

Literature and Publishing Sector Review

June 2015

By: Nordicity in association with Drew Wylie

For: Creative Scotland

Literature and Publishing Sector Review

Final Report

June 2015

Commissioned by:

Creative Scotland

Prepared by:



in association with

drewwylie

Table of Contents

FOREWORD	1
EXECUTIVE SUMMARY	3
1. SECTOR REVIEW CONTEXT	15
2. RE-SCOPING THE SECTOR	18
3. SCOTLAND’S WRITERS	20
4. DEVELOPING A NATION OF READERS	43
5. PUBLISHING IN SCOTLAND	52
6. THE SECTOR ECOSYSTEM	76
7. INTERNATIONAL PROMOTION AND MARKET DEVELOPMENT	95
8. BRINGING IT ALL TOGETHER	111
 Lists	 113
Conclusions	113
Recommendations	116
Figures	119
Tables	120

Literature and Publishing Sector Review

FOREWORD

The Literature and Publishing Sector Review is the fifth Sector Review undertaken by Creative Scotland. It follows Reviews for Theatre, Dance, Music and Film, while Reviews for Visual Arts, Creative Learning and Equalities, Diversity and Inclusion will also be published this year.

Once complete, the Sector Reviews will form the basis from which we will develop a broader Arts Strategy, a strategy that will sit alongside those for Screen, Creative Industries and International, all of which underpin the delivery of Creative Scotland's 10 Year Plan, Unlocking Potential, Embracing Ambition.

The Arts Strategy will provide a national overview of the arts in contemporary Scotland - highlighting opportunities, challenges, connections and the role of the arts in society. It will set out a shared action plan that will contribute to the long-term health of the arts, including the support needed for individual artists to thrive here. It will be a strategy rooted in, and of, Scotland's people and places.

The Literature and Publishing Sector Review provides us with an evidence-based portrait of this sector and community as it is now. It gives insight into the diverse, complex and, at times, delicate ecosystem that has developed over many years and which supports many skilled and committed individuals and organisations dedicated to Literature and Publishing in Scotland.

The Review aims to reflect the successes and the distinct qualities of Literature and Publishing in Scotland whilst at the same time identifying development needs, future challenges and opportunities.

This is set out alongside a set of 38 recommendations which present opportunities for us all to collaborate, connect and coordinate our efforts in new ways to the benefit of Literature and Publishing in, and from Scotland.

Many voices and views have contributed to the development of this Review. Bringing such a wide variety of opinion and experience together as a coherent whole is down to the hard work, care and knowledge of Creative Scotland's Head of Literature, Languages and Publishing, Jenny Niven and the Literature team, Aly Barr and Emma Turnbull.

They have worked in close partnership with the consultants, Nordicity in association with Drew Wylie, with the invaluable support of an expert Steering Group and Reference Group. We thank everyone for contributing to date. The publication of the Review is not an end point but rather the beginning of what will be an on going and reflective process – one that must continue to involve the perspective and effort of many individuals and organisations.

Leonie Bell, Director of Arts and Engagement, Creative Scotland (June 2015)

Embarking on this Review offered both the consultants and the Literature Team at Creative Scotland a unique and privileged perspective on the contemporary landscape of literature and publishing in Scotland.

The quality and volume of the work produced, the energy and commitment of those who create and support it, and the willingness of those people to engage in the shared endeavour of improving the lot of writers and writing in Scotland were both energizing and humbling.

Capturing this in one document however, albeit one 120 pages long, is almost impossible. What the Sector Review does is to arrange thematically the many interconnecting strands and themes that constitute the literature and publishing sector, and posit recommendations on how to adapt, improve or develop our current offering.

Some of what is suggested involves incremental or small-scale change while other ideas, such as a new approach to finance for publishing, or a much more robust and structurally supported approach to promoting literature from Scotland internationally, are more radical.

We look forward immensely to the opportunity to discuss these findings with the literature and publishing sector, and the wider community and to working together to use this publication to effect positive change.

A consistent theme in the review, brought into ever-sharper relief by the current economic climate, is the need for the sector, the various industry bodies and public agencies including Creative Scotland, to work together to build on what already exists. We must find new opportunity from looking at the current landscape and how to strengthen and support literature and publishing in new ways.

There is also enormous opportunity in widening the reach and impact of all of our work by connecting with more parts of society. Creative Scotland looks forward to playing an active role in this area of work and to helping to provide a greater prominence for, and engagement with, literature.

This review would not have been possible without the wisdom, guidance and healthy level of challenge from our intrepid steering group, Robyn Marsack, Tom Pow and Jan Rutherford to whom we are extremely grateful. The consultancy team, Nordicity in association with Drew Wylie, have approached the task of mapping this complex, multifaceted sector with herculean effort and we'd like to thank them for their dedication and good humour throughout.

Jenny Niven, Head of Literature, Languages and Publishing, Creative Scotland (June 2015)

EXECUTIVE SUMMARY

Literature in Scotland has a rich tradition, and a contemporary vitality that is a core part of the nation's cultural life. This Literature and Publishing Sector Review (the 'Review') celebrates achievement and signposts the way forward. Its foundation rests on the commitment of many to make literature in Scotland more central to the nation, its communities and citizens, and as a means to communicate with the wider world.

Scotland's literature ecosystem comprises a diverse range of activities. Writing, publishing and reading remain the key building blocks, but festivals, storytelling and new digital formats are emerging as particularly important to the future of the sector. The shape and size of Scotland's literature scene is changing:

- **Writers in Scotland** are committed, independent and highly skilled. Many are engaged in an ever-widening spectrum of writing formats, genres and subjects. The practice of being a writer shares many traits with other artists, and the challenges encountered by writers and publishers mirror those of others within the creative industries. However there is uniqueness and specificity to being a writer that requires a tailored review.
- **People in Scotland** spend more time reading than any other culture-related leisure activity.
- **Publishers in Scotland** continue to play a major role in the propagation of Scottish literary works, adapting and responding to the changes that digital technology brings, as well as forming an industry extending far beyond Scottish works and Scottish borders.
- **There is a wide and dynamic Scottish literature ecosystem** comprised of individuals, companies and organisations that are voluntary, privately and publicly supported. It is through these organisations that all of the reading, writing and publishing activity is facilitated, encouraged, and delivered.

Sector Review Context

Over the last decade, Scotland's literature sector has been reviewed a number of times, including the Scottish Arts Council *Review of Publishing* (2004), *Literature, Nation* (revised 2009), the *Literature Working Group* report (2010) and prior to this Review, the last report was prepared via the *Mission, Models, Money* initiative (2008-2010). The appetite for a new review was evidenced by the Literature Alliance Scotland (formerly Literature Forum for Scotland) and is part of Creative Scotland's series of Sector Reviews across the arts, screen and creative industries.

This Review has been undertaken in the context of the rapidly changing landscape of the literature and publishing sector. It is also a reflection of Creative Scotland's 10 Year Plan *Unlocking Potential, Embracing Ambition*¹ launched in spring 2014 that set out a shared vision for the arts, screen and creative industries in Scotland.

This Review has been developed within the literature community and has encompassed substantial consultation with many voices and views helping to shape it: a web-based survey responded to by 1,080 writers, publishers, participants in the Scottish literature ecosystem, and interested citizens with some affiliation with literature; over 60 stakeholder interviews; four half-day industry reference group meetings, each with over 25 sector representatives. The entire process was overseen by a six-person Steering Group, which included industry representatives.

¹ Creative Scotland's 10-year plan sets out a shared vision for the arts, screen and creative industries in Scotland. Accessed at creativescotland.com

The stated purpose of the Review was to:

‘Undertake an overview of contemporary literature and publishing in Scotland, identify areas of strength and gaps in provision, and make recommendations for Creative Scotland’s strategic approach to literature, languages and publishing.’

This Review follows an evidence-based approach, leading to a series of conclusions and logical recommendations – 38 in all. This executive summary captures the essential aspects of those conclusions and recommendations, including the themes of **‘connection, collaboration, and coordination’** that will be necessary in setting future strategy. Changes are needed to both make the most of the strategic opportunities open to the Scottish literature community, and to cope with the changing economic and political landscapes of Scotland – all in the context of the state of perpetual shift in the arts and creative industries across the board.

Re-scoping the Sector

This Review provided the opportunity to rethink the scope of the sector given the current dynamics of publishing, the expanding ways in which writers practice their craft, and the new ways in which readers engage with the written word. The Review reflects the shifting boundaries of the sector, from libraries acquiring self-published works, to online retailers providing consumer reviews, to the rapid growth in live literature events and festivals, and to the ever-expanding opportunities for readers to engage with literature.

This Review ‘re-scoped’ the sector and concluded that there is a need to consider ‘literature’ in its contemporary form as well as historical tradition – to be inclusive in considering its participants, and to reorganise the support network around literary works of high quality whatever the form, genre, format or intersection with other art forms. This Review recommends that Creative Scotland and organisations that represent literature in Scotland consider and engage with literature in inclusive terms to embrace a holistic view of writers, publishers and other stakeholders involved in the literary ecosystem.

Scotland’s Writers

As the vital ingredient in Scotland’s literature and publishing, writers form the backbone of the sector. The Scottish Government estimates there are approximately 2,300 professional artistic creative writers in Scotland, of a total 6,000 writers across all formats, according to the Annual Population Survey.² Of these, some 1,000 writers make their living primarily out of writing, whilst another 1,300 earn some revenue from writing as a secondary source of income.

Connected to all facets of life in Scotland, writers are widely celebrated by readers, but are somewhat under-represented in the media for their contribution to culture and society. Like writers around the world, however, they are now facing a number of new and pre-existing challenges – including reduced (or nil) advances from publishers, fewer multiple-title contracts, in many cases declining support in marketing and promotion, and lower royalties yielded from ever-decreasing online book pricing. Meanwhile, writers also have new opportunities to distribute their work through digital platforms, self-publishing, festivals and new formats, including ‘live literature’.

² Annual Population Survey conducted by the Office for National Statistics and compiled by the Scottish Government.

Inclusiveness

This Review reinforces the conclusion above that writers in Scotland work through a rich medley of developing and established writing genres and forms. 'Literature' must now be considered as inclusive of many traditional and new expressions of the written and spoken word, in order to reflect the contemporary practice described via our consultation.

Insufficient compensation

Most Scottish writers are insufficiently compensated for their work – 81% of Scottish writers responding to the Nordicity survey earn below the National Minimum Wage (annualised). Some do earn reasonable incomes, as the average for all those earning above minimum wage is just over £30,000 per annum. The top literature-related income categories are royalties from previous works, publisher advances and speaking engagements. **For writer pay, the Review recommends that financial support should be accessible to writers at various stages of their career – from the emerging to the established.**

Self-publishing and writer hubs

Writers are using new digital platforms and are self-publishing; they are also working increasingly in virtual and physical hubs with others. With squeezed margins, publishers cannot commit as much support and advances to writers as in the past. The relationship between writers and publishers is undergoing substantial change whereby both are discovering new models via which to collaborate, and to market and disseminate written works. There are changes in the ways self-publishing writers work – whether on their own, in some form of collaborative model, or in cross-arts formats.

Consequently, **the Review recommends that publishers grow their interest in self-publishing and learn how to interact with writers working in this way, so that they can adapt the traditional writer-publishing model accordingly. Literature support organisations will also miss out on opportunities to discover new talent if their programmes are not adjusted to facilitate writers who self-publish.** It is noted that the new Open Project funding model created by Creative Scotland is more flexible than previous iterations. However, some specificity as to the needs of individual practitioners and more openness to new models and innovation would be helpful.

Finding support

A more systematic collection and presentation of funding and training opportunities including and beyond Creative Scotland would enable more writers to take advantage of appropriate financial support. **The Review recommends that a comprehensive repository of grants, training and other resources be developed; as well, an exploration of how knowledge transfer directly between writers, including those working in different disciplines (for instance playwrights and screenwriters) should be.**

Writers' and performance fees

There is a lack of standardisation in relation to fees and terms and conditions of engagement within the literature sector. This is exacerbated as the type of engagements and commissions writers pursue, or are offered, continues to evolve and expand and by the wide variety of financial models that support activity within the sector. **The Review recommends that organisations representing writers continue to work closely with the sector in setting standards and terms of engagements for activities (travel, speaking engagements, residencies, and publishing contracts), which accurately reflect the complexities and realities of the**

sector. Creative Scotland and other organisations and bodies then have a responsibility to ensure writers paid via their funding are appropriately remunerated, using these best practice models in their rationale.

Literary reviews and literary criticism

As a result of the challenging economics of traditional media, professional reviews of Scottish literature are expected to continue to decline, in part giving way to the on-going proliferation of citizen journalism and digital recommendation sites. The review found that literary awards were considered to be an effective mechanism to connect writers, publications, retailers, press and media with the public. Given that critical review remains fundamentally important **it is recommended that more literary reviews and criticism should be supported, representing a diversity of content, both in traditional and online formats – and that the literature community should more emphatically deliver that message to traditional print media.**

Skills development

Increasingly, Scottish writers need to become more efficient and effective in the areas of editing, marketing and promotion by working collaboratively, sharing knowledge and pooling resources. There are apparent gaps in the training opportunities in these areas as well as in rights negotiation and management and other business skills. **It is recommended that a review of key training requirements by relevant literature sector organisations and post-secondary institutions be undertaken by members of Scottish Creative Industries Partnership (SCIP), and perhaps relevant higher education institutions. The purpose would be to determine any gaps, and design joint initiatives to fill the gaps.**

Developing a Nation of Readers

Three overarching themes dominated the consultation where readers were concerned:

- **Literacy:** While in fundamental terms, reader development is concerned primarily with encouraging, supporting and promoting reading for pleasure; the issue of literacy is central to the question of fostering a nation of readers. Many Scottish organisations excel in this area, particularly in targeted work with groups within society who face barriers to reading. Other institutions and bodies with a vested interest in supporting literacy might look to smaller, pre-existing pilot programmes within the sector for models.
- **Reader development for young adults** More effective networks for young adults could help connect them to others with similar interests and thus help fill a gap in reader development between early school support and the focus on adult readers.
- **Scottish books used in schools** There is a strong desire from the sector to see more Scottish literature both historical and contemporary featured within the Scottish education system; adequate training and resources for teachers to use this material must be developed.

It is recommended that through leadership, support organisations could develop stronger links with Education Scotland – which itself should be encouraged to be proactive in fostering more strategic relationships with Scottish writers and literature organisations, and in engaging with Scottish texts and, specifically, writers.

These initiatives should include contemporary and historical works in a range of genres, be representative of all the indigenous languages of Scotland and support the development of appropriate resources.

Connection with libraries

Literature and libraries intersect in fundamental ways. This Review complements the library strategy announced in June 2015 and recognises the pivotal role that libraries play in terms of how literature and reading are woven through the lives of the individual and community.

Increased partnership with libraries could lead to greater all-around engagement between these important stakeholders and Scottish literature. Such collaboration could contribute towards the re-energising of public libraries so that they would explore new ways of resourcing for Scottish literature. A number of tangible areas of shared ambition and endeavour have been outlined; there is scope for much greater partnership working at a strategic level.

Following a decision as to which body or consortium of bodies will take responsibility for the delivery of the CoSLA strategy, **it is recommended that Creative Scotland and relevant sector organisations convene regular meetings between the two groups to discuss furthering the initiatives and goals outlined above.**

Publishing in Scotland

Publishing is critical to the development of the careers of most writers, creating access to literature from and in Scotland and promoting it abroad.

Despite pressures both global and specific, the industry in Scotland is dynamic and active, and stands to take a more prominent and potentially profitable role as the Creative Industries 'offer' in Scotland is better supported and understood. Although lower margins are placing increasing pressure on the ability of publishers to support the level of advances and promotion seen in the past, the publisher remains the cornerstone of all the functions that go into the dissemination of the written word.

Whilst digital technology has led to downward pressure on pricing books, many Scottish publishers (as well as writers) have adapted to the opportunities presented by digital platforms – for example, reader tracking, online distribution and ordering, rights management and the use of social media.

Growth within a scaled back publishing market

In 2014, there were 105 publishers officially counted in Scotland, down from 130 in 2010.³ Publishers now employ circa 1,000 people, down from circa 1,400 in 2010. Scottish publishers are somewhat concentrated in Edinburgh, where about a quarter of the publishers are located.

Scottish publishers publish significantly more non-fiction than fiction, and do publish non-Scottish writers as well as Scottish ones. Most of their sales are outside Scotland and, in fact, the rest of the UK represents a larger market than Scotland itself. However, much of the publishing sector is economically fragile because of a heavy reliance of many publishers on non-market sources of working capital, and because often what they publish has smaller potential audiences. Yet they still operate as enterprises and should be treated as such. Bucking this trend, some publishers are indeed innovating and pushing the boundaries of business models in their field. They should be supported as having good growth potential; and their ability to tell this story would be greatly enhanced by better data collection and statistical analysis of the industry.

Support gap for publishers

³ Official Scottish Government statistics for 2013 from the Business Register and Employment Survey (BRES) indicate that employment in book publishing (SIC5811) was 1000 (rounded to the nearest 100) across the whole of Scotland.

A lack of coherence amongst the agencies and stakeholders affects the development prospects of publishers in Scotland and inhibits the development of Scottish literature. This is particularly evident in the innovative and growth segments of the industry, and at the micro-enterprise and cross-arts levels.

It is recommended that Creative Scotland explore with members of SCIP how the public development agencies can support the growth of a) micro-enterprises b) larger publishing companies and c) those in-between.

It is recommended that these organisations consult and involve other stakeholders whose business it is to foster innovation and entrepreneurship across the arts and creative industries, as well relevant investors and innovative publishers.

From self-publishing to micro-enterprises as creative hubs

Whilst the models have not been articulated completely, micro-enterprises and literature hubs – both place-based and virtual – should form part of the overall publishing and writing ecosystem to be nurtured and developed. Accordingly, **it is recommended that micro-enterprises and cross-arts collaboration with artists and entrepreneurs in other creative industry sectors should be supported – particularly in local and regional hubs, whether place-based or virtual.**

Measures for strengthening Scottish publishers

Developing measures to increase the effectiveness of the publishing ecosystem, especially publishers, would improve the return on investment in Scottish literature and the success of writers. Greater transparency regarding available opportunities and financing options is recommended. For Creative Scotland, greater transparency in terms of process could be a useful start, as well as clearer indication of how publishers can leverage the Open Project Funding scheme.

It is recommended that Creative Scotland consider how to evaluate funding applications from publishers by including (in addition to existing artistic merit criteria) the delivery track record of publishers. Developments to assessment criteria should be made explicit and transparent via Creative Scotland communications. A best practice guide for publishers, relevant to the Scottish industry, should be developed by Publishing Scotland and should inform decision making by Creative Scotland.

Examining the potential of soft loans for publishers

A mix of soft and guaranteed loans would respond to the problem of publishers being prevented from obtaining credit from commercial sources on the basis of their IP (which banks do not accept as collateral).

It is recommended that Creative Scotland work with Publishing Scotland to consider ways to identify and configure future financial support in the form of soft loans or guaranteed loans.

The publishing sector needs to articulate the business case for championing book publishing as being central to the development of IP as a potential high growth area. Mechanisms that better capture economic data for publishers, including the contribution of micro-enterprise publishers, are strongly recommended to support this narrative.

Publishing in Gaelic – a comprehensive approach

Beyond the development of specific aspects of Gaelic writing, reading, and publishing, mainstreaming the language and continuing to promote its accessibility to an ever-wider audience is high on the priority list.

Booksellers' role in Scotland

Independent bookshops play a vital role in the literary ecosystem in Scotland not least because of their on-going involvement with their communities, their direct relationship with writers, and their partnerships with libraries.

It is recommended that independent booksellers be encouraged to, via collective action where appropriate, work more closely with libraries, Publishing Scotland, and with literature institutions. The objective would be to reach out more widely to the reading public and attracting inward investment to support this work.

The Sector Ecosystem

Scotland is home to a sophisticated network of organisations and projects that support the development of literature in myriad ways – a literature support ecosystem.

Leveraging the Regularly Funded Organisations (RFOs)

Nine literature organisations and two organisations with a literature dimension were offered a three-year programme of support of £8.6 million from Creative Scotland in late 2014. Whilst the RFOs outlined proposals for the duration of the funding period of 3 years (2015-2018), they are expected to review progress and make annual adjustments as they go along. The recommendations from this Review should provide further direction for these organisations, including how to approach these opportunities collaboratively with other partner organisations. There is also the need to engage with RFOs from other sectors that work with writers, e.g. theatre or film.

It is recommended that the Creative Scotland enter into dialogue with the RFOs as they develop plans for 2016-17 to explore how initiatives emerging from this Review would be integrated into their priorities, and how they can achieve greater results through more collaboration.

Networks of literature hubs

Building on previous parts of this Review, it is recognised that literature development is in many ways local, and opportunity exists in both strengthening provision that is firmly rooted in community, addressing geographical imbalances in provision, and building on areas of excellence where they develop. Literature hubs, of sorts, are already in evidence in a variety of ways across Scotland, so it is well worth exploring the concept of a network of literature hubs that would make the Scottish literature ecosystem's expertise, best practices, and resources more accessible to Scottish communities. **It is recommended that Creative Scotland convene interested parties to explore the networked hub concept as to possible design, partners, funding, benefits, regional take-up, and operational sustainability.**

European and International links

EU funding for culture and creative industries is important in supporting new and partnership-based initiatives. As well as bringing in additional finance, increased partnership in EU projects for Scottish institutions has many subsidiary benefits. Scotland has developed a strategic platform for engaging with the EU and trans-European partnerships, and the literature sector should be directly involved in this work. **It is recommended that a more proactive and coordinated approach to engaging with EU institutions for literature sector projects be adopted by the sector.** Creative Scotland's role in this is supported via the new Creative Europe Culture Desk appointment made in June 2015.

