



Small-Nation Publishing

COLICO Lecture delivered by Professor Alistair McCleery, Director, Scottish Centre for the Book, at the Annual Joint Conference of the Library Association of Ireland and CILIP at the Hilton Hotel Belfast on 30th April 2009.

Thank you for your kind introduction, your welcome home, and indeed for your invitation to speak to such a distinguished and knowledgeable audience- and to speak too at an occasion of this status and significance. Librarians everywhere are united in their belief in the importance of education, of access to information, and of the need for reading development. In that faith, you place yourselves at the centre of the world of books, the calm and calming hub around which the rest of us – authors, publishers, teachers, readers – circulate in our frenzy to make sense of the world in which we live. The theme of my talk this afternoon is about making available an understanding of the small bits of the world in which we all live – small nations, national regions and regions in EU terms – when they are in danger of being neglected in favour of an understanding from the larger parts of the world. More specifically, I want to explore with you the position of publishers in these small nations, national regions and nations – as they are the ones likely to be investing in and producing the material, fiction and

non-fiction, that feeds our understanding of the local as opposed to the global – what can be done to support those publishers and what the likely consequences of that might be in a globalised information economy and increasingly globalised culture. I'll be using examples of publishing and its life-support systems from Scotland, Ireland – the South – and Canada. I could have used the topical example of swine 'flu and the speed and scale of its transmission to illustrate globalisation but I won't. Instead, let me use a more culturally enlightening illustration: Mel Gibson and Scottish football.

In 1996 the then Manager of the Scotland football team took his players to the cinema to see *Braveheart* (1995) in the hope that the film of Scottish victory in the fourteenth-century Wars of Independence would inspire them to success on the pitch. The film traced the career of William Wallace, chiefly from the point where he had returned from Rome, fluent in the universal language of clerical hegemony, Latin, and included his victories against the armies of Edward I, before his capture and death by being hung, drawn and quartered in London. More apocryphal incidents in the film included the impregnation of the French wife of the Crown Prince by the doughty Scotsman; while the more historically accurate account of the Scottish nobles sharing a common heritage with their English counterparts, and indeed owning estates in both countries, provided a key motivation to the narrative's depiction of upper-class pusillanimity and desertion.

The film was based on a book by an American academic of Scottish ancestry; Wallace was played by an Australian born in the USA where he now lived and worked; most of the action was shot in Ireland with the collaboration of the Irish army; and *Braveheart* is owned, reflecting the production investment, by an American

studio, Twentieth Century Fox, part of News Corp, a media conglomerate, the fiefdom of Rupert Murdoch, an Australian of Scots origins who has taken American nationality. The Scotland football team, mainly composed of Scots playing in English teams as opposed to Scottish teams comprising players from everywhere except Scotland, failed to make much progress in Euro 96 but, unusually for those in such an occupation, the Manager remained in post until he resigned after failure to qualify for the 2002 World Cup. He was succeeded by a German whose contract as Manager of the Kuwaiti national side was bought out by the Scottish FA.

Globalisation, in this sense of disregard for the boundaries of the nation-state, has a long pedigree; even globalisation, in the sense of the spread of specific cultural narratives and icons, has an extended history (*Don Quixote*); but perhaps globalisation, in the sense of trans national ownership of the media, is a phenomenon more clearly associated with the second half of the twentieth century and beyond. And it is one that particularly affects publishers in small nations, national regions and regions who find themselves in competition with much, much larger enterprises that know no national or regional allegiance or responsibility. For example, Scotland is a national region of five million inhabitants, like Ireland, situated on the northern periphery of Europe. It has formed since 1707 a political union with England and Wales, its neighbours to the south who constitute a population of fifty-five million. In turn, it now forms part of the European Union with its commitment to free movement of goods and labour across national borders. Within the larger English-language community, Scotland, again like Ireland, has been both an embattled minority culture and a leading influence thanks to its imperial diaspora. A separate Scottish history and culture existed before and after the Union: during Scotland's period as an independent

nation-state, the status Wallace fought for, but also in its later incarnation as a stateless nation or national region.

