



## Australian ISMN Agency

ISMNs and music publishing in Australia

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## 1 Introduction

The Australian ISMN Agency conducted its first comprehensive survey of ISMN-registered publishers since its inception in December 2001. The purpose of the survey was to obtain a better understanding of how the Australian music publishers categorize themselves and their work, what they publish, why and how they use ISMNs, their general attitude to ISMNs, their plans (if any) for future publishing in electronic form, the importance that libraries and related services have for publishers, and what, if anything, the Agency can do to improve its services.

This report synthesizes the results of the survey, together with the knowledge and experience of Australian music publishers and publishing practice that the Agency has acquired over the last eight years, into an understanding of the current state of the music publishing industry in Australia, and the role that ISMNs occupy within that industry.

## 2 Background

### 2.1 Australian music publishing

Printed music publishing in Australia is predominantly undertaken by the following categories of publishers: large commercial publishers, the Australian Music Centre, small publishers, and composer/self publishers.

#### 2.1.1 Large commercial publishers: AMPD, Music Sales, EMI, Hal Leonard, and Alfreds Music Publishers.

The large publishers have an important presence in the Australian printed music industry even though they publish very little printed music that would count as original Australian publications. They function as hire libraries, distributors, and as agents for other Australian and overseas publishers, and none of the large publishers are registered with the ISMN Agency.

It has not been possible to accurately determine the amount of original Australian publishing produced by these companies, but all of the evidence suggests that they publish a combined total which is typically less than 130 original Australian publications per annum. The largest amount of Australian content is produced by AMPD who publish between 30 and 120 titles each year. Hal Leonard do not publish locally, and EMI and Alfreds have published very little locally for several years.

In terms of non-Australian content, these companies (re-)publish overseas content for the Australian market. Such publications are not likely to be eligible for Australian ISMNs (this has yet to be tested and is currently a hypothetical scenario), but they should be subject to legal deposit if they are in fact specifically published in Australia and are not just distributions of items published offshore.

Electronic music publishing and supply is an established part of the business of both AMPD and The Music Sales Group. Both companies offer a substantial catalogue of printed music (mostly non-Australian in the case of Music Sales) that can be purchased online and printed using the *Scorch* music viewer.<sup>1</sup>

### 2.1.2 The Australian Music Centre

The Australian Music Centre (AMC) does not claim to be a publisher, but rather an organization that distributes, under licence, copies of works produced by their composer members for a certain percentage of the sales. However, from the point of view of the Australian ISMN Agency, they are treated as a publisher.

The AMC have registered 3,135 ISMNs since the Agency's inception at the end of 2001, which is an average of about 390 per year.<sup>2</sup> This accounts for about one third of the estimated total number of Australian publications each year. For this reason, the AMC is a major contributor to Australian music publishing activity.

At the time of writing, the AMC are finalizing a merger with the Australasian Performing Right Association / the Australasian Mechanical Copyright Owners Society (APRA/AMCOS) as a condition of the Australia Council's ongoing funding to the AMC, with the intention that the AMC continue to exist as its own entity. For that reason the future work and activity of the AMC is not entirely clear at the time of writing, although the indications are that their main publishing services for their composer members will continue as they currently are (i.e., licensing, reproduction, and representation).

### 2.1.3 Small publishers

Publishers in this category include small but significant publishers, often run as part-time businesses. Such publishers include *Publications by Wirripang*, *Reed Music*, *The Keys Press*, and *Orpheus Music*.

These four publishers together contribute about one quarter of the expected annual publishing output from Australian publishers. This is a substantial contribution from only a few publishers.

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<sup>1</sup> *Scorch* is an online music notation viewer that is available as a plug-in for web-browsers. It is produced by the Sibelius company and can be used to view music that has been prepared with the Sibelius music notation software. *Scorch* allows music to be viewed, printed, played in a synthetically-rendered manner, and even transposed into different keys directly from the vendor's website. Both AMPD and Music Sales freely expose the first page of their electronic publications but restrict the remaining page(s) until money has been paid. *Scorch* can also be used to deliver normal PDF files, allowing a vendor to provide the content of the file to be printed without having to deliver the file itself. The trade-off is that a royalty or licence fee has to be paid to Sibelius to use the *Scorch* delivery platform.

<sup>2</sup> The terms "registered", "assigned", and "allocated" tend to be used interchangeably to refer to (1) publishers giving an ISMN to one their publications; and (2) the Agency reserving a block of ISMNs for a particular publisher. There is no standard terminology, but the context should be sufficient to make the meanings clear.

#### 2.1.4 Composer/self-publishers

The ease with which composers can self-publish their own work has led to the emergence of a significant number of composer/self-publishers. However, the output from these publishers is usually very small as this report shows. There are exceptions, however, such as the work of Stephen Leek, a prolific choral composer who publishes a reasonably large catalogue of his own work, or of the internationally prominent composer Nigel Westlake who self publishes under the business name Rimshot Music.

It is impossible to know exactly how much of the total Australian music publishing output is registered with the ISMN Agency, but estimates on the basis of all of the known information suggest that approximately 80% of publishers are registered. There are some small publishers who remain unregistered with the Agency in addition to the five major publishers from the first category mentioned above.

## 2.2 The administration of ISMNs

### 2.2.1 General

Publishers who register with the Agency are assigned a block of ISMNs depending on the amount of publications that they have or anticipate producing in the near future. The publishers self-allocate numbers from their list as they publish each title, and they then advise the Agency of the details of the publication. In a small number of instances the Agency does not give the list of assigned numbers to the publisher but issues numbers to them as requested. This latter service is useful for those publishers that do not feel confident about managing a block of numbers themselves.

The Agency is required to maintain records of publishers' contact details, the blocks of numbers that have been issued, and the titles that have been assigned to ISMNs. The ISMN head agency in Berlin is advised of changes to publishers' contact details in order for them to maintain a directory of publishers, but otherwise all of the data remains with the local agency.

The Agency prepares a report for Berlin each year, which is largely statistical and represents the activity of the Agency for that year.

