surprising drop in book sales to schools. Figures for book clubs, where sales decreased by 19.5% for the year, show the largest decrease in the sector.

The situation in the book industry in Denmark is difficult, despite the large number of titles published each year. The book market is characterized by falling print-runs, rising book prices, and decreasing purchases by libraries. The living and working conditions of Danish writers depend very much on the situation in the book market, and the national policy reflects the concern for the improvement of the position of literature in the overall cultural field.

One of the most important institutions concerned with literature is the Danish Literature Information Centre (Dansk Litteraturinformati-

center), whose task is to promote Danish literature abroad. The Centre publishes information and bibliographies on Danish literature in English, French and German, as well as a guide to Danish children's literature and, twice a year, the Danish Literary Journal, a newsletter on Danish literature in English. The Centre administers funds allocated for translation grants and various literary activities.

The financial support for writers comes from special funds and foundations. Most of the foundations which give aid to authors are administered by the Danish Authors' Association and funding is distributed by the National Library Authority. Moreover, the Ministry of Culture maintains contacts with a large number of private foundations and societies which provide money for literary purposes.

Denmark's first Literature Act was adopted in spring 1996 and a Literature Council established in autumn 1996. The Council's task is to administer the new subsidy arrangements provided for the new legislation plus a number of existing schemes. The objective of the new legislation is to promote literature and access to literature in Denmark, while promoting Danish literature abroad.

Background

(<https://www.cia.gov/library/publications/the-world-factbook/geos/da.html>)

Once the seat of Viking raiders and later a major north European power, Denmark has evolved into a modern, prosperous nation that is participating in the general political and economic integration of Europe. It joined NATO in 1949 and the EEC (now the EU) in 1973. However, the country has opted out of certain elements of the European Union's Maastricht Treaty, including the European Economic and Monetary Union (EMU), European defense cooperation, and issues concerning certain justice and home affairs.

Population

5,529,888 (July 2011, est.)

Economy

This thoroughly modern market economy features a high-tech agricultural sector, state-of-the-art industry with world-leading firms in pharmaceuticals, maritime shipping and renewable energy, and a high dependence on foreign trade. Denmark is a member of the European Union (EU); Danish legislation and regulations conform to EU standards on almost all issues. Danes enjoy among the highest standards of living in the world and the Danish economy is characterized by extensive government welfare measures and an equitable distribution of income. Denmark is a net exporter of food and energy and enjoys a comfortable balance of payments surplus, but depends on imports of raw materials for the manufacturing sector. Within the EU, Denmark is among the strongest supporters of trade liberalization. After a long consumption-driven upswing, Denmark's economy began slowing in 2007 with the end of a housing boom. Housing prices dropped markedly in 2008-09. The global financial crisis has exacerbated this cyclical slowdown through increased borrowing costs and lower export demand, consumer confidence, and investment. The global financial crises cut Danish GDP by 0.9% in 2008 and 5.2% in 2009. Historically low levels of unemployment rose sharply with the recession but remain below 5%, based on the national measure, about half the level of the EU; harmonized to OECD standards the unemployment rate was about 8% at the end of 2010. Denmark made a modest recovery in 2010 in part because of increased government spending. An impending decline in the ratio of workers to retirees will be a major long-term issue. Denmark maintained a healthy budget surplus for many years up to 2008, but the budget balance swung into deficit during 2009-10. Nonetheless, Denmark's fiscal position remains among the strongest in the EU. Despite previously meeting the criteria to join the European Economic and Monetary Union (EMU), so far Denmark has decided not to join, although the Danish krone remains pegged to the euro.

Exchange rate

CAD 1.00 = DKK 5.35

Children's Books

Simon Payette, Éditions Chouette

Opportunities abound to increase the number of Canadian children's books translated into Swedish, Norwegian and Danish, given the very limited number of titles translated in the past. However, opportunities for the sale of rights to Canadian children's books appear more attractive for French-language publishers than for English-language publishers who must focus on direct sales of English titles. Indeed, Scandinavians have a very

good knowledge of English and will often prefer reading in English, particularly as English editions are less expensive than their translations. French-language publishers have more options regarding the sale of rights. Children's titles offer French-language publishers great opportunities for rights sales, but this requires that their titles stand out from the local literature. Norway, Sweden, and Denmark feature similar children's books within

Children's books published in Norway, by genre, 2005–08

	2005	2006	2007	2008	2005–08
Novels for young people	29	17	27	30	103
Novels for children/Illustrated stories	39	48	40	49	176
Thrillers/Detective stories	3	3	10	11	27
Fantasy	6	10	12	13	41
Easy Readers	26	29	31	25	111
Poetry	2	1	5	5	13
Short stories	4	2	2	1	9
Plays	—	1	—	1	2
Pictures books/Cartoons	31	31	33	41	136

Source: NORLA

different systems, but one thing is constant: the strength, quality, and originality of children's titles.