Scotland has a continuing distinctive social and cultural history, including many of the institutions of civil society: the legal system, the educational system, its professional bodies, including those for librarianship, its charities (SSPCA and RSPCA), and its post-Reformation predominant church. These institutions shaped and continue to shape a strong sense of Scottish distinctiveness reflected and fed by Scottish publishing.

But what is **Scottish** publishing? Defining publishing in Scotland has long involved the disentangling of what is the Scottish-based industry from the aggregated UK profile of a metropolitan (ie London-based) industry and, since the mid-twentieth century, from the profile of a trans national industry. Disentangling can be more difficult in this context as a Scottish publisher can be the imprint of a UK or trans national group with its performance data hard to disaggregate. Such a group is now more likely to have general media interests of which book publishing will be only one. The disentangling involves distinguishing between media products and their role within the group, the book of the film as opposed to the film as opposed to the film of the book, education as opposed to reference books, for example, every bit as much as it does seeking separate profiles for member companies within the group.

Instead of disentangling, however, we can cut through the Gordian knot. There is an easier way of answering the question: what really is **Scottish** publishing? And I should add that this is not merely an 'academic' question as it provides the basis, as

we'll see later, upon which a more focussed form of support can be allocated. A rough distinction can be made on the basis of output between those firms that publish *for* Scotland and those that publish *in* Scotland. The former are founded to reflect a cultural nationalism and its literary or historiographical expression. Many of these small presses fail after initial success or remain relatively static. Where success is consistent, these firms can lose their independence through merger with or acquisition by larger, London-based, houses. (A similar migration can often be noted in the place of publication of Scottish writers: early work published in Edinburgh, later work in London.) Those firms that publish *in* Scotland, though not necessarily *for* it, have been even more vulnerable just because of their dependence on markets outside Scotland – particularly those firms whose success before 1950 was based on the imperial enterprise. Let me give two illustrations of this.

For example, in 1962, Thomas Nelson and Sons merged into the Thomson Organisation in an effort to sustain its educational publishing interests on a global scale. It had been a publisher *in* Scotland though not latterly *for* Scotland.¹ The production plant remained in Edinburgh while the editorial offices moved to London. The firm also began to seek competitive quotations for production work from printers in the UK, and more frequently abroad. The printing division was sold off in 1968; the works, in 1880 the epitome of forward-looking investment, were razed to the ground to make way for the headquarters of an insurance company. In 1969, the successful US division was sold off to a Tennessee publishing firm which retained the name Thomas Nelson and Sons. The earlier move of the editorial offices to London

¹ See my 'Introduction' to Heather Holmes and David Finkelstein, *Thomas Nelson and Sons: Memories of an Edinburgh Publishing House* (East Linton, 2001)

represented the first in a number of changes of address indicative of the imprint's role as a building block in international merger and acquisition strategies. Thomson merged the imprint with its acquisition of Pitman and it moved to Walton-upon-Thames. Thomas Nelson and Sons made a further migration from Walton-upon-Thames to Cheltenham as a result of its sale by Pearson, which had only just bought it from Thomson, to the Dutch conglomerate Wolter Kluwers. Kluwers merged the imprint in 2000 with Stanley Thornes to form a new division, Nelson Thornes. All this is itself a local consequence of global realignments in educational publishing. The story of Nelsons is not just of historical interest: it demonstrates the inability of even the most successful local companies, with a global outreach, to withstand the forces of a trans national marketplace.

Let me try your patience with a second example: Oliver and Boyd. Oliver and Boyd represents a less clear-cut example in terms of its development but not of its outcome. It began as a distinctly cultural publisher in 1798, issuing Burns's 'Holy Willie's Prayer', for example, in 1801 as well as the poems of Ramsay, Fergusson and many anthologies of Scottish song. It published *for* Scotland. The company published the *Edinburgh Almanac* from 1812 until 1932 and the *British Ready Reckoner* in 1812. From the middle of the nineteenth century, its educational and medical lists dominated and provided the basis for strong export revenues. It had become a publisher *in* Scotland. This position persisted until the second half of the twentieth century when the company retrenched to serve the distinctive Scottish educational market. It became again a publisher *for* Scotland. The company was sold to the *Financial Times* in 1962, itself to be absorbed by Pearson. The university and general publishing departments were immediately closed but the schools division continued to