The ISMN body also holds an AGM and Panel Meeting each year. Two years ago the Panel Meeting was held in Indonesia and the Australian Agency prepared and delivered a paper at that meeting on the state of the Australian ISMN agency and its registered publishers at that time. Although the Australian Agency is generally not present at the AGM, it maintains its voice by transferring its voting rights to another attending representative.

### 3 Australian ISMN activity

#### 3.1 Publishing activity of registered publishers

From its inception in December 2001 until December 2009, the Australian ISMN Agency has registered 145 music publishers, of which 139 are listed as current. Those publishers have assigned a combined total of 6,785 ISMNs. It is clear, however, that only a small number of registered publishers are actively growing their catalogues and assigning ISMNs to their publications on a continuous basis.

34% of publishers have been registered for more than two years but have not allocated a single ISMN since they registered.

A further 27% of publishers have been registered for longer than two years and have allocated ISMNs to their publications, but have not made any allocations within the last two years. This is a high figure at slightly over one quarter of all publishers, but it is likely that natural attrition (the expectation that a certain percentage of publishers will cease operating each year) can account for this figure.

The remaining 39% (54 publishers) have allocated ISMNs within the last two years or they registered with the Agency within the last two years.

Curiously, of the 43 respondents to the survey, 5 were received from those publishers who have not allocated any ISMNs at all, and 10 were received from publishers who have not allocated any ISMNs within the last two years. This is summarised in the following table:

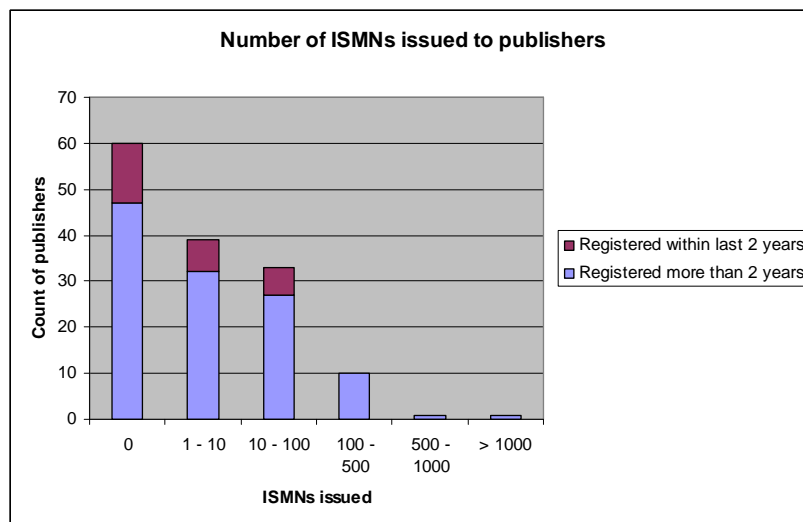
	Registered for more than 2 years and no allocations made at all.	Registered for more than 2 years and no allocations in the last 2 years.	Publishers active or registered in the last 2 years.	Total
Number of publishers	47	38	54	<b>139</b>
Responded to the survey	5	10	28	<b>43</b>

The 15 publishers who responded to the survey who have not (or not recently) assigned ISMNs suggests can be considered “inactive” publishers.

Active publishers	54
Inactive publishers	15
Dormant publishers	70

Considered in this way, the maximum number of potential responses to the survey is only 69 (54 active and 15 inactive publishers), which means that the 43 responses received is 62% of the likely maximum, which is a very good level of response.<sup>3</sup>

The majority of publishers who have registered have allocated low numbers of ISMNs (less than one hundred) over their period of registration, while only a relative minority have allocated more than 100 numbers. Only one publisher has allocated more than 500 ISMNs and only the Australian Music Centre has allocated more than 1,000 numbers. This is summarised in the following chart.

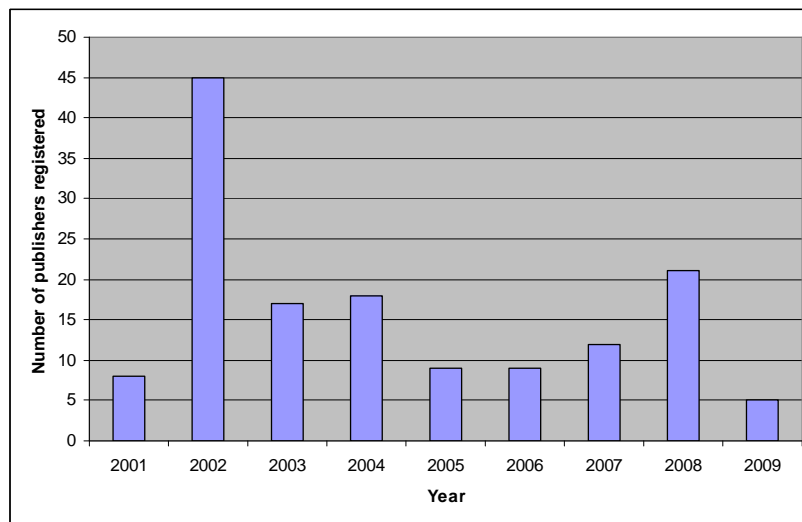


Another perspective on the Australian ISMN publisher-registration profile is seen in the chart of the number of ISMNs allocated by publishers who have registered in different years in the Agency’s history, shown below.

70% or more of the publishers who have registered with the ISMN agency have allocated either none or very few ISMNs to their publications, while about 20% on average have allocated anywhere between 10 and 100 ISMNs. There are only 11 publishers who have allocated more than 100 ISMNs to their publications since the Agency’s inception, and of those only 2 have allocated more than 500 ISMNs. These 11 publishers all registered prior to 2005 and only two or three more of the publishers currently registered are expected to grow their catalogues to eventually allocate more than 100 ISMNs, and they are all small publishers.

<sup>3</sup> I recognize that there is a methodological anomaly here given that 5 of the respondents have not been active participants in the ISMN system at all. However, the point remains that the number of responses received was reasonable relative to the realistic maximum.