This exploratory mission travelled from Oslo to Copenhagen by way of Stockholm. We were fortunate to have received logistical assistance from the respective Canadian embassies. Support from the Livres Canada Books team was also very helpful. We had the pleasure of visiting major publishing houses, publishers' associations, bookstores and representatives from the Canadian embassies. Bjorn Petter Hernes from the Canadian embassy in Oslo has very close ties to the literary scene and

gave us some interesting contacts. Likewise, Annika Malmberg from the Canadian embassy in Stockholm, introduced us to the Swedish publishing milieu.

There are a great many similarities between the three countries in the way in which business is conducted. Obviously, punctuality is important. Also, we noted cultural similarities with Canada; for example, similar northern characteristics and a shared love for the wilderness. Moreover, these similarities are often reflected in literary themes.

NORWAY

Norway has a population of approximately five million with a per capita income of more than US\$50,000, one of the highest in the world. According to Den Norske Forleggeförening, the Norwegian Association of Publishers, 93% of the population read one or more books in 2009 and 74% read books every week. With more than 5,300 titles published in 2009, Norwegian literature is prolific in relation to its population. Of this number, Norwegian authors publish between 160 and 175 children's titles per year (see table above).

The Norwegian book market is extremely strong and well protected by a series of measures such as:

- A fixed pricing system is in effect from the date of publication to May 1st of the following year. This system has been applied equally to audio books and eBooks since the beginning of the year. Subsequent discounts are around 12.5%.

- VAT exemptions for books and audio books. However, eBooks are subject to taxes.
- A purchasing program administered by the Arts Council in which
 - 1,550 copies of 130 Norwegian children's fiction titles are purchased and distributed to public and school libraries;
 - 1,550 copies of 30 Norwegian non-fiction children's books are purchased and distributed to public and school libraries;
 - 500 copies of 100 translated adult and children's fiction titles are purchased and distributed to public and school libraries.
- A standard agreement in effect between the Association of Publishers and the Association of Writers in regards to royalties and translation costs (around 20% for fiction and 12.5% for other titles).
- Major grants available to writers and translators.

Despite these protectionist measures, a number of readers prefer to purchase books in English rather than Norwegian, since many Norwegians are fluently bilingual. Their decision is often influenced by their preference to read in the language of publication, as well as by the price of English books, which is half the price or even less than that of Norwegian books. Titles in Norwegian, whether translated or not, sell for slightly more than C\$46, or about three times the Canadian price.

However, it is clear children's books are much less impacted by this trend, with the exception of titles for teens. We suggest publishers already selling English titles in the UK get in touch with the distributor Schibsted, responsible for most of the English-language book distribution in Norway. It might also be possible to work through Gartner in the UK since they have a direct distribution agreement with Tanum, one of the five major Norwegian bookstores. The potential for Canadian packagers is also significant. Book/toy combos do not seem to be very prevalent yet, even though they are often the most visible items in bookstores.

Publishing, distribution and sales are often vertically integrated. The major publishers are: Gyldendal Norsk Forlag, Aschehoug, Cappelen Damm, Schibsted Forlagene and Det Norske Samlaget. Major bookstore chains include: Ark, Norli, Notabene, Fri Bokhandel and Tanum. Distributors to bookstores are Forlagssentralen and Sentraldis-

SWEDEN

With a population of nine million, Sweden is more densely populated than Norway but the per capita income is lower at almost US\$37,000. The Swedish book market is more receptive than the Norwegian market. However, the same trends of vertical integration and the decline of traditional sales channels in favour of Internet sales are evident. Sweden also seems to be experiencing a major crisis with a substantial 10% decline in sales since 2008, mainly due to the deregulation of the market. However, children's books are the only major category to escape this trend. In fact, despite a drop in the number of titles published in 2009, revenue generated by the sale of children's books increased. Of the new children's titles published each year, it would appear more than half are Swedish titles while the rest are translations from abroad. On average, a

tribusion while distributors to kiosks and grocery stores are Bladcentralen and Interpress. There are also two book clubs that account for about 10% of the market.

