



WAN-IFRA ANNUAL REPORT 2010



www.wan-ifra.org



“WAN-IFRA has a strong pedigree and offers a level of expertise that most members will appreciate. It’s that level of expertise and meticulous attention to detail, which helps people like me and our business deal with the industry’s ever increasing challenges in these economically straitened times.”

**Kevin Beatty, CEO, A & N Media,
United Kingdom**

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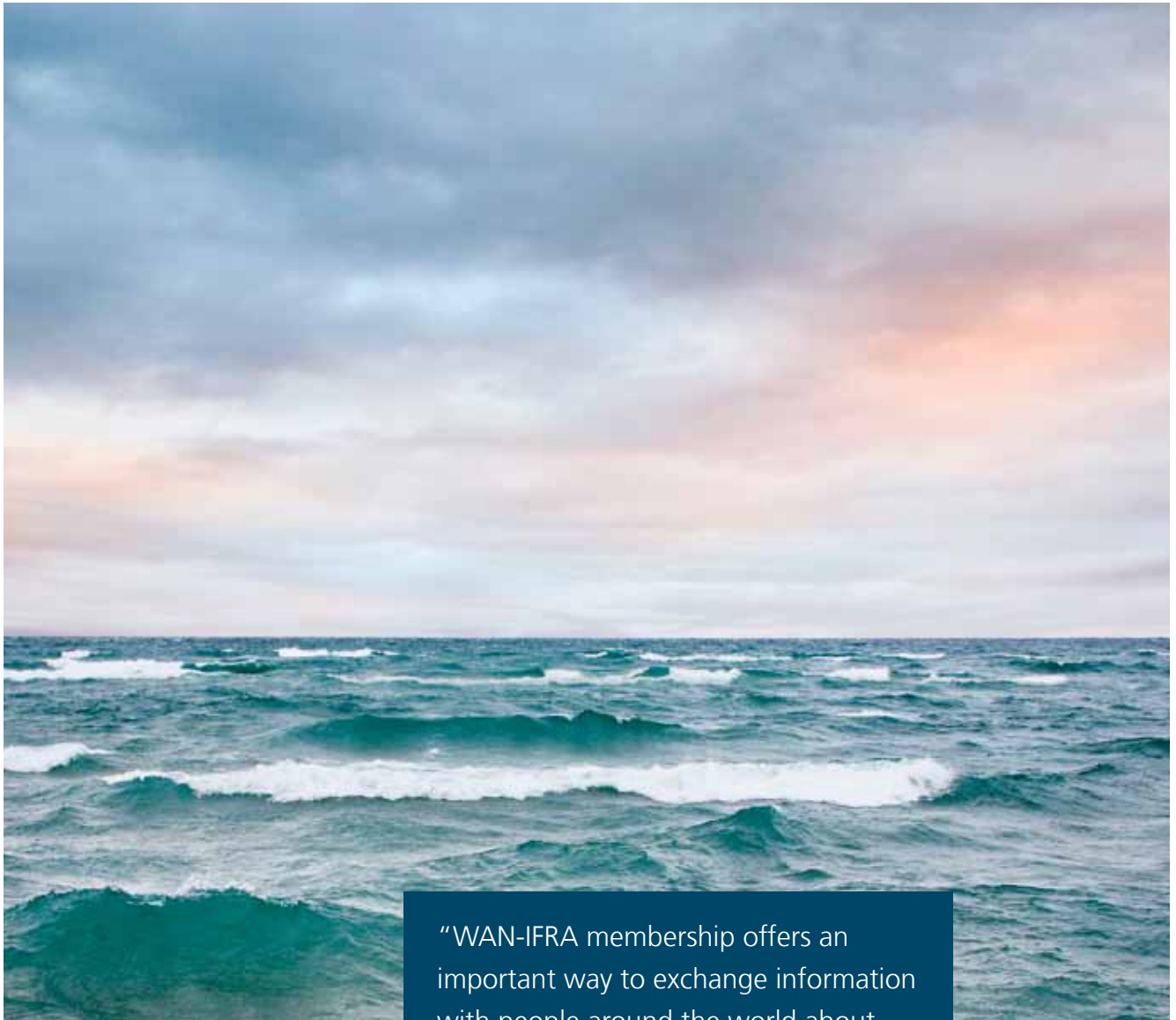
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“WAN-IFRA membership offers an important way to exchange information with people around the world about the challenges facing our industry as well as the opportunities about how to move forward. That, for me, is the great opportunity that WAN-IFRA gives to everybody. ... It’s a great privilege for me to be on the board of WAN-IFRA.”

Mohamed Alayyan
Publisher and CEO, Al Ghad, Jordan

REPORT OF THE PRESIDENT



While the global economy brightened somewhat in 2010, the challenges confronting newspapers worldwide have remained largely undiminished. However, the firm resolve and dedication of the World Association of Newspapers and News Publishers (WAN-IFRA) to work together with the industry to meet these challenges also continues

unabated. Our efforts – and our results – during the past year reflect this determination, as do the high levels of confidence and support that news publishers throughout the world and the supplier community have shown for our organisation.

Strong participation in WAN-IFRA's conferences, trainings and study tours as well as near record participation in IFRA Expo 2010 and a highly successful World Editors Forum (WEF) in Hamburg underscore our organisation's ability to address the stormy issues the industry faces and bring together the right people at the right place at the right time to work towards a solid and sustainable future for us all.

Likewise, our efforts to support a viable, free and independent press around the world remain at the core of our organisation. We recently marked the 20th anniversary of World Press Freedom Day, and we remain deeply committed

to asserting the need for a strong, free press wherever it is threatened.

Although the challenges ahead remain formidable, our dedication and commitment to the industry in general – and our members in particular – will continue to drive all of our activities and efforts to find workable solutions that help publishers create products and services of real value for their customers and build the businesses that offer them.

As I step down from my long tenure as president, I wish to take this opportunity to thank the members of the WAN-IFRA and WEF Boards and the members of our Committees, all of whom give generously of their time and expertise throughout the year.

I also wish to express my heartfelt thanks to our members around the world for their involvement and support, especially those who pledged additional financial and strategic support that enabled us to successfully complete the merger of WAN and IFRA.

I'm leaving WAN-IFRA in the extremely capable hands of my successor, Jacob Mathew of India. I plan to remain active. And I'm looking forward to what the future may bring.

Gavin O'Reilly

REPORT OF THE CEO



The year 2010 has been strenuous but we achieved our goals. We created a stable financial base for the association to get a positive operating result for 2011. Finalising the merger brought together the different areas of the Association and everybody is now working hand in hand to meet the challenges of our industry. We successfully paved the way to develop a five-year strategic plan.

We are immensely grateful for the financial and strategic support we received from our members around the world; this assisted us in overcoming our financially difficult situation in the beginning of 2010 and shows the commitment of our members to the organisation.