The literature and publishing sector ought also to be alert to the opportunity presented via the Scottish Government International Partnership Framework and Innovation and Investment hubs as those plans continue to develop.

Access to a wider funding pool

With increasing pressure on Creative Scotland funds, and EU funding inappropriate for many situations, it is **recommended that the literature sector should expand its reach and access to existing trusts, foundations, social and business enterprises, to explore new ways of introducing new sources of funding to support writers and activity (e.g. crowdfunding), and to be assisted to further develop capacity in fundraising.**

Advocating for literature

Championing literature is an intrinsic part of the work of literature organisations. Should the recommendations around a wider reach for literature and a broader approach to funding be adopted, the imperative to do so will become even greater in the future. There is also the opportunity for a much more robust case for the value of literature to be made beyond the arts and creative industries, namely in: 1) finance, employment and sustainable growth; 2) health, wellbeing and cities; 3) education and lifelong learning; 4) justice; and 5) culture and external affairs.

The Literature Alliance Scotland (formerly Literature Forum for Scotland) plans to be a more ambitious advocate for the sector, but these plans are currently a work in progress. **It is recommended that a coherent approach be developed to promoting and championing the ways in which literature and publishing positively impact culture and society in the Scottish context.**

Scotland's Languages

Scotland's three indigenous languages are a cultural asset and a rich creative source for writers. Support within the arts and society more broadly for the development of Scots and Gaelic currently differs.

The Scottish Government set out the next steps in developing Scots in the *Scots Language Working Group Report: Response from the Scottish Government* in 2011. Whilst momentum for delivery has been fragmentary, the public and political will appears to be strong. This Review welcomes the new Creative Scotland Scots Language Policy, and the associated partnership between National Library Scotland and Creative Scotland on developing the new post of the Scribe, as one of the means to deliver on the promise of the earlier analytical work. This policy was launched just before this Review was published.

Literature and tourism

There is opportunity to increase the access to and use of Scottish literature in Scotland's tourism sector, e.g. more literary heritage destinations, literary trails, wider promotion of festivals and events. Unique, locally specific promotions and activities, such as capitalising on the strong Scotland-wide impact from Edinburgh's UNESCO City of Literature status or the nascent Netherbow project, stand to have greater international impact with the right support. **It is recommended that the case be substantiated and made to appropriate tourism and event organisations, and tourism product distributors, to trigger investment in and expansion of literary tourism in Scotland, leveraging existing resources.**

Getting more from Scottish book festivals through collaboration

Book festivals have been in the ascendance in Scotland in recent years but greater collaboration through networking would provide access to best practices, services, and joint initiatives – with different festivals

supplying different kinds of expertise. **It is recommended that Creative Scotland continue to facilitate the development of leadership in the festival community to enhance coordination, collaboration, evidence of impact, investment opportunities, reach, and knowledge transfer across Scotland's breadth of literary festivals and events.**

Literature and Equalities, Inclusion and Diversity

It is important that opportunities to engage with literature are offered across the country's communities and at every level, from writing and publication, to participatory and promoted activities. There are many strong initiatives and models developed by Scottish literature organisations that engage with both groups and individuals alike and have been transformational in their impact. Widespread across the nation, and diverse as to the particular needs of the communities engaged, from those for whom English is a second language to prison populations, many such projects have demonstrated best practice, and offer the opportunity to be applied to other contexts or geographies. **It is recommended that the strength and diversity of outreach provision that already exists within the literature ecosystem be shared and that one of the support bodies takes the lead in collating, disseminating and building upon the many examples of best practice.**

International Promotion and Market Development

Scotland has a growing international profile. The Scottish independence referendum in particular, and the recent political transformation in Scotland have brought the country a higher level of global attention. As a whole, Scotland's literary heritage is a living heritage that continues to be important in mediating the country's relationship with the world. Support for writers, storytellers, promoters, and an industry that maintains and develops international links will not only yield results for the future creative and economic growth of the literary sector and the creative industries more widely, but also enhance Scotland's international standing.

According to the consultation in this Review, however, **there is a widely held feeling across the sector that not enough is done to coherently showcase, champion and build on these aspects of literature in international terms.** This view was widely expressed by individual writers, publishers and organisations alike. Given the sector-wide appetite for a new direction to the promotion of Scottish literature internationally and the growing sophistication of the international strategies to promote other national literatures worldwide – a more strategic overview of Scottish literature internationally is appropriate. **It is recommended that Creative Scotland and leading literature institutions and publishers convene a summit for laying the groundwork for a strategic and coordinated international presence.**

Scottish literature international – writers' and literary ecosystem perspective

From this consultation, there emerged the strong conclusion that there should be a sustained and effective international strategy for Scottish literature that represents the interests of writers, publishers and the wider sector with specific means and outcomes identified. The conclusion of this review is that a specific body be created to support a range of activity related to Scotland's literary presence internationally.

With respect to writers in particular, it is recommended that Scotland establish an international literature promotion organisation that would cover the following.

- Increase the level of travel and exchange for Scottish writers.
- Develop a repository of international resources and information.
- Keep track of which countries' writers visit to develop a more robust intelligence base for counterpart organisations overseas, and to better connect to market opportunity overseas.

- Engage in advocacy for literature from Scotland and support the promotion of Scotland internationally as a literary nation.

A model for Scotland's international literature exchange

Following research and consultation, the Irish Literary Exchange, whose remit includes supporting travel, facilitating exchanges, translation, and coordinating activity across the country was found to be a model which with adaptation could well be adapted to a Scottish context. A new 'Scottish Literature International' would develop a wide range of international contacts and opportunities. It would be both a champion and shop front for Scotland's writers and literature organisations and, to some extent, publishers. Ideally, it would also lead to the development of more and better relationships with international organisations, including within the EU and prospective bidding partners for EU funds.

It is recommended that Creative Scotland take the initiative in setting up a new body, Scottish Literature International, with the participation of the appropriate literature organisations and government authorities.

Scottish literature international – publishers' perspective

It is clear the needs of Scottish publishers in addressing international development of markets are not uniform and care must be taken to develop flexible solutions that respond to this reality. For those publishers with an interest in international development the needs are as follows.

- Exposure to relevant literary ecosystems abroad.
- Financial support to travel to book fairs, festivals and literary events.
- Improve contacts with foreign distributors, agents, and publicists.

Scottish literature and Scottish publishing represent tradable assets for those public agencies equipped to foster foreign interest in Scottish industry and society. Accordingly, Scottish Development International (SDI) and the British Council have a stake in increasing their understanding of the potential of the sector. **It is recommended that members of SCIP work with Publishing Scotland and others to develop the story and materials required to communicate the positive environment for writing and publishing in Scotland, and to foster the necessary connections to increase inbound investment in literature.**

The right authority for leading publishers internationally

Given the need to direct more resources toward the business end of international development, and that publishing is a marginal activity for Scottish trade development authorities, some organisation should be designated with more authority and resources to promote Scottish publishing abroad. **It is recommended that Publishing Scotland be approached to carry out the support role in international markets, as the best positioned to pursue this line of activity, and to work with Scottish Development International (SDI), and Scottish Enterprise to ramp up their roles, and within the Scottish Government Framework for International Development as it develops.**

It is also recommended that Publishing Scotland should work with publishers and other key stakeholders to devise an international book fair strategy, including, in the longer term, careful consideration of the cost-benefits of pursuing Guest of Honour status at Frankfurt.

Translation – domestic and international relevance

There is sector-wide recognition of the importance of translation. It is important that publishers and agents are kept informed of available subsidy in order that they might use this as leverage in negotiations. **It is**

recommended that Creative Scotland work with Publishing Scotland to brief the sector on activity and to ensure that key foreign publishers understand how to apply for translation grants, such as the newly devolved translation support programme, which Publishing Scotland will deliver from mid-2015.

Bringing it All Together

This Review can be distilled down to three main themes that underlie the recommendations proposed:

1. Disruption and expansion of scope of the literature sector

This Review articulates digital disruption, evolution and opportunities for the literature sector, as well as the extension of the scope of Scottish literature to encompass a wider pool of writers working in new environments – with fellow writers and with creators in other sectors.

2. Reinforcing mainstream societal goals

This Review challenges literature in Scotland to elevate its game and forge stronger partnerships across the literature community and to extend its professional reach by working at a strategic level with other key organisations.

3. Connection, collaboration and coordination

In an ever more challenging financial environment, it is critical that individuals and organisations alike, are alert to the benefits of an approach which is communicative and open, which encourages best practice to be shared and built upon, and which pursues joint initiatives and collaborative approaches wherever possible.

This Review identifies gaps in the circumstances for writers, publishers, the literature ecosystem, and the international presence for Scottish literature.

- **Writers:** not necessarily supported throughout their careers; a lack of networking platforms; gaps in provision of skills to meet the needs of a changing sector and publishing environment; lack of support for the standardization of arrangements and contracts between writers and third parties; lack of support or coordination in respect of international travel; and a decline in critical coverage.
- **Publishers:** lack of partner able to help grow publishing as an industry; lack of data and understanding of the breadth of innovation in publishing to make the case for the Scottish publishing sector; an issue of transparency in terms of Creative Scotland support, and commercial accountability; lack of coordination of support for independent or community-oriented booksellers; and transition paths to replace lost revenue in the online era.
- **Literature ecosystem:** increased support of geographic diversity and addressing equalities issues; weak relationships with EU on co-funding (though recognising it is complex and progress requires investment); potential for networking across emergent literature hubs; gap in alignment of libraries and tourism with Scottish literature output; lack of networks among festivals for sharing knowledge and leadership; not full appreciation of translation.
- **International presence:** no lead organisation; need for dual track institutions; lack of strategic and long term international planning.

Setting the strategy

This Review has opted for strategic guidance, typically looking for leadership within the literature community to seize different opportunities and address the priority issues. The themes of connection, coordination, and collaboration leave the most lasting impression of what this Review is attempting to communicate.

Drawing up an implementation plan

This Review provides Creative Scotland and literature stakeholders the basis to draw up an implementation plan. **It is recommended that Creative Scotland launch the completed sector review with a summit event that connects the whole sector, with multi-agency hosted sessions devoted to each area of potential action.**

There are four overarching conclusions from the findings of the Review.

1. Creative Scotland is not a one-stop shop for investment in the sector

The literature sector comprises a wide range of tangible and intangible heritage, creative practice and cultural industry with alignments to many and various sources of investment, from the EU, to enterprise support, to venture capital, to lottery funding. Creative Scotland cannot be expected to broker all of this, but can be expected to assist the sector identify potential investment.

2. Access to the literary elements of Scottish culture should not be a postcode lottery

There are wide variations in the quality, depth and accessibility of the literature / literary culture offer across Scotland. Libraries are not always in a position to address this need, and a mixed economy of hubs should be developed to ensure literature development takes place everywhere.

3. Focus on those looking to the future – both those that have plans to transition to the changed literary environment, and those pioneering new approaches.

The needs of established organisations and institutions can drown out the opportunities in new approaches. Money is scarce and it is important that investment is directed to activity that will develop over the next ten years. There is little point in propping up business or operational models that are in decline.

4. Scotland can be a world leader in literature, developing writing and reading that transcend traditional boundaries, enriching the lives of its citizens and the reputation of Scotland as a distinctive creative nation

1. SECTOR REVIEW CONTEXT

Literature in Scotland has a rich tradition of writers, publishers, and readers. This tradition and its contemporary state are a source of pride and a voice for Scotland both at home and abroad.

This Literature and Publishing Sector Review ('Review') celebrates achievement and signposts the way forward. Its foundation rests on the commitment of many to make Scottish literature more central to the nation, its communities, and the lives of its citizens. It also seeks to expand the footprint of the best of Scottish literature in the rest of the UK and abroad.

This Review reflects the people and organisations that make up the literature sector – amongst them writers, readers, poets and storytellers, publishers, and publishing professionals (including agents, publicists, broadcasters, distributors, designers, specialised printers, instructors, teachers and others, including freelancers), booksellers, retailers, literary translators and translation services, literary festivals and events, representatives of libraries, sector support organisations, associations, development agencies and other stakeholders.

This Review examines the nature of contemporary literature in Scotland. It points to the strength of Scottish literary organisations, and identifies gaps that inhibit their collective effectiveness. It builds on previous studies of Scottish literature and the reinvigoration of Creative Scotland that has given new direction to the arts, screen and creative industries.

This Review looks at foreign and domestic models in the setting of recommendations for reader development, improving the environment and conditions in which writers and sector stakeholders work, Scottish publishing, the literature ecosystem – the organisations that serve literature development – and the reach and reputation of Scottish literature throughout the UK and beyond.

This sector review was undertaken in the context of *Unlocking Potential, Embracing Ambition*,⁴ and its 10-year plan launched in spring 2014 that sets out a shared vision for the arts, screen and creative industries in Scotland. In this shared vision, Creative Scotland identifies five ambitions that frame its collective aims: (i) excellence and experimentation, (ii) access, (iii) places, (iv) leadership and workforce, and (v) global connectivity across the arts, screen and creative industries is recognised and valued. This Review embodies these ambitions in the development of its narrative, leading to conclusions and concrete recommendations for Scotland's literature and publishing sector.

Underpinning these ambitions is the notion of '**connection, collaboration and coordination**' in setting future strategy. Changes are needed both to make the most of the strategic opportunities open to the Scottish literature community, and to cope with the changing economic and political landscapes of Scotland. The state of perpetual shift in the arts and creative industries has created evolving challenges this Review is designed to address.

Purpose, remit, and scope of this Review

Within the remit of Creative Scotland there are five art forms, including literature, which maintain close links to the creative industries. Sector Reviews have been completed for Dance (2012), Theatre (2012), Music (2013) and Film (2014), with Visual Arts underway (2015).⁵ The stated purpose of this Review is to:

⁴ Creative Scotland's 10-year plan sets out a shared vision for the arts, screen and creative industries in Scotland. Accessed at creativescotland.com

⁵ Creative Scotland's Sector Reviews have an aim of providing an overview of the cultural ecosystem of each sector, shaping the future priorities for funding and providing the basis for a more strategic approach to funding and support, which may lead to the provision of new services. Each of the reviews broadly follow the same 4-stage process: (i) audit and mapping, (ii) sector analysis, (iii) gap analysis, and (iv) reporting and recommendations. Accessed at creativescotland.com

‘Undertake an overview of contemporary literature and publishing in Scotland, identify areas of strength and gaps in provision, and make recommendations for Creative Scotland’s strategic approach to literature, languages and publishing.’⁶

Creative Scotland commissioned the consulting firm Nordicity, in association with Drew Wylie, to undertake the Review – through extensive consultation and input from a wide-reaching representative group of the literature and publishing community.

The remit of the scope of the project encompasses ‘individual writers and practitioners across multiple forms, literary professionals, literature organisations (including Scotland’s book festivals), development workers, agents, booksellers, and publishers’.

Further areas were addressed in the Review, namely: youth and young people, the market for Scottish books, libraries, booksellers and the retail sector, education, language, equalities and diversity, the impact of digital change on literature and publishing in Scotland, and the profile of – and opportunities for – Scottish writing internationally.

The Review provided the opportunity to rethink the scope of the sector given the current dynamics of publishing today, the expanding ways in which writers practice their craft, and the new ways in which readers engage with the written word. The Review reflects the changing boundaries of the sector, from libraries providing self-published work, to online retailers offering consumer reviews, to the rapid growth in ‘live literature’, literary events and festivals, and to the opportunities for readers to engage with literature.

Extensive consultation within the Scottish literature community

This sector review has been extensive in its consultation. Whilst not possible to reach all sector stakeholders, every effort has been made to derive a thorough and representative view of the sector. Where possible, the Review has drawn on existing sector initiatives, statistics and research material in the public domain.

- **A Steering Group**⁷ was assembled to provide strategic guidance and sector insight throughout the sector review consultation and analysis – consisting of Creative Scotland’s literature team alongside three representative sector professionals.
- **A Reference Group** comprising over 25 sector representatives, including writers, publishers, staff of literature organisations, professionals and practitioners from across Scotland, met four times for half-day working sessions.
- **Interviews** were conducted with a representative cross-section of over 60 key sector stakeholders.⁸
- **Focus groups** and meetings with industry stakeholders were led by the consulting team and Steering Group.⁹
- **An online survey** was designed and distributed amongst the entire sector ecosystem and open to the general public. Specific segments of the survey were dedicated to writers, publishers, festivals, libraries and support organisations and other members of the literature sector and the publishing ecosystem. Approximately 1,000 useable responses were recorded, of which approximately 475 were writers.

⁶ Extracted from the tender brief, issued 28 May 2014.

⁷ The members and participants of the Steering Group and Reference Group are included in the list of those consulted (‘consultees’) found in the appendix to this report.

⁸ The names of the interviews and their affiliate organisations are in the appendix to this report.

⁹ Over ten focus groups and meetings were held with sector representatives as an important element of the consultation.

Accessibility, participation and representativeness are important to the sector, and accordingly, the Review takes a holistic view of the sector. From writing to publishing, to supporting services, to distribution and access, to institutional infrastructure, to languages and equalities, the review addresses key areas of focus including diversity, disability, education and literacy, amongst many other social and economic factors.

Representation from across the sector and in the consultation process was ensured by Creative Scotland and the Steering and Reference Groups. In view of all these forms of consultation, this Review is based on an extensive and representative consultation of Scotland's literature and publishing sector. The Review draws upon the wealth of pre-existing research and analysis of the sector, and indeed many findings today reflect the conclusions and recommendations of previous reports over the last decade.¹⁰

¹⁰ Report by the Scottish Government's *Literature Working Group* (commonly known as the *Goring Report*), which can be accessed at gov.scot/publications, and the *MMM Project The Legacy*, a report for the Literature Forum for Scotland (now known as Literature Alliance Scotland) and Mission, Models, Money, which can be accessed at missionmodelsmoney.org.uk, in particular, reflect several key conclusions and recommendations made in this Review and demonstrates the consistency and on-going need for attention in certain areas.

2. RE-SCOPING THE SECTOR

Literature is the living memory of a nation. It connects past and present, and provides the vocabulary for exploring who we are, and where we want to go. A society that neglects its own literature cannot act as a civilising force in world culture. Equally without renewing its stories, a community cannot nurture citizens who are confident and self-critical, passionate and open. We believe that literature is vital for Scotland and for global culture.

Literature Alliance Scotland

Whilst past studies have made substantial contributions to the Scottish literature sector, this Review formulates a new set of assumptions as to what constitutes the literature sector of today. Quality writing in traditional forms such as fiction, poetry, drama and narrative non-fiction remain central. Oral forms, such as storytelling and spoken word have always been and remain important components of the literature sector today.

This Review brings in other genres and formats that are perhaps not traditionally considered 'literature' – forms such as graphic novels; formats for various digital platforms (blogs, ebooks, zines and video games); and other mediums of contemporary literature including scriptwriting for theatre, screen and radio. Just as art form distinctions blur and new forms of creative expression cross the creative industries, the literature sector also includes experimental writing in a range of media.

Whilst almost impossible to be definitive about it, Scottish literature encompasses the following forms, genre, delivery formats, business models and languages for the purposes of the Review:¹¹

- **all forms of literary expression and genres:** fiction, non-fiction, poetry, theatre or playwriting, graphic novels, children's, literary criticism, etc. – by writers who may also write for other media, which are not included in this Review's scope of literature, e.g. newspapers and periodicals¹². Whilst academic writing is an important element for some Scottish publishers, it is not included in the scope of this Review except when such academic writing is dealing with Scottish literature *per se*;
- **all delivery formats:** live performance, physical and digital publishing, song writing, playwriting, scriptwriting including for film, TV, radio and video games, and cross-arts as well. Literature includes written work in the form of web-based content such as blogs and online publications;¹³
- **a variety of established and emerging business models:** including traditional publishing and self-publishing; varying levels of publisher involvement; multi-art form or cross-platform; and cross-sector activities such as partnership working which links writing, publishing, events and festivals, booksellers and retail, libraries, education, places and spaces; and,
- **all relevant languages:** Scotland's three indigenous languages – Gaelic, Scots and English.

¹¹ In a recently published "Review of Literature" Final Report (March, 2015) by Creative New Zealand, the report took pains to avoid the trap of attempted comprehensiveness as it provided a list of examples of eligible fiction and non-fiction categories but underlined such lists were not exhaustive.

'Fiction' includes, but isn't limited to, novels, novellas, short stories, children's fiction, young adult fiction, graphic novels, illustrated picture books, and speculative fiction such as fantasy, science fiction, detective fiction, and historical fiction.

'Non-fiction' includes, but isn't limited to, autobiography, biography, essays, social commentary, literary criticism, reviews, analytical prose, non-fiction written for children, young adult non-fiction, graphic non-fiction and writing about the physical and natural sciences." P. 6

¹² Literary magazines are included and are supported by Creative Scotland.

¹³ Commercial online publications, just as for print media, are not financially supported by Creative Scotland.