It was very difficult for us to evaluate the level of interest from the publishers we encountered. Our contacts were cordial and welcoming, but few responded to my follow-ups. However, those that did have demonstrated genuine interest and discussions on rights sales are advancing rapidly. High quality picture books and original fiction for teens and pre-teens appear to be of interest.

We had the pleasure of meeting Syerre Henmo and Grete Rygh, children's book publishers from Aschehoug and Gyldendal respectively. These two publishing houses are among the biggest in Norway and have a formidable history. They are vertically integrated and produce an impressive catalogue that includes all literary genres. They did however express an interest in high quality books with particularly original illustrations, and bestsellers. When we visited bookstores, it was clear the children's sections were much smaller compared to what we might find in Canada. Major translations originate in the UK. *Maisy* and the *Barbapapa* series are popular and successful children's books.

It should also be noted Norwegian publishers are extremely reluctant to embrace the eBook, which they generally perceive to be a major threat.

translated children's book could expect to sell around three to four thousand copies while a Swedish title would enjoy much stronger sales at around four to five thousand copies.

There are also a number of measures in effect to protect the players in the Swedish book industry and encourage the translation of titles into Swedish:

- Literature Funds
- Funds for translations (into Swedish; contact the Swedish Arts Council)
- Purchasing program of 5,000 copies of Swedish titles and 8,000 copies of translations
- Grants to participate in the Göteborg Book Fair, held at the end of September. Foreign authors and publishers are eligible (for more information, contact the Swedish Arts Council).

There are two major publishing groups concentrating more and more on distribution and retail sales. The major one, Bonnier, also controls the popular online magazine *Adlibris* as well as the main book clubs. We met with the directors of this firm that generates more than US\$2.2 billion in sales annually and whose CEO/President is a sixth generation Bonnier. However, the Swedish division is in the process of restructuring after an industry-wide decline in profits. They showed little interest in the translation of children's titles, with the exception of bestsellers. Obviously they have an impressive catalogue of all literary genres and international connections with a number of other publishing houses under their ownership.

Norsted, the major competitor, is part of a cooperative that controls the main bookstore chain *Akademikbokhandeln* and the second major website *Bokus*. We did not meet this publisher.

Our meeting with Forma Publishing, owned by B. Wahlström Förlag, was particularly interesting. Forma seems to be well versed in children's book publishing with a beautiful catalogue of popular titles as well as more specialized books. The publishing group also includes magazines and is also a major player in publishing books for teens and preteens. They also publish the *Barbapapa* series that seems to be an enduring success in Scandinavia.

We also had the pleasure of meeting with publishers from the Natur and Kultur publishing house. This firm was founded after the Second

Word War on the ideals of freedom of the press, democracy and education. The company is controlled by a foundation that allows them to pursue goals other than simple profitability. They are a medium size firm that publishes about 40 new titles annually. They publish extracurricular educational children's books as well as high quality picture books. They are the publishers of *Molly* and are also very receptive to new titles. They particularly welcome translations (almost 50% of their publications are translations).

Another phenomenon of note is the fear generated by the site *Piratebay.org*, created and located in Sweden. Publishers are extremely wary of this site that enables eBooks to be downloaded illegally.

The lower cost of English titles also seems to affect Swedish publishers. The sale of English books is growing while the number of translated titles is in decline. The Bonnier group reported that several years ago translated books represented about two thirds of their catalogue but only account for one third today.

Swedish children's literature is not primarily didactic; its main objective is not to teach. However it often employs amusing techniques to help young children learn. Children's books often depart from the conventional to address serious even risqué subjects. At the same time, there are many books whose sole purpose is to entertain and distract. Illustrations often employ non-traditional and childish techniques.

DENMARK

We did not have the pleasure of meeting with the Association of Danish Publishers; our information comes solely from two Danish publishers. However, these two publishers, Gyldendal and Lindhardt & Ringhof control significant market share. Gyldendal is one of the major publishing groups in Denmark and controls one of the most important Danish distributors. They publish primarily local or Scandinavian authors, but do have room for high quality translations and bestsellers. We noticed a number of similarities with their sister firm in Norway. Their catalogues are similar and they also publish *Maisy*. It is likely the group purchases translation rights for Norway and Denmark simultaneously, as they operate independently.