It has also been a challenging year for our staff. The workload was immense and everybody had to adapt to a new environment in a merged organisation. To reduce costs we had to cut the number of staff. This was not only hard for the 8 employees involved, but caused additional emotional pressure on their colleagues. Nevertheless, everybody within the association now cooperates and has started to use the huge potential we have with our subsidiaries around the world and the immense skills that can be found in the different internal departments. We also proudly launched our new website www.wan-ifra.org.

Our core operating principle to defend and promote press freedom is a clear commitment by everybody in the now expanded organisation. WAN-IFRA campaigned in different parts of the world where journalists were faced with hostility, repression and murder. It is our intention to expand our press freedom work to a broader audience and therefore we increased significantly the number of interviews given to newspapers, radio and TV stations and the number of articles published. We are intensifying our campaign in Latin America and very successfully used our first Latin American

conference in Bogota as a platform to do so. Thanks to significant donations from the Swedish international development agency, the European Union and others, we were able to intensify our media development activities. We supported the independent media in countries like Vietnam, Mozambique, Georgia and others.

Since 2010, the business environment in our industry has been improving in most parts of the world as well as the success of our conferences. IFRA EXPO in Hamburg showed an increasing number of exhibitors and near to record numbers of more than 10,000 visitors. The World Editors Forum which was held concurrently in Hamburg was a big success with more than 600 participants. Our other commercial activities like training, consulting and different events had an increasing number of participants and we observed that newspaper and media companies are again interested to invest in their people and business development after the extreme cost control in the crisis year 2009.

With the help of our Board, the Executive Committee, the Steering Group and the different advisory boards, we have positioned WAN-IFRA to fulfil its mission of promoting quality journalism and editorial integrity, as well as supporting the development of prosperous business and technology.

Christoph Riess

REPORT OF THE CFO



2010 marked a year when WAN-IFRA was still dealing with the financial crisis of the previous year, which had a strong impact on the newspaper industry as a whole. The restructuring activities created by the merger of WAN (France) and IFRA (Switzerland/Germany) were another financial influence that had to be addressed.

Both of these issues immensely influenced the result of the newly formed association. The term “Stormy Times” is not only a good description for the 2010 financial status but also reminds many of us of the troubles we experienced when we were forced to cancel several events because of the volcano ash cloud in Iceland, adding to an already difficult year.

The effect that the above mentioned situation as a whole had on the WAN-IFRA financial figures is clearly reflected in the restructuring costs. The one-off effect that accommodates cost-cutting measures and extraordinary expenses of restructuring the organisation amounted to approximately EUR 1.1 million in the financial year 2010.

It comes as no surprise that a non-profit organisation such as WAN-IFRA cannot compensate this amount. WAN-IFRA is greatly indebted to its members who helped weather the “Stormy Times” with magnanimous donations that totalled EUR 1.0 million.

From a financial perspective, the restructuring tasks in 2010 focused on securing global liquidity by cost cutting in all areas of operation through a clear allocation of responsibilities between WAN-IFRA France, WAN-IFRA Switzerland (Germany) and the WAN-IFRA subsidiaries, the implementation of a global reporting system and the creation of relevant Key Performance Indicators (KPIs).

The appointment of a CFO, responsible for the administrative tasks in the new association, took a large part of the burden off management and after implementation of a new global financial system, the most urgent tasks of reorganisation were successfully completed by the end of the year.

A constant turnover is proof of the success of the management team which implemented the new structures and can now concentrate on their respective and relevant tasks and core business in each department. Total revenues remained stable with only a slight decrease in revenues (–3 % compared to the previous year – donations and funds for media development not included).

Hence, to guarantee a solid financial basis, the financial focus for 2011 is to enhance the reporting system and a continuous reviewing of internal processes and commit to our five-year strategic plan.

Andreas Musielak

MEMBERSHIP SERVICES

With close to 80 national publishers associations and over 2800 member companies from around the world, WAN-IFRA has immense collective experience at its disposal. This, together with its status of official representative of the industry at international bodies like the UN, UNESCO, WIPO and others, as well as the international networking aspect and the influence of the members on the organisation's work, results in a unique combination of industry significance, detailed knowledge and business insights that no other organisation in the news publishing industry can offer its members.

After two years of stagnation in membership development and slightly decreasing numbers, WAN-IFRA can look back at the past twelve months and report a slight uptake, not only for its overall activities, but also regarding the development of its member base.

In the course of last year, WAN-IFRA welcomed more than 20 new member companies – both from the publishing and the technology and service provider side – to its international Newspaper Community. We look forward to close cooperation with these new partners in the coming years.

THE NEW WAN-IFRA MEMBERS

(by category and chronological order of joining):

Associations, Educational and Other Institutions:

- Alliance of Newspapers and Press Distributors, Bulgaria
- Nanyang Technical University, Singapore

Publishing Companies and Press Agencies:

- Editialis, France
- Kali Kaumundi, India
- NRC Handesblad, Netherlands
- S.A.G.A., France
- Assir/Al Watan, Saudi Arabia
- Hamshari, Iran
- Al Watan, Bahrain
- Economia, Czech Republic

On the other side, the economic situation took its toll. Mergers, acquisitions, financial difficulties and in worst case even bankruptcies led to resignations from membership and diminution of the WAN-IFRA community of members.

In concrete terms, 2010 brought with it a minimal net decrease in membership numbers. However, the outlook for 2011 already shows increasing interest in WAN-IFRA's work and activities as well as a positive development.

The consolidation of the membership structures of former WAN and IFRA and the implementation of the new fee structure for publishing houses – adopted by the General Assembly at the end of 2009 – has been and will be one of the biggest challenges and projects for the coming months.

WAN-IFRA's overall membership structure is continuing the tradition of promoting common industry interests by building on solidarity. It will enable the organisation to follow its mission to support members' business, to actively shape the industry's future as well as to protect and develop press freedom as one of the pillars of a democratic society.

- Kurir-info d.o.o., Serbia
- Folha de Sao Paolo, Brazil
- Estetik, Turkey
- Connex, Germany
- ACP, France

Technology and Service Providers to the Industry:

- Premier Printing Group, Hong Kong
- The Independent Publications, Bangladesh
- 24Media, Greece
- DigiNews, Netherlands
- binuscan, France
- DM Informatik, Switzerland
- Eterno Infotech Pvt., India
- Louis Cerutti AG, Switzerland



For more details, please visit
www.wan-ifra.org/membership

The above art work is entitled "Zeitungssturm"; it was created in 1987 and is on display in the WAN-IFRA building in Darmstadt.

FACTS

- Approx. 3000 members from 117 countries*
- Stable number of members in 2010

* (including subsidiaries of member companies and individuals)

PRESS FREEDOM AND MEDIA DEVELOPMENT

WAN-IFRA's 2010 press freedom and media development activities have at their heart, the core mandates of the organisation:

- To defend and promote press freedom and the economic independence of newspapers as an essential condition for that freedom and
- To promote the fundamental role of newspapers and the entire news publishing industry in society and in building and sustaining democracy.