While the nature of writing communities everywhere is evolving, Scottish literature has its own distinctiveness. It begins with a strong literary heritage that is celebrated throughout the world, from the historical novels of Walter Scott to the gritty crime fiction of Ian Rankin. A diversity of languages and cultural traditions are alive and well in Scotland today, represented in the work of many writers from the Gaelic poetry of Aonghas Macneacail to the Shetlandic of Christine De Luca. Oral traditions and storytelling are vibrant, living traditions, with a national home in Edinburgh's Scottish Storytelling Centre, an integral part of the city as the first UNESCO City of Literature. Edinburgh has developed the world's premier book festival, in the Edinburgh International Book Festival, and a unique network of literary festivals, Bookfestivals Scotland, has evolved in Scotland that spans the length and breadth of the country. Meanwhile, writers have also played a major role in the wider arts and creative industries, with their contribution evident in projects as diverse as Dundee's video games cluster and the opening of the long distance trail, the John Muir Way.

Consultation with several hundred writers provides the foundation for this grassroots Review of the literature sector. Writers themselves related that there were many different ways in which their work is multi-art form, not traditional, and often collaborative – essentially far from the common notion of 'a writer in a garret'.

Conclusion 1 – The need to consider 'literature' in its contemporary as well as historical tradition, influences the setting of new directions for literature – to be inclusive of its participants. In light of the widened scope of the sector, the challenge is to reorganise the support network around literary works of high quality whatever the form, genre, format or combination with other art forms.

Recommendation 1 – It is recommended that Creative Scotland and organisations that represent literature in Scotland consider and engage with Scottish literature in inclusive terms to embrace a wider set of writers, publishers and other stakeholders involved in literature.

3. SCOTLAND'S WRITERS

Scotland's writers, contemporary and historical, are what make Scottish literature. Who they are, what they write, and how they earn their livelihoods are covered in the first part of this section. Their evolving relationship with publishers and the rise of self-publishing is reviewed, along with other aspects of their profession (including travel, festivals, awards, promotion and literary criticism). Finally, the support they receive and what training is required are discussed, leading to recommendations for improving conditions and financial return for writers.

Writing – the core of Scottish literature and new challenges

The canon of Scottish literature is a roll call of world-renowned writers, from Robert Burns, Walter Scott, Robert Louis Stevenson and Muriel Spark to contemporary celebrated writers such as John Burnside, A L Kennedy, Ali Smith, and James Kelman. Meanwhile, as expressed in Section 2, the true scope of Scottish writing today is much wider than this pantheon of writers. Writers in Scotland express themselves across different languages, genres and formats. They collaborate and connect to the wider sector in innumerable different ways, and approach their writing lives from a myriad of different perspectives: with different resources, methods, levels of experience, approaches to readership and in terms of their ambitions.

A total of 475 individual writers contributed to the Nordicity survey, which forms the basis of this section of the Review, with a further 15 writers contributing to the consultation via face-to-face interviews with the consulting team. What emerges is a group of highly engaged, independent artists with a wide range of perspectives and opinions on how they manage their writing lives, and on how their writing might best be supported via organisations and public funding. The Review aims to address the consistent themes that have emerged from the consultation, and offer recommendations both for smaller-scale initiatives, and for strategic approaches to development.

Like writers around the world, writers in Scotland face a number of new and pre-existing challenges – including reduced (or nil) advances from publishers, fewer multiple-title contracts, in many cases declining support for marketing and promotion of their titles, and lower royalties – largely as a result of the impact of online retailers. The digital shift, the fragmentation of markets and the challenges inherent therein, affect publishers' operating models, which have had major repercussions for others.

However, the same disruptive forces are creating new opportunities, with electronic platforms offering the chance to reach new audiences and connect writers with readers and other creators in new ways. The dramatic increase in screen-based content, from radio and television to video games, offers writers new opportunities for their practice. New forms are offering different points of entry into writing and literature, such as with the burgeoning graphic novel and live literature scenes in Scotland emerging as increasingly important sources of work and community for Scotland's writers.

How writers are coping with and taking advantage of these changes – and what interventions can improve their lot – are critical issues for Scottish literature.

Describing writers in Scotland – what they write and how they choose to work

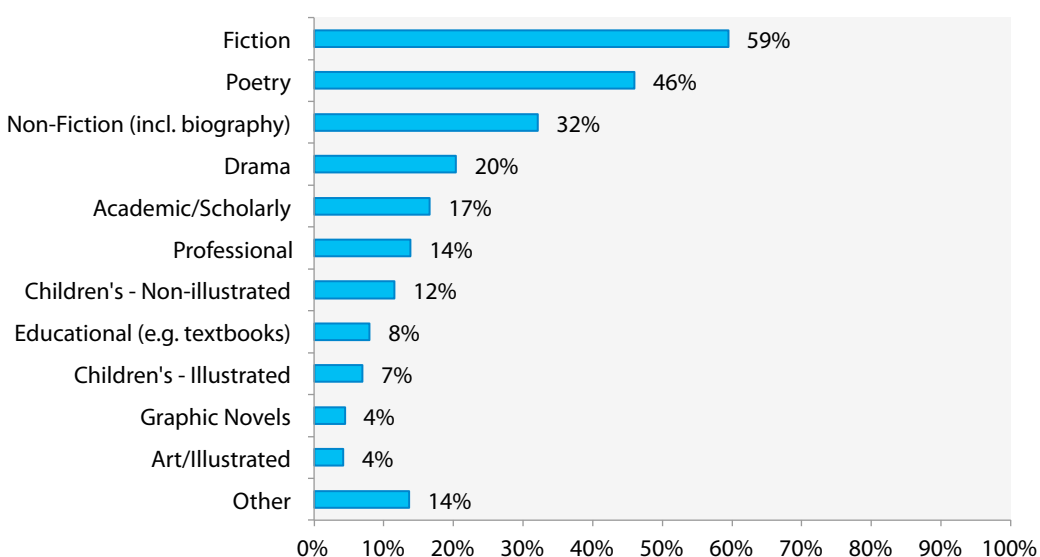
It is estimated by the Scottish Household Survey that approximately 5% of people living in Scotland engage in creative writing in one form or another, although only a small minority earn any income from writing. The Scottish Government estimates there are approximately 2,300 professional artistic creative writers in Scotland, of a total 6,000 writers across all formats, according to the Annual Population Survey. Of these, some 1,000 Scottish writers make their living primarily out of writing, whilst another 1,300 earn some revenue from writing as a secondary source of income. Within these figures are writers who have publishing deals or self-publish themselves, as well as those writing in English, Gaelic and Scots languages.

According to the Nordicity survey, there is a healthy proportion of emerging writers in Scotland – some 35% of respondents claimed six or fewer years of experience. There was also a strong representation of experienced practitioners. Some 40% of respondents described having 7-20 years of experience, and the remaining 25% of responding writers indicated they had over 20 years' experience.

Both genre and form were provided as optional categories in the online survey.

- The most frequent **form** was fiction (books), followed by poetry (written), short stories, and non-fiction (books). After that top tier, other forms in order of activity were: educational/academic, poetry (performed), dramatic theatre, professional, cultural criticism, screenplays, oral literature and video game content.
- The **genre** of writers was principally consistent with the focus on the form, although there was a small number of additional classifications mentioned – children's illustrated and non-illustrated, art and graphic novels, as illustrated in the figure below. These genres were less frequent, with the exception of children's. After combining illustrated and non-illustrated children's genres, the combined children's genre was similar to drama and academic/scholarly in frequency.

Figure 1 – Most frequently selected genres for Scottish writer survey respondents



Source: Nordicity Survey (2014)

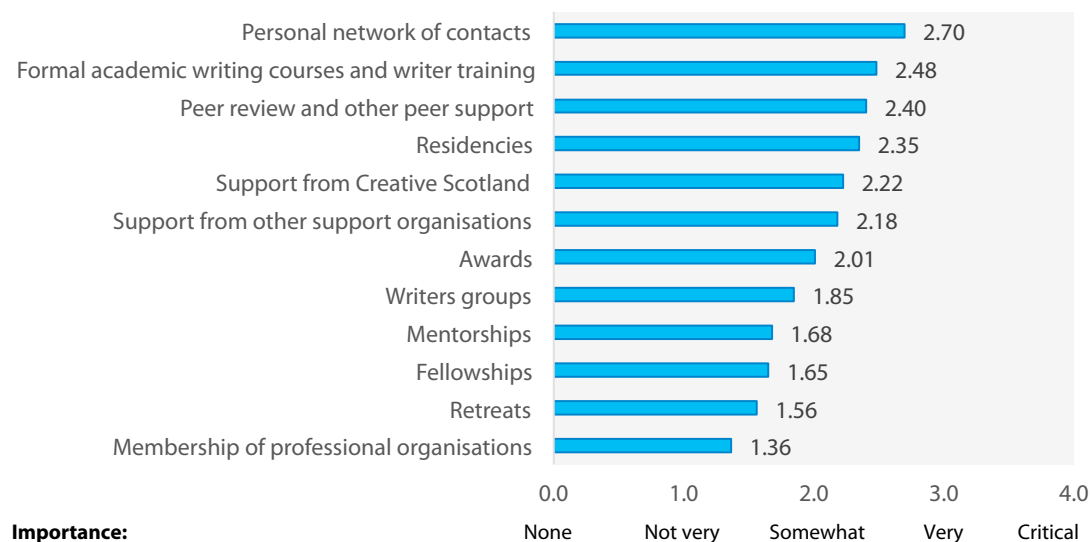
Consultation throughout the Review revealed that many writers tended to work across forms and genres. At one time such cross-form genres may have consisted of academic work or journalism, for example; whereas in 2015, it was just as likely to include script writing for film, video games and blogging.

Conclusion 2 – Writers work through a rich medley of developing and established writing genres and forms, so that 'literature' must now be considered as inclusive of many traditional and new expressions of the written and spoken word. This conclusion mirrors conclusion 1 in Section 2 in terms of the widening breadth of literature.

Respondents to the survey were also asked to relate the relative importance of various factors or opportunities on their writing lives, and their responses are shown in Figure 2 below. It indicates the high level of importance

writers place on the ability to network, collaborate and share experience and expertise with others in the sector - despite the largely solitary nature of the writing practice itself.

Figure 2 – Factors contributing to the development of Scottish writers’ careers



Source: Nordicity Survey (2014)

Can one make a living out of writing?

The answer for most writers is – with great difficulty. This answer is fairly universal and certainly not unique to Scotland. It can be seen from the online survey results that Scottish writers earned a gross mean of approximately £6,000 per year from literature-related income.

Based on the Nordicity survey data, an estimated 35% of Scottish writers earned above Scottish minimum income thresholds from their total household income.¹⁴ For literature-related income only, approximately 81% of Scottish writers earned below the National Minimum Wage (NMW) as measured on an annualised basis. Consequently, only 19% of the 475 writers earned more than the NMW in terms of literature-related income.

As is the case for self-employed individuals in other occupations, writers often have multiple sources of income. This situation is often as much by choice as by financial imperative. Even many highly successful writers in Scotland also hold parallel careers in fields such as social work, medicine or teaching. It was reflected by a member of the steering group that one recent change for writers in terms of income, has been an increase in the number of opportunities to earn from activities complementary to writing, such as delivery of workshops, engagement with education, health or participatory settings, consultancy work or commercial writing. Many of these activities require substantial training in other areas, and this subject is discussed in more detail in Section 4 ‘Developing a nation of readers’.

In the UK in general, there has been a noted rise in self-employment and a drop in self-employed income levels across all occupation levels. In addition, many writers shoulder expenses for their writing careers in a fashion similar to those of other freelancers and indeed small businesses. High-income writer households tend to earn more in both literature and non-literature related income – see Table 1 below.

¹⁴ The literature-related income levels for writers fall far below both the National Minimum Wage of £13,124 and the Minimum Income Standard of £16,850.

Table 1 – Writer income from literature and non-literature activities

	Literature-related Income (literature only)		Total Income (literature and non-literature)	
	Lower income (below NMW)	Higher income (above NMW)	Lower income (below NMW)	Higher income (above NMW)
Total income	£480,248	£1,874,504	£1,020,500	£4,200,000
Average Income	£1,861	£13,583	£3,880	£30,216

Source: Nordicity Survey (2014)

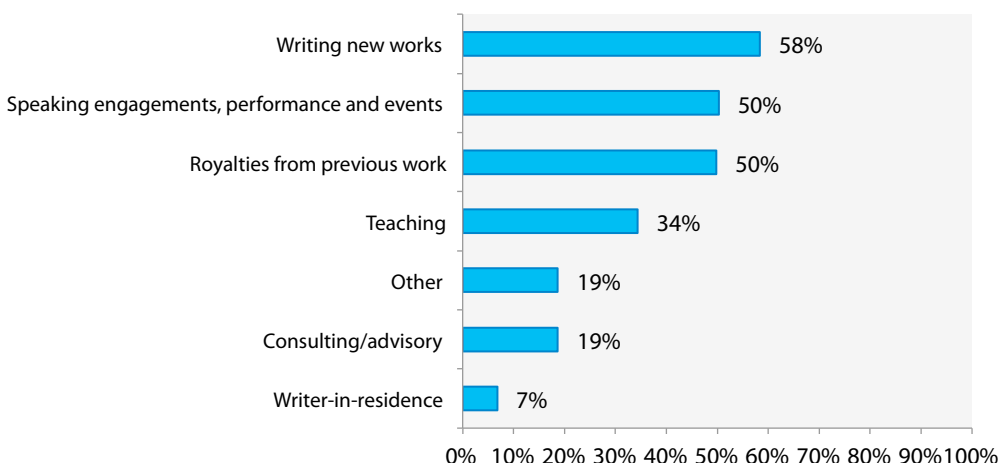
Note: 'Lower income' earners are those earning below the National Minimum Wage, whilst 'higher income' earners are those earning above NMW.

A total of 51 (out of 402 responding to that question in the Nordicity survey) earned more than the National Minimum Wage from income directly attributable to literature-related activities. This relatively low percentage prompts industry figures, like agent Jonny Geller, to advise writers who want to make a living from their writing to be flexible and even switch genres.¹⁵

Creators across the arts in general do not on average make a consistent annual wage, as is the case for artists working in crafts, visual arts, dance, music, theatre and even film and TV. On the other hand, a minority of them do very well, just like some writers. Like their counterparts in other arts areas, writers operate in a 'hits' business, where economies of scale work to the advantage of the small number of successful writers, whilst the majority of writers earn much more modest income from their craft.¹⁶

The most significant literature-related revenue streams were as follows: (i) writing new works (incl. publisher advances), (ii) speaking engagements, performance and events, and (iii) royalties from previous works – all within a similar level of importance. Following these income categories were (iv) teaching, (v) consulting and advisory work, (vi) other sources, and (vii) writer-in-residence appointments.

Figure 3 – Literature-related activities earning Scottish writers their income



¹⁵ The Guardian. [Pity the writers in their garrets in a world where only a few can flourish](#). Thorpe, V (13 July 2014)

¹⁶ The same is true for publishers; one 'H is for Hawk' or 'Fault in Our Stars' can engender and sustain an enormous number of subsequent titles.

The issue of low income is not limited to those writers at the entry level or those just embarking on their writing career; it affects writers at all stages of a writing career, so the impact of low income for writers can persist throughout a writer's career. With limited public subsidy and high competition for funds it is critical that available financial support is accessible as and when writers require it but achieving a balance between supporting talented individuals embarking on a professional career in the literary arts, as well as quality and supporting well established professionals to embrace artistic risk or take a new direction in their practice, remains a fundamental challenge.

It is also important to note that writers shape their own lives, making decisions based upon where writing fits or how important writing is in their lives more broadly. It was noted in the consultation with this Review's Reference Group that whilst writers 'expect funding bodies to provide critical support to writers, it will always ultimately be the writer's own decisions which shape his or her writing life'.

Conclusion 3 – Whilst the incomes from writing for all but a small minority of writers remain low, many combine other jobs or forms of support to earn a living. This state tends to persist throughout their careers, so a long-term perspective is warranted in considering support measures, with a careful bias toward quality writers – at any stage of their practice.¹⁷

Recommendation 2 – It is recommended that Creative Scotland and other literature organisations offer appropriate support which can be accessed regardless of whether a writer is new, mid-career or established – along with assessment methods that ensure emerging writers who produce high quality product have sufficient opportunities to access funding.

Standardising earnings for writers

According to the Nordicity survey, Scottish writers now earn almost as much from speaking engagements at festivals and events as they do from book sales of their most recent work. However there is a lack of standardisation in relation to fees and terms and conditions of engagement within the literature sector.

The Society of Authors issued a report in 2010 that covered the issue of writer appearances in its widest context, including fees. At the end of 2013, after surveying some of its members, it issued new advice on appearance fees at schools and elsewhere. The Society recommended £350 and £250 respectively for full and half-day engagements, plus expenses, and a fee of £150 for a single session (not exceeding one hour) plus expenses.¹⁸ For longer engagements, such as a residency for a week or a month, the Arts Council England suggested that writers base their fee on an annual salary of £22,000.

Whilst these recommended fees provide a helpful guide, they do not appear to fully 'solve' the issue of industry standards for many writers. In fact, when questioned on the 'level of comfort Scottish writers have with key sector issues', Industry Standards scored a 1.65 (between 'little understanding' and 'somewhat familiar' on a scale where 0 = 'none' and 4 = 'expert'). It is worth noting this earnings standardisation is not an issue specific to Scotland; conversations are taking place around the world amongst writers attempting to weigh up the relative benefits of offering to exchange work or time for profile – through association with mastheads or brands – or from the desire to contribute to a project or event they support.

The situation is further complicated by the ever-expanding number of types of opportunity a writer may be offered, from commissions to residencies, event hosting or podcasts. Finally, the nature of the sector is such that there is an immense range of financial models supporting the events and activities themselves, from casual workshops to some of the world's most sophisticated literary brands. The ability of host organisations to pay is not uniform. The aspiration to apply a standard minimum writers' fee across events is also tempered by the

¹⁷ However, few writers suggested that they expect or desire to be able to rely on public funding to support their entire writing lives, direct support was only one factor affecting writers.

¹⁸ Society of Authors, [Author Fees Advice for School and Library Visits](#) (2014)

desire for larger events to compete for national and international names, and the minor budgets of many smaller events.

Terms for writers' fees specifically for festivals are being addressed through coordination amongst Scottish literary festivals. Despite pressurised budgets, Scotland's larger and mid-level festivals in 2015 agreed informally in principle to raise their fees either in the coming or next financial year.¹⁹ While this informal agreement has been welcome news for writers, it was a development restricted to festivals only at this particular juncture.

The Live Literature Fund, funded by Creative Scotland and delivered by Scottish Book Trust is a £150,000 annual initiative (currently both immensely popular, and vastly oversubscribed), which facilitates writer appearances in community settings, including schools and libraries. Its payment structure covers travel and accommodation expenses (vitally important in reaching Scotland's rural communities) and pays 50% of a £150 appearance fee for participating writers, with host bodies contributing the remaining £75. This fund has effectively set a benchmark for fees for this type of activity, although it was noted by a Reference Group member that this figure was recommended as a minimum payment, as far back as 2004.

Nonetheless it is important to note that while this Review recommends advocating better pay for writers across the board, a change in the fee structure in the current economic climate may have extremely adverse effects on the ability of community organisations, particularly those funded by local authorities, to continue to support writer visits. Creative Scotland has a commitment to supporting applications and organisations that remunerate artists fairly and in line with standard industry rates and guidance. However, this Review does not recommend that Creative Scotland mandate specific fees for artists directly.

Conclusion 4 – Writers fees for speaking engagements, performances and events are a critical source of income for writers. Yet, there is a wide disparity in rates and conditions for different types of engagement.

Recommendation 3 – It is recommended organisations representing writers continue to work closely with the sector in setting standards and terms of engagements for activities (travel, speaking engagements, residences, etc.) that accurately reflect the complexities, diversity and realities of the sector. Creative Scotland and other organisations then have a responsibility to ensure writers are paid according to best practices and agreed to standards set.²⁰

Where are the publishers in the picture?

Scottish writers who are taken on by Scottish publishers²¹ appear to have been well served by them. However, consultation revealed that writers do not feel they are always getting the best deal out of their relationships with publishers – so being able to renegotiate the 'minimum standards' for writers would advance the interests of the writers. In fact, some writers and publishers both observed that better structured negotiations would help protect writers and strengthen the already virtuous relationship many writers have with publishers.

As is discussed in Section 5, publishers face diminished revenues per sale of books because of the 'Amazon effect' (i.e. the proliferation of online distribution), ebooks, and the resulting compression of retail prices. Publishers of ebooks may save in manufacturing costs but they still typically need to produce print copies as well. As a result they reduce costs, which affects the amount they have to spend on marketing and promotion, and for giving advances to authors.

¹⁹ Note that a standard speaking fees arrangement for festivals has effectively been in place since the establishment of the Live Literature Fund in 2004. This is significant in a UK context and was a live issue for debate at 2015 London Book Fair (LBF). It is seen as a strength in Scotland's festival sector that this arrangement has been adopted in Scotland. Chris Gribble, Chief Executive of the Writers' Centre Norwich, mentioned its uniqueness in a public meeting at LBF on authors and making a living, and recommended that other nations follow suit.

²⁰ The Society of Authors already provides a range of guidance and rates for writers that endeavour to provide some best practice standardisation, accessible at societyofauthors.org.

²¹ Section 5 of this Review is fully dedicated to the role of publishers in Scottish literature.