Lindhardt & Ringhof are the exclusive Danish publishing house under the umbrella of the major international group Egmont. This group seems to be focused primarily on popular, mass-market titles. Translations are more common and novels such as *Twilight* or historical fiction seem to dominate their list. However, the significant number of children's titles in their catalogue cannot be ignored and several titles seem to be more original than most.

It would appear the Danish book market does not enjoy significant protectionist measures. In fact, price controls were eliminated more than four years ago. There are, however, private funds designed to support Danish culture that offer finan-

cial support to publishers as well as grants for translating titles into Danish.

The Danish market is very close to that of Germany and the other Nordic countries that constitute their major markets for rights sales. Sales to book clubs and bookstores are in decline while sales in supermarkets have increased. This trend is due primarily to the lower price offered by supermarkets and has resulted in a decline in new titles in favour of bestsellers. There is no vertical integration with bookstore chains but integration does exist with the two major distributors.

An average print run seems to be about 2,000 copies while bestsellers often sell as many as 5,000 copies.

As we noted in Sweden and Norway, English books are gaining in popularity, although this trend is more significant in Denmark than in the other two Nordic countries. The English-language section typically occupies one third of shelf space in bookstores. English books retail for approximately one third the cost of Danish books. Translations

account for only one third of new publications. Translators generally receive royalties of 25% and are considered almost equal to authors.

The Danish eBook market is probably one of the most advanced in Scandinavia. Yet it still remains very modest to the point of being insignificant. At the same time, it must be noted that the animosity we noticed in Sweden and Norway regarding digital publishing was absent in Denmark. Publishers seem more receptive and willing to experiment.

It is clear that author presence and a connection between author and reader are particularly important in Denmark. Some books experienced huge spikes in sales when its foreign author visited Denmark, only to fall into oblivion once the author tour was over. Danish readers are particularly fond of difficult and controversial topics, even in the case of children's books. And in spite of everything, the market for children's books seems to be quite open to translations. Thrillers and semi-historical fiction for teens based on parallel universes seem to be particularly popular.

Trade Publishing

Jack David, ECW Press

I was walking along a street in Copenhagen when it came to me. The reason why it was so difficult to sell translation rights to Scandinavian publishers. And it was obvious: their populations were English speakers and readers, and when they could, they preferred buying English books from the originating publisher, usually in the UK or the US. These books were available sooner because there was no delay to secure the rights and translate the text, and they were usually cheaper than the Norwegian, Swedish, or Danish version. The original editions were available in bookstores where often 30% to 40% of all titles were in English. And they were available online as well.

After six flights and four countries (I also visited Helsinki before the mission), I had my answer. And this also provided the answer to the mystery of why Quebec publishers were having better luck with French translations. No competition.

I have about twenty business cards from Scandinavian publishers, five from our very helpful folks at Canadian embassies, two from representatives of the Swedish Arts Council, two from executive directors of the Norwegian and Swedish trade associations, and one from the Chief Buyer English Titles at Tanum, a very large Norwegian bookstore chain. We had twenty-some meetings, and began to understand the differences between book markets in all three countries. Norway, with 5 million people, has a very controlled system, with fixed book rates and government purchase programs. Sweden, with 9 million people, is looser, and Denmark, with 5 million, has the most open system. Finland, although a member of the EU (Norway is not), was not visited by the mission, and has a population of 5 million. Together, we're looking at 24 million potential readers, most of whom are able to read books in English.

NORWAY

First off, everything is really expensive. Bjorn, our trusty Public Affairs Officer, explained to me that North Sea oil, plus farmed fishing (they have lots of fjords that make perfect farms) has erased their debt, and given them lots of kroners in the bank. Oslo is an easy city to like, and we were treated to an interesting lunch at the Norwegian Publishers Association (NPA), and later that evening a long dinner, again hosted by our new Norwegian friends. They have fixed prices for their books, although after a year or so, they can discount. Publishers own distributors and bookstores, and no one seems too concerned about this (at least the owners). As with other Scandinavian countries, they are way behind the eBook 8-ball, although the big players also own the dominant eBook companies. Translations from Norwegian are supported at 50% of the cost by an organization called NORLA (Norwegian Literature Abroad). They also have a government sponsored book purchase program buying 1,000–1,500 copies of most all fiction,

SWEDEN

Off to Stockholm Tuesday night and an early meeting with a very supportive group from the Canadian embassy. They reminded us that the embassy was happy to make introductions, but after that a business was on its own. They do welcome the opportunity to host authors or launches. Next, off to the Swedish Arts Council (SAC). Publishers apply for support six months *after* a book has been published, on a title-by-title basis. If the book passes the quality test, then page count determines the final amount (up to C\$5,000 for fiction). There is also a book purchase program, less generous than the Norwegians', where 291 copies are bought for libraries. 1,700 titles are submitted and about 40% get purchased. SAC also has a translation program, and offers twenty-three travel grants for foreign publishers to attend the Goteborg Book Fair during the last week of September (May 1 deadline).