thrive. Its textbooks designed for the then new Scottish Standard Grade examinations anticipated the change from O-level to GCSE in England and Wales and captured some of the market south of the border. However, Oliver and Boyd was closed down completely by the then Pearson Longman in 1989 with a turnover of £2.75 million and a net profit level of 10%. Its closure left Scotland at that point without an educational publisher to supply the needs of its distinctive schools system. The Oliver and Boyd list was transferred to Longman in Harlow and allowed to expire in time.² The group into which Oliver and Boyd sank, never to reappear, Pearson Education, employed in 2004 – the last year for which disaggregated national figures are available – only 2,071 people in the UK but 16,133 in the USA and another 4,080 in branches worldwide.³ There is no reason to doubt that these proportions have remained the same: Pearson's gaze remains outwards to a global market rather than on local needs. Again, not an anecdote safely in the past but an illustration of the operation of globalisation upon publishers providing a successful and needed service within small nations, regional nations and regions.

So the model, or models, based on the operations of the global information economy emerge: dominance on a local scale succeeded by absorption by global players; a continuing creation and disappearance of small publishing houses to provide outlets for a Scottish cultural output falling in and out of fashion on a UK and international

² See my essay on 'Conglomerates' in David Finkelstein and Alistair McCleery, *The Edinburgh History of the Book in Scotland. Vol. 4, Professionalism and Diversity 1880-2000* (Edinburgh, 2007)

³ Pearson Group, *2004 Annual Report* at http://www.pearson.com/investor/ar2004/governance/notes_10.html#a (accessed 27 April 2008)

stage. This instability must then be also set against increasing competition from other sources of information and other forms of expression often backed by the deep pockets in research and development, and trialling, of trans nationals such as Google. In the case of Oliver and Boyd, another key aspect of the process may be seen in the closure by the centre of a reasonably healthy branch. Oliver and Boyd's 10% net profit failed to meet the corporate targets of Pearson while, on the other hand, it did represent a strong and solvent position within a limited local market that many current enterprises would envy. The stress on making targets like this not only makes publishers search for larger markets than the small nation or region but it also makes them risk-averse. They need to search for the 'sure thing' and this leads in turn to copying the latest success – more boy wizards anyone - or offering of huge advances to celebrities of all kinds whose fame might be expected to deliver the necessary sales and margins. (Or both in terms of last Christmas's spate of celebrity 'autobiographies' to cash in on the unexpected success of Peter Kay in 2007.) Globalisation not only leads to the loss of local publishers but it also severely limits the range and diversity of content being actively promoted and distributed.

Of particular relevance to Scotland, **and** other small nations or national regions, large advances are offered to authors whose earlier work produced by a local publisher has demonstrated the 'surety' of its sales. And in order to make the sure thing more secure, the conglomerates expend large advertising budgets, employ huge sales forces, and exploit strong media connections (often within a sister company). Even if the book does not sell, and the public is on occasion perverse enough to assert its own tastes, it is not without want of promotion and publicity. Theoretically it might be possible to 'write locally, publish globally'; but practically to publish globally means

to write globally. I realise that this may seem a contentious assertion in the light of the success of those Irish novelists, for example, published by large trans national companies. I would be pleased to defend myself in the question session later but for now I'll just say one thing: the most successful Irish novelist at the moment may well be ... Cecilia Aherne.

Is it possible to redress the balance between local minnows and global sharks to ensure that a range of cultural and educational needs are met? How can support of whatever kind be targeted to be most effective in terms of the no doubt limited resources available? These are questions that have exercised not only me but many others concerned with the maintenance of distinctiveness and difference. One possible answer, adopted in both the UK and Ireland, is fiscal; books here are rated as zero for VAT purposes along with other 'public benefits' such as children's clothes. Books *do* attract reduced rates of VAT in most of the countries of the EU: zero only in the UK, Ireland, Poland and Croatia. By contrast in Denmark the full rate of VAT of 25% is paid on books. Does it make a difference? No, there is no discernible impact on book sales. Some might even propose that to tax books generally, no matter the genre or point of origin, would create funds to focus on the support through library purchase schemes, for example, of those titles that are culturally or educationally important. Cecilia Aherne pays for Joyce Cary! However, scepticism is the order of the day as, firstly, hypothecation of tax revenue is a principle most governments shun and, secondly, today more than ever, governments are more likely to use these revenues at national and EU levels to fill the holes left elsewhere by the present economic conditions.