The propensity for many Scottish writers to work directly with Scottish publishers is based partly on national sentiment, partly on geographic accessibility, and partly because the publishers are often best placed to serve Scottish writers. Indeed, acclaimed writers such as Alexander McCall Smith, Michel Faber and Debi Gliori choose to continue managing many of their publishing deals with Scottish publishers. Other leading Scottish writers unsurprisingly work with global publishers based in London or abroad. Moreover, as the publishing landscape has changed, fewer writers stay with one particular publisher throughout their careers and a significant proportion of leading writers are published by a range of houses, including both Scottish and those elsewhere; such as Janice Galloway, James Robertson and Alasdair Gray.

At the same time, forces of change have altered the relationship between publisher and writer to the detriment of writers. Recent data for the UK as a whole show that writers' advances have declined precipitously.²² For reasons largely related to technological disruption, the publisher business model has undergone substantial revision – publishers can no longer afford to pay advances at the same level as in the past (although those offered by Scottish publishers have never matched those of the conglomerates).

Publishers still invest in writers and nurture the careers of many. However, the research conducted for this Review indicates that writers perceive that in some cases they are not as thoroughly supported by the publisher as in the past, particularly in terms of marketing and promotion. According to the Nordicity survey, writers market their works themselves through social media, and by speaking at literary festivals and events to generate exposure, often without the involvement of their publishers. The traditional editorial role in publishing is perceived to have been affected, which puts greater onus on the writer to secure editorial support in other ways. It should be made clear that most publishers do still support their writers in editing and marketing/promotion but many have had to cut back on the number they support or the extent of that support.

Part of the publisher-writer relationship is that not all Scottish writers who get published do so via Scottish publishers. Conversely, few publishers focus exclusively on Scottish writers. Certainly, Scottish publishers have a major role in disseminating Scottish works and providing income to writers as well as career support. However, the data shown in Figure 3 indicate that other forms of income – such as performance fees – are highly important as well.

Self-publishing is growing in Scotland

Though this Section 3 of the Review focuses on the writer, and self-publishing is discussed in Section 5 with regard to publishing in Scotland, this growing phenomenon pertains to and affects the writers themselves.

Self-publishing has been greatly abetted by the internet and facilitated by new platforms and tools that provide templates and arrange for printing and distribution. Services exist that digitally connect writers to other writers as well as readers. In fact certain genres in particular, such as romantic fiction, have flourished in the self-publishing environment.²³

It should not be assumed that all self-publishing is of genre fiction, as there are many drivers in the decision to self-publish. Niche publishing, or cross-art form works, including artists' books, work for exhibition purposes or pamphlet publishing are often far more suited to these more flexible models. Writers have many reasons for choosing this route.

²² Advances continue to be paid, with two-thirds of respondents having received an advance during their career, which rises to over three-quarters of professional authors. Nevertheless, this is a decline since 2006 of 5% for professional writers, and furthermore the size of these advances is also falling, as '44% said that the value of the advance has gone down over the last five years'.

Source: Queen Mary, University of London for ALCS, *The Business of Being an Author: A Survey of Author's Earnings and Contracts* (April 2015), accessible at alcs.co.uk.

²³ The international leader in romance fiction, Harlequin, has seen sales decline dramatically because of the self-publishing vogue for this genre – even though Harlequin itself has been an early adopter of ebooks publishing.

Some entrepreneurial writers choose to self-publish in order to make use of their own skills and talents independently from the traditional publishing structure.²⁴ Such writers conduct the 'business end' of publication themselves by finding designers, outsourcing printing, managing their distribution and the relationships with booksellers, in addition to managing their opportunities to participate in events and other promotional activities.²⁵

Another recent development is the collaborative and collective efforts of writers – either physically co-located or networked through digital platforms (e.g. Wattpad) or hubs and venues. Such hubs are also related to cross-art forms, as writers work with others to create new media works involving interactive publishing, games and various forms of live performance and music.

As with other artists, writers value the opportunity to network. One such opportunity is afforded by the Scottish Writers Centre based in Glasgow at the Centre for Contemporary Arts (CCA), which itself offers master classes, writers' groups and an event programme, alongside specific writing groups for Scots-English and for Gaelic, within the broader setting of the lively CCA.²⁶ The consultation highlighted in various ways that more networking opportunities would be welcomed by writers from all across Scotland.

The needs of the literature sector are not so different from other creative sub-sectors. Writers want to be part of a lively arts scene. They want access to facilities to research, support or exhibit and gain critique of their work. They want to be able to network and reach out to partners, new markets and commissioning opportunities. In some situations it may be possible for writers or literary professionals to join up with existing resources, such as creative SME networks like Creative Dundee, or incubation centres like the Creative Clyde Business Centre. The idea of writers' hubs and collaborative working is more fully explored in Section 6 – The Sector Ecosystem.

Traditional publishers often court the most successful self-publishing writers. Self-publishing can be a way to operate independently, in collaboration with other writers and creators, or be a route to the more conventional publishing model; the example of James Oswald is an illustration of an alternative trajectory (see Case Study 1).

Conclusion 5 – The relationship between writers and publishers is undergoing substantial change whereby both are discovering new models by which to collaborate, market and disseminate written works.

Recommendation 4 – It is recommended that writer support mechanisms and funding opportunities offered be reflective of change within the sector. Such mechanisms should encourage innovative approaches and support the ever-evolving new models as they emerge.

²⁴ The Nordicity survey results show a greater familiarity of digital platforms, digital marketing, and similar by those writers who have actively embraced the self-publishing model.

²⁵ When looking at other creative industries, the 'music industry model' resonates with writing and publishing. As music was the first art form to feel the disruptive force of technology, the dominant role of the record label has been challenged – not dissimilar to the role of the publisher. Through consolidation and because of the complexity of rights management in a world of multiple distribution channels, the international majors in music and publishing are alive and well. However, the creators can now engage others to undertake many of the functions of a label or publisher.

²⁶ The [Scottish Writers' Centre](#) is a national resource that supports Scottish writers and promotes Scotland's vibrant literary culture.

Case Study 1: Self-publishing success story – James Oswald

In 2013, The Telegraph hailed James Oswald as ‘crime fiction’s next big thing’. This is a model tale of how a self-published writer can be a success. Oswald is not only born and bred Scottish, having graduated from Aberdeen in 1990 and running the family livestock farm in North East Fife, but he started his self-published career in the adopted Scottish genre of modern crime fiction.

After having had his manuscript for *Natural Causes* rejected a few years earlier and putting his writing career on the back burner, after inheriting his father’s farm, Oswald met Allan Guthrie at the Harrogate Crime Writing Festival in 2008, opening his mind to the possibilities of self-publishing. Within weeks, Oswald was selling 2,000 copies a day. By the time of the print publication of *Natural Causes* in 2013, he had accrued online sales of 350,000 for this debut and its sequel, *Book of Souls*, which was released in 2012 online.

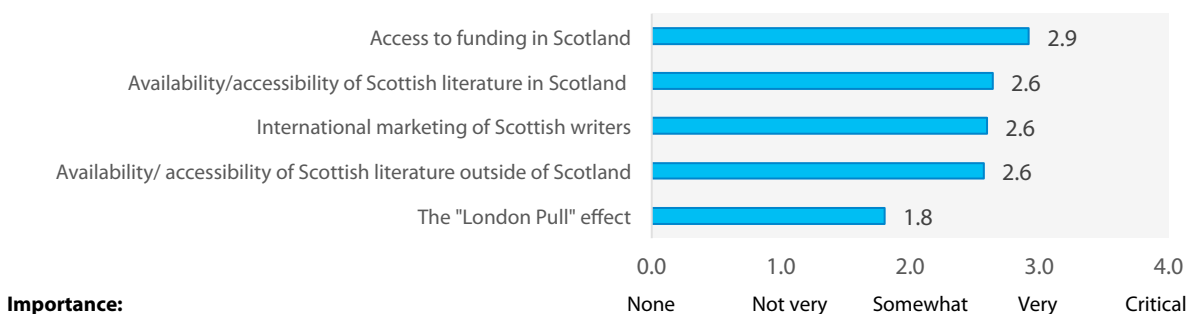
The success of these novels of Edinburgh Detective Inspector Tony McLean resulted in a bidding war between publishers, with Penguin coming out on top and with international rights being sold to six countries.

Since then his success has continued: with critical acclaim for his debut, which made the shortlist for the Crime Writers’ Association Debut Dagger Award; with a further two McLean novels; and a series of three fantasy novels. All of this output is available online or in Penguin paperback. By spring of 2015, readers had welcomed the publication of his fifth McLean crime novel online and in hardback by Penguin.

There is established institutional support for Scottish writers

As with other art forms and creative sectors, financial support from public and private funders can form an important source of income for writers. In fact, access to funding was identified as the most important sector issue for Scottish writers in the Nordicity survey as illustrated in the Figure 4 below.

Figure 4 – Importance of Scotland-specific sector issues



Source: Nordicity Survey (2014)

Creative Scotland (and its predecessor organisation, the Scottish Arts Council) has traditionally played an important role in supporting writers in Scotland directly through awards, bursaries, professional development

funding and other routes. Prior to the re-organisation of funding support by Creative Scotland in October 2014, there were 25 funding strands, which were replaced by Open Project Funding in late 2014. Between these two periods, funding was delivered in a transition phase. Today, direct funding to writers is available through Creative Scotland's Open Project Funding – available to both individuals and organisations working across Scotland's arts, screen and creative industries.

The demand for Open Project Funding is highly competitive and far outstrips the supply, with high quality applications far from guaranteed funding. Alongside the high volume of demand for funding, the amounts requested by applicants have in many cases increased beyond the caps governing previous funding strands.

Extracts of some of the following individual applications illustrate the diversity and ingenuity of the recipients as to the nature of their creative activities.

- *To write a collection of 50 poems – portraits of little known, neglected Scottish women through the ages. The poems will be written in two languages – English and Scots, in the voices of the women themselves.*
- *To research, visit and document wishing trees in Scotland. To meet with/interview local people/storytellers who know the lore of these trees. To map Scotland's wishes and gather material for a children's novel, travel book and storytelling performances.*
- *To support the writing and research time needed to properly establish my writing career. During this period I hope to research and write my second novel, which looks at mental health and biography; and to bring together and finish writing my first full-length play, which I've been researching for a few years. The bursary would be used to give me eight clear months of writing and research time without having to take on a job or freelance assignments.*

Many institutions that are in part-funded by Creative Scotland, also support writers financially. Specifically, Creative Scotland provides indirect funding to writers through its three-year Regularly Funded Organisations (RFOs) – see the box 'The nature of writer support provided by RFOs in Scotland' below in this section. See Section 6 for a further discussion of RFOs in the context of Scotland's literature ecosystem.

Conclusion 6 – Creative Scotland's new funding model is intended to be more flexible than previous iterations. Clear communication about how writers can access Creative Scotland's Open Project Fund will encourage further applications.

Conclusion 7 – Whilst Creative Scotland is one route to funding, there are other possible routes to be explored. A more systematic collection and accessible presentation of funding and training opportunities beyond Creative Scotland would enable more Scottish writers to take advantage of the appropriate financial support.

Recommendation 5 – It is recommended that Creative Scotland facilitate the development of an ongoing comprehensive repository of writer grants and other sources of financial and training support.

The nature of writer support provided by RFOs in Scotland

Cove Park supports writers by offering year-round residencies to collaborate with other artists (both national and international) to produce multidisciplinary art forms.

Edinburgh International Book Festival supports Scottish writers through live readings, at which writers earn fees of £200 per event and retail sales.

Edinburgh UNESCO City of Literature supports Scottish writers through opportunities to perform at the Edinburgh International Book Festival with Story Shop, a year-round networking base with their Literary Salon and a full guide to literary events in Edinburgh.

Gaelic Books Council provides writers with commission grants, translation support and Gaelic awards.

Glasgow Women's Library supports Scottish writers through holding writers' workshops, competitions and courses.

Moniack Mhor supports Scottish writers through the provision of courses, retreats, events, awards, bursaries and fellowships.

Publishing Scotland supports Scottish writers indirectly through its support of Scottish publishers to make their writers as accessible as possible, including through supporting agents, translators and other interested parties.

Scottish Book Trust provides writers with awards and competitions, fellowships, advice, resources, training and education. The SBT also delivers the New Writers Awards talent development programme.

Scottish Poetry Library supports Scottish writers as a national resource and advocates for poetry by providing a centre of excellence, audience development, creative language and reading development, and community engagement both nationally and internationally.

Traditional Arts and Culture Scotland (TRACS) supports Scottish writers through the Scottish Storytelling Centre and the Scottish International Storytelling Festival.

Wigtown Book Festival supports Scottish writers through events and literary celebration, residencies and regional capacity building to support writers.

Writers, profile and publicity

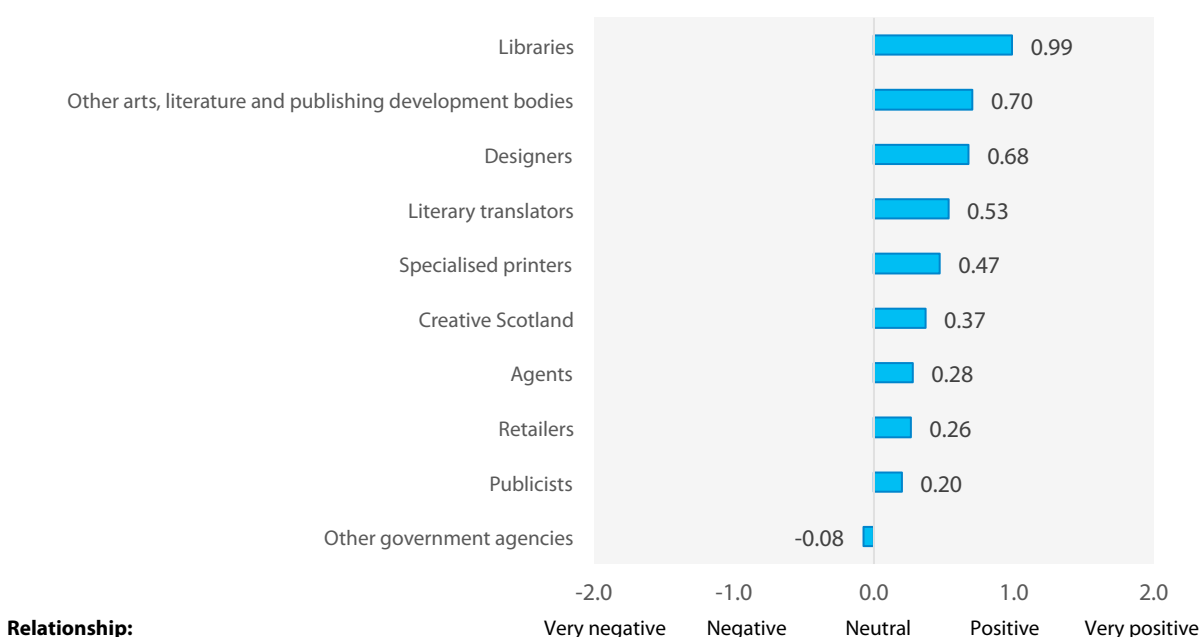
In the Nordicity survey, Scottish writers identified a number of different activities as important to developing their profiles. A web presence and social marketing were considered important. So were speaking engagements at various venues, literary festivals and events, in particular. Book reviews, literary criticism and awards were also identified as part of the conventional toolkit required for the promotion of writers. As a result, Nordicity survey respondents need to become increasingly self-reliant for the promotion of their work, particularly in association with literary festivals, events and booksellers.

The conventional model for the dissemination of written works is for the publisher to work with the writer to generate publicity through various promotional initiatives, and to supply books to booksellers and retailers. As mentioned earlier, new models in several respects are overshadowing this approach.

Today, books retailers now include Amazon and other digital distributors. Retailers also include other mass-market vendors who order their inventory from centralised purchasing systems or from distributors outside of Scotland. Such distributors may not even offer many Scottish literary works. Writers (and publishers) now operate in this environment, and many may need support to learn how to work with the new realities of marketing, promotion, and distribution (see training, skills and investing in career development).

Besides operating effectively in a new business climate, there are other opportunities for increasing the visibility of Scottish writers, including libraries, independent booksellers, and tourism promotion. As shown by Figure 5 below, writers indicated a very positive relationship with libraries in addition to identifying strongly with other literature development organisations. Designers and translators are not far behind in the opinion of writers. Creative Scotland itself is in the middle of this order, ahead of ‘other government agencies’.

Figure 5 – Scottish writers’ relationship with other elements of the sector



Source: Nordicity Survey (2014)

The relationships between writers and these organisations are important to note:

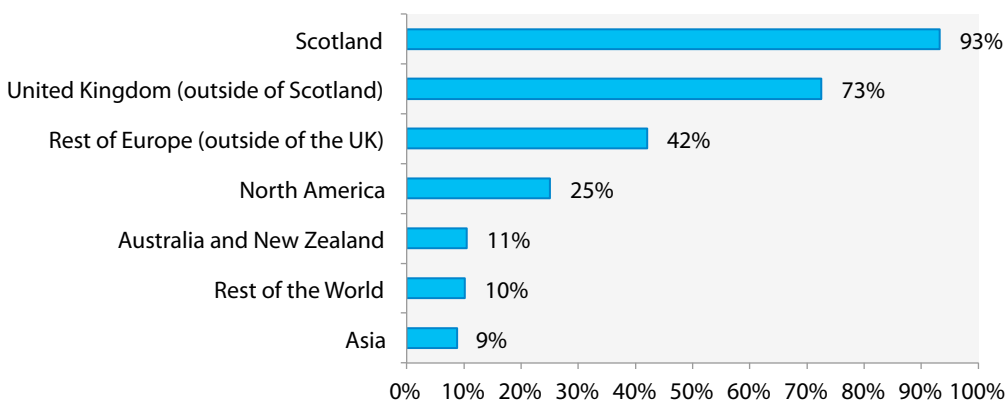
- Both public libraries and school libraries are crucial for reader development in Scotland. Ensuring that public and school libraries offer Scottish works (beyond educational materials) improves their accessibility to the entire population (see Section 4 for a focus on libraries and how they can expand their inventory of Scottish works).
- Libraries and booksellers showcase writers via the events they run independently or in partnership with others such as festivals. Those independent booksellers that have survived and now prosper in the Amazon era remain important as community assets with a local sensibility to Scottish literature (see Section 5 for a focus on the role of booksellers).

- Tourism promotion is another way to bring more awareness to Scottish literature. Ensuring that Scottish works and literary tourism activities are amply included in such promotion would make that element of Scottish literature more accessible to foreign visitors (see Sections 6 and 7 for more on tourism).

Support for travelling to literary events and festivals outside Scotland

According to the Nordicity survey, travel is a necessary aspect in the development of the career, profile and sales of 70% of Scottish writers. For those writers who travel to promote, perform and sell their literary works, Scotland and the rest of the UK were by far their most frequent destinations, according to the Nordicity survey – see Figure 6. The rest of Europe (outside of the UK), meanwhile, was a prominent market for writers, followed by North America.

Figure 6 – Geographic destination of Scottish writers travelling to promote, perform and sell their works

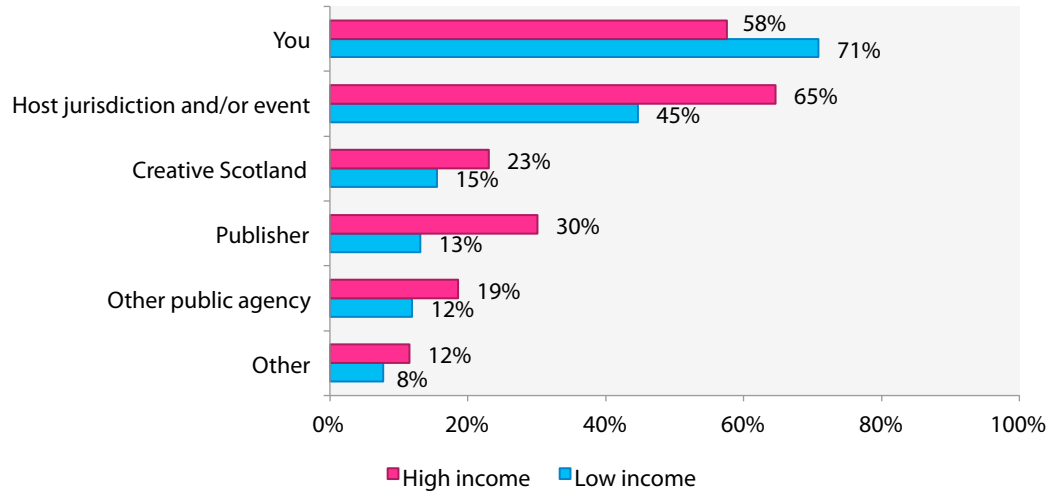


Source: Nordicity Survey (2014)

There are of course multiple reasons for writers to travel. At times, the destinations will be where their work has a nascent, developing or established market. Other times, it will be for research or professional development purposes without any connection to sales *per se*.

The Nordicity survey revealed that many host jurisdictions do pay writers but self-financing for part or all expenses remains standard. Creative Scotland, other public agencies and publishers also financially support some writers, but according to the Nordicity survey, the support remains partial. As Figure 7 below shows, there are some differences in sources of financing between writers at different income levels. Hosts, publishers, Creative Scotland and other public agencies are more critical sources of income for high-income writers than lower-income ones.