We had a lovely lunch at the Swedish Publishers Association, where we learned they had fought the EU 25% tax on books, and were now fighting the tax on eBooks. Kristina Ahlinder, the Swedish Managing Director, has been doing her job for the past fifteen years.

and lesser amounts of other genres; the books are distributed at no charge to the libraries, who sometimes complain that either they already have bought the book or that they should be the ones who choose what goes into their library (the program spends about 5.5 million Euros, annually).

We met with the two largest book publishers, Gyldendal and Cappelen Damm (Cappelen had bought Damm a few years ago). Both Gyldendal and Cappelen Damm complained that small publishers were able to price their books at whatever they wanted because they weren't part of the NPA (about 70% of all publishers). Gyldendal has introduced the concept of a "Termination List", that is the names of authors who they just can't continue to publish year after year if their books are not performing well. Overall, publishers' sales are falling, and bookstores are suffering, but they don't see strong eBook growth for some time although they are getting ready.

François and I then headed into Old Town down curvy cobblestoned streets into an alley/street, where we ducked into the office of Svante Weyler who, after a long history at Norstedt (the second biggest Swedish publisher) had started his own company. While at Norstedt, a journalist had been recommended to him, and came in with a plastic bag holding two manuscripts, with a third almost done. Five months later the author died. It was Stieg Larsson. Svante is fighting the little guy vs. big guy battle, both in terms of signing up authors and in getting visibility in the bookstores and the media. Some of the smaller Swedish publishers are talking about setting up their own association. Svante wondered why European publishers did 20% or 40% translations, while Americans did maybe 2%. Why, indeed. And the day ended at Forma where they publish about forty works of fiction, ten of which are Swedish originals. Mostly they do illustrated books, gardening and cooking, which they buy from Italy or the UK.

Next day our first visit was with the largest publisher in Sweden, Bonnier, who also owns TV stations, newspapers, magazines, and pieces of other

publishers. We met with Albert Bonnier, a sixth generation family member, and his editor in chief. You'll be delighted to know that Gutkind Hirschel, a German Jew, changed his name to Gerard Bonnier in 1804. It's still a family-owned business with 10,000 employees and 2.5 billion Swedish crowns in revenue. Anyway, 20 years ago about two-thirds of their list was translated works, and now it's about one third. They are buying less for translation now because the English versions come out earlier and cheaper. In fact, they are switching their translated books to non-English authors so they won't be competing with the US and UK editions. The number of bookstores in Sweden has

DENMARK

If it's Friday, it must be Copenhagen. Once again we had terrific support from Paulette Bérubé from the embassy. Our first meeting was with Gyldendal who have cut back from twelve editors to six in the past four years. The markets are getting worse. In Denmark, fixed prices were eliminated four years ago, and although publishers don't own bookstores, they do own distributors (and distribute for other publishers). In Danish bookstores, about one third of books are in English, and two thirds are by Danish authors.

On to Egmont, which is buying fewer and fewer translations (it was here the reason finally sank in). If the foreign author could be present in Denmark to promote the book, then they'd do the translation. As soon as the author leaves, and promotion

gone from 450 to 280 in the past 10 years. They had published Michael Ondaatje, and had sold over 100,000 of the *English Patient*. But his last book didn't do even 1,000 copies so they didn't make an offer on his new manuscript.

The second publisher we met was Kultur and Natur, where a new editor named Richard Herold has taken over. He used to be part of a company called Atlas (three employees) and included Alice Munro and Mavis Gallant on his list, selling over 100,000 of Alice. This company is owned by a foundation, so the profit imperative is not pressing, and they have a history of supporting leftist causes. In fiction, they publish about 50% translations.

stops, so do sales. Danes prefer politically incorrect books as evidenced by our final meeting with Politiken, an arm of the newspaper that published the notorious cartoons. Security was very tight because there have been threats against the company. One of the editors used the phrase greenhouse, meaning they needed to have an author greenhouse to develop new writers. I guess that fits with the termination list.