I would like to link at this point resale price maintenance (RPM) aka recommended retail price aka (in the UK) the Net Book Agreement to the question of VAT. Both are indiscriminate mechanisms. RPM has been abolished now in the UK and Ireland – it had only the force of a voluntary agreement. However, it still exists in Denmark, Germany, France, Greece, Italy, the Netherlands, Norway, Austria, Hungary, Bulgaria, Spain and Portugal: either as a statutory condition or in the form of Business-to-Business agreements, as with the NBA, normally agreed on behalf of their members by trade associations – publishers, booksellers, authors. Where it still exists, that is, in most of Europe outside the British Isles, RPM applies to all titles. Or where there are exceptions, those exceptions are just those educational and academic books that are likely to be of greatest cultural value. What RPM does, in other words, is to prevent you from buying Cecilia Aherne in Tesco (two for £7) – or anywhere else at a discount for that matter. What it may not do is maintain a level playing field in terms of retail price between the ‘non-net’ products of local publishers, particularly non-fiction and educational books, and those of the global conglomerates. Again, it has been argued cogently that if our concern is that people *read*, without concern for *what* they read, then the abolition of RPM, certainly in the UK, has made books available at lower prices through more retail outlets such as Tesco or online through Amazon. There is less evidence, however, to show that this has actually increased the number of active readers rather than shifting the point of purchase from CTNs (Confectioner, Tobacconist, Newsagent), garages and independent booksellers to superstores and the internet. And I do have a concern for *what* people read if we are to sustain and grow, rather than conserve and display in museums, the patchwork of distinctive cultures, histories and narratives across Europe and the rest of the world.

But let me go back first on my travels to Scotland before returning to Ireland and then to Canada. There are two types of publisher now in Scotland roughly corresponding to the publishing *in* Scotland and publishing *for* Scotland categories I have identified already.⁴ Most of the *in* category publishes little that is aimed specifically at a Scottish market and for some of those publishers less than 55% of their turnover comes from that market. The five largest publishers average between them 10% of their total sales in the Scottish market. However, let me focus on the *for* category. For the *for* category, the Scottish market is crucial: it can account for between 70% and 99% of total sales. While a relatively small number of titles are produced by each *for* publisher, the types and genres of those titles are diverse. There is one key exception to this notion of diversity. While fiction, including children's literature, in a UK context generally makes up about 50% of publishers' output; in Scotland for the *for* category the figure is much smaller with popular non-fiction and academic/cultural output dominating. Books that explain Scotland to Scots (and others). This reflects to a great extent the cultural nationalist mission of the *for* publishers. In addition, while fiction has a higher public profile – authors can become minor or even major celebrities (the case of JK Rowling) – it is a difficult market to break into, subject to intense competition. Non-fiction is, moreover, better suited to niche or small publishing as markets are easier to identify and target. And it is this area, to which we can add *new* fiction and poetry by reason of their small revenues, for which we need to seek more discriminating mechanisms to offer effective support. Publishers *in* Scotland do not need such support: publishers *for* Scotland do.

⁴ See Alistair McCleery, et al., 'Publishing in Scotland: Reviewing the Fragile Revival', *Publishing Research Quarterly*, vol. 24, no. 2 (2008) pp. 87-97

This situation may be shared, to some extent, I admit, by other small publishers in the UK and by other industries in small countries. However, the factors peculiar to Scotland include: our lack of children's book publishers; our small educational and academic publishing sectors; the failure of certain markets; and basically the nature of the content from the *for* publishers being perceived as too 'regional' or 'niche' to appeal outside Scotland that creates a dependence on a relatively small marketplace in global terms. Further down the supply chain, the retail and library supplier sectors in Scotland have suffered major casualties with closures and takeovers.⁵ Within Scotland, and its relatively consensual political culture, the rationale for public support for private-sector publishing to overcome the negative aspects catalogued above remains unquestioned; there is an agreement on the need to ensure the dissemination and availability of Scottish writing and Scottish books. We just need to know how to do it as effectively as possible! Particularly at a time of intense competition for taxpayer-derived resources.