Freedom of expression and development of free media is an essential element for creating long-term stability and building of democratic societies. WAN-IFRA has a distinct position in the press freedom and media development community as the newspaper industry organisation with a human rights mandate.

The mandate of WAN-IFRA as the representative body of the newspaper industry gives particular weight to lobbying and protest actions. The WAN-IFRA constituency stands unrivalled in terms of the pressure brought to bear on governments and other groups in cases of press freedom violations. Through its close links with the industry, WAN-IFRA

plays a broker role between the media industry and partners in emerging markets, thus creating new opportunities for cooperation in the field of press freedom and media development.

Given the commercial pressures impacting the media industry worldwide, financial sustainability is a pre-requisite for its endurance. By providing expertise tested in the international media marketplace, WAN-IFRA enables programme beneficiaries to develop the knowledge and skills necessary to guarantee their long-term financial survival.

These development initiatives include strengthening media management, editorial strategies, and developing and implementing successful business models. WAN-IFRA also provides consultancies, mentoring, career road-mapping, professional exchanges and training programmes.

When equipped with the relevant skills, journalists, editors and managers are empowered to make their businesses more sustainable and strengthen the editorial quality of their products, thus creating the conditions for good governance, transparency and fighting corruption.



Archbishop Desmond Tutu signs the Declaration of Table Mountain in Grahamstown, South Africa, July 2010



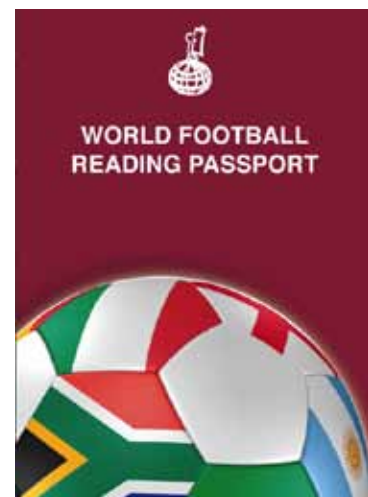
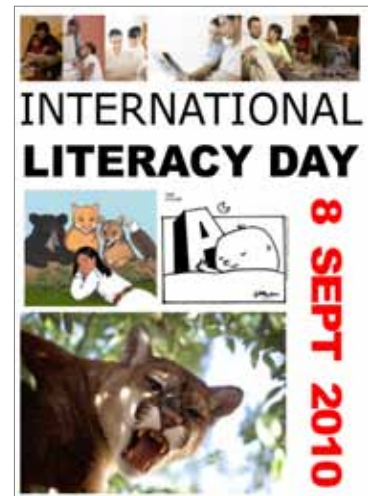
FACTS

- Since joining WAN-IFRA's Women In News programme, 30 % of participants have advanced to higher positions within their organisations
- A pilot project in Uganda saw a local newspaper send SMS blasts to between 1000 and 2000 subscribers, ensuring immediate contact with the audience and the ability to receive citizen journalism content.
- 28 national protest campaigns against violations of press freedom and freedom of expression were carried out in 2010.
- WAN-IFRA media-in-danger missions took place in Yemen, Azerbaijan, Egypt and Turkey.

YOUNG READERSHIP DEVELOPMENT

WAN-IFRA helps newspapers and newspaper associations engage the young and their influencers to create a literate, civic-minded new generation of readers all over the world in a variety of ways:

- Helping to establish news in education programmes that encourage the use of the newspaper both in new and mature democracies. In 2010, work expanded in Jordan, bringing to more than 5000 the number of students who regularly use newspapers in class there. Two Jordanian secondary school educators became WAN-IFRA's first "Teacher Ambassadors".
- Encouraging excellence in all strategies to engage the young on all platforms by awarding the annual World Young Reader Prizes. Top prizes in 2010 went to Metro newspaper in Poland, the country's leading choice of readers aged 15 to 24, for its "Total Youth Think," strategy which incorporates content throughout its pages that young people can use in their everyday lives. Seventeen other prizes went to newspapers for excellence in editorial and brand strategies, newspapers in education, public service, making the news, enduring excellence and connecting with mobile. In 2010, the first "School Newspaper Prize for Press Freedom" was awarded to a Brazilian school. The prize encouraged school newspapers to use material created to observe 3 May Press Freedom Day.
- Adding a voice to media literacy discussions in support of press freedom and the role of newspaper journalism in a democracy. WAN-IFRA gave presentations to teachers in Macedonia (11 May) and, assisted by our Finnish and Swedish member associations, to media literacy experts from around the globe at the World Summit on Media for Children and Youth in Sweden (14-18 June). Several association leaders from Austria, Brazil, Germany, Finland, France, Luxembourg, Norway and the United States met (Berlin 1-2 March) for a session focusing on innovation in young readership development during hard times.
- Creating free resources available to any newspaper or teacher to support this work. In 2010, WAN-IFRA provided its fourth free serialized story for newspapers to use in connection with International Literacy Day (8 September) and, in partnership with its International Association of Sports Newspapers, a new version of its World Football Reading Passport to coincide with the 2010 FIFA World Cup in South Africa.
- Spreading the word to newspaper executives as widely as possible. The merger offered new kinds of opportunities, especially from subsidiaries, to tell the story of young readership development to new audiences.



FACTS

- Norske Skog, the Norway-based paper producer, renewed its commitment to support this work.
- Papers totaling more than 4 million circulation used WAN-IFRA's free serialized story and newspaper-related activities to celebrate International Literacy Day.

WORLD EDITORS FORUM (WEF)

The World Editors Forum in 2010 set a record with its annual conference, with more than 800 chief editors and other senior newsroom executives attending the Hamburg event, which benefitted from its association with the IFRA Expo. The turnout was a reflection of a new and more dynamic WEF, which is in a position to connect with more editors world-wide, thanks to its expanded role in WAN-IFRA as the centre for all editorial initiatives.

The World Editors Forum, which is the organisation of WAN-IFRA for senior newsroom personnel, saw the election of new President Erik Bjerager, Editor-in-Chief and Managing Director of the Danish national daily Kristeligt Dagblad. Under his leadership, the Board of WEF has been reconstituted and has taken a deeper interest in campaigning for press freedom, as well as investing in the cutting-edge editorial initiatives for which the WEF is well known.

These include the Editors Weblog, one of the premier global web resources for editors, which saw record levels of visitors in 2010 and continues to grow. The weblog, www.editorsweblog.org, provides industry news of interest to editors as well as analysis of trends and links to editorial resources.

The weblog also serves as a source for the WEF Trends in Newsrooms publication, the annual review of best practices in major newspapers around the world on topics like print and online integration, newsroom design, newsroom management, online strategies, newspaper design and many other issues.

WEF study tours continued to attract key groups of editors for tailored visits to innovative newsrooms around the world. WEF will continue to be the global association for editors looking for advice and practical ideas for improving their newsroom operations and for providing high quality journalism.