And, yes, it's true what they say about the midnight sun, especially in Helsinki.

Finally, I'd like to compliment my fellow scouts Linda Cameron and Simon Payette, as well as Christy Doucet from Livres Canada Books for setting up the details, and most especially François Charette.

Scholarly Publishing

Linda Cameron, University of Alberta Press

The academic publishers I visited in Norway, Sweden and Denmark were all divisions of large commercial publishing houses. In each case the "academic" publishing consisted of textbooks for K-12 and university level courses.

I was told scholars are reluctant to write textbooks because they don't get academic credit for them. Publishers must try to convince them to turn journal articles (for which they get academic credit) into textbooks.

When I asked about scholarly monographs the academic publishers told me they do not publish those books because there is no market for them.

Average print runs are 1,100 copies, and 5,000 copies are considered a big market. There is a lot of competition for books in English. Publishers sell directly to libraries or through bookstores.

According to the academic publishers no one is asking for e-textbooks because the reading devices are not yet readily available. Publishers are discussing open access; however, they have not found a workable business model.

A Google search resulted in the discovery of three university presses in Denmark. According to Wikipedia they are: the Museum Tusulanum Press; the University Press of Southern Denmark; and the Aarhus University Press.

I did not meet with anyone from any of the Danish university presses; however, Wikipedia entries for each are as follows.

Museum Tusulanum Press (Museum Tusculanums Forlag) is an academic press of the University of Copenhagen for the fields of humanities, social sciences and theology. It was founded in 1975 as a non-profit institution and publishes approximately 60 titles annually. Most of the authors are affiliated with the University of Copenhagen or the Danish Royal Library.

University Press of Southern Denmark (Syddansk Universitetsforlag) is Denmark's largest university press and was founded in 1966 as Odense University Press (Odense Universitetsforlag). The press publishes books from the world of science in the broadest sense of the word. Its authors are mainly academics from the University of Southern Denmark and from Denmark's other centres of higher education. The University Press of Southern Denmark also publishes a wide range of textbooks and teaching materials, as well as periodicals.

Aarhus University Press (Aarhus Universitetsforlag) is a commercial Foundation, founded in 1985 by Aarhus University, Denmark. The main purpose of the Press is to publish the scholarly works of researchers at the University, but many authors come from other Danish institutions of higher education and from abroad. The Press not only publishes scholarly works, but also disseminates works of intellectual merit and general interest to a broad reader audience. Common to all titles is their strong scholarly base, since all books are peer-reviewed.

The University Press publishes approximately 70 new books per year and is particularly strong in archaeology, history, philosophy and literature as well as natural sciences. The Press currently has

more than 1,200 titles in stock of which 400 are in English and some few in German and French. The titles are sold and purposefully marketed abroad using distributors in the United Kingdom and the United States.

The Press feels that the maintenance of a very high quality in graphic design, cover design, choice of paper and quality of printing, is crucial. Several Press titles have been honoured by the Association of Book Craftsmanship (Forening for Boghaandværk) and chosen to be part of their annual exhibition for the Best Book Craftsmanship Award, most recently in 2007 with the publications *Sima Qian: Historiske optegnelser* [Sima Qian: historical records] and *Marinus: Karikaturtegner med kamera* [Marinus: caricaturist with a camera].

Additionally, a number of Press titles are on commission from other publishers, among whom are: The Carlsberg Foundation (Carlsbergfondet), The National Museum (Nationalmuseet), The Centre for Alcohol and Drug Research (Center for Rusmiddelforskning), The Centre for Grundtvig Studies (Center for Grundtvigstudier), Jutland Archaeological Society (Jysk Arkæologisk Selskab), The Historical Society of Jutland (Jysk Selskab for History), and The Danish Institute at Athens (Det Danske Institut in Athen).

There might be some possibility to co-publish with Nordic academic publishers if the subject matter links closely to their publishing programs. It is less likely there are language rights opportunities, as the cost of translation is high in the Nordic countries and most people read English.

Publishers sell directly to bookstores, sometimes through their own distribution services, which are vertically aligned between the publisher and the bookstore.

Canadian publishers wishing to sell books directly into the Nordic market would be well served to sell through their UK distributor, as it seems the UK is the general source of English language books. A list of Nordic booksellers is included in the appendix.

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Weyler Forlag
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