		Year of publisher registration								
		2001	2002	2003	2004	2005	2006	2007	2008	2009
No. of ISMNs allocated	0	1	18	5	7	5	3	8	12	1
	1 - 10	3	12	7	6	1	3	4	4	3
	11 - 100	2	9	3	4	3	3	0	5	1
	101 - 500	1	5	2	1	0	0	0	0	0
	501 - 1000	0	1	0	0	0	0	0	0	0
	> 1000	1	0	0	0	0	0	0	0	0



#### 4 About the publishers survey

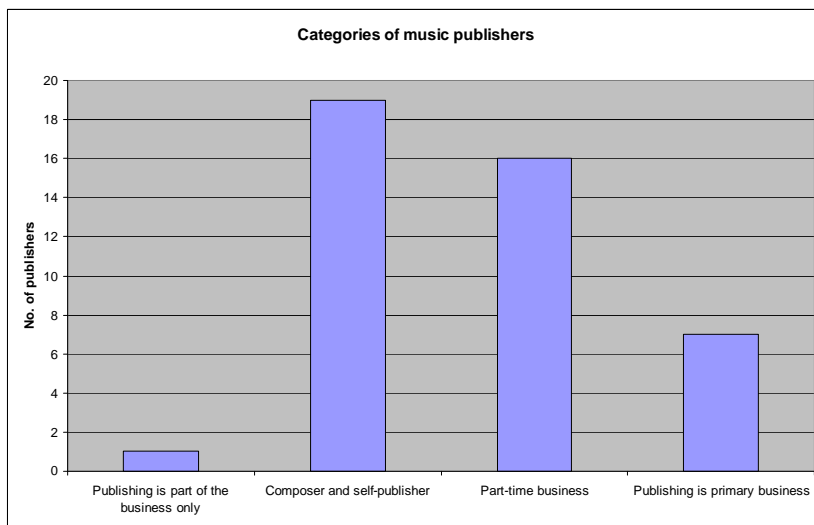
The ISMN-registered publishers survey was website-based, and prepared using the services of surveymonkey.com. Links to the survey were sent to 109 publishers, which are all of those for whom the agency has an email address recorded on its database. A further 6 were mailed out as hardcopy surveys. Of the 115 recipients of the survey, the Agency received 43 responses as discussed above.

#### 5 Commentary on survey responses

##### 5.1 Types of publishers

Most publishers identify themselves as either part-time publishers or composer/self-publishers.

Publishers identified themselves as belonging to one of the four categories shown in the graph below. Of the 43 survey respondents, only 7 identified music publishing as their main or primary business. The majority of respondents identified themselves as either composer/self-publishers or as part-time music publishers, with 35 of the 43 respondents placing themselves in either of these two categories. The AMC responded by saying that music publishing is part of their business only, and so they occupy their own category because they are clearly not a part-time operation but do not consider publishing to be their primary business.

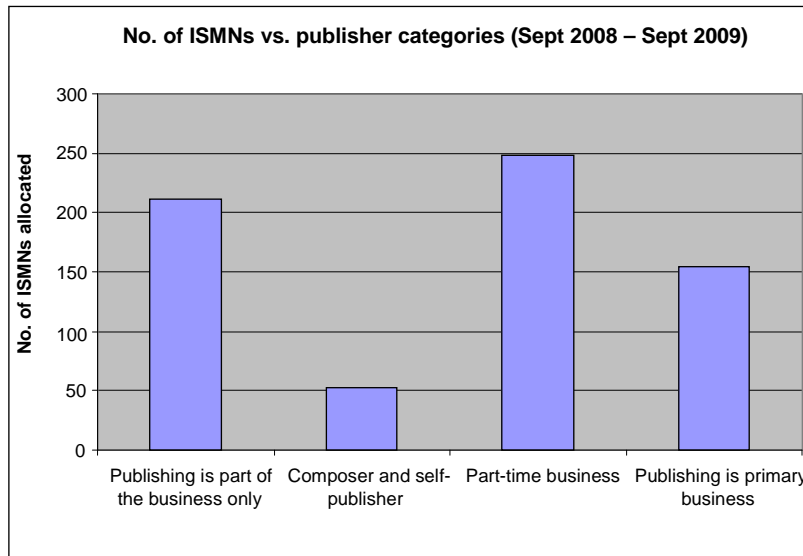


## 5.2 Volume of publishing

The largest category of publishers (composer/self-publishers) produce the smallest number of publications (8% of total publications), and the majority of publications are produced by those publishers who operate on a part-time basis.

The following chart is a sample of the number of allocations made by the different publisher categories from the period September 2008 to September 2009 (the sample was taken only from those publishers who responded to the survey). It shows that the majority of ISMNs were allocated by those publishers who identify themselves as part-time publishers.



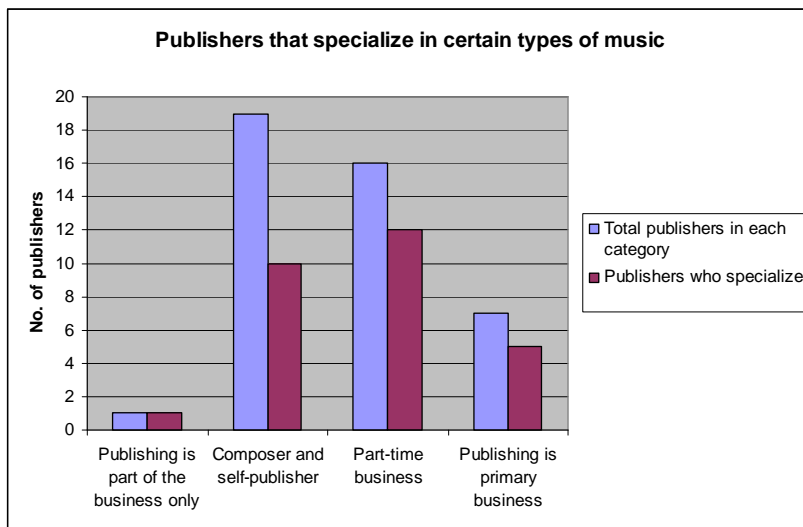


The table shows the specific relationship between the number of publishers in each category (those who participated in the survey), and the number of publications registered with the ISMN Agency over the course of one year (Sept 2008 – Sept 2009):