FACTS

- Record attendance at 2010 World Editors Forum in Hamburg
- Record traffic to Editors Weblog
- New WEF President, Erik Bjerager, Editor-in-Chief and Managing Director of Kristeligt Dagblad

COMMUNICATIONS AND PUBLIC AFFAIRS

Football – in the form of the FIFA World Cup – dominated sports news in 2010, and news organisations for the first time were able to provide coverage via mobile devices, thanks to WAN-IFRA's intervention in the terms and conditions that govern press access to the venues.

The initial terms and conditions released by FIFA for news organisations wishing to cover the World Cup in South Africa banned news distribution by mobile phones. But that restriction was removed during WAN-IFRA's negotiations to improve the terms and help make them compatible with news coverage today.

The 2010 terms were improved in other ways as well – notably the removal of restrictions on the number and timings of photos posted to the web, and a recognition that nothing in the terms was meant to inhibit press freedom and critical coverage.

WAN-IFRA has been engaging with FIFA since 2005 and holds regular talks on issues of concern to news media. It is also a founding board member of the News Media Coalition, which negotiates with other sports organisations as well.

This engagement is part of WAN-IFRA's public affairs role: to support national newspaper associations in their work to defend and support the interests of their member newspa-

pers, and to represent the newspaper industry in all issues of international concern.

Another big issue in 2010 was online copyright protection. WAN-IFRA is a founder of ACAP – the Automated Content Access Protocol – and helped prepare ACAP in 2010 to become a new digital rights management standard under the International Press & Telecommunications Council (IPTC).

In the communications area, WAN-IFRA launched its new website in 2010, and increased its profile through numerous articles, interviews and broadcasts in both the trade press and the general press.

WAN-IFRA relaunched its flagship publication, WAN-IFRA Magazine, as a bi-monthly, and introduced three targeted EXTRA tabloid-formatted editions that were published throughout the year. The magazine's coverage continued to reflect not only the technological and strategic trends facing our members and the industry but also the vital roles of press freedom, public policy and young reader programmes.

"Paged" content might serve as the magazine's core content, but it continues to be enriched with a wealth of linked content to our website, including interviews, case studies, graphics, videos and more. In all, the magazine expanded its audience to reach nearly 25,000 readers, both in print and ePaper.



FACTS

- WAN-IFRA helped to ease the restrictions on mobile phone coverage at the FIFA World Cup.
- ACAP becomes new digital rights management standard under IPTC
- WAN-IFRA launches new website.
- WAN-IFRA Magazine now reaches 25,000 readers

MARKETING AND EVENT MANAGEMENT

2010 was in many respects a remarkable year when it comes to the events and exhibitions business. Hit by the volcano ash cloud in Iceland, by the upheaval in Bangkok and certainly by the fallout that the cancellation of the Beirut events caused, the first half of the year presented numerous challenges. In spite of the difficulties, the event business started to blossom in the second half of the year. Participation numbers were increasing again, and some optimism returned for the supplying industry. Evidently, the market entry of tablet computers caused an increased interest in technical solutions, and this clearly had a positive impact on participation numbers in our conferences, study tours and IFRA Expo.

Particularly for IFRA Expo, we had the challenge to counter the trend of shrinking visitor numbers, which we experienced in 2008 and 2009. Hence, new concepts were needed to attract target audiences that did not necessarily have our annual exhibition on the radar, like journalists, business development managers, advertising managers, corporate and magazine publishers. The concept for IFRA Expo 2010 was revised in several respects to meet these requirements:

- We chose Hamburg as a location, and the maritime charm of this media metropolis proved to be attractive to many visitors, not only from Germany. A record number of 100 (!) participating visitor countries registered.
- We introduced the new presentation platform "Media Port". This forum presents the latest technologies for cross-media publishing and advertising, but rather than having suppliers present their products, we asked for customer case studies that were presented by the clients themselves. The result was a highly credible platform that received a lot of positive feedback. Up to 200 participants took part in the sessions on topics like "Innovative Advertising," "Cross Media Publishing Trends," "Corporate Publishing Business Models" or "Tablet Publishing."

After the decision to cancel the Beirut events, we decided to combine the 17th World Editors Forum with IFRA Expo in Hamburg, and invited the world's editors to come to Hamburg. Some 800 editors from around the globe seized this opportunity to network, and a lot of them also attended IFRA Expo to get up to speed with the latest developments in technology. Both IFRA Expo and the World Editors Forum benefitted from this co-location, but above all it was beneficial to our customers who availed of this prime information opportunity. The city of Hamburg, the weekly newspaper "Die Zeit" and Axel Springer publishing house significantly supported the events so that they became a huge success. IFRA Expo registered more than 10.000 visitors, the highest number since 2007, when the industry was booming.

In terms of marketing, a number of initiatives were started in 2010 that are fully harvested in 2011:

- WAN-IFRA invested in a new emailing system, which allows us to plan, execute and track email marketing campaigns to the highest professional standards
- Expanding our databases to new areas, with measurable results already at IFRA Expo Hamburg 2010
- The activities on social platforms (primarily Twitter, LinkedIn, Facebook, XING, YouTube and Flickr) were pushed, and the foundation laid to expand even further in 2011.

The introduction of the WAN-IFRA Events Steering Group proved to be the right step. In regular meetings, subsidiaries as well as WAN-IFRA competence centers get together to discuss and consolidate conference and study tour suggestions. The result of these meetings is a truly strategic events portfolio with the aim to reflect the needs of our core target audiences - while at the same time taking up new trends and topics that come out of the markets.



FACTS

- IFRA Expo 2010 Hamburg: Turnaround managed with a steep rise in visitor numbers
- WAN-IFRA Marketing: Professionalization in email marketing, social media and development of new target groups
- Events Planning: WAN-IFRA Events Steering Group to consolidate and improve strategic events portfolio

NEWSPAPER PRODUCTION

The Competence Centre Newspaper Production develops and maintains more than 30 standards with the strong support of the two Technical Committees "Production" and "Materials & Environment," in which industry experts from suppliers and newspaper printing plants work together for the future of the industry.

Areas of standardisation are:

- Print plant design
- Acceptance test for production equipment
- Interfaces
- Materials
- Production processes
- Process implementation
- Quality benchmarking
- Standard colour profiles and testforms
- File formats

In 2010 the Competence Centre Newspaper Production established the international conference "Printing Summit," held for the first time in Salzburg, Austria, in April. Other events and study tours covered automation and organisation questions. One of the tours brought WAN-IFRA members from America, Europe and the Middle East to Japan

where NSK and CONPT representatives welcomed the group and helped them to discover techniques and technologies used in the Japanese newspaper industry.

Training classes were organised around the year partly in co-operation with other associations and suppliers to train prepress, press and postpress operation people from a large number of countries.