How does Scotland do it now? The Scottish Arts Council (SAC) provides direct grants to publishers. These are mainly given to defray production costs on specific titles or commissioning and producing a block of titles. The SAC carries out an assessment that is based upon both the literary, artistic or cultural merit of the book or books concerned and the estimated financial projections. The amount given to publishers has fluctuated over the last ten years but the overall trend is downwards. The grant scheme is a reactive one with publishers submitting appropriate proposals

⁵ Alistair McCleery, David Finkelstein and Jennie Renton, *An Honest Trade: booksellers and bookselling in Scotland* (Edinburgh, 2008) ix-xix

as they arise and the downwards trend could be more indicative of the fact that fewer titles were being published during the past decade that met the criteria of the scheme – a worrying aspect in itself if indicative of a fall in ‘cultural output’. Publishers can also apply for substantial grants for marketing projects. SAC grants are effective in creating an element of stability for the industry, particularly for *for* publishers. This has been enhanced by specific support of a more professional infrastructure for coordination, cooperation and promotion, particularly Publishing Scotland (formerly the Scottish Publishers’ Association) and the initiatives for which it has been responsible, such as Booksource or BooksfromScotland.com.⁶

The issue may well be that there is never enough of such support. The National Lottery has, on the other hand, been the source of welcome ‘additionality’ funding administered through the SAC. However, the substantial Lottery-derived grant of £244,000 that was given to Neil Wilson Publishing in 1999-2000 to create a new fiction imprint, 11:9, based in Glasgow, illustrates some of the advantages **and** disadvantages of SAC support. The money was used to underwrite the publication of thirteen books (of a planned forty) by first-time Scottish authors. Although each of the authors received an advance of £2,000, most of the grant was spent on the support infrastructure including major promotion and marketing. The intention, to launch new Scottish talent in the wake of political devolution, was excellent and the personnel involved were experienced professionals but the books, with the exception of

⁶ See Marion Sinclair, Alistair McCleery, and Mark C. Graham, *A Review of Scottish Publishing in the 21st Century: Summary Report* (Edinburgh, 2004) available at <http://www.scottisharts.org.uk/1/information/publications/1000311.aspx> (accessed 27 April 2009)

Jonathan Falla's *Blue Poppies*, failed to make the hoped-for impact, particularly in the London-based media.

The imprint took its name from the date of the referendum on Scottish devolution but, in another example of best-laid plans falling prey to the unpredictable, this was also to be the date of the attack on the World Trade Center towers in New York, creating a subtle obstacle to effective marketing of the brand in the USA and elsewhere.

External factors such as an overall downturn in the general market for fiction played their part but internal decisions, including the choice of a relatively heterogeneous group of books to be marketed as a package, shared the responsibility for the initiative's failure to meet its own objectives. No post-mortem can be altogether definitive. Without such efforts, new writers might remain 'mute inglorious Miltons' with obvious loss to the cultural life of the nation.

On the other hand – and, yes, this is the characteristic stance of the academic – it must be acknowledged that the example of 11:9 also provokes a criticism that is more generally voiced about state support for publishing: that it creates 'lazy' publishers who persist in producing a larger number of titles than the market warrants. It is true that contemporary book sales across Europe demonstrate the long tail: most sales at any given point are generated by the top 100 titles. The remaining titles – and about 110,000 were published in the UK last year, 9,000 (English-language) in Ireland – sell few copies and then over a longer period. The objections to this situation are economic, based on the presumption that publishers should only produce what most people want, presumably Cecilia Aherne, and to a lesser extent environmental, based again on a market-led presumption that the low-selling titles will eventually be pulped

rather than stored and distributed over a longer period. However, all I am describing here is increased consumer choice, the costs of which are increasingly mitigated by print-on-demand, online selling – and perhaps eventually by Google! The alternative, to make available to consumers only the top 100 titles at any point, identified in advance through celebrity authorship or success elsewhere, would be to limit them to a diet of Katie Price and Niall Ferguson, Michael Palin and James Patterson – not necessarily bad in itself but relatively bland and lacking local ingredients. The interests of authors – in being published and read – and of readers – in having a wider choice – underpin the support by SAC for publishers *for* Scotland.