	Percentage of total publishers	Percentage of total ISMN allocations in one year
Publishing is primary business	17%	23%
Publishing is a part-time business only	37%	37%
Composer & self-publisher	44%	8%
Publishing is part of the business only (the AMC)	2%	32%

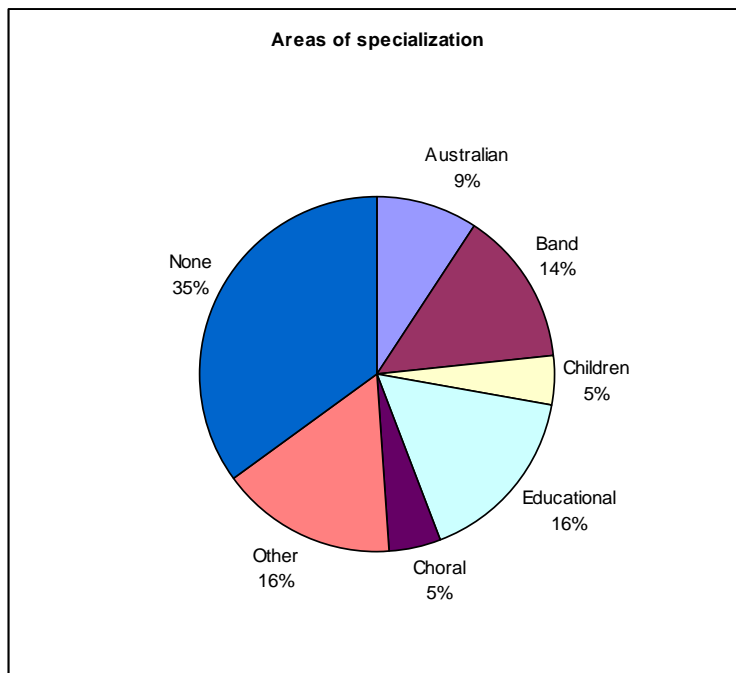
### 5.3 Specialization

65% of the respondents to the survey considered that they specialize in particular types/styles/genres or purposes of music publishing. The two most common areas of specialization are band music and educational music.



The above chart shows that specialization is the norm for those categories of publishers who allocate the highest number of ISMNs – in other words, the most prolific publishers tend to specialize in particular types of music, or have a particular publishing profile.

Two of the areas of specialization that stand out are educational music and band music. Seven of the twenty-seven publishers who said they specialize indicated educational music as their specialization. A further six of the twenty-seven indicated that they specialized in band music. Other areas of specialization are children’s/school music, and choral music. There is no discernible relationship, however, between the type of publisher or the number of publications that a publisher produces and any area of specialization.



## 5.4 Electronic publishing

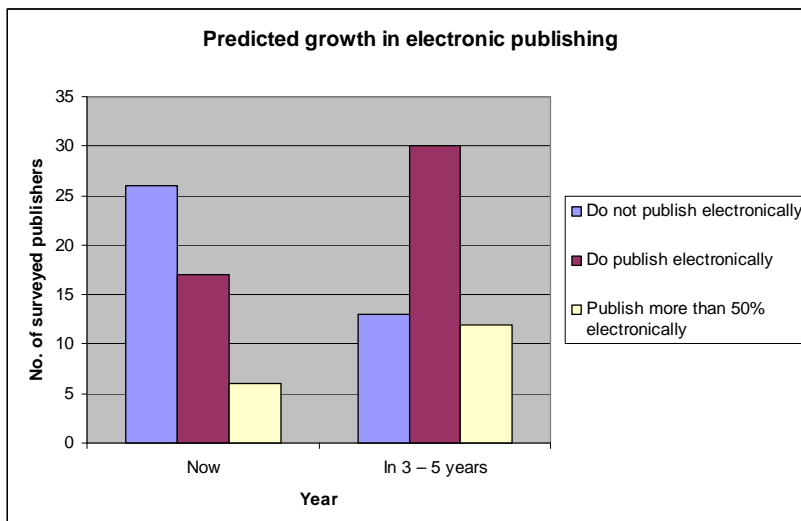
- Excluding the AMC, 70% of the publishers who responded to the survey will publish at least some of their catalogues electronically in 3–5 years time. Most of these publications will be produced and distributed as downloadable PDF files. The total number of electronic publications is likely to remain around 25% or less.
- The AMC are developing infrastructure to fully support the distribution of their music publications as PDF files. If they provide all of their new publications in electronic form, then this would be between 35 - 40% of the total number of publications currently assigned ISMNs each year.
- The Music Sales Group and AMPD have developed the means to sell printed sheet music online using Sibelius's *Scorch* software. AMPD currently offer 752 titles for online purchase, and Music Sales offer 43,754 titles online.

For the purposes of this report, electronic publishing refers to any practice that publishers employ to provide publications by electronic means (such as website downloads, files on CDs or other media, etc.), irrespective of the originating form of the work or if it is also made available through conventional printed sales.

### 5.4.1 ISMN-registered publishers (excluding the AMC)

The survey specifically sought to obtain information about the current and future practice of ISMN-registered publishers in relation to electronic publishing and the related issue of how such publications might be supplied or distributed.

17 of the 43 respondents indicated that they currently publish some items electronically, and of those 17, 6 reported that they publish 50% or more of their publications in electronic form. However 30 respondents stated that they plan to publish at least part of their catalogue electronically in the next 3–5 years, and of those 30, 12 anticipate publishing 50% or more of their publications in electronic form. This is shown graphically below.



That more publishers plan to produce electronic publications in the short- to medium-term future is no surprise. The survey responses reveal that most of the interest in increasing electronic publishing activity comes from composer/self-publishers and those publishers who produce 100-500 items each year.