In October the new members of the International Newspaper Color Quality Club 2010-2012 celebrated their success in high-quality standardised print production. The awarding gala was the concluding highlight of IFRA Expo in Hamburg.

Many consulting projects could be carried out in 2010, including a number of Certification of Standardised Printing projects on different continents.

The competence Centre published a number of articles for WAN-IFRA publications as well as for other trade magazines. This activity included the production of a "Special" on Lean Production, which caused discussions in the industry.



FACTS

- Semi-commercial business development with new materials and production processes
- Major investments in Europe in automation and close-loop systems
- Establishment of annual conference “WAN-IFRA Printing Summit”
- Strong participation in colour quality and certification programmes
- Successful study tour to Japan

EDITORIAL, ADVERTISING AND GENERAL MANAGEMENT

The Competence Centre EAGM/Newsplex supports WAN-IFRA members in the strategic and operational decision-making and implementation processes for Editorial- Advertising- and Publisher-related topics. This support is achieved by knowledge exchange, know-how transfer and management support covering current and future topics of the digital and print publishing world.

In 2010, EAGM and Newsplex organised seven conferences, including the 9th International Newsroom Summit and the 20th Annual Newspaper Advertising Conference and Expo, as well as three study tours, which drew a combined total of 1004 participants.

EAGM/Newsplex also organised the XMA Cross-Media Awards in 2010, which achieved the highest number of submissions in the history of the awards, with 79 projects being entered in the contest.

NEWSPLEX

The mission of Newsplex is to help news publishers modernise and transform their companies into true multimedia operations. Through our ongoing advisory and training projects as well as workshops, conferences, study tours, presentations and reports, Newsplex helps empower publishers to improve the way they collect and distribute news and information to their customers, while at the same time emphasizing the importance of change management and strategy development. The Newsplex team works with doz-

ens of groups from major media houses each year, both in our facilities in Darmstadt, Germany, and Columbia, South Carolina, U.S.A., as well as going on site to offer clients in-house expertise to help them meet today's and tomorrow's challenges and prepare for the future.

In 2010, the Newsplex team worked on projects with publishers such as Archant in the U.K., Ringier and Südostschweiz Medien in Switzerland and Grupo Ferre Rangel in Puerto Rico as well as with other major publishing houses around the globe.

Also in 2010, Newsplex launched the "Newsplex GoLocal leaders" programme 2010/2011, which brought together 10 regional publishing houses from the Germany/Austria/Switzerland region. The programme involved strategy workshops that focused on the local market opportunities: Development of local content and business strategies, "home assignments" and project reviews, and included an exchange of best-practice with national and international experts.

WAN-IFRA ACADEMY

WAN-IFRA Academy continues to create new topics and develop new training events in areas such as the importance of staff development as well as commercial operations and cross-media advertising.

In 2010, WAN-IFRA Academy offered 70 training events, which drew some 360 participants.



FACTS

- 1004 participants in EAGM conferences and study tours
- Record number of 79 project entries to 2010 XMA – Cross Media Awards
- Company training in numerous countries, including – Switzerland, Germany, U.K., Belgium, India, Singapore, Malaysia and Thailand

EMERGING DIGITAL PLATFORMS AND BUSINESS DEVELOPMENT

2010 was the year when the publishing industry began in earnest to explore the business opportunities in publishing across all mobile digital platforms, including serious business development in tablets and smartphones. With the launch of the iPad in Q1, and many competing tablets appearing in the subsequent months, the interest from publishers in WAN-IFRA's events and services around digital platform publishing increased.

Through its Executive Programmes eNews and eRev, WAN-IFRA offers membership to exclusive topic-related groups, set up to provide an innovative way to shorten the learning curve and gain insights vital to developing relevant business strategies. Each Executive Programme focuses on one key topic or aspect of the media industry. The programmes are all based on special membership, over two or more years, and give added value to their member companies by providing access to top industry players, unique networking opportunities, visits to cutting-edge companies, professional workshops and more.

2010 was a record year for eNews – which is focused on tablet and e-reader publishing – with 29 member publishers. There were two eNews seminars, in Tokyo in spring and London in autumn, with visits/speakers including Sony, Bridgestone, Apple, Amazon and Gannett. The eRev pro-

gramme is all about how publishers can grow their digital businesses, and also included two seminars during the year, in London and San Francisco, with visits including a full day hosted by Google in Mountainview as well as Apple, Yahoo, Digg, Yelp and the San Francisco Chronicle.

In October, the 3rd Annual International E-reading and Tablet Conference was held in conjunction with IFRA Expo in Hamburg, and the event tripled from the previous year, with 260 participants and eight sponsors getting involved. Speakers represented publishers with tablet/e-reading business experiences, such as Tamedia and Gannett, as well as solutions providers, such as Woodwing and Adobe.

The Emerging Digital Platforms and Business Development team also offer consulting for media strategy projects within e-revenues, mobile and e-reading/tablets. During 2010 demand for these services increased, and over the course of the year a handful of consulting projects were carried out in Europe and Asia.

With the intense awakening in the publishing industry to the business opportunities in publishing on digital platforms, we foresee a continued high demand for conferences, executive programmes, study tours and consulting in this area.



FACTS

- Record year for eNews with 29 member companies
- 3rd Annual E-reading and Tablet Conference draws 260 participants
- Study Tours include visits to high-tech companies like Google, Apple, Yahoo
- Growing demand for consulting services

WAN-IFRA WORLDWIDE

THINK GLOBAL, ACT LOCAL

The regional offices and subsidiaries help realise the WAN-IFRA's strategy of "think global and act local." Newspapers and news media companies in different parts of the globe are developing at different paces leading to different needs and requirements. The fully owned subsidiaries located in Singapore, Chennai, Stockholm, Madrid and Lyon ensure that languages and geographical distances are no longer a barrier for providing efficient and tailored services to the global media industry.

The 2010 highlights from the subsidiaries include:

- The Research and Materials Testing Centre (RMTC) established in Chennai with the support of Indian newspapers has grown to become a nodal centre for print centric research and testing services. Cost Control conference in Delhi and the annual conference in Jaipur were successfully organised by the Indian subsidiary.
- The Middle East conference was firmly established as the most important media conference in a region where media activism is increasing.
- The Nordic subsidiary persuaded mediagroups representing 140 newspaper titles to join as individual members of WAN-IFRA, when the collective membership was dismantled. More than 400 Nordic participants took part in the 3 conferences, system workshops and seminars held in Scandinavia.
- Spanish services were boosted by a successful annual conference and a first-ever conference on Human Resources for the media industry.
- In Lyon, foundations for the Newsplex facility called Rhône-Alpes Medias were laid. The €900K project from the French subsidiary is made possible with the support of regional government and University of St. Etienne. A conference on sports news was successfully held for the first time.
- Publish Asia, the annual meeting point for the Asian media executives, made a strong come back while Digital Media Asia grew to become the largest new media conference in Asia. Digital Media Awards launched in 2010 was well received.