The issue remains how best to offer this support. The devolution settlement that led to the re-establishment of a Scottish Parliament in 1999 gave greater control over cultural policy to Scotland although it continued to centralise the key area of fiscal regulation within the Westminster government. This has led to an increasingly frenetic search for new administrative mechanisms through which a distinctive national culture can be stimulated, sustained and promoted while remaining within the restraints of that devolution settlement. The Scottish Arts Council itself initiated a series of strategic reviews of different art forms, including a review of publishing; the then Scottish Executive produced a national cultural strategy; an independent but consensual Cultural Commission reported on the topic; and a Culture Bill was suspended pending the 2007 Scottish Parliament election; its major innovation, a new funding body Creative Scotland to subsume both the SAC and Scottish Screen, has only just been reintroduced in Parliament by the now Scottish Government after much debate, changing of course, and expenditure of consultants' fees. What all contributors to the search for administrative mechanisms in Scotland shared was a

willingness to examine policies and processes within other small countries and assess the potential for the import of good practice into Scotland. The only qualification to this within a devolved government remained the inability to use the tax regime as one of the mechanisms available to comparator nation-states. Two countries tended to be quoted consistently: namely Ireland and Canada – given the similarities in their industry structures and the need to address issues related to dual and/or minority languages. In particular, the range of support programmes and initiatives offered to support and encourage the development of their creative, including publishing, industries were the subject of acute analysis within Scottish (overlapping) cultural and political circles.

Ireland

It is noteworthy that the Irish publishing industry is largely independent of the major international players. Major overseas publishing groups, primarily those with a strong UK presence, do compete in the Irish market, usually from a base in the UK, often using a dedicated sales team on the ground in Ireland. Imports represent approximately 70% of the overall market but there are substantial variations between different sectors. In the educational sector, it is estimated that 90% of the market is held by Irish publishers whereas in the general sector foreign publishers dominate, comprising over 85% of the market.⁷ If Irish publishers *in* Ireland publish *for* Ireland, then it is only to a limited range of readers – specifically those held captive within the educational system. ‘Free readers’ are catered for by the global conglomerates.

⁷ See <http://www.publishingireland.com/about.shtml> (accessed 27 April 2009)

– CLÉ produces a biennial *Irish Book Publishing Survey*.

What support exists comes from the Irish Arts Council.⁸ The Arts Council was established to stimulate public interest in and promote the knowledge, appreciation and practice of the arts. Irish literature in this context comprises all of the imaginative literature, written and spoken, upon the island of Ireland, whether it originates in Northern Ireland or the Republic, or by Irish writers living abroad, in the Irish or English languages. The Council offers both grant-aid and loans to publishers who wish to publish works of contemporary literature or works that are concerned with contemporary arts and culture, for example, books on visual artists or on composers. It carries out an assessment that is based upon both the literary, artistic or cultural merit of the title and the estimated financial projection. The Council assists titles in the English language while Bord na Leabhar Gaeilge funds books in the Irish language. The latter's rationale is linguistic while the Arts Council's is artistic. The Council can be credited with a large increase in the number of children's titles, including non-fiction, published in Ireland since its adoption over twenty years ago of a deliberate policy to support their specific production. Its continuing pump-priming role in specific sectors has shown flexibility and responsiveness. The publishing sector in Ireland does not receive any preferential tax status although authors resident there do so in relation to their royalty income.