Of the composer/self-publishers, 14 plan to publish up to 50% of their publications in electronic form, and those same publishers currently produce 10 items or less each year. If their publishing output stays relatively constant then this group of publishers overall anticipate publishing less than 70 publications annually in electronic form in 3 – 5 years time between them.

Of the second category, two publishers who produce between 100 and 500 items per year anticipate publishing between 20% and 50% of their catalogues electronically.

By extrapolating the results of the survey against the total amount that has been published in the last eight years by the different categories of ISMN-registered publishers (except the AMC), it is likely that 25% or less of the total number of items published overall by these publishers will be in electronic form in 3–5 years time. That figure would currently represent about 100 items.

#### 5.4.2 The Australian Music Centre

Publications produced by the AMC currently account for anywhere between 35% and 50% of the total annual number of ISMN allocations in Australia. AMC publications also account for 10-15% of the NLA's total intake of purchased and legal-deposit music. It is known that the AMC has been actively working to develop the capacity to produce and deliver music publications electronically, and assuming that many newly-published items will be available electronically within 3 – 5 years then that represents a significant proportion of material that will be available in electronic form; 10-15% of the total NLA music intake and 35-50% of ISMN allocations.

#### 5.4.3 The Music Sales Group and AMPD

Two major electronic publishing initiatives are being undertaken by the Music Sales Group and by All Music Publishing and Distribution (AMPD). Both companies now offer selected titles for sale directly from their websites using Sibelius's *Scorch* music reader. The Music Sales Group currently offers 43,754 titles and AMPD offers 752 titles.<sup>4</sup> Of these very large numbers of titles available online, the number of Australian titles — or titles whose print corollary would be eligible for legal deposit — is completely unknown.

These online sales services work by exposing the first page only of each publication to the public via the website music reader, *Scorch*. On payment of a fee, the rest of the publication is accessible to the purchaser who can then print a complete copy of the music directly from the web browser. It is important to note that these services do not sell electronic files, but function to deliver *print* products via the consumer's own computer. There is no ability to download anything and so the consumer is effectively purchasing the right to print a copy of the music from the vendor's website.

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<sup>4</sup> Figures shown on the AMPD website <http://www.ampd.com.au/Public/BrowseDPD.aspx> and the Musicroom website (the Music Sales Group's online portal) <http://www.musicroom.com.au/en-AU/digital.html> (both sites accessed 17th February 2010).

Interestingly, AMPD have decided to make this service only available to retailers at present, thereby continuing to include them in the distribution chain. This means that if a customer wants to purchase a piece of sheet music that may only be available online, she/he can go to a retailer who can then print a copy for the customer who then pays the retailer directly. It is expected that this service will soon be opened up directly to the public.

#### 5.4.4 Preferred electronic formats

60% of the survey respondents who anticipate publishing electronically think that they will offer PDF files either for free or on a pay-for-download basis from a website. Approximately 20% think that they will supply files on CD or other media, and the remainder are divided between publishing files in proprietary formats (such as Sibelius/Scorch, Finale, etc.) and producing image files in formats such as JPEG or TIFF files.

Only a relatively small number of ISMN-registered publishers anticipate using the *Scorch* online music application to make their publications available, whereas this is the technique of choice by the two large publishers, Music Sales and AMPD. While it is possible that smaller publishers might follow the lead of AMPD and Music Sales and use *Scorch*, the disincentives are that it is primarily limited to scores produced with *Sibelius* and a license fee must be paid for its use. It is too early to predict whether *Scorch* will become the dominant delivery mechanism or whether other alternatives will emerge.

### 5.5 Use and non-use of ISMNs

68% of survey respondents, and all who published more than 50 titles, assigned ISMNs to all of their publications of the past year.

29 of the 43 survey respondents reported that they assigned ISMNs to all of the publications that they produced in the last 12 months. A further breakdown of the figures shows that, in fact, all of the publishers who reported publishing more than 50 items in the last year assigned ISMNs to all of their publications.

The publishers who said that they assigned ISMNs to only some or most of their publications were divided about equally between part-time publishers and composer/self-publishers.

There were 6 publishers who said they assigned ISMNs to none of their publications and all six reported publishing less than 10 items each in the last 12 months.

On the basis of these results, the trend is clear: the more publications that a publisher produces, the more diligently do they assign ISMNs to their work. All publications by publishers who produce more than 50 items per year received ISMNs.

Of those who did not assign ISMNs to their publications, the reasons given fall into three main categories:

1. Publisher either forgot or could/did not find time.

2. Concern about systemic issues regarding ISMNs: specifically “book wholesalers ... do not know how to deal with ISMNs” and “Lending Rights do not recognise ISMNs”.
3. Publications were intended for specific clients and not for general distribution and so no ISMNs were assigned.

The first reason is unfortunate, but predictable. The third reason is not a concern because if the music is not “published” in the sense that it is available to the public then it does not qualify for an ISMN. The only implication for this survey is that if publishers had this non-published music in mind when responding to the question of how many publications did not receive ISMNs, then in fact the figure is possibly lower than indicated because those items were not eligible in the first place.