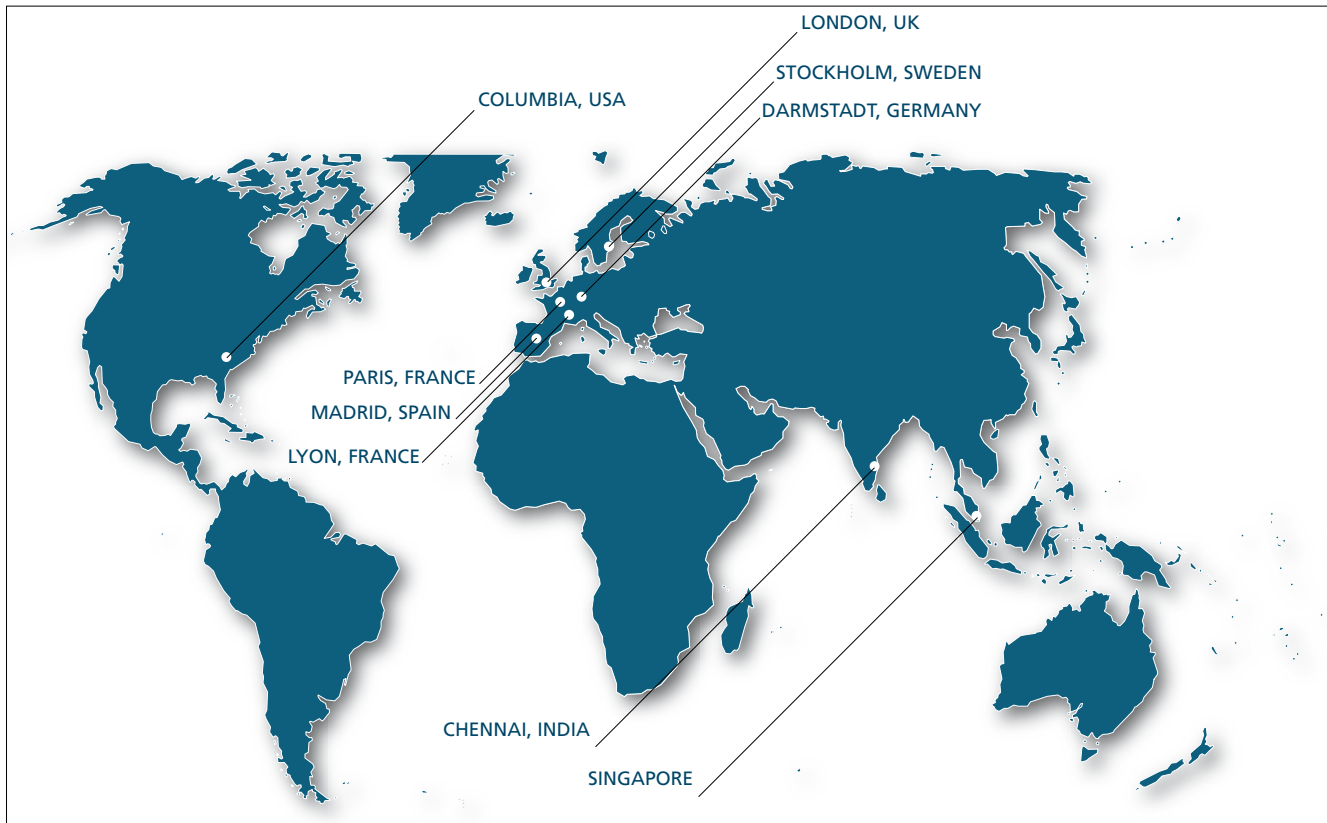
MULTIPLIER EFFECT

Besides providing localised services, subsidiaries create a multiplier effect by propagating the services offered by the Darmstadt and Paris offices. The close co-operation and mutual support with the Paris colleagues ensures that the programmes such as Young Readers or Press Freedom initiatives get a wider coverage. Media development efforts were augmented by subsidiaries either through provision of expertise or sharing of resources on trainers. The regional variations of the international Printing Summit and Newsroom Summits, launched in both Asian and India proved to be very successful. Likewise the success of the Digital Media Asia event led to the creation of a sister event in Europe. The synergies created from the exchange of ideas between the competence centres and subsidiaries has enabled WAN-IFRA to maximise its offerings with minimum resources.

LOCALISED TRAINING

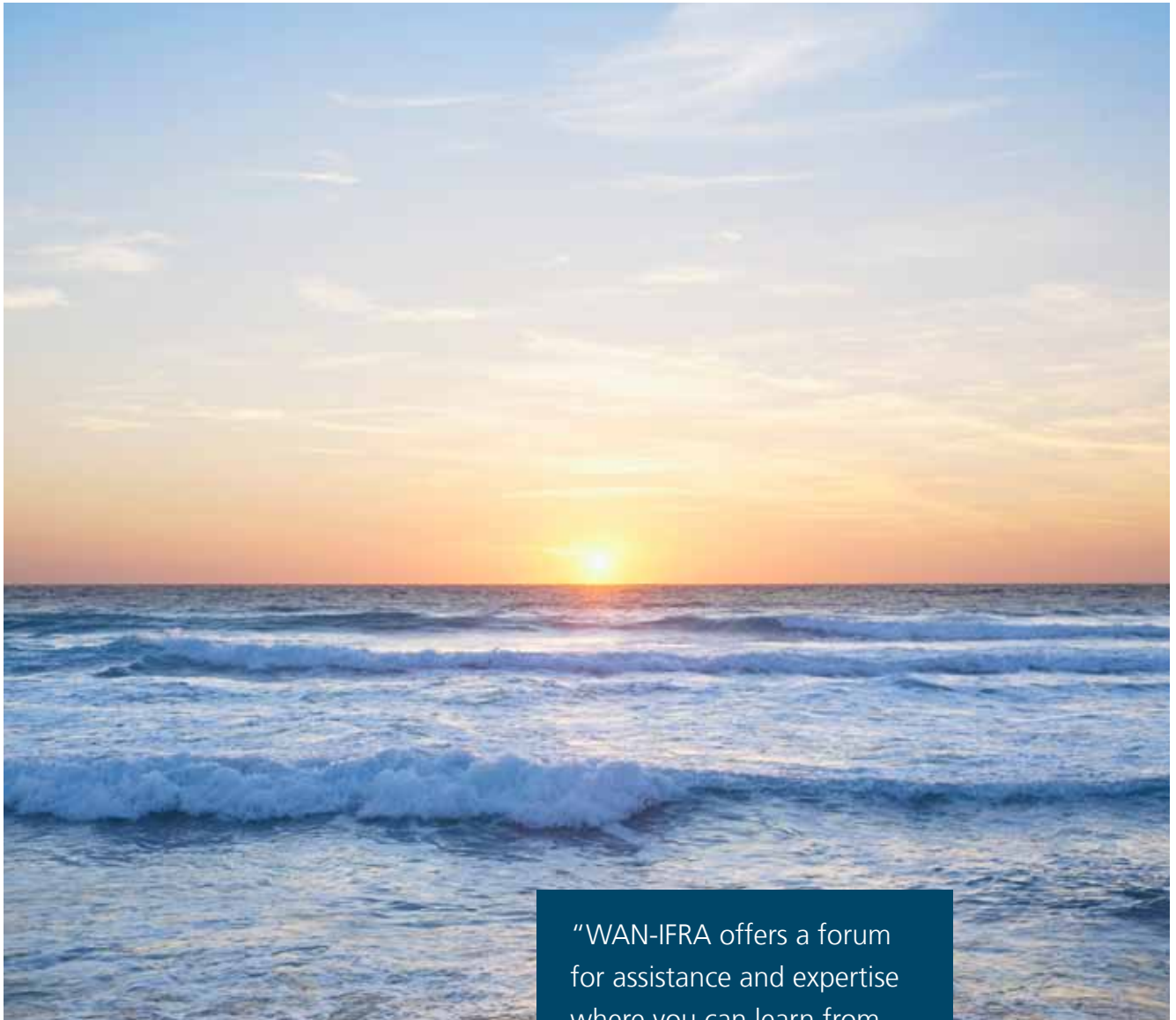
The regional offices fulfil a growing need for high quality training from media companies. These trainings use a combination of international trainers and modules developed in headquarters, supplemented by local expertise and understanding of local issues. In addition to public trainings, customised in-house trainings are also offered. Training initiatives in 2010 include:

- Launch of executive education programme in India with faculty from Kellogg School of Management
- System workshops in Nordic on advanced topics of video in newsroom and mobile publishing
- Colour quality improvement and standardisation training in Middle East initiated in partnership with member companies
- System workshops in Spanish on developing apps for mobile devices and cost savings supplemented by trainings on logistics and digital journalism. More than 80 media executives from Iberica benefited from these trainings.
- The French subsidiary has now become the preferred training partner for media companies in France. More than 770 people attended the French-language trainings.
- 420 media executives attended 22 training programmes offered across India and Asia.



FACTS

- Combined revenue of approx. Euro 2.0 million
- Regional events attended by 2488 participants from 81 countries
- Trained 465 media executives



“WAN-IFRA offers a forum for assistance and expertise where you can learn from other newspapers.”

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Managing Director,
Kasturi & Sons Ltd., India

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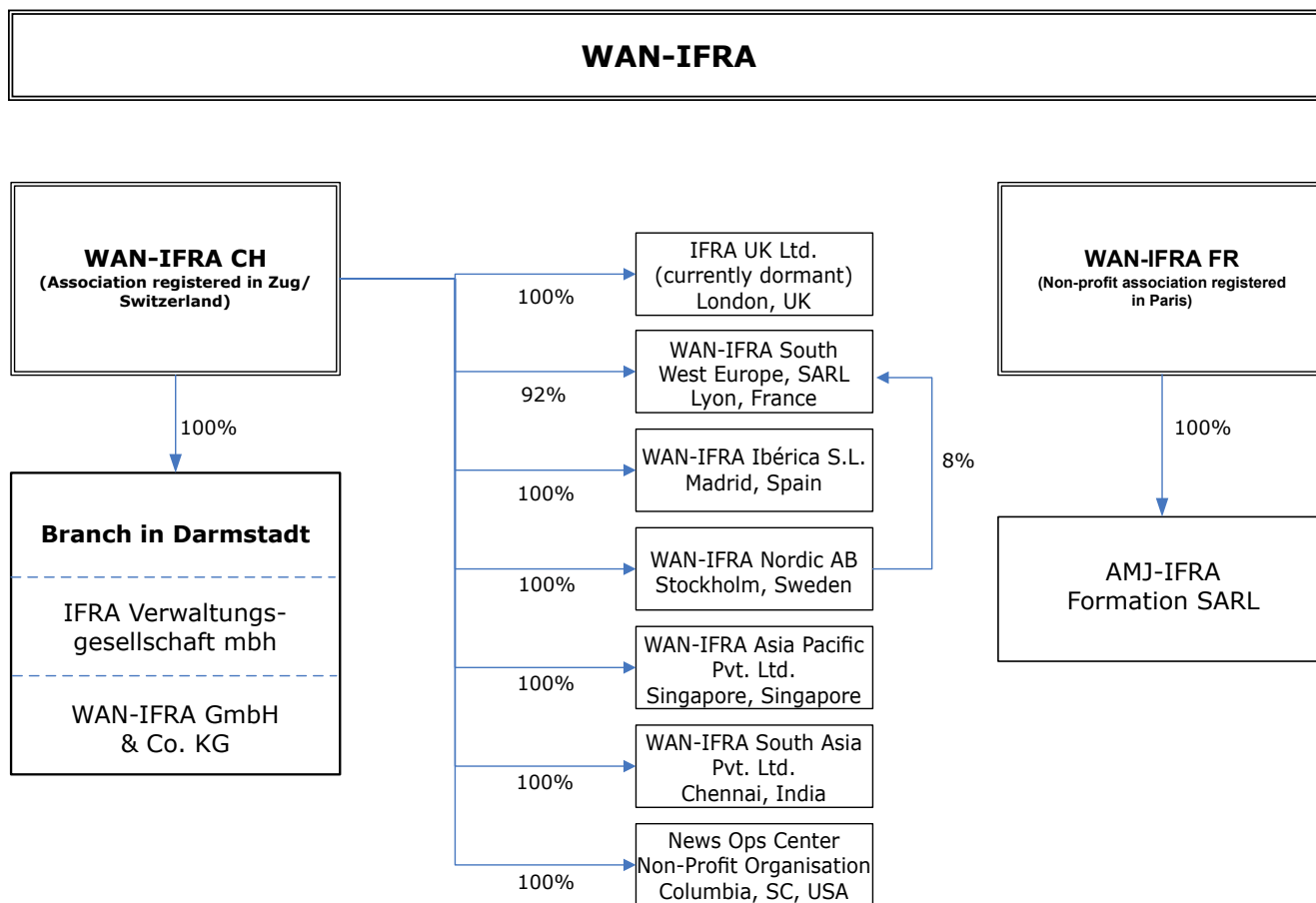
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Washington, D.C., United States