Figure 7 – Source of financing for Scottish writers who travel (by income)



Source: Nordicity Survey (2014)

Conclusion 8 – Travel within Scotland and beyond is important for the development of all writers and writers travel for a multiplicity of reasons. The international markets pursued by writers vary but there are commonalities; more coordination across the sector, improved financing and greater flexibility to allow strategic initiatives may lead to increased impact.

Recommendations relating to travel and other support mechanisms for Scottish writers abroad are presented in Section 7 regard to a putative Scottish Literature International body, and a coordinated and strategic approach to accessing markets, travel and translation.

Promoting literary works through prizes and awards for writers

Awards and prizes are an important aspect of the publicity landscape, as well as offering prestige, future opportunities and, in many cases, financial reward. To create visibility and profile in a crowded marketplace, prizes give publishers, libraries and retailers alike something to work with. Fully exploiting the impact of literary awards with the press and media is therefore critical.

Besides the holy grail of the Man Booker – long list and short list, let alone winner – the Saltire Society Literary Awards are increasingly important in the annual cycle of Scottish book publishing. These awards currently include 6 literary categories and though a perpetual increase in their number is not desirable, the sector did expect the Saltire Society to respond to the widening scope of Scottish literature with the inclusion of new awards to reflect new genres and formats. There was no consensus through the consultation as to there being a particular award missing from the Scottish landscape, but suggested new categories included the following:

- linking writing to other arts sectors;
- literary criticism awards;
- awards for librarians or those in literary education;
- translation awards;
- prizes for titles embracing an international approach;

- prizes for touring of award winners throughout Scotland's literature hubs – be they libraries, independent book stores, or arts or writers' centres.

Notwithstanding the lack of consensus on how the scope of awards should be widened, there was agreement that the visibility of awards and their penetration through the crowded public and media space needed collective action. Currently, the value of awards was not being fully converted into reader development or commercial success. The art will lie in finessing the increased impact of awards without undermining their integrity.

Book reviews and literary criticism develop awareness

Literary review and criticism through the media is an essential element to a thriving, healthy literature and publishing sector. The media provides an avenue for the promotion and celebration of Scottish writing, including reviews, commentary and other writing in the popular media (e.g. print and broadcast). Literary review and criticism both on- and offline provides a more formal appreciation and critique of written works, and it plays a central role in reader development and the consumption of books (see Box on 'New writing and critical review').

Another rising angle in the context of book reviews is 'citizen journalism'. Increasingly, the public can contribute to the review and critique of written works via open forums and the 'the blogosphere' – albeit without enforced quality assurance and standards in place. Of course, there is a distinction between literary criticism that happens to be online and which still have quality, named, professional reviewers; and 'good reads' or user generated citizen journalism.

New writing and critical review

Creative Scotland has provided funding to a number of journals and magazines to support new writing and critical review. A breakdown of this support from 2012 to the present is as follows:

Publication	Most recent award	% of total budget from CS*	CS* funding 2012 to present
The Evergreen (quarterly hardback journal)	£25,000	23	0
Scottish Review of Books (quarterly newspaper style review)	£69,000	27	£139,000
Dark Horse (bi-annual poetry magazine)	£27,420	53	£62,290
The Drouth (bi-annual cultural magazine)	£19,000	39	£37,000
Edinburgh Review (bi-annual literary magazine)	£19,900	49	£39,300
Northwords (bi-annual Highlands literary newspaper)	£19,115	80	£68,787
Gutter (bi-annual literary journal and review)	£7,000	21	£24,875
The Bottle Imp (bi-annual Scottish studies e-zine)	£3,000	n/a	£9,000

* Creative Scotland

Extensive consultation with the literature sector frequently raised the issue of decreasing channels for written works to be reviewed and actively disseminated across the general Scottish public. It is viewed as one of the strongest challenges facing the sector. The deteriorating amount of investment in book reviews in Scottish newspapers, the Scottish editions of the UK newspapers and the major broadcast media (BBC Scotland, independent radio, local radio and local television) has come under fire.

Respondents to the Nordicity survey have indicated that the most important way they learn about new works is 'word of mouth' (WOM). In the age of social media, WOM may also include social media such as Twitter. Whatever the mode, the originator of the WOM opinion must have learned about the literary work through some means of promotion in the first place – such as reviews in the media, and thus WOM will always be a secondary, albeit important source.

In the past, literature was heavily reviewed by newspapers, magazines, and the broadcast media of radio and television. Declining revenue bases in traditional media have led to significantly less space, time and budget being devoted to literary coverage, and increasingly, reviews of titles are syndicated across many media outlets as a way of amortising costs across more assets. The experience of some of those consulted was that literary content syndicated via the UK-wide Press Association tended to include little Scottish content. In addition, literature sector participants decried the lack of 'noisy' interventions to forestall the abandonment of the local book reviews by newspapers, magazines, and broadcasters.

Some literature organisations in Scotland publish their own reviews, lists, recommendations and related content via their websites, and in some cases include literary podcasting within their remits. With investment, including a commitment to pay quality named reviewers for their contributions, there is perhaps opportunity within these for a leading literary platform to emerge.

Support for the training of literary critics remains a tool for fostering literary criticism of a thoughtful and professional kind. Scottish universities deliver both undergraduate and postgraduate studies in literary criticism; academic publishing in Scotland also encompasses literary studies and criticism. However, some of those consulted believe that the link between literary criticism and journalism training has been fractured.

In fact, the Reference Group favoured specific support for works of underrepresented and diverse groups such as youth and young people, women, Gaelic and Scots speakers, and in support of the promotion of cultural diversity generally. A range of programmes are in place or being developed in this area which will be a welcome contribution to the landscape, including those by the Scottish Poetry Library, Glasgow Women's Library and the Scottish Review of Books. There is perhaps also an opportunity to develop a literary element of the Herald Young Critics programme, run by the Edinburgh International Festival. Nonetheless, whilst these initiatives are excellent for the longer term, they may not directly affect mainstream media for some time.

Parallel to the decline in literary coverage in traditional media has been the rise of recommendation algorithms of subscribers to Amazon and other retail giants – or by citizen reviews in platforms such as Amazon's 'Good Reads' or blogs. These platforms fulfil a clear marketing function and it can be argued that they democratise the reviewing process and present opportunities for publicists, agents and writers themselves to play a significant role in ensuring wider coverage of Scottish literature in the new media.

Broadcast media in Scotland, both radio and television, were frequently cited throughout the consultation as underserving and underexploiting literature, offering very little in terms of books-related coverage, discussion or debate. Aside from the BBC, the newly established local television broadcasters in Glasgow and Edinburgh may provide an avenue for drawing attention to Scottish literature. The validity of such opportunities should be explored in the context of this Review by the literature sector.

In a fashion similar to freelancers and small businesses, many writers in Scotland must work to promote themselves and access new markets in which to sell their work. Measures to enable Scottish writers to further develop their profile are increasingly wide ranging, including through both new and established opportunities such as traditional or digital technology, avenues for enhanced media coverage, literary reviews and criticism, festival activities and the celebration of success such as literary prizes.

Conclusion 9 – As a result of the deteriorating economics of traditional media, the decline of the professional review of literary works by print and broadcasters is expected to continue, and in part give way to the on-going proliferation of citizen journalism and online recommendation sites. However, neither new nor traditional media should be ignored in promoting good literary criticism.

Recommendation 6 – It is recommended that more literary reviews and criticism should be supported, both in traditional and online formats, including being vocal with traditional print media; such support would also include the continuing support of literary journals, training for literary criticism, and negotiating better literature coverage with local and national media.

Conclusion 10 – As the marketing and promotion of artists as a ‘personality of commercial value’ has been previously championed in other creative industries (such as the music sector), Scotland’s writers may benefit from the approaches learned and executed by artists in other art forms.

Conclusion 11 – In general, it is necessary for Scottish writers to become more efficient and effective in the areas of marketing and self-promotion by working collaboratively, sharing knowledge and pooling resources.

Training, skills and investing in career development

In terms of the training and skills development, the majority of respondents (65%) to the Nordicity survey had received no formal training relating to their practice as a writer (see Figure 8). This differed very slightly between self-published and traditionally published writers (70% of self-published writers have received no training, 62% of published ones). Of those who had received training, this was largely through higher education institutions (see Figure 9). The vast majority cited core writing skills as the primary area they’d received training in (see Figure 10).

Figure 8 – Writers receiving formal training

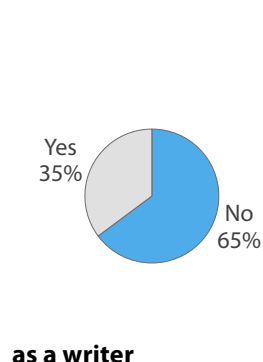


Figure 9 – Type of formal training received by writers

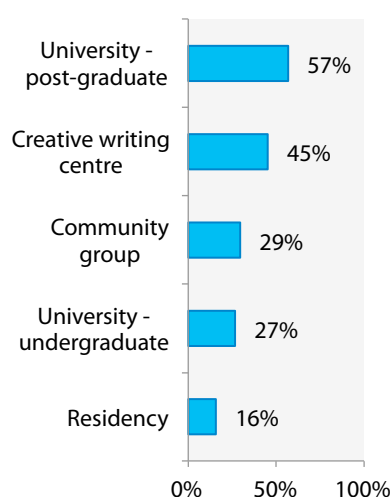
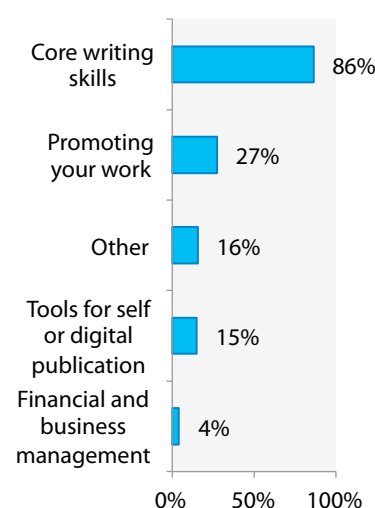


Figure 10 – Skills writers derived from formal training



Source: Nordicity Survey (2014)

Given the changing dynamics within the publishing industry, it is clear that many new skills are required or would be beneficial to writers both beginning and throughout their careers. For instance, if writers choose to play a stronger role in marketing their work, or in developing their own profiles, there are practical ways that they might be assisted to do so. In addition, the business models in publishing are growing more complex with the rise of distribution channels – online, ebooks, in addition to the bookseller. The ability to work through rights, negotiate contracts, and manage one’s career with confidence is more necessary today than ever before, a trend that continues for both published and self-published writers.

While this review did not endeavour to map an exhaustive list of all possible training and development opportunities available to writers in Scotland, there were a range of schemes arising frequently throughout consultation: taught courses run by Moniack Mhor; the New Writers Awards and a number of ‘upskilling’ resources online, including the use of social media, offered by Scottish Book Trust;²⁷ the specific offer from Gaelic Books Council; Clydebuilt poetry mentoring scheme; Peter Urpeth’s mentoring and development scheme, Emergents;²⁸ mentoring programmes such as Picture Hooks²⁹ for illustrators, or day long professional development initiatives, such as Turning Another Page.³⁰

The Cultural Enterprise Office,³¹ whose remit is in supporting creative business throughout Scotland, also operates a service specifically to provide specialist business skills advice to writers, however, they report that their service is under-utilised, with only 1-2 enquiries per month.

There are of course many advantages for writers in pursuing training beyond Scotland, with many excellent opportunities available throughout the rest of the UK and beyond. Creative Scotland and other agencies (Skills Development Scotland) arguably have a responsibility to support writers to supplement their knowledge via these avenues where necessary. There are also courses and opportunities offered within other areas of the arts, such as the Playwrights Studio, which could be more widely promoted to and accessed by writers currently working in other forms.

The picture that emerges of training in Scotland is that examples of good practice is perhaps neither readily visible nor comprehensive enough, and tends to be ‘there if you know it’s there’. This landscape could be improved both by coordinating, communicating and amplifying the impact of what already exists, and filling the gaps with new or amended programmes.

In terms of clear gaps in the skills landscape, a lack of editing expertise in Scotland was a core element that was frequently mentioned in responses to the Nordicity survey. This was referred to as a necessary area of improvement for both publishers and individual writers alike. While many saw the editor’s role as being distinct from that of the writer, there was also a recognition of the changing landscape and its challenges. As one respondent put it:

‘We’re seeing an explosion in self-publishing. If you want to spend money to improve the state of literature in Scotland, provide these writers with editorial services to improve the quality of their work.’

– Survey respondent

Screen writing teaching was perceived as a notable gap in the training landscape with little on offer beyond introductory courses. Partnership working between the literature and film sectors would offer solutions in this

²⁷ Scottish Book Trust resources include [General](#), [Writing tips](#), [Getting published](#) and [Use of social media](#).

²⁸ Discussed later in Section 3.

²⁹ [Picture Hooks](#) is a mentoring scheme funded by Creative Scotland set up to provide an opportunity for development under the guidance of established professional illustrators.

³⁰ [Turning Another Page](#) is a 2013 professional development programme for writers living and working in Scotland consisting of a number of events including The Poet’s Compass (a conference for Scotland’s emerging poets).

³¹ The [Cultural Enterprise Office](#) is Scotland’s specialist business support and development service for creative micro-businesses and cultural practitioners.

area with possible opportunities within the new Screen Skills Fund, which was launched with support from the Scottish Government, by Creative Scotland in April 2015.³²

As noted elsewhere in this review there is vast opportunity for literature to be more visible and valued in other dimensions of society – including health, justice, and education. These specific environments require specialist approaches. A clear gap that has been identified in the provision of training in relation to writers is in working with vulnerable people in the area of participatory arts, such as in hospitals, prisons and care settings. A strong desire has been expressed to share knowledge and access training opportunities for working in this area.

Reference Group members expressed that increased professionalism is needed in many aspects of the literature landscape, which in turn would improve the situation for writers. For example, smaller literary events and festivals do not know what is reasonable to ask an author to do, or fail to provide necessary information or appropriate support. It was suggested that practical training could be accompanied by 'how to' guides, standardised templates, or a sector wide agreement or code (however, such a code would need to take account of a wide diversity of factors for it to be relevant and affordable for an equally wide diversity of events, programmes and initiatives).

³² The new Screen Skills Fund Scotland is one of Creative Scotland's three funds within the [Screen Funding programme](#).

Conclusion 12 – Whilst this Review did not set out to make an exhaustive evaluation of the training opportunities available to writers, there are clear areas for possible improvement, both in coordinating and showcasing the current offer, and in developing new programmes. The end objective would be an integrated programme of skills development and training tailored to the needs of writers, publishers, and other stakeholders working in the wider literature sector. A single platform showcasing all related opportunities would be immensely beneficial to the sector.

Recommendation 7 – It is recommended that Creative Scotland work with the Scottish Creative Industries Partnership members to review training offered via the sector and post-secondary institutions that deliver training, in order to determine any gaps and design joint initiatives to fill those gaps. Areas such as promotion and marketing in the internet age, rights negotiation/management, general technical and business skills, editorial support, screen writing, and working in participatory settings ought to be explored.

Case Study 2: Emergents – supporting writers and publishers in the Highlands and Islands

Based in the Highlands and Islands, an area redolent with literary history and culture, emergents provides writers with a professional critical assessment service, networking opportunities across the creative industries, as well as a high level of tailored support and key knowledge-sharing events that embrace the new digital world.

Peter Urpeth, as the leader of the writing development programme at emergents, is trying to develop writers with real commercial potential in the contemporary publishing, self-publishing and digital industries, and to assist the growth and sustainability of the publishers in the Highlands and Island region.

For writers, **emergents** provides:

- 'Work In Progress' – a professional critical assessment service of manuscripts
- skills development – by means of one-to-one meetings training and support needs are identified and a programme put in place
- mentoring – short, intensive and individually tailored
- showcasing – genre projects are presented to leading literary agents
- writer opportunities - these are relayed to writers and advice provided and
- networking – events and promotions are held.

For publishers they are now developing a range of services that focus on skills development, translation, on showcasing, and international promotion.

Case Study 3: Lynsey May, debut writer

After completing a creative writing degree at the University of Edinburgh, Lynsey was discouraged by the lack of resulting opportunities and began submitting short stories to print journals that she had identified through her own personal research.

Following on from this, Lynsey was awarded a New Writers Award from Scottish Book Trust. The award has played a significant role in increasing her profile and helping her secure invitations to career influencing events such as the Edinburgh International Story Box and the Dundee Literary Festival.

Lynsey went on to receive valuable training from the Scottish Book Trust along with 'on the job skills'. However, due to the rising popularity of live book events, she identified a need for further more practical training, such as the use of technical equipment (e.g. microphones), communications (e.g. working with technical staff at events) and performance skills (e.g. public readings and appearances). For these hands-on skills, Lynsey looked to the music industry as a source of learning, for the experience in live performances and the notion of selling a personality.

Lynsey has developed her presence online, using social media and a website with regular blog updates. With her blog having received hits from around the world, she recognises an opportunity to reach these new markets outside of Scotland but, like many debut writers, has yet to find the right strategy to pursue. For a debut Scottish writer, even breaking into the UK market from Scotland has had its challenges, not least of which has been establishing rapport with agents and publishers themselves. Whilst there are notable resources for published writers, the path for debut writers has been less clear for writers like Lynsey.

In one instance, after being sought after by an international in-flight airline, Lynsey was commissioned to write a piece but was unable to negotiate a fee. Despite the potential exposure and portfolio experience of the opportunity, she felt this was not enough of a benefit to offset the loss of income. She felt that she could have benefitted from having more resources and skills around negotiating with agents and publishers.

In order to develop and provide moral support for a community of debut writers, Lynsey has set up a writing group, which has not only provided a valuable network but also a resource for finding and sharing opportunities. Libraries have also proved to be a valuable support structure for Lynsey and she received grants to attend an Arvon writing course in Aberdeen.

Most recently, she has been working on a novel with the help of her London-based agent, who, due to the immense pressure now put on debut publications, has contributed in a strong editorial role.

Case Study 4: Ryan Van Winkle, poet

Ryan Van Winkle is a poet, theatre-maker, podcaster, critic, workshop leader, teacher and events organiser who has built a career through actively forging international networks and creating artistic communities. He finds collaboration and mutual support between artists critical for international successes and a sustainable, secure arts culture.

He championed interdisciplinary spoken word events in Edinburgh from 2006 to 2011 with “Golden Hour”: a free, interdisciplinary literary event that took place monthly in the Forest café, an artist collective that Van Winkle founded and now directs. Events such as ‘Neu! Reekie!’ and ‘Rally & Broad’ have followed since. ‘Golden Hour’ aimed to fill a gap in provision between slam poetry and open mic events, showcasing the best of the city’s talents in an entertaining way that challenged audiences, maintained literary quality and encouraged poets who had previously shied away from the public to perform. ‘Golden Hour’ has toured poets at events internationally, and appeared at literature festivals including the EIBF and the Melbourne Writers’ Festival. A European tour was partially funded through a £500 Creative Scotland grant and emerging artists such as Hailey Beavis and the Scottish band Withered Hand benefitted from the exposure.

After completing an MSc at Edinburgh University, Van Winkle was employed by the Scottish Poetry Library as their first reader in residence working in libraries across Edinburgh “getting rid of the public fear of poetry”. This was an enormous stamp of approval, allowing him to develop his workshop skills and build networks. It was here that Van Winkle first started making podcasts, which were good promotion for his international work. He has now interviewed hundreds of writers for the SPL podcast, and he also co-produces the ‘Multi-Coloured Culture Laser’ podcast and is Poet in Residence at Edinburgh City Libraries.

As Literature Director for Highlight Arts and with support from the British Council, Van Winkle organised a series of translation workshops in Pakistan and more with Literature Across Frontiers in Iraq (as part of the Niniti Literature Festival), which led to his work being translated into several languages. Occasionally he is approached by individuals wishing to translate his work. He has several published collections although many of the poems they contain were first published in magazines and anthologies. “When a new poem gets accepted it feels like validation, like maybe you wrote something that isn’t only for yourself. Literary publications have been essential to my confidence and growth as a writer.”

Building and maintaining an international reputation has involved enormous dedication, investment of both money and time, and an adventurous attitude which has allowed Van Winkle to take risks and chances when they arise. In order to perform in Pakistan and Australia for example, he had to organise logistics and co-found organisations in order to get invited.

Case Study 5: Alexander McCall Smith, established writer

Alexander McCall Smith has always been driven to write. He sent his first manuscript into a publisher at the age of 8 and it was the kind and gentle response from that publisher that encouraged him to keep going. He has now published well over 100 books, a mix of academic titles, children's books, novels, short stories, non-fiction, ebooks, pamphlets and serial works. His non-academic work first came to publication through a competition run by Chambers in Edinburgh. He won the children's novel section and has since written more than 30 books for children. His adult fiction has been published by a number of publishers in the UK, currently including Polygon, Little, Brown (Hachette), Harper Collins and RCAHMS. Alexander did not study on creative writing courses. He has used his life experience, experience in lecturing in academia and trial and error to find his way forward in writing and publishing.

The allure of larger markets (The 'London pull' effect)

Alexander is loyal to Scottish publishing and always has been. He continues to publish regularly with Polygon (Birlinn Ltd) and occasionally with other Scottish publishers including RCAHMS, B&W, Canongate, and Barrington Stoke. His No.1 Ladies' Detective Agency series is now published in hardback, paperback and ebook by Little, Brown (Hachette) in London along with the Isabel Dalhousie series and paperbacks of the Scotland Street series and occasional standalone novels. The key to making this work has been a strategy of co-operation whereby his publishers are encouraged to work together to cross-promote his work on UK and international platforms rather than competing directly for his time and the attention of the trade and media. This also saves all of the publishers time and money and creates great impact. He has an Edinburgh-based publicist and a PA who work across all of his UK publishers and with his London and American agents. Alexander's loyalty to the Scottish literature sector stretches beyond book publishing. Over the past 10 years he has published a serial novel through the pages of the Scotsman newspaper for three months of the year.