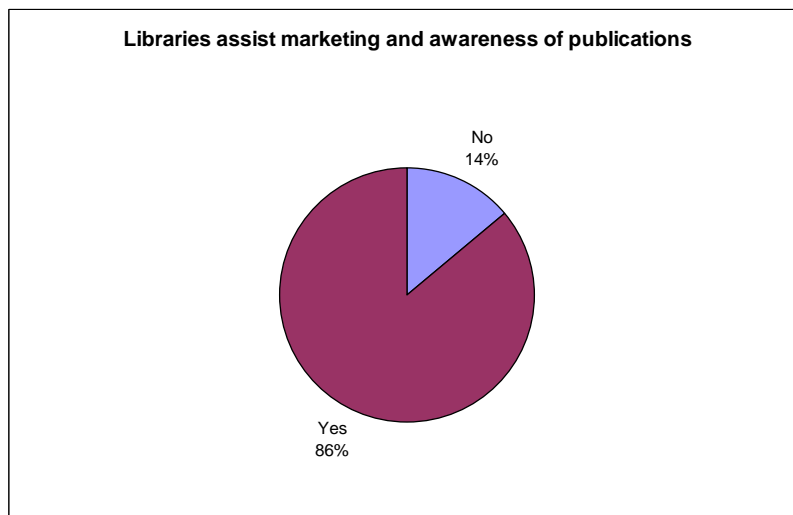
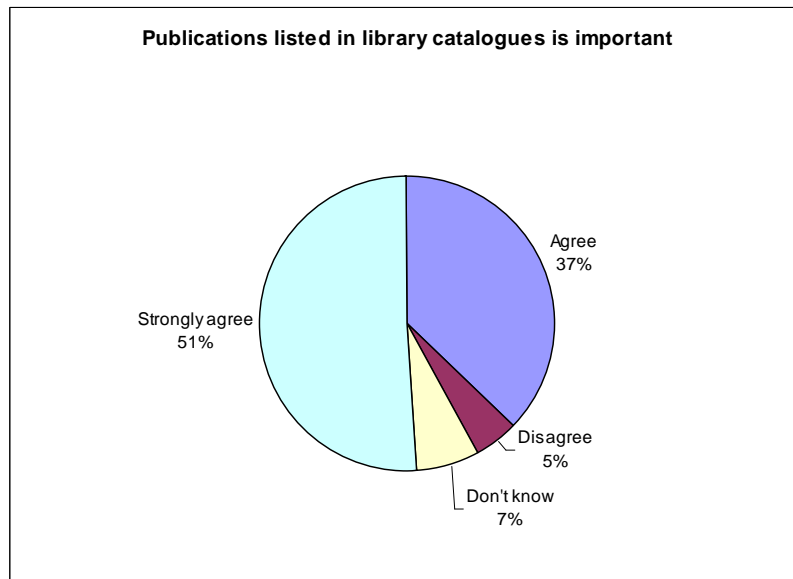
It is true that the Public Lending Rights body do not recognise ISMNs, and that their guidelines specifically refer to books and ISBNs (although music publications are not specifically excluded). However, even with an ISBN, publications only qualify for PLR funds in lieu of sales royalties if more than 50 copies are estimated to be held in Australian public lending libraries. This is likely to be the real impediment against composer/self-publishers and small music publishers claiming PLR payments.

The claim that book wholesalers do not know how to deal with ISMNs is potentially true, and requires further investigation by the ISMN Agency.

## 5.6 Role of libraries

90% or more of survey respondents agree that listing publications in library catalogues and related services is important. They also agree that doing so assists in marketing and raising awareness of their publications.

Respondents to the survey overwhelmingly agree that having their publications listed in library catalogues is important to them. Furthermore, respondents also overwhelmingly agree that libraries or library-related services assist with marketing and raising awareness of their publications.



The responses to these questions were highly consistent, however those who either did not know or disagreed with the statement that listing in library catalogues is important also indicated that libraries do not play a role in marketing or increasing awareness of their products.

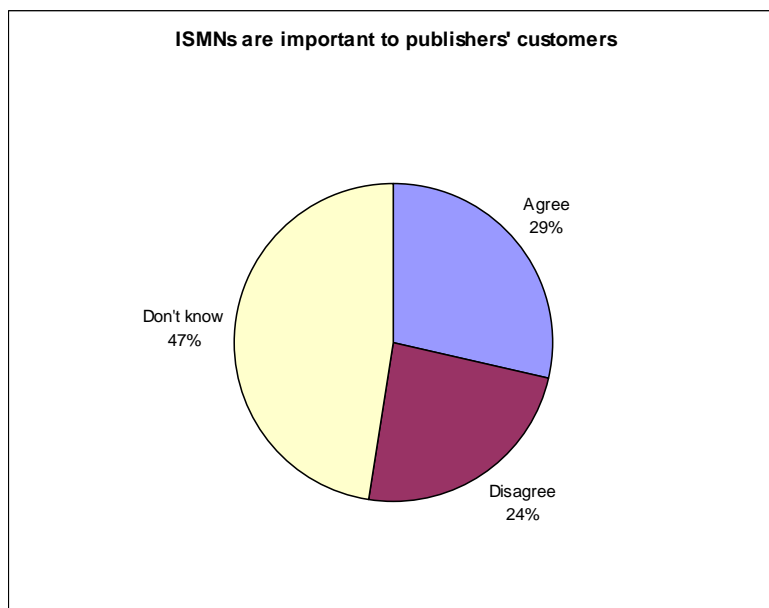
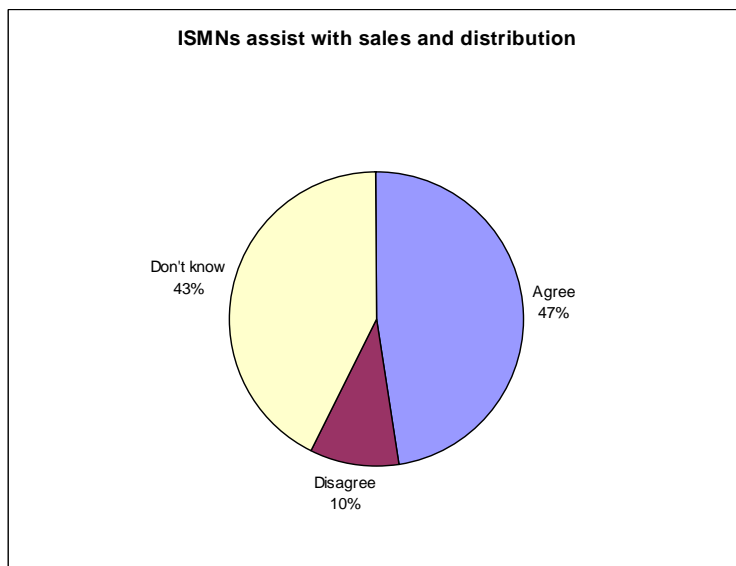
Two publishers claimed that listing in library catalogues is important but did not think that it assists with raising awareness of their publications. From these two publishers it is not clear why they consider listing in library catalogues to be important.