However, the Arts Council in Ireland supports publishing primarily as a means of securing a strong and stable Irish literary culture: writing *for* Ireland, rather than publishing *in* Ireland. While its financial assistance may reflect the belief that Irish writers are likely to be better served by editors in Irish publishing houses, this is not a

⁸ See Irish Arts Council at http://www.artscouncil.ie/en/intro/about_us.aspx (accessed 27 April 2009)

restriction on its investment. Irish publishing suffers, however, from the same phenomenon as its Scottish neighbour: indigenous companies may nurture and develop authors but local success will bring more lucrative advances from London-based publishers. From the Arts Council's point of view, this presumably benefits Irish literature in providing it with a wider readership – as well as providing authors with a larger (untaxed) income. From this narrower cultural perspective, the economic consequences for the Irish publishing industry may be of less significance. Indeed, the latter's underpinning by its successful educational output may seem to balance the industry's overall books, if not those of individual companies. From the UK, that is, London perspective, Ireland now represents an attractive market in which to establish a foothold, challenging the indigenous trade publishers through direct competition for authors. Even the nurturing function, in other words, is under threat by the establishment of branch imprints. Penguin Ireland was established in 2002 with the express aim of becoming the leading publisher of Irish-interest literary and commercial fiction, and general non-fiction, exploiting the parent company's global marketing outreach. Michael McLoughlin, Managing Director of Penguin Ireland, commented upon its launch: 'By applying the rigorous standards of a world-class company such as Penguin to books with Irish themes, I believe we can bring Irish titles to the widest possible audience.'⁹ Not *in* or *for* but publishing *from* Ireland.

⁹ Penguin Ireland in

<http://www.penguin.co.uk/static/packages/uk/aboutus/history.html> (accessed 27 April 2009) A separate Penguin Scotland closed in January 2008.

To summarise, Ireland's trade publishers, in common with their Scottish counterparts, face strong challenges from the London-based publishing industry in terms of competing for authors, for sales in the home market, and for the primary role in promoting their distinctive literary culture overseas. Ireland's particular advantage is the strength of its educational publishing base, accounting for over two-thirds of total publishers' revenues. This is in sharp contrast with the situation in Scotland where the educational publishing base has been eroded in terms of the number of companies and the lack of Scottish ownership of these companies. However, the more limited ambitions of the Arts Council in Ireland contrast strongly with those of the Scottish Arts Council – and certainly with those of the Canadian agencies involved in supporting publishing.

*Canada*¹⁰

Canada has slightly more publishers per capita than Scotland but fewer than Ireland; it has around 643 for a population of 31 million.¹¹ The publishing industry in Canada has experienced substantial growth in both the number of titles published (17,000 pa in English) and in the number of publishers. More than 75% of publishers in Canada are located in Ontario and Quebec, though there is a significant cluster in British Columbia. Approximately a fifth of the Canadian market is for textbooks, which contrasts sharply with the Scottish situation but resembles the Irish. There are

¹⁰ I am grateful to Susan Renouf for her constructive comments on this section of my lecture.

¹¹ Statistics Canada, *2006 Annual Survey Of Service Industries: Book Publishers* in <http://www.statcan.gc.ca/daily-quotidien/080710/dq080710a-eng.htm> (accessed 27 April 2009)

similarities between the Canadian, Scottish and Irish publishing industries in that all exist alongside larger English-language publishing industries and all have other language publishing, French-language and First Nations in Canada, Gaelic and Scots in Scotland and Gaelic in Ireland. The French language has equal status with English in Canada and the fate of the French language itself is not wholly dependent on speakers in Canada, unlike the example of Scottish Gaelic where the number of speakers is in decline. Quebec publishers have a potential other market in selling to French readers in France and elsewhere, a market that is not paralleled in the Scottish or Irish Gaelic case. There is a market in producing educational French-language titles for the curriculum throughout Canada.

The Government of Canada had developed by the end of the twentieth century a wide range of programmes to support the growth and development of the publishing industry throughout Canada with an emphasis on equal development of material in the two state languages.¹² Some of these programmes were common to the development of the cultural industries as a whole while others were targeted directly at specific sectors of the industry. Support ranged from direct grants to support the writing and publishing of books to discount financing to support the growth and development of small businesses. Foreign investment policy also supports the Canadian-owned and controlled book publishing industry.