Alexander has 46 foreign language publishers around the world in addition to English language publishers in Scotland, England and in America, Canada, and Australia (and NZ). The demands on his time are great and they are coordinated by a small Edinburgh based team who work closely with all publishers around the world.

The importance of literary festivals, events and booksellers

A hectic schedule of events and appearances is followed every year with at least 50% of Alexander's time spent travelling, promoting his work and meeting the readers. Meeting the readers is the most important aspect of the events for Alexander. Direct feedback is invaluable. At present a mix of festivals, bookshop and library events is undertaken in both the UK and the USA along with private engagements.

Long a supporter of independent bookshops, he is always keen to accommodate as many as possible in every tour. Independent booksellers were key to breaking Alexander both in the UK and the USA and he has never forgotten that. Daunt books, Toppings, Mr B's, Aldeburgh Bookshop and many others are visited frequently in England. In Scotland, Mainstreet Trading, Edinburgh Bookshop, Looking Glass Books, The Watermill and Yeadons are all remarkable bookshops. And recently, with encouragement from Alexander, Robert Topping has opened a new shop in St Andrews. Alexander continues to support these shops through events, signed stock and goodwill wherever and whenever possible. That said, the number of publishers across the world, all with demands on his time, make it difficult to undertake the number of events he would like to do and to reach all areas of the UK.

The impact of digital technology

Alexander has always self-published to an extent in tandem with his work with professional publishers. In the past this took the form of self-published short stories for friends (which is where and how The No.1 Ladies' Detective Agency started) and then the development of a small publishing imprint. He publishes short stories regularly on Twitter and has taken part in an international Twitter Fest. Social media is all about engaging with your reader and Alexander has done that for many years – long before social media emerged. He has done this through regular letter exchanges with readers, in-paper short stories and serials, newsletters to readers, presenting on radio and adapting his own work and more. The advent of Twitter and Facebook has given him a new platform.

Ebook editions of Alexander's books are very popular both here in the UK and in the USA. Short stories published in ebook format offer a new market-building tool for this audience.

4. DEVELOPING A NATION OF READERS

Scotland is a nation of readers. Accordingly, it is appropriate to devote a section of this Review to the reader and reader development. Section 4 of this Review first identifies the extent to which Scottish people consume or engage with literature – how much they read. It then turns to education and literacy, and the relationship between Scottish literature and Scottish educational organisations (notably Education Scotland). Finally, we look at libraries in Scotland and their fundamental role developing readers and people's exposure to Scottish literature.

In this section, developing readers is used to refer to three different but interrelated outcomes: i) the improvement of literacy, ii) the development and promotion of an enjoyment and appreciation of reading generally, and iii) specific support for titles by Scottish authors or publishers.³³ Scotland's literature organisations, and by extension Creative Scotland, are implicitly engaged in all three of these activities but their remits and explicit focus across each element vary.

Reading – the most popular form of cultural participation in Scotland

According to the Scottish Household Survey (SHS), reading is by far the most popular form of cultural participation in Scotland. More than two-thirds of the general population of adults participated in reading for pleasure in 2013, roughly three times more than the next form of cultural participation.³⁴ In regard to attendance at cultural events and visiting places of culture, the SHS indicates that 30% of Scottish people visited libraries³⁵ and that it was the most frequent activity on the once-a-week measure. The survey also indicates that 2% of the population attended book festivals or reading groups.³⁶

Table 2 – Frequency of attending cultural events and visiting places of culture in the last 12 months*

Adults (%)	At least once a wk	Less than once a wk – at least once a mth	Less than once a mth – at least 3-times a year	Twice in the last 12 mths	Once in the last 12 mths	Don't know	Total	Base
Cinema	4%	23%	43%	21%	10%	0%	100%	4,910
Live music event	2%	10%	30%	31%	27%	0%	100%	2,800
Theatre	0%	4%	25%	39%	32%	0%	100%	3,080
Library	20%	39%	19%	16%	7%	1%	100%	3,060
Museum	1%	9%	29%	36%	25%	0%	100%	2,980
Historic place	1%	10%	36%	33%	20%	0%	100%	2,690
Gallery	1%	12%	29%	35%	23%	0%	100%	1,940
Book festival or reading group	2%	11%	9%	20%	57%	1%	100%	470

Source: 2013 Scottish Household Survey

* Other activities were also recorded but not all are included here.

As far as reading goes, those consulted via the Nordicity survey are not representative of the general public as they include those with a prior strong interest in literature. However, they offer further demonstration that

³³ This definition of 'reader development' differs slightly from the definition found at openingthebook.com.

³⁴ 2013 Scottish Household Survey: the second most popular form of cultural participation in Scotland is creative work on computer/social media, where 23% of adults participated.

³⁵ Libraries include mobile and online libraries.

³⁶ 2013 Scottish Household Survey. *Scotland's People Annual Report: Results from 2013 Scottish Household Survey* (15 Jan 2015), accessed at gov.scot/publications.

Scottish people are avid readers, and offer an insight into the activities of Scotland's reading champions, as shown in Table 3.

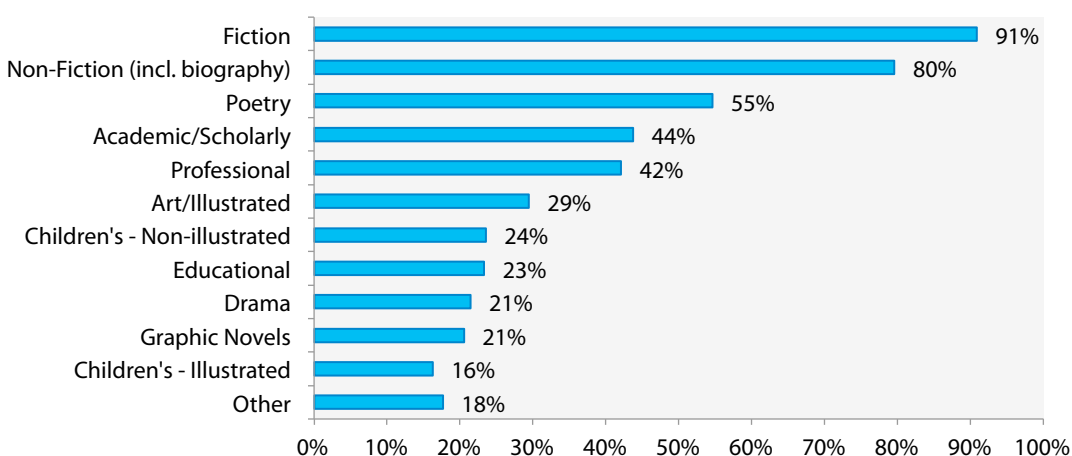
Table 3 – Survey results indicating Scottish reading propensity of respondents

Books read per month	70% of survey respondents read 3-5 books per month or more, whereas only 1% read less than 1-2 books per month
Hours of reading per month	Over half of survey respondents read 10+ hours per month, whereas less than 15% read under 5 hours per month.

Source: Nordicity survey

As to what they read, fiction is almost universal, followed closely by non-fiction and poetry, as illustrated in Figure 11. Whilst the remaining genre categories were lower, they remained quite significant. This survey result is further testimony to the diversity of writing and of interest among Scottish citizens.

Figure 11 – Genres read by survey respondents



Source: Nordicity Survey (2014)

The Nordicity survey also confirms that, amongst this highly interested reading group, the physical book remains almost universally the format of choice. However, almost half of those responding to the online survey supplemented their reading through the use of electronic tablets and other e-reading devices.

Improvement in literacy in Scotland

The Scottish population performs reasonably well in global education rankings for reading. The Organisation for Economic Cooperation and Development's (OECD) evaluation programme for international student assessment (PISA) indicated that across the education systems assessed worldwide, there are twice as many OECD countries scoring below Scotland than those scoring above Scotland.³⁷ In fact, over the last decade, Scotland has improved

³⁷ Scottish Government, ultimately from OECD, oecd.org.

its ranking globally, specifically amongst the lower achievers.³⁸ Whilst this PISA ranking is not the only metric measuring reading ability, it does indicate that improvement is occurring but there is clearly room for further progress in reading competency in Scotland. One important aspect of reading competency is the direct relationship to basic literacy.

Literacy is an issue that has been a particular focus for Scottish political leaders. Notably, First Minister Nicola Sturgeon launched the child literacy campaign *'Read, Write, Count'* in early 2015. This campaign demonstrated the government's public commitment to continue the emphasis on education to lessen inequality in Scotland.³⁹

Whilst Scotland celebrates relatively strong rates of literacy, around one-quarter of the Scottish population (26.7%) may face occasional challenges and constrained opportunities due to their literacy difficulties. Within this quarter of the population, *'3.6% (one person in 28) face serious challenges in their literacy practices'* – and there are still too many held back in life by poor literacy competency.⁴⁰ The government has signalled its *'commitment to a heightened, more targeted focus for improving literacy skills in Scotland through better co-ordination and partnership working'*. In October 2010, the Scottish Government published a Literacy Action Plan (LAP) with an *'overarching vision... to raise standards of literacy for all from the early years to adulthood'* with *'a particular focus on those with the lowest levels of literacy'*.⁴¹

Education Scotland supports adult literacy with resources for teachers, working with the Scottish Qualifications Authority (SQA), and by supporting an online Community of Practice. Scotland's Curriculum for Excellence adopts a holistic position: *'All practitioners are in a position to make important contributions to developing and reinforcing young people's literacy skills'*. A set of principles and practice guidelines for literacy across learning supports this approach – they promote literacy across all areas of learning and curriculum.

Scottish literature institutions contribute meaningfully in promoting literacy, most notably the Scottish Book Trust (SBT). Literacy is at the heart of SBT's Vision statement. Moreover, one of its three central aims is to increase literacy levels in Scotland. SBT believes the most powerful and compelling way to achieve this objective is through *'inspiring a love of reading and writing'*. Its funders and partners agree with its approach as evidenced by the SBT in helping to deliver various national strategies and policies, including the Scottish Reading Strategy (Scottish Library & Information Council) and the Literacy Action Plan (Standing Literacy Commission, Scottish Government). The scope of SBT's work is impressive, supporting over 1,200 literature events and providing online resources for 375,000 users.

Specifically on raising literacy, SBT focuses on Early Years and on Adult Learners. In regard to the former, the Bookbug programme of nationwide Bookbug Sessions and 4 Bookbags for every child from birth till 5 years old is central. Independent research has shown that not only has Bookbug improved literacy but 98% of Early Years practitioners have also seen a positive impact on family interaction, behaviour and language development. In regard to Adult Learners, SBT intends to focus on Scotland's prison population (where 81% in the Scottish Prison Service 2012 have been shown to have functional literacy issues), and on the 15% of the most deprived areas where adults are significantly more likely to have literacy problems.⁴²

³⁸ The proportion of students in Scotland below Level 2, the OECD's baseline of ability to participate effectively in society, was 12.5 per cent, which is lower than the OECD average of 18.0 per cent and significantly lower than Scotland's 2009 result of 16.3 per cent.

³⁹ *This week I will put education – and my determination to tackle educational inequality – at the heart of my government's agenda for the remainder of this and, if re-elected, our next term of office.* New Scotsman. 8 February 2015.

⁴⁰ [The Scottish Survey of Adult Literacies \(SSAL\) 2009.](#)

⁴¹ The *Early Years Task Force* published a paper outlining their key priorities in spring 2012. These priorities included the development of a new national parenting strategy, plus continuing support for a third phase of the *PlayTalkRead* programme and an extension of the *Bookbug* programme in 2012/13 to widen access and participation for vulnerable and harder to reach families.

⁴² Scottish Book Trust Business Plan 2015-18.

Scottish reading and interest in literature

Reader development, in the core sense described by *Opening the Book*⁴³, is unsurprisingly a fundamental aspect of much of the work undertaken and produced by literature organisations, from festivals to library programmes to book clubs.

Book Week Scotland (BWS) is an important mechanism central to developing readership in Scotland. Established via a manifesto commitment by the Scottish Government in 2012, and funded by Creative Scotland, Book Week Scotland is delivered by Scottish Book Trust in association with the Scottish Library and Information Council (SLIC) and hundreds of partners around the country. Participation has risen (to almost 270,000 in 2014) and evaluation reports indicate an extremely high level of engagement, with the majority of participants citing ambitions to continue and enhance their reading activities in all post-event feedback.⁴⁴ Challenges for the future include widening reach and building audiences for less represented groups, such as males and young adults.⁴⁵

There is also an on-going discussion as to whether the current timing of BWS, annually in November, prevents the publishing and retail elements of the sector engaging as they might because of their preoccupation at that time of the year with Christmas sales. This issue was cited throughout the consultation. It is understood that SBT are continuing to explore the possibility for a date change post 2015 event. However this considerable disruption to their planning would need to be met by a strong commitment from publishers and booksellers to capitalise on the opportunity it would theoretically afford.

There are a large number of organisations that seek to develop readers, as part of their wider literary remit, via smaller more targeted programmes. For instance, Glasgow Women's Library (GWL) project work has included the *Read, Relax Recharge* initiative, whose live readings provide women with opportunities to discover and discuss the wealth of women's literature. GWL also works with women in the Scottish Prison Service in '*Reading for Well-Being*' groups, and through the learning centres at HMP Greenock and Cornton Vale Prison, to raise awareness of inequality issues whilst building up inmates' skills and confidence.

The Scottish Poetry Library (SPL) is an institution with an active reader development programme. Amongst its activities are: introducing younger children to Scots; working with teenagers and young adults through the agency of a Reader in Residence; engaging prisoners with written and spoken poetry, including in Scots; using poets to reach out to mental health groups and school children with mental health issues; and promoting intergenerational well-being through poetry sessions connecting children with the elderly. The SPL also endeavours to inspire librarians with a host of ideas to illuminate their visitors' lives – as does the playful *Putting Bards in the Bog* initiative.⁴⁶ The Scottish Poetry Library and the Scottish Storytelling Centre have together developed the national programme, *Living Voices*. This programme offers older people activities (often in a care home setting) that mix story, song and poetry in an interactive session with artists, volunteers, staff and residents, to prompt reminiscence, conversation and creative responses.⁴⁷

Edinburgh UNESCO City of Literature's recent *Great Scott! Campaign*⁴⁸ is a very visible and playful promotion of a stalwart of Scottish literature. On the 200th anniversary of the publication of the novel *Waverley*, Edinburgh's Waverley Railway Station was festooned with the wit and wisdom of Sir Walter Scott. This initiative demonstrates

⁴³ *Opening the Book* defines reader development as active intervention to i) increase people's confidence and enjoyment of reading, ii) open up reading choices, and iii) offer opportunities for people to share their reading experience.

⁴⁴ Source: Final report for Scottish Book Trust: Book Week Scotland 2013 evaluation by Ruthless Research. The review consultation also prompted a concern to develop Book Week impact across the year.

⁴⁵ Final report for Scottish Book Trust: Book Week Scotland 2013 evaluation by Ruthless Research.

⁴⁶ Scottish Poetry Library, accessible at scottishpoetrylibrary.org.uk.

⁴⁷ Scottish Poetry Library, accessible at scottishpoetry.library.org.uk.

⁴⁸ Edinburgh City of Literature, accessible at cityofliterature.com.

the potential for devising campaigns that build on the popularity of Scotland's literary heritage to encourage reading across a wide spectrum of people and age groups. Collaboration between literary organisations, libraries and cultural institutions provide a strong foundation for this approach.

The GENERATION Project, 25 Years of Contemporary Art in Scotland – a model for Scottish literature and the wider creative and cultural sectors.

As part of the Glasgow 2014 Cultural Programme, Creative Scotland partnered with the National Galleries of Scotland and Glasgow Life to deliver *'one of the most ambitious celebrations of contemporary art ever held by a single country'* in a nationwide programme showcasing Scottish art at more than 50 venues across the country.

Following the legacy of GENERATION, there is great potential and an emerging appetite to leverage this model of showcasing artistic excellence for Scotland's literature sector, and indeed the wider creative and cultural sector.

Scotland's rich diversity of nearly 50 literature festivals is integral to reader development. Some of these festivals have year-round outreach programmes (e.g. StAnza, and Wigtown Book Festival) further extending their impact. For instance, Wigtown's 'Giving Voice' initiative supports literature enthusiasts to become 'voices' for those who can no longer readily read or write, be they housebound, in a care institution or in community centres. Edinburgh International Book Festival are poised in 2015 to roll out a large scale outreach programme (called 'Booked!'), in locations throughout Scotland via specific funding from the People's Postcode Lottery to increase access to reading experiences. These and other literature institutions are discussed more fully in Section 6 of this Review (the Sector Ecosystem).

Finally, writers themselves are clear stakeholders in reader development. As illustrated in the Nordicity survey (see Figure 12 and Figure 13 below) when asked about their participation in reader development with specific groups, over a third participated in public events in educational or community/well-being settings, while just under half worked with minority groups or those with protected characteristics.⁴⁹ Work in these areas is a clear priority for Creative Scotland given its stated commitment to equalities.

⁴⁹ The nine "protected" characteristics are age, disability, sex, race, religion or belief, pregnancy and maternity, marriage and civil partnership, sexual orientation and gender reassignment.

Figure 12 – Writers participating in public events in educational or community/well-being settings

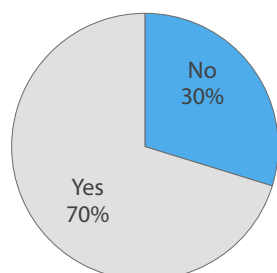
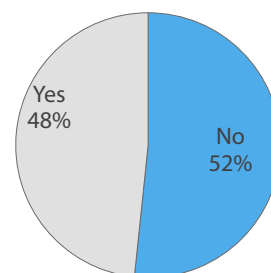


Figure 13 – Writers working with minority groups/those with protected characteristics*



Source: Nordicity Survey (2014)

Young adults – a gap in reader development

Through the consultation process in this Review, there were several references to the apparent gap in the provision of reader development in Scotland for young adults. Whilst there is strong provision for reader and writer development through childhood and at the primary school level, the consultation revealed that there is a need for more organised activity to sustain the interest of young people in reading and literature, whilst in their teens.

According to this consultation, Scottish literature and literary institutions appear to lack a sufficiently broad relationship with the education system and Education Scotland itself. Some literature organisations, like the SBT, have developed a very strong relationship, but a more consistent and holistic collaboration with literature organisations in reader development (and literacy) is desirable. SBT and others are tackling the relative gap in support for reading after primary school, but a more strategic push is needed. It means working more effectively with the young adult cohort – a notoriously difficult demographic to engage in reading. Institutional links between the literature sector and education do not appear strong enough to leverage the most out of the potential relationship.

The objectives of enlarging readership in Scotland, encouraging writers, and creating opportunities in schools is highly relevant to each of Scotland's indigenous languages – English, Gaelic and Scots. The Review consultation revealed concerns about teacher training in relation to Scots and Gaelic literature and Scottish texts. Whether an accurate observation or not, it is clear that the activities of the literature organisations to improve reader development should embrace Scots and Gaelic, as well as English.

Conclusion 13 – There are opportunities inherent in a greater engagement between formal education and the literature sector. Young people stand to be the primary beneficiaries of any positive outcomes.

Recommendation 8 – Creative Scotland and Education Scotland should establish shared goals specific to literature and collaborate in strengthening the links between the literature sector and formal learning.

Putting Scottish literature at the centre of education and readership development

The consultation in this Review also revealed a concern that Scottish literature, as a discrete tradition does not feature as prominently in the secondary education system as it should, in the way English, American or Irish literature does in curricula across the Western world.

In an effort to advance the prominence of Scottish literature in schools, the Association for Scottish Literary Studies (ASLS) has developed a range of educational support materials, and the ASLS also convenes an annual teachers' conference which aims to better equip teachers in teaching the work of Scottish authors in schools.⁵⁰ However, the scale of this challenge requires a response from across the sector, including Education Scotland, SBT, Creative Scotland, literary organisations and the publishing sector. SBT has flagged the potential for an expansion of educational publishing in Scotland, which could support a push in this area.

Conclusion 14 – The literature sector's importance to education is clear but there appears to be a relative paucity of Scottish literature in the everyday school system. The inclusion of more Scottish work, taught by well-resourced and equipped teachers, on school curricula, is critical to the development and continued health of Scottish literature.

Recommendation 9 – Rather than set schools minimum requirements for stocking Scottish titles in their libraries, it is recommended that key partners such as ASLS, Publishing Scotland, SBT, SLIC, possibly with Scottish Government support, collaborate on a joint initiative over several years to encourage and enable schools to include Scottish writing as a prominent element in their resources.

Working with Education Scotland

At one level, the policy framework for education in Scotland provides a sound platform for including literature and writing in the formal education process. A commitment to literacy has seen consistent support for reader development, particularly through the SBT, that touches the lives of every young person in the country.

The SBT has developed a strong relationship with Education Scotland because the development of reading is core to its mandate. It has an enormous reach into schools and communities through its programmes to encourage reading in part through distribution of books (not specifically Scottish) to school age youth and young people. SBT is also involved in the national government's 'Read, Write, and Count' programme to improve young people's capabilities and is at the centre of the National Strategic Workshop.