WAN-IFRA LEGAL STRUCTURE



WAN-IFRA FINANCIAL REPORT



WAN-IFRA CONSOLIDATED

Assets		2009	2010
A.	Fixed Assets	2.704.051	1.238.987
B.	Current Assets	0	0
	1. Cash in hand	17.259	15.036
	2. Bank accounts <i>including funds for media development</i>	2.907.389 (1.158.956)	2.512.267 (1.178.114)
	3. Trade accounts receivable	1.578.525	1.486.280
	4. Other accounts receivable (VAT)	759.778	292.536
	5. Down payments made	137.633	152.077
	6. Work-in-progress. contract-in-progress	0	0
	7. Deferred charges	173.507	73.431
		8.278.142	5.770.615
Liabilities			
A.	Equity capital		
	1. Equity capital at January 1	3.253.935	1.208.862
	2. Annual Results	-2.076.021	1.177.913
			-1.410.461
			-201.599
B.	Provision	2.064.981	1.191.946
C.	Shortterm Liabilities		
	1. Trade accounts payable	355.614	967.842
	2. Bank loans an overdraft	957.441	381.531
	3. Payments received on accounts	458.976	800.970
	4. Payments received on accounts	4.415	213.325
D.	Prepayments and deferred charges	3.258.801	2.416.600
		8.278.142	5.770.615

Remarks

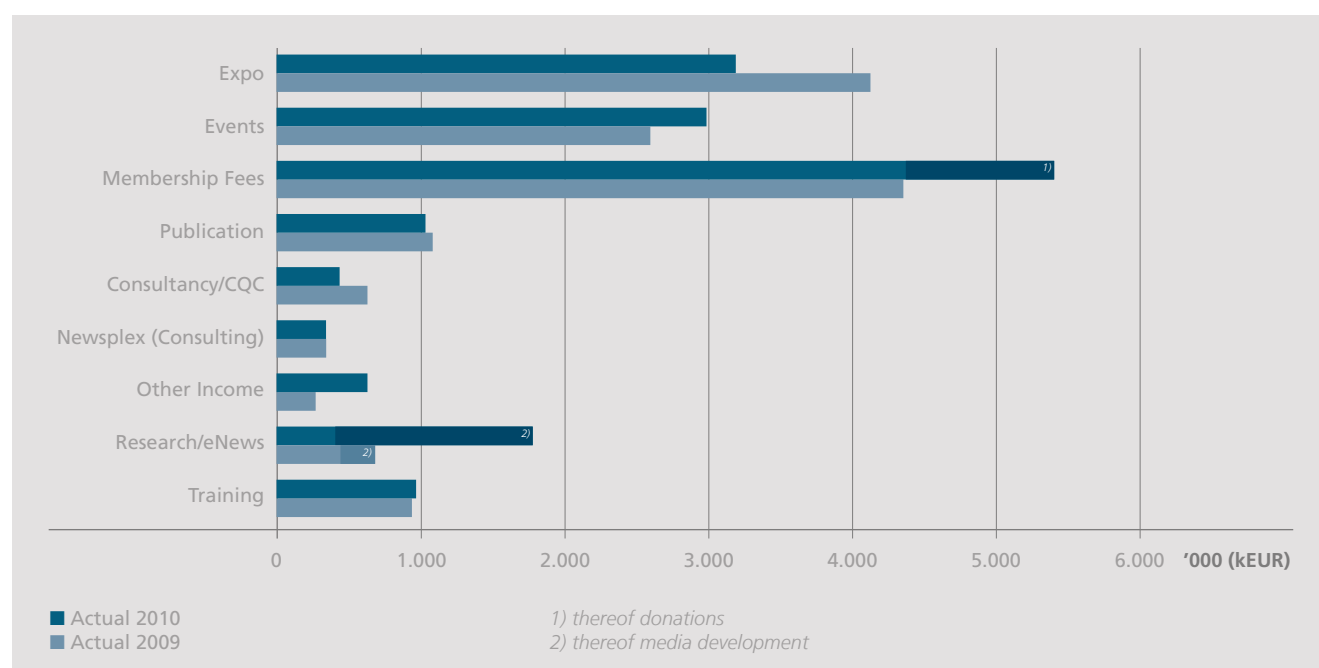
1. 2009 & 2010 includes IFRA VerwaltungsGmbH
2. Reclassification in different balance sheet items compared to previous years
3. WAN-IFRA South Asia – retrospective adaptation of legal calendar year (before fiscal year 01. April – 31. March)

WAN-IFRA consolidated	Actual 2009	Actual 2010
Revenues	15.016.399	16.732.372
<i>thereof donations</i>	(0)	(1.027.621)
<i>thereof Media development</i>	(240.380)	(1.367.781)
Personnel	-7.562.395	-7.671.678
Other costs	-7.460.631	-8.558.508
<i>thereof Media development</i>	(-240.380)	(-1.367.781)
Provision for debit losses	-761.521	-624.501
EBITDA	-768.149	-122.315
Depreciation and Amortisation	-283.174	-244.962
EBIT	-1.051.323	-367.277
Financial result	93.019	63.224
Ordinary business result	-958.304	-304.053
Extraordinary result	-1.078.269	-1.083.276
Company taxes	-39.448	-23.131
Result	-2.076.021	-1.410.461

WAN-IFRA CONSOLIDATED

3. REVENUE DETAILS

WAN-IFRA consolidated	Actual 2009	Actual 2010
Expo	4.114.924	3.181.675
Events	2.589.710	2.979.346
Membership Fees	4.343.216	5.388.430
<i>thereof donations</i>	<i>(0)</i>	<i>(1.027.621)</i>
Publication	1.082.064	1.031.959
Consultancy/CQC	630.354	436.972
Newsplex (Consulting)	344.316	342.613
Other Income	291.210	629.667
Research/eNews	682.748	1.774.782
<i>thereof media development</i>	<i>(240.380)</i>	<i>(1.367.781)</i>
Training	937.858	966.928
	15.016.399	16.732.372



4. OPERATING EXPENSES

WAN-IFRA consolidated	Actual 2009	Actual 2010
Representation	-210.789	-193.609
Travelling	-1.107.904	-1.141.493
Catering	-352.299	-603.408
Cost of Premises	-402.629	-408.950
Insurances/Fees	-48.485	-51.431
Vehicles	-74.150	-91.335
Machine Maintenance	-85.871	-74.524
Materials	-68.431	-96.367
Consultancy	-230.791	-431.268
Financial Costs	-30.974	-36.938
Rental Expenses	-1.096.777	-1.097.320
Mailing	-507.920	-510.356
Tel/Fax/Internet	-191.477	-216.045
Taxes	-21.529	-20.017
Research Projects	-13.403	-215
Hire Expenses	-25.214	-33.234
Travel/Other cost subsidiaries	-54.024	-64.949
Licences	-59.513	-43.225
Printing Costs	-217.506	-269.738
Lecturers/ Interpreters	-1.423.682	-1.651.860
Other Services	-1.052.043	-1.443.590
Other Operating Expenses	-185.219	-78.636
Operating costs	-7.460.631	-8.558.508
<i>thereof Media development</i>	<i>(240.380)</i>	<i>(1.367.781)</i>

Remarks

1. 2009 & 2010 includes IFRA VerwaltungsGmbH
2. Reclassification in different balance sheet items compared to previous years
3. WAN-IFRA South Asia – retrospective adaptation of legal calendar year (before fiscal year 01. April – 31. March)



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