### 5.7 Attitudes to ISMNs

Most publishers agree that ISMNs are important, although there is no consensus as to why. Most publishers think that using ISMNs impart prestige and legitimacy to their publications.

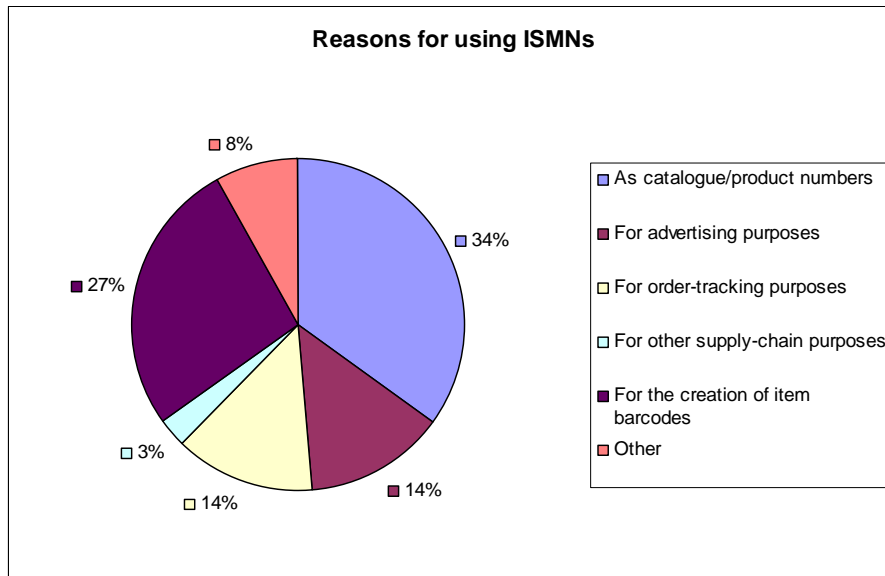
The survey asked respondents to say whether they agree, don't know or disagree with the statements that (1) music looks more professional with an ISMN than without one; (2) assigning ISMNs is important to them as publishers; and (3) assigning ISMNs is important to the music publishing industry. More than 80% of respondents agree that music publications look more professional if they include an ISMN, and more than 90% of respondents agree that assigning ISMNs to publications is important to both them and to the music publishing industry overall. However, the certainty of these responses diminishes when publishers were asked specifically why they use ISMNs.

When asked if ISMNs assist with sales and distribution of publications, the results are distributed almost equally between those who agree and those who don't know. And when asked if ISMNs are important to their customers, the majority of publishers responded that they do not know.

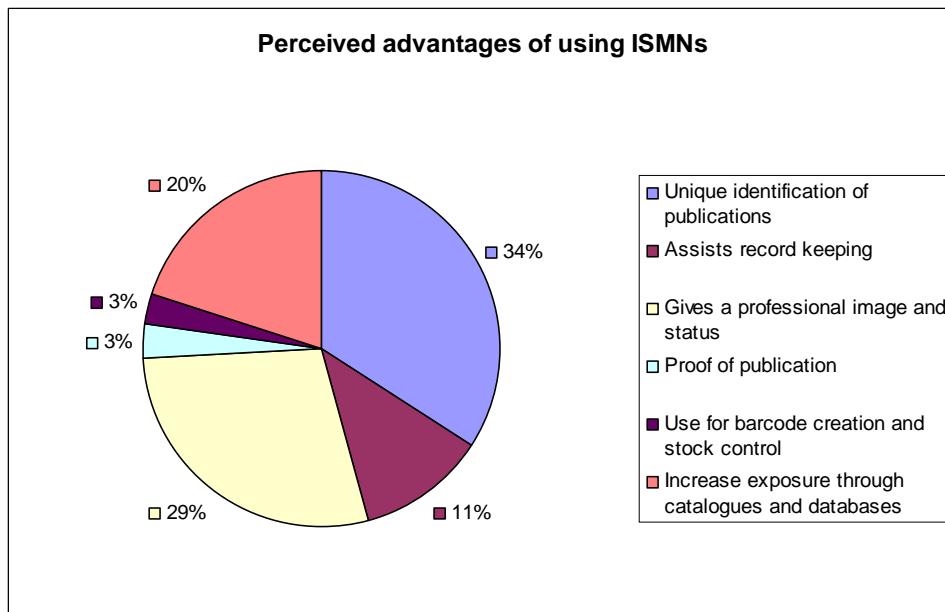




When publishers were asked about other purposes for which they use ISMNs, the two largest categories were for catalogue/product numbers and for the creation of barcodes. The responses, however, did not indicate a common reason for using ISMNs.



Similarly, when asked about the main advantages of assigning ISMNs, there is no clear, commonly-understood advantage, although about one quarter of the respondents pointed to the unique identification of publications as the main advantage.



The differences in the responses to these two very similar questions were surprising. However, the one response that is consistent is that ISMNs are advantageous in providing unique identification to publications. A lot of emphasis is also placed on the capacity for ISMNs to impart a professional status or impression to publications. There were two publishers whose responses suggest that the only reasons for using ISMNs are for the professional image or prestige that they are perceived to offer.

The overall impression is that publishers believe that the use of ISMNs is important to both their own business and to the music publishing industry overall, but there is no single prevailing imperative to use them.

### 5.8 Quality and useability of the Australian ISMN service

90% or more of survey participants reported that the service offered by the Australian ISMN Agency is easy to use, provides sufficient and clear information on its website and from its staff, and is of good quality overall.

All of the survey questions that asked respondents to rate the ease of use of the ISMN system (website and forms), the quality of the service received from staff, and the quality of the ISMN service overall, received overwhelmingly positive responses.