Conclusion 15 – Scottish literature organisations should broaden their relationship with Education Scotland, beyond the excellent relationship now held by SBT.

Recommendation 10 – It is recommended that Creative Scotland lead and support organisations to develop stronger links with Education Scotland. The latter should be encouraged to be more proactive in fostering more strategic relationships with Scottish writers and literature organisations, and in engaging with Scottish texts and writers, specifically.

Libraries as a reader development partner

Libraries play a fundamental role in communities across Scotland. They have been champions of literature and of reader development for generations, and have been a critical asset in advancing Scottish literature through public lending, events and a wide range of activities connecting the public with Scottish work. Research has found that young people that use their public library are nearly twice as likely to be reading outside of class every day.⁵¹

Orkney Library and Archive won the 2015 Bookseller Library of the Year Award⁵² and is a good example of the on-going development of libraries as a key part of Scotland's literature sector. In 2015 the library's twitter feed had almost 18,000 followers and the provision of online and digital catalogues, and ebook downloads were

⁵⁰ The Association for Scottish Literary Studies' [ASLS Schools Conference](#) is held at the University of Strathclyde, Glasgow.

⁵¹ Department for Education, *Research evidence on reading for pleasure*, (15 May 2012), accessed at [gov.uk](#).

⁵² The Bookseller. *The Bookseller Industry Awards Shortlist & Winners 2015*. (May 2015), accessed at [thebookseller.com](#).

found to be particularly important in a dispersed islands community. This initiative follows on from Midlothian Library Service's previous success as Library of the Year in 2014. The clearly symbiotic relationship between readers and libraries was underlined last year via Marc Lambert, the Director of SBT, and his rallying call during Book Week Scotland 2014 that every child in Scotland automatically be enrolled from birth in their local library. Subsequently, every local authority in Scotland has agreed in principle to support the facilitation of this initiative.

The Convention of Scottish Local Authorities (CoSLA) recently engaged the Scottish Library and Information Council (SLIC) to develop a national strategy for public libraries in Scotland, chaired by Martyn Evans, Chief Executive of the Carnegie UK Trust.⁵³ The strategy, published in June 2015 articulates the case for continued library support and identifies opportunities for forming strategic alliances for Scotland's libraries. Scottish Book Trust, Publishing Scotland, Gaelic Books Council and Creative Scotland were partners engaged as members of the Working Group formulating the national strategy.

The report details six strategic aims that will support the vision of the strategy to ensure 'Scotland's public libraries are trusted guides connecting all of our people to the world's possibilities and opportunities'. The aims are:

- reading, literacy and learning;
- digital inclusion;
- economic wellbeing;
- social wellbeing;
- culture and creativity; and
- excellence in public services.

There are clearly a great many areas of shared aspiration and endeavour between the library service and the literature and publishing sector in Scotland. The near simultaneous development of the library strategy and this Review has allowed the opportunity to highlight a number of very closely aligned priorities, and pinpoint specific recommendations for areas of possible collaboration. The most relevant areas as articulated in the Libraries Strategy are as follows.

- Create strong national, regional and local partnerships with all public services and community planning partners
- Share best practice on how to create effective and accessible public service or community hubs
- Develop and strengthen national, regional and local partnerships with arts and culture organisations
- Pilot a collaborative venture to provide access to ebooks from Scottish publishers
- Support librarians to become effective voices for freedom of information and expression
- Develop and implement a learning and development programme for all library staff
- Engage proactively with models for efficient procurement of goods and services at national level

This Review's consultation process revealed a number of primary areas of opportunity and potential development between the literature and publishing sector and libraries, which relate directly to the aims and priorities outlined above:

- **Working with librarians to increase their knowledge and their work with Scottish writers and Scottish literature.** Professionals within the literature sector would be uniquely well placed to further equip these public-facing posts with high quality up-to-date knowledge on Scottish literature for a

⁵³ Scottish Library and Information Council (SLIC). Policy and Research Timeline, accessed at scottishlibraries.org.

range of age groups. A possible format for this might be to develop the concept of a literary roadshow to refresh the relationship of local libraries across Scotland with Scottish literature.

- **Further promotion of local and Scottish literature** through activities like author events, workshops, displays and promoted books – both physical and digital.
- **Amending procurement practices that restrict librarians’ ability to stock a wide variety of Scottish writing**, particularly contemporary titles. An oft-repeated critique of Scottish libraries in this Review, particularly by publishers, was the perceived lack of Scottish titles acquired by libraries to stock their inventory. Current procurement practices of libraries, particularly developed to respond to budgetary pressures, favour working with wholesalers that can offer discounts on materials they have acquired – largely external to Scotland. Not enough Scottish authored titles or Scottish-published titles are offered in these circumstances. Centralised procurement by libraries means that the benefits of working directly with Scottish publishers are not sufficiently exploited.
- **Developing a national ebook platform** that would provide an opportunity for proactively engaging readers with Scottish literature, and increase the numbers of titles from Scottish publishers available to readers across the country. There is a clear connection between the recommendations of this review in establishing community hubs for literature (see Sections 5 and 6) and the library strategy’s parallel focus on the development of libraries as community hubs and to strengthen their partnerships with arts and cultural organisations.

The CoSLA review concludes with two options as to leadership routes to deliver the proposed strategy: i) adopting a partnership approach across the bodies in Scotland who currently share a role in promoting the development of local public library services, or ii) adapting the current role of SLIC to become a National Development Body for Libraries. Whichever option is selected will obviously have implications for the best approach for Creative Scotland and the literature and publishing sector more broadly in pursuing the possible joint development opportunities of the kind outlined above.

Conclusion 16 – Increased partnership with libraries could lead to greater all-round engagement between these important stakeholders and Scottish literature. It could contribute towards re-energising public libraries to explore new ways of resourcing for Scottish literature. A number of tangible areas of shared ambition and endeavour have been outlined, so there is certainly scope for much greater partnership working at a strategic level with libraries.

Recommendation 11 – Once the CoSLA strategy delivery mechanisms are set, Creative Scotland and relevant literature sector organisations should initiate regular meetings between the two groups to discuss furthering joint initiatives to meet literature and library goals.

5. PUBLISHING IN SCOTLAND

Publishing is critical to the development of the careers of most writers, creating access to literature from and in Scotland and promoting it abroad.

Section 5 of this Review outlines the seismic changes wrought by digital technology on the world of publishing, and then characterises the Scottish publishing industry – trends in size and number of employees, with some examples of publishers successfully coping with change. It takes a closer look at profitability and financing sources for publishers and the profile of books and markets for them. This section discusses the growth of self-publishing and how it can be considered a new form of micro-enterprise, often operating out of some form of arts or literature hub. The special cases of publishing in Gaelic and Scots are addressed, and finally, the role of the booksellers is highlighted.

Praise for Scottish Publishers

“I regard Scottish publishing and the world of Scottish Letters as being absolutely vital to Scottish culture. I stand in admiration for all that Scottish publishers have done in the last few decades, often fighting against very difficult odds.”

Alexander McCall Smith, January 2015

Scottish publishers are key ingredients in the success of writers but are enterprises in their own right. This section discusses who has responsibility for strengthening Scottish publishers, and proposes new ways to structure and consider incentives for enabling publishers to be more competitive domestically and internationally. It recommends the recasting of the way in which Creative Scotland should help publishers address their challenges, as well as suggesting the consideration of soft loans as a possible mechanism to do so.

Publishing in evolution, disrupted by digital

Book publishing all over the world is evolving from its traditional models, sometimes in innovative ways, as the following five overlapping trends illustrate.

1. The challenge to ‘traditional’ publishers’ business models

Amazon’s dominance over the physical and ebook market has enabled it to exert enormous retail pricing control, and subsequently has driven down the retail price of books (much to publishers’ dismay). Although distribution costs have largely been reduced, the price pressure exerted by Amazon has led to lower margins for publishers.

Ebooks have become a significant component of a publisher’s portfolio, obviously reducing printing costs. Again, however, the market is pushing down the price of ebooks so there has not been a commensurate improvement in publishers’ finances.

- In the UK, some 12% of all ebook sales are self-published titles, with a share of up to 20 per cent in specific genres such as crime, science fiction, fantasy or romance.⁵⁴
- In 2014, there was a 5% decrease in physical book sales in the UK as a whole and despite a 19% growth in digital sales, there was still a 2% decline in overall invoiced value.⁵⁵

2. Consolidation in publishing

One response to business model challenges has been for large publishing empires to consolidate.⁵⁶ The past two to three years has seen major consolidations on a global scale with consequent closures of facilities and shedding of jobs.

⁵⁴ The Bookseller. [Bowker: self-published e-books 12% of sales](#). Farrington, J (7 June 2013)

⁵⁵ Nielson Bookscan. 2014 UK sales figures

⁵⁶ In 2013, Bertelsmann’s Random House, the world’s largest trade publisher, merged with Pearson’s Penguin to create Penguin Random House. Early in 2014, HarperCollins acquired Canadian Harlequin from Torstar, for almost half a billion

3. Conversion in the bricks-and-mortar sales channels

Concentration to achieve economies of scale has also occurred in the global bricks-and-mortar retail sector with many small book stores going out of business as their customers turn to Amazon to buy books at lower prices. However, some booksellers have fought back by diversifying their revenue streams (e.g. sale of merchandise, events, and food) or by building a client base through identifying closely with the communities they serve.⁵⁷

4. The challenge of discoverability

The rise of online distribution of physical books and ebooks has stimulated publishers into developing new practices to reach and engage audiences on multiple platforms. In view of the intense competition for readers' time and attention, publishers and writers face huge challenges to stand out in the crowd – thus, 'discoverability' at book festivals, through social media and other online techniques (e.g. search engine optimization, Amazon home page placement, and greater use of mobile platforms) has become crucial.

5. The emergence of self-publishing

As discussed in Section 3, self-publishing in recent years appears to have moved from the fringes of the book marketplace to become a viable option for certain writers. Online communities are providing writers with feedback and support to develop stories, particularly in genre-driven fiction such as science fiction and romance. New platforms have enabled and encouraged writers to seek readers directly, with a higher degree of professionalism than was previously possible.

This evolution has seen publishers (and writers) adapting to the opportunities presented by digital platforms, for example, reader tracking, online distribution, online ordering, keeping track of rights, and the use of social media. For the first time since the paperback, publishers have had a new format with which to shape the market: easily and quickly updatable new editions are possible; publishers can deploy flexible pricing that could be responsive to promotional opportunities as they arise. Some writers quickly saw a rise in the number of ebook copies being sold. However, because the price points have been low, so have the returns to both writer and publisher.⁵⁸ With respect to the balance between threat and opportunity, one publisher said that:

'... in the old days stocking a bookshop with a large number of titles enabled consumers to find something new, make unexpected purchases. But now these stores carry less inventory, so the impulse purchases are affected – and impulse purchase drives sales. Whilst there are more routes to market because of digital platforms, organizing for them is more difficult – there is a blizzard of info.'

– Scottish Publisher

Despite pressures both global and specific, the industry in Scotland is dynamic and active, and stands to take a more prominent and potentially profitable role as the creative industries 'offer' in Scotland is better supported and understood. Although lower margins are placing increasing pressure on the ability of publishers to support the level of advances and promotion seen in the past, the publisher remains the cornerstone of all the functions that go into the dissemination of the written word.

Whilst digital technology has led to downward pressure on pricing books, many Scottish publishers (as well as writers) have adapted to the opportunities presented by digital platforms – for example, reader tracking, online

dollars. In 2014 Hodder UK also acquired the London-based Quercus and Hachette acquired 2012's Independent Publisher of the Year, Constable & Robinson.

⁵⁷ As described later in Section 5, the independent booksellers in Scotland that remain are in the most part extremely strong, vibrant and creative outlets acting not only as retailers but as community hubs for all things literature.

⁵⁸ Abstract from written comment made by Jan Rutherford, member of the Steering Group.

distribution and ordering, rights management and the use of social media. Addressing the various disruptions in the publishing business is a continuous process. *Adopt and adapt* are necessary bywords for publishing not only in Scotland but for elsewhere. The value of placing these new opportunities at the heart of a new publishing business model can be illustrated by the following case study of Blasted Heath, a publisher that is 100% online, which has developed unique relationships with writers, has low production costs, and effectively harnesses reader reviews for online promotion.

Case Study 6: Blasted Heath, publisher

Blasted Heath is a digital-only publisher, which aims to create and access a bigger market for self-published writers. It publishes work from Scottish and international writers and was born out of the realisation that traditional publishers were increasingly sales-focused due to changes in the market and were averse to publishing work that may not sell.

With the introduction of BookScan (software that records every print book sale) some writers struggled to get deals with publishers. Blasted Heath aimed to increase authorial control over the publishing process. They learned from the experience of digital companies such as Amazon, by treating authors like customers with dedicated liaison staff, and by recognising the importance of consulting authors on issues like editing and design. As a result of these innovations, Blasted Heath's production costs reduced significantly as a result of titles only requiring editing, design and formatting for online publication.

Blasted Heath's online sales were driven by the promotion generated by positive reader reviews. As a result, series and genre titles were the most successful. Operating on a 'freemium' model, writers could allow the first in a series of books to be free, generating positive reader reviews and developing an audience. This was particularly relevant for debut authors such as James Oswald 'the working farmer' (see Case Study on James Oswald in Section 3) who, after failing to get a traditional publishing deal, elected to self-publish online and made the first copy of his series free as a low cost promotion strategy. Over the long term, Oswald enjoyed very successful sales as a result of the reader reviews.

As it has become increasingly difficult to get written works noticed online, Blasted Heath predictions of a move towards targeted email promotional schemes make initiatives such as 'Bookbub' more promising opportunities. In this new model, readers having registered online receive targeted, free ebooks, which have been promoted by publishers via a moderate fee of \$200-300. Bookbub had three million subscribers in 2014, 5% of which were British and each promotional slot generated approximately two or three thousand reads, creating essential reader reviews and developing audiences. Aggressive price promotion strategies such as these have become one of the most effective for series titles. Whilst public appearances can be important platforms for increasing physical sales for many writers, their impact on digital sales have been viewed by many as negligible.

Blasted Heath suggests that there is a huge 'shadow industry' in digital publication. The extent of the digital market remains difficult to fully assess as online sales figures are frequently omitted from both sales reports and BookScan figures, and also because digital retailers like Amazon no longer release sales figures.

Scottish publishers – under pressure but adapting

Scottish book publishers are mainly SMEs – small or medium-sized enterprises. The largest trade book publisher in Scotland is Canongate, yet it employs only about 40 people full time (including its London operation) and has a turnover of some £10 million. The small size of Scotland's publishing houses is consistent with the size of the

typical publishing firms in the UK.⁵⁹ However, publishing generates significant employment in the creative economy.

The Publishers Association produces a compendium of industry performance that suggests that in the UK in 2013 there were 231,000 publishing jobs equally divided between men and women, of which 27,000 were in book publishing. Research by Nesta (*A dynamic mapping of the creative industries*, Nesta 2013) indicates that as much as 40% of this employment can be categorised as 'creative'.

In 2014, there were 105 publishers officially counted in Scotland, a reduction from 130 in 2010.⁶⁰ Publishers now employ about 1,000⁶¹ people, down from some 1400 in 2010. Scottish publishers are somewhat concentrated in Edinburgh, where about a quarter of the publishers are located. Glasgow is home to around 10% of companies, with the remaining 65% distributed across Scotland.

However, this employment tally does not include the army of freelanc-employed individuals who work in design, editorial, publicity, sales and other areas of publishing development. A more complete estimate of the employment and turnover in book publishing in Scotland should include their contribution as well – but estimates are not made in this Review.

The online survey captured 35 publishers, who responded to the question on their 2013 turnover for 'literature-related' sales. From this figure a careful 'gross-up' of this sample to the 105 total publishers in Scotland was conducted. This process entailed estimating the turnover of the non-responding publishers through industry consultation and review of publicly available information. It included a review of international publishers – particularly DC Thomson and Harper Collins with significant operations in Scotland – focusing on the books part of their publishing business. This Review arrived at a total turnover figure of **£166.6m** in 2013. Publishing Scotland noted that official figures for the Scottish book publishing industry are not regularly gathered and those that already exist do not always capture parts of the industry such as micro-businesses or legal specialists. Whilst other figures for the publishing sector are higher, they include categories not considered in book publishing, e.g. newspaper publishing, or turnover derived from activities outside the scope of literature publishing.⁶²

⁵⁹ Out of the 2160 publishers in the UK, over 50% have an annual turnover of less than £100,000. Moreover, in the whole of the UK, there are only 85 publishers with a turnover in excess of £5 million, *UK Book Publishing Industry in Statistics 2014*, by the Publishers Association, section 4.2 VAT-based book publishers by turnover bands and employment size, accessed at publishers.org.uk.

⁶⁰ There are about 2,160 book publishers in the UK: London has 585 and Scotland has 105 with the South East (outside London) at 445, the East at 250 and the South West at 240. The other 9 Government Office Regions are about the same as or below Scotland with respect to number of publishers, *The UK Book Publishing Industry in Statistics 2014*, by the Publishers Association, section 4.3 Number of VAT-based book publishers by Government Office Regions, accessed at publishers.org.uk.

⁶¹ Official Scottish Government statistics for 2013 from the Business Register and Employment Survey (BRES) indicate that employment in book publishing (SIC5811) was 1000 (rounded to the nearest 100) across the whole of Scotland. According to Nordicity's methodology for grossing up the sample to the universe, the figure is roughly the same. While Publishing Scotland puts the figure at about 1500, the number is apparently based on 2010 data – which was more accurate at that time.

⁶² Some estimates of Scottish publishing turnover are also lower. For example, the Scottish Annual Business Statistics (derived from the Annual Business Survey) in 2012 estimated the annual turnover at £120m.

Case Study 7: Canongate, publisher

Scottish publishing is sophisticated, international and intelligent

Founded in 1973, Scottish publisher Canongate nearly went under in 1994 but after a management buyout by Publisher and Managing Director Jamie Byng, it became independent again. It has since emerged as one of the most dynamic publishing houses in Britain. With a distinctly international outlook, Canongate Books continues to nurture and publish new talent from around the world, whilst retaining the essence of the Scottish Canon.

“We have no specific agenda other than to promote and publish challenging, quality work from as broad a perspective as we are able. We are one of the founding members of the Independent Alliance, a global alliance of ten UK publishers and their international partners who share a common vision of editorial excellence, original, diverse publishing, and innovation in marketing and commercial success. Canongate Books has offices in Edinburgh and London, with partners in New York and Melbourne.”

Source: canongate.tv

Whilst the number of publishers is declining, the survey data did suggest some renewal. There is a solid chunk (45%) who started more than two decades ago,⁶³ but over a fifth of publishers are less than 3 years old.⁶⁴ Some publishers noted that those that were lost, were not being replaced by equivalent companies. Others felt that the disappearance of some reflected a variety of issues (e.g. poor succession planning) rather than the market simply not being able to support them. In fact, sometimes the dissolution of a company has meant that experienced publishing talent then becomes available in the marketplace for the next generation of publishers who really appreciate being able to tap into their networks and expertise.

Conclusion 17 – There has been a gradual decline of traditional publishing both in terms of number of publishers and employment, yet there are companies bucking the trend and indeed innovating. Support measures could take into account differences in ambition, adaptability and success in publishing.

⁶³ According to Publishing Scotland, the oldest publisher in Scotland is Brownford and Sandson, which has been publishing for 165 years. It employs 10 people.

⁶⁴ According to Publishing Scotland, typically 6-7 new publishing companies emerge per year in Scotland, and some existing ones are acquired, or withdraw from the business.

Case Study 8: Sandstone Press

Sandstone Press is an independent publisher based in the Scottish Highlands which publishes a range of titles by Scottish, Irish, British and international writers of fiction and non-fiction. Sandstone also publishes adult literacy titles, producing a series in partnership with Highland Council's Adult Basic Education Service and Highland Adult Literacies.

The company has been building a reputation in non-fiction, with several titles garnering prize nominations and developing a solid sales platform from which to build upon. Sandstone's fiction list includes a number of emerging Scottish authors as well as writers based in Norway (translated crime fiction which attracted support from both Creative Scotland and its Norwegian counterpart NORLA), London, South Korea and Malaysia.

In 2011, it was catapulted into the limelight with the announcement that one of its titles – *The Testament of Jessie Lamb* by Jane Rogers – had been long listed for the prestigious Man Booker Prize. Sandstone went on to re-publish the book in partnership with Canongate. A second Sandstone title, *The Marrying of Chani Kaufmann* by Eve Harris, was long listed for the Booker prize in 2013.

Sandstone's current strategy is to continue to seek strong fiction from the UK and across the world, with acquisitions from Australia, Canada and the US along with a number of other familiar and not so familiar names. However, they remain committed to their strong non-fiction list. Sandstone has also negotiated deals with local independent bookshops, offering promotions and higher discounts (in some cases) to drive sales in remoter areas. They have also embraced digital with promotions via Kindle and an active social media presence.

Sandstone won the Saltire Scottish Publisher of the Year Award in 2014.