At provincial level, support is also available although it varies in nature and scale from province to province. In Quebec a great deal of investment has been made in the

¹² Canadian Heritage at <http://www.pch.gc.ca/pc-ch/sujct/arts-culture/publi/index-eng.cfm> (accessed 27 April 2009)

publishing industry both as an instrument of asserting cultural sovereignty – much like Scotland – and as a means of renewing the local economy that has in places been much affected by the collapse as here of traditional industries such as textiles.¹³ That is also an objective of the provincial government in Ontario where the chief tool is fiscal: a tax credit plan that enables publishers to gain tax credits (or cash) for eligible Canadian-authored titles.¹⁴ Funds there for marketing and digital transformation are more markedly aimed at revitalising a post-manufacturing economy. More recently, the province of New Brunswick has initiated support programmes for publishing to add diversity to a local economy over-dependent on tourism.¹⁵ British Columbia in the west has concentrated on supporting local publishers, including first-nation publishers, through book-purchase programmes for schools and libraries.

All these programmes and policies to support the production, distribution and promotion of Canadian books, magazines and newspapers reflect a belief in Canada's distinctive culture(s). They are based on the premise that Canadians must have access to Canadian voices and Canadian stories. However, the defensiveness that characterises some of these measures is balanced by the capacity-building nature of others available to the publishing sector through a general desire to grow the creative economy in Canada. These initiatives sustain not only publishing *for* Canada but also publishing *in* Canada.

¹³ <http://www.sodec.gouv.qc.ca/livre.php> (accessed 27 April 2009)

¹⁴ <http://www.omdc.on.ca/page3259.aspx> and <http://www.omdc.on.ca/Page3397.aspx> (both accessed 27 April 2009)

¹⁵

<http://app.infoaa.7700.gnb.ca/gnb/Pub/EServices/DetailOrgEng1.asp?OrgID1=818&DeptID1=22> (accessed 27 April 2009)

Conclusion

The three aspects of globalisation identified initially – increased transnational flows of media products; increased commonality of transnational culture; and increased transnational ownership – are not discrete elements but aspects of a cyclical, reinforcing process. The consolidation of publishing within media groups, through take-over, merger and integration, leads to a concentration of the book market. Such a concentration results, despite perceptions to the contrary, in a decrease in consumer choice and an increase in the commonality of transnational culture (in turn, exaggerated by the integrated marketing of a range of media products within the one group I noted earlier). The emphasis here is not on non-Scottish (or Irish, or Canadian) ownership in itself but on the effects of that non-Scottish (Irish, Canadian) ownership. Ultimately the concern is not with the vulnerability of publishing in small nations, national regions or regions or non-indigenous ownership of the booktrade *per se* but with the effects of that upon the small nation's sense of itself, upon its cultural identity.

Increased transnational flows of books are a challenge to an open marketplace, particularly in the sense that economies of scale will nearly always enable larger publishers, with the cooperation of larger booksellers, to supplant the smaller. Government, directly or through its agencies, must then take up the responsibility for maintaining the open marketplace by preventing the development of cartels, both those that seek to dominate the entire cycle and those that operate across media; and ensuring freedom of expression for writers and a concomitant freedom of choice for readers. There is a nexus here of economic, social, and cultural responsibility through

which national and regional governments must ensure diversity by applying mechanisms to fill the gap between social and cultural benefits and market viability. If, at national or regional level, governments cannot affect the power of transnationals directly, then indirectly they can counterbalance that power by privileging national and regional companies and products without infringing statutory commitments to a free market. The chief defence of this form of intervention – in Scotland, in Ireland, and in Canada as elsewhere – is a cultural one. A commonality of transnational culture, including media integration of product development and marketing, threatens small nation linguistic and cultural diversity – to our global detriment.

Finally, if we then have the will and the rationale to support local publishing, we can copy effective mechanisms elsewhere to make certain that, within small regions, national regions and regions, the publishing sector thrives (not just survives) to produce the books and other material that feed our need to understand more about ourselves and the history and culture of where we live. But that is not an end in itself. Books need readers. And that is where you all come in. I said at the beginning of this lecture that librarians are at the hub, at the centre – just because you are key intermediaries between authors, publishers and readers. Publishers must work with you, interact with you, to ensure that the books they are supported to produce pass into the hands of readers. Together we pursue in this a common goal: to create an informed citizenry with an assured sense of its own distinctive, culture and history, at ease with, and understanding the distinctiveness of, its neighbours on all sides. Books are bridges to this unity in difference – COLICO itself represents a keystone in making our goal a reality. Thank you.