	Respondents who agree or strongly agree		Respondents who rated service as 'good'
It is easy to obtain ISMNs from the Agency	98%	The quality of the last contact with ISMN Agency staff	90%
Is it easy to notify the Agency of allocations	90%	The quality of the ISMN service overall	95%
The Agency staff are always able to answer questions	90%		

Furthermore, 90% of respondents reported that the information provided on the Australian Agency's website was sufficient for their needs (most of the remaining 10% indicated that they hadn't looked at the website at all), and the Australian ISMN website together with direct contact with Agency staff, rated as the two most useful sources of information about ISMNs to publishers.

From these responses it is clear that the Australian ISMN Agency is doing very well in terms of creating a system, in terms of its website and user forms, that is both useable and useful. It is also clear that the service provided directly by ISMN Agency staff is well regarded by respondents.

### 5.9 Comments on suggested improvements

Specific suggestions for improvements to the ISMN service that were made by survey respondents include:

- Offer publishers the facility to see and list the publications that they have registered on the ISMN database;
- To view copyright information on registered works;
- To see composers' biographical notes
- To provide the ability to register multiple publications at once

Suggestions 1 to 3 above can already be achieved using the National Library of Australia catalogue (or *Trove* for biographical notes if they have been made available).

While publishers can see all of their publications on the NLA catalogue, they cannot print or save a list of all of their publications with the details that are important to them in a form that is useable. This is a considerable disadvantage of the current VuFind catalogue used by the NLA, but the Agency is happy to provide such a list to publishers on request.

The ability to register multiple ISMNs at once is a concern that the Agency has been aware of for some time. There are two methods to achieve simultaneous registration of multiple publications that avoid the requirement to fill out a form for each item. Firstly, by arrangement with the Agency, publishers can omit the process of filling in forms and providing details to the Agency for each item if they self-allocate ISMNs and are prepared to print and provide legal deposit copies of publications to the NLA as soon as possible after publication. Music Unit cataloguing staff will then do all of the necessary data entry directly from the publications themselves as soon as they have been received. This method, however, is not suitable for those publishers who require cataloguing-in-publication (CiP) records to be made prior to publication. Secondly, the ISMN Agency can, upon request, supply a pre-formatted Excel spreadsheet to publishers that they can use to quickly and easily enter the data for up to 100 publications. This form can then be emailed directly to the Agency, thereby bypassing the need to fill in a separate paper or online form for every publication.

## 6 Summary of observations

- Very few ISMN-registered publishers identify publishing as their main activity. Most publications are produced by part-time publishers.
- Many publishers registered with the Agency have not assigned any ISMNs at all. It is not clear why they registered in the first instance, although the term "publisher" in the music industry is ambiguous and refers both to publishers of recorded music (which is

a very common use of the term) as well as to print music publishers. In fact, members of the Australian Music Publishers Association (AMPAL) consist mainly of recorded music publishers.

- The output of original Australian publications from the large publishers active in Australia (who are not registered with the Agency) is very small.
- Electronic publication is recognized as a serious probability by Australian publishers, evidenced by the work that has been done by Music Sales and AMPD to offer publications online through the *Scorch* application.  
The extent and significance of the role that the AMC will play in providing electronic publishing and delivery services is still uncertain, but it is clear that they are working hard and fast to establish the infrastructure to fully support such services, which is expected to be operational within a matter of weeks from the time of writing.  
The impact on electronic music publishing by the remainder of the ISMN-registered publishers is not expected to increase beyond 25% of the total output in 3 – 5 years time.
- The importance of ISMNs is not very clear to Australian publishers because it currently does not play a major role in the supply, distribution and retail processes in this country. However, publishers value the sense of legitimacy that ISMNs impart, and they want their use of ISMNs to facilitate wider distribution and exposure.
- The service provided by the ISMN Agency is considered valuable and to be of a good standard.

## 7 Conclusion

The benefits of ISMNs to the publishers themselves and the music community overall has yet to be fully established. Publishers recognize that ISMNs lend an air of authority or legitimacy to publications and that they put them on some sort of international map – but it is not clear just what that map represents besides a presence on library catalogues and related services such as *Trove*.<sup>5</sup> The benefits of ISMNs to publishers appear to be more fully understood in Europe, for example, where organizations such as Harrassowitz and Schott Music incorporate ISMNs into their publication and distribution workflows.<sup>6</sup> However, within Australia, similar distribution mechanisms do not exist and so the remaining benefits that publishers recognize are the ability to uniquely identify publications numerically and to provide a standard number that can be used to create product barcodes.

These are not strong benefits to publishers in Australia at the moment, especially given that the three major distributors of music, Music Sales, AMPD, and Hal Leonard, do not use ISMNs at all, and there is anecdotal evidence that retail/wholesale systems in Australia do not

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<sup>5</sup> See <http://trove.nla.gov.au/>

<sup>6</sup> See the ISMN Newsletter 19 (September 2009).

Available at [http://www.ismn-international.org/download/ISMN%20Newsletter%2019\\_web.pdf](http://www.ismn-international.org/download/ISMN%20Newsletter%2019_web.pdf)

recognize them either (the main music retail and point-of-sale system in Australia, called “Musipos” assigns its own product numbers and barcodes).<sup>7</sup>

What this means is that ISMNs have not directly had a significant impact on improving the availability of Australian music publications although they have *indirectly* improved availability because the publications are identified by the NLA much more readily and subsequently listed in catalogues, other online discovery tools, and the Australian National Bibliographic Database. However, ISMNs have not yet improved availability through the rest of the music publishing and retail sector.

This situation might change, however, with time and if the publishers of Europe look to use ISMNs within the Australian market, and indeed if an ISMN Agency is established in America where some of the large music publishers have their bases. If ISMNs become more fully developed and recognized in these two large market regions then there will be an incentive for Australian publishers to use ISMNs if they seek distribution into those markets, and for distributors seeking to distribute (or re-publish/imprint) European or American publications. In other words, ISMNs will not realize their potential in Australia until they are more fully adopted in the larger markets of the world, and those markets seek a more active presence in Australia.

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<sup>7</sup> See <http://www.musipos.com.au/>