Many Scottish publishers are deceptively profitable

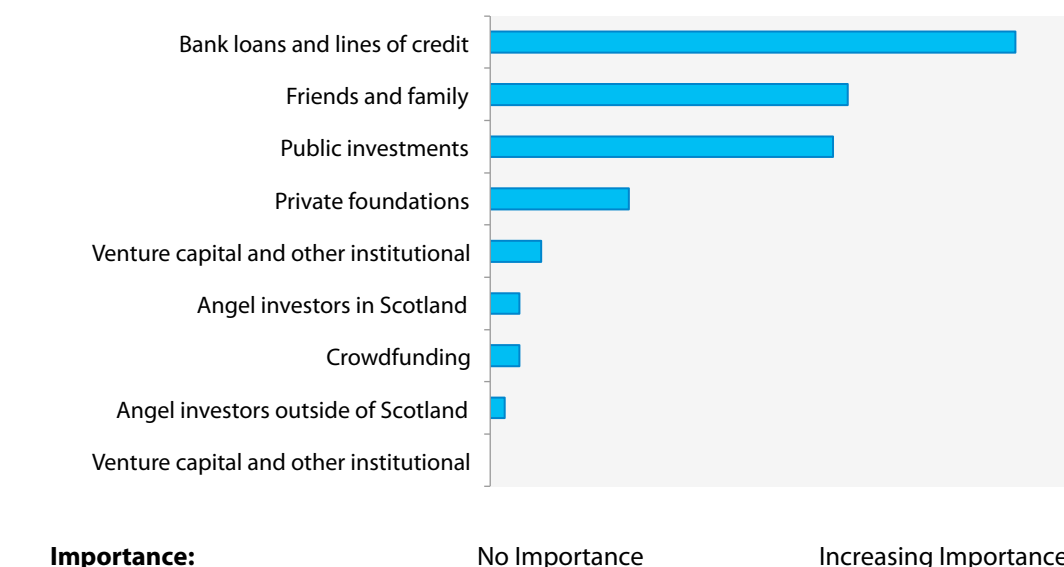
Scottish publishers report to being relatively profitable – based on their answers to the online survey. Whilst there were some companies who reported as not being profitable in 2013, the largest reported profits from 0 to 10% of turnover. However, almost a third of the survey of publishers showed profits of 10-20%, and a few reported being even more profitable than that (mostly very small firms, however). Not one company said they lost money in the latest year of reporting.⁶⁵

Discussions with publishing industry observers in Scotland led to the conclusion that this professed profitability was deceptive. For example, it was speculated that many of the 'profitable' companies did not include any salary drawn by owners, i.e. they were only profitable because the owner gave his or her time to managing and operating the company.

In the online survey, publishers were asked to indicate their firm's most important sources of financing, the results of which indicated, as might be expected, that bank loans and lines of credit were most important (see Figure 14). However, friends and family, public investments and even private foundations provide much of the working capital. That finding suggests that some publishing is only partly commercial as an economic activity. It reinforces the notion that many publishers are profitable only because they compensate lack of operating revenue from financing that does not come from the sale of books or rights.

⁶⁵ For context, consider that according to Dr. Rüdiger Wischenbart, who compiles rankings internationally, the large international companies have earned 10+% in profits over the last few years.

Figure 14 – Most important sources of financing for Scottish publishing companies



Source: Nordicity Survey (2014)

Whilst many book publishers may be in this precarious state, they are adept at staying afloat and do publish writers, spend money, and make sales. Arguably, this pattern is similar to much of the smaller scale creative sector. Such publishers should not be dismissed as simply lifestyle businesses as their contribution to Scotland's literary economy is important.

Finally, an important part of the matrix is that some types of book are seldom, if ever, profitable (e.g. poetry publishing). Poetry is obviously a critical element of the literary landscape in Scotland but typically involves extremely small print runs. Publishers tend to do short runs, and their main sales are at events – but it is not a profitable genre. An assessment of the health of Scottish publishing only focussing on profitability would be to miss a critical aspect of the value of publishing to culture and society more broadly.

Conclusion 18 – Much of the publishing sector is generally fragile because of a heavy reliance on non-market sources of working capital. Some are not profitable, like poetry or publishing in Gaelic, because the potential audiences are small. However, they still operate as enterprises, and should be treated as such – although likely requiring different interventions than those publishers with significant growth potential.

Scottish publishers do much more than publish Scottish literature

*'Stop assuming that publishing is always about literature.'*⁶⁶

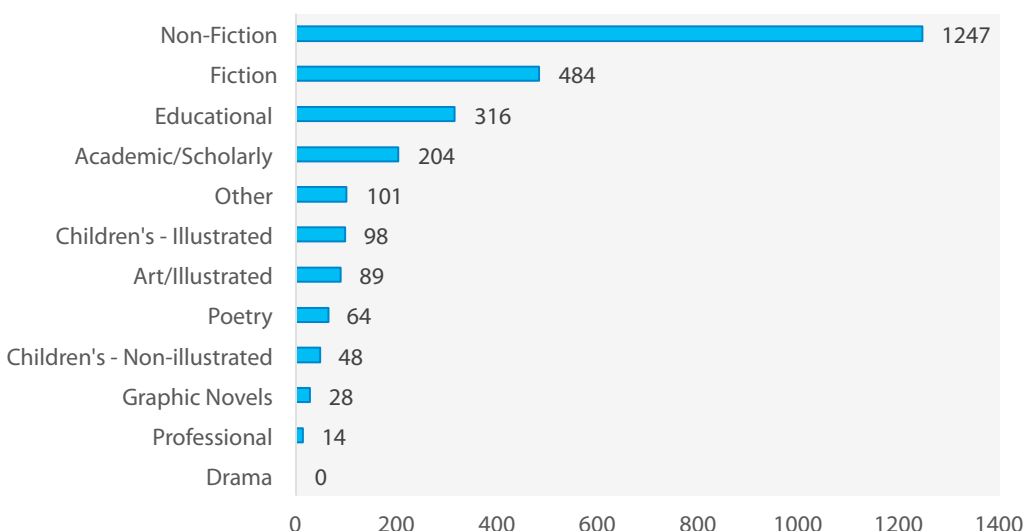
Scottish book publishers are not only in the 'literature' business, if literature is narrowly defined as works of social or cultural significance – be it local or national. This Review is not taking that narrow view as previously discussed. However, whilst Scottish writers claimed their interest in fiction as the dominant subject area (see

⁶⁶ Source: one publisher comment submitted in response to the Nordicity survey.

Section 3)⁶⁷ Scottish publishers publish more non-fiction than fiction (see Figure 15). While literary non-fiction forms a proportion of those figures, they also include for instance reference and educational titles, which are outside the scope of this review (see Section 2).

This reality means that supporting and encouraging the development of publishing has a two-edged rationale – economic (good jobs, growth prospects, exports) and cultural (support of Scottish writers). Creative Scotland’s concern must be to contribute to a healthy publishing industry, which has the capacity to foster writers and literature. However, the value of publishing to Scotland must be demonstrated beyond Creative Scotland and beyond its specific contribution to literature – so the plea that ‘publishing is not all about literature’ – is heard by other agencies with a vested interest in supporting the creative industries.

Figure 15 – Number of titles published in 2013 (by genre)



Source: Nordicity Survey (2014)

As noted earlier, Scottish publishers invest in non-Scottish as well as Scottish authors. The Nordicity survey showed that some 38% of the total revenue of Scottish publishers is generated from titles authored by Scottish writers.

In the same way, Scottish writers may have their publisher in Scotland or not. Publishers also conveyed in interviews that they felt they could not be profitable publishing only fiction, so they publish a wide range of written material. They are also diversifying into related literature activities, and even branching into other activities that are outside of publishing (e.g. Canongate into video).

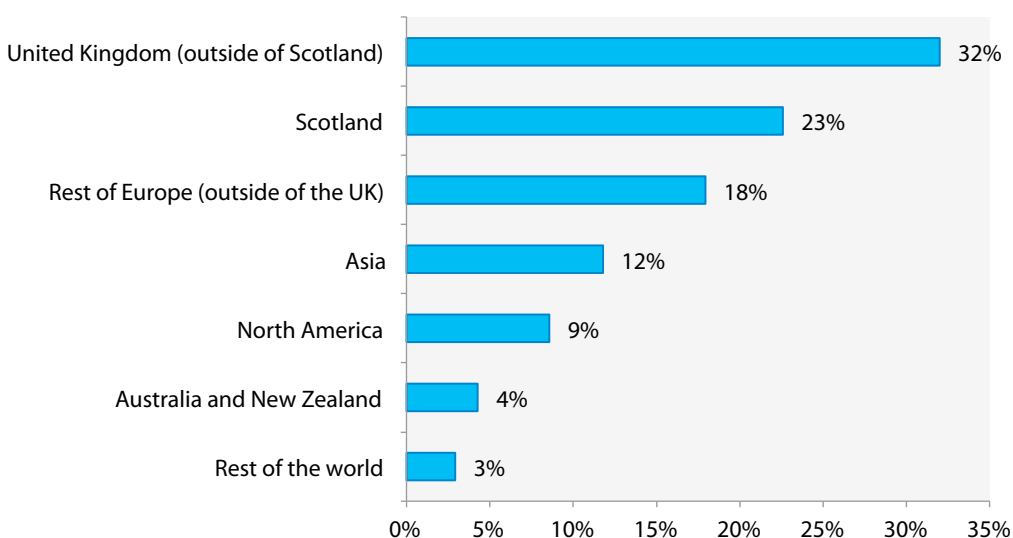
Conclusion 19 – Any measures to boost Scottish literature through the participation of publishers must take into account the fact that on publishers publish non-literary material, and publish non-Scottish writers as well as Scottish ones.

⁶⁷ One Reference Group member does not fully trust the survey data about writers noting ‘many non-fiction writers have other jobs and therefore don’t see themselves as writers first and foremost. They are therefore less likely to have been reached by the survey or responded to it. You also need to define non-fiction carefully in this content. Is it a work on the development of the railways, a new history of Scotland, a work of creative travel writing or memoir? Very complex area and needs expansion and further consideration’.

Scottish publishers sell mostly outside Scotland

Figure 16 below shows the breakdown of 2013 sales by Scottish publishers by geographical market. Nearly one quarter of sales were to the Scottish market (23%) and nearly one third to the rest of the UK (32%) and so together comprising over half the total at 55% of all sales in 2013. The rest of Europe is an important market, accounting for nearly one fifth of sales (18%). Separately, Asia, North America and Australia/New Zealand were relatively smaller markets for Scottish publishers but in combination, sales outside of Europe constituted 28% of 2013 totals. Industry observers point out that sales outside the UK are less profitable than sales within the UK.

Figure 16 – Share of 2013 sales by geographical market



Source: Nordicity Survey (2014)

The larger, global publishers

In the US, it was once common to refer to the 'Big Six' publishers.⁶⁸ A similar, though not identical, set has dominated the UK publishing landscape for decades, as well as much of the global English-language publishing industry. Indeed London is an international centre for English language publishing. In 2013, however, the 'majors' experienced a significant shift with the announcement of the merger between Random House (owned by Bertelsmann) and Penguin Group (owned by Pearson), to form Penguin Random House to be owned by Bertelsmann and calling itself *'the world's first truly global trade book publisher'*. Indeed, according to Nielsen BookScan, Penguin Random House is the largest of the UK book publishers, ahead of Hachette Livre (the previous number one), HarperCollins and PanMacmillan. Pearson Education and Oxford University Press round out the top six in the UK.

Amongst them, these publishers encompass dozens of divisions and probably nearly 100 imprints. Some divisions are in themselves massive entities. These publishers enjoy the benefits of scale in many elements of their business from production to agreements with retailers. Apart from the Oxford cluster in the UK, these publishers are London-based, with strong connections to other publishers (or their sister companies) in New York, Toronto, Mumbai and so on. Most of these publishers no longer have a Scottish-based sales 'rep' for Scottish retailers. They also regularly acquire successful (and sometimes struggling) independent publishers – as

⁶⁸ The 'Big Six' publishers refers to Hachette, Macmillan, Penguin Group, HarperCollins, Random House and Simon & Schuster.

was the case in 2014 when Hodder acquired the London-based Quercus and Hachette acquired 2012's Independent Publisher of the Year, Constable & Robinson. However, there has been no recent acquisition of a Scottish-based publisher.

Many within these global publishers publish some of the most renowned or commercially successful writers from Scotland, including Ian Rankin, Iain Banks, Irvine Welsh, Louise Welsh, James Kelman, Val McDermid and Ali Smith. Typically, the majors publish the most commercial writers from Scotland. While the London-based publishers are competitors to Scottish publishers, they do support and promote successful Scottish writers on a global scale.

The 'London-pull' effect

There is a view in publishing circles that London, Oxford and Edinburgh are the UK's three publishing centres, and that the rest of the UK has a much smaller publishing sector than Scotland. Whether accurate or not, figures show that London dwarfs any other region in the UK as a major publishing centre.⁶⁹ Hence, there is the 'London pull' effect, whereby, writers who are successful are drawn to London-based publishers because they have larger budgets for advances and also larger promotion, marketing, and global distribution capacity.

It is clear that successful, high profile writers get published by the majors, typically out of London. They can benefit more from the global marketplace if an international publishing giant is fully behind the writer. There are two reactions to this among Scottish publishers. The first is: 'if we can just get one high profile writer to do one title with us that would be huge for us'. The second is: 'let's nurture new Scottish – or other new – talent and publish alongside London'.

It appears that some medium-sized, enterprising Scottish publishers are going international themselves in a variety of ways. They hook up with a variety of distributors in foreign markets, as they establish relationships with the world's publishing networks. They may not like the terms of Amazon, but Scottish publishers can access international markets through Amazon's global online distribution network. Thus, they can provide Scottish writers access to international markets – maybe not as well the majors but more than they could in the past. As evidenced by Canongate, Scottish publishers can establish a presence in London, which can give them better access to supporting services, financing, and international connections that abound in London – as well as to writers themselves.

Conclusion 20 – London-based publishers – and those in other global publishing centres – try to sign up the most commercially successful Scottish writers, and thus compete with Scottish publishers for these rights.

From self-publishing to micro-enterprises as creative hubs

At the end of 2013, The Guardian delved into reports that one quarter of Kindle ebook sales in the US that year were for indie publishers and self-published authors. The figure *'is a strong indicator of what's ahead for the UK'* said Orna Ross, director of the UK Alliance of Independent Authors,⁷⁰ which represents self-published writers.

Scepticism and contention still exist around the nature of self-publishing in Scotland, particularly with regard to the quality of the finished products. As noted in Section 3 new services are becoming available which certainly help to augment the ability of writers to self-publish and contract out the needed professional services. Not many good writers are also proficient designers, editors, contract negotiators, publicists or marketers.

⁶⁹ The largest number of book publishers are located in London (585) in 2013-14 followed by the South East (445), the East (250) & the South West (240), and with Scotland coming in 5th (105) of the 12 Government Office Regions.

Source: The Publishers Association. *The UK Book Publishing Industry in Statistics 2014*, accessed at publishers.org.uk.

⁷⁰ The Guardian. *Amazon reveals quarter of Kindle ebook sales in US were for indie publishers*. Bury, L (4 December 2013), accessed at theguardian.com.

There may still be some way to go before the relationship between self-published writers and publishers will settle into some logical business accommodations. Many self-publishing writers who do well will likely gravitate to signing future publishing contracts with traditional publishers. For the publisher, commissioning writers who have already demonstrated market appeal via self-publishing, takes some of the risk out of the equation. There are no valid statistics on the total number of self-published writers working in Scotland. However the Nordicity survey demonstrates a high rate of self-publishing, with 33% of respondents having self-published during their career.⁷¹ Again little data exists but it is generally believed that only a few of them would do well enough in the marketplace to attract the attention of publishers.

Related to the self-publishing model for writers and publishing, is the emergence of micro-enterprises – which one could call a refinement of self-publishing, or a refinement of traditional publishing. At one level, it is one and the same, once the self-publishing writer acquires or hires the services of editing, graphic design, distribution, marketing/promotion, and business acumen in the sale of IP rights, that writer can become a micro-enterprise, - a one person publisher, albeit one that can contract out some of the publisher roles.

Such individual writers increasingly work in communities, sometimes co-located (hubs), sharing space, ideas, skills, and service providers. The writing may be done individually or in collaborative fashion – whether directly (where the connection is a common physical location), or virtually (where the connection is via some form of internet platform). Additionally, these communities do not typically consist only of writers but can be multidisciplinary across the arts. Whilst these concepts were discussed in Section 3, it is useful to think of them as the other side of the coin – micro-enterprises, rather than writers who self-publish.

The UK's National Dance Network successfully adopted a similar approach by linking hubs from the field of dance in geographically dispersed communities. The Network is an informal grouping of proven venues presenting/ programming/ producing dance with a located right across the UK. They operate as independent venues but they adopt a common vision and mission, adhering to a shared set of objectives attained through agreed values. The Network appoints a Chair and a Steering Group, which meet to share best practice and ensure smooth network coordination; by this means, each venue is able to innovate and respond locally but successes and solutions are communicated to and transmitted across the Network.

The establishment of a literary hub is currently underway in Edinburgh with the re-development of the Netherbow district as a literary quarter centred on the Scottish Book Trust, Canongate, the Scottish Storytelling Centre and the Saltire Society. It has been ten years since Edinburgh was designated the world's first UNESCO City of Literature, and the governing trust has launched a project to create a new charitable trust, which it is anticipated will drive the plan forward and establish a cultural visitor gateway for Edinburgh and the literary scene across Scotland. (See Case study of the Wheeler Centre as another example of a physical literary hub.)

Whilst established publishers are adapting their business models to the new platforms, the emergence of the micro-enterprise is synergistic with these kinds of literature hubs – again which could be based on the more general arts-based hubs widely present in different regions of Scotland (see Section 6). The hub concept can be place-based, referring to the gathering under one roof of arts activities, as shown in the examples above. The hub can also be a network of like-minded organisations where their expertise, data, and best practices can be shared across all participants in the network (like the Dance Network described above, or Moniac Mhor in the case of residencies). Hubs can also be both place-specific and part of virtual networks.

⁷¹ Of the 475 writers responding to the Nordicity survey, 33% have self-published and 67% have never self-published.

Case Study 9: Scotland's informal, grass roots writers' hubs

The Edinburgh League of Comics is an informal collective of graphic novelists, acting as a grass roots hub, supporting new, emerging and established artists. Originally formed with the purpose of promoting the graphic novel genre and encouraging new artists, the collective grew from working in schools and libraries, to providing advice on writing, self-publishing, reader development and recommendations – recipients included young people, parents, teachers and writers from all walks of life. Meeting monthly in Edinburgh, members are invited to create and present new graphic novel works and receive feedback from their peers in a safe and constructive environment of amateur and professional writers.

Similarly, grass roots writers groups and informal hubs occur across the sector, such as collaborative poetry groups and slams, where writers such as Ryan Van Winkle collaborate and present new work. The legacy of some of these activities includes important live literature events such as *'Rally & Broad'* or the former *'Golden Hour'*. Writers have benefitted from these networks for their ability to share knowledge and resources, opportunities, collaboration and equipment and spaces.

Case Study 10: The Wheeler Centre of Books, Writing and Ideas

The Centre was part of Melbourne's bid for being a City of Literature and held its first event in 2010. It is located within a wing of the State Library of Victoria, and hosts a number of literary organisations, as well as facilitating the delivery of various events, including:

- Writers Victoria,
- Emerging Writers' Festival,
- Melbourne Writers Festival,
- Express Media,
- SPN (Small Press Network),
- Digital Writers' Festival, and
- Australian Poetry.

The diversity of this support for literature exemplifies its two-fold purpose of a) providing a vibrant hub for the writing and literary sector, and b) a diverse programme of public conversations and events.

A few measures enumerate the success of its curating and ethos. Since its opening in 2010, 40,000 people have attended all events; 1,800+ speakers have participated in more than 1,100 public conversations; 35,000+ subscribe to their e-newsletter; with 45,000+ contacts on social media; 80% of their events have been free, thereby lowering barriers to participation and encouraging wide access; and they have made 70% of their events available online with original video, audio and writing content, furthering dissemination and increasing the impact of their programme.

Much of the work of the hosted organisations has a clear focus on developing the skills and increasing the competence of young writers and those new to writing or the sector.

This is an example of physical literary hub: a state library adjacent to a literary centre, collocated with a number of daughter organisations or associated literary bodies.

Whether in hubs or not, supporting the growth of micro-enterprises enhances creativity within the publishing model. It is complementary to innovation from traditional publishers. This can lead to both increasing the number of businesses, as well as growing successful enterprises into larger ones – all of which creates more opportunities for writers.

Supporting commercial development in the literature sector could be enhanced by taking advantage of the growing phenomena of self-publishing, community hubs, and cross-art forms. Measures to encourage community hubs (place-based or virtual only) can include skills development in business models, support of shared services, development of individual digital skills, showcasing of said hubs work, and creative mentoring. As this concept is broader than publishing, it is captured further in Section 6, which is devoted to the literature ecosystem. The benefits to the strengthening of hubs would extend beyond publishing, as they support networks of writers, public programming around books and ideas, and promoting development throughout Scotland.

Conclusion 21 – Whilst the models have not been articulated completely, micro-enterprises and literature hubs – both place-based and virtual – should form part of the overall publishing and writing ecosystem to be nurtured and developed.

Recommendation 12 – It is recommended that micro-enterprises and cross-arts collaboration with artists and entrepreneurs in other creative industry sectors be supported, particularly in local and regional hubs, whether place-based or virtual.

Who has responsibility for strengthening Scottish publishers?

Creative Scotland in its present and former incarnations has worked with Scottish publishers for years. There always has been a recognition that publishers are critical to the production, marketing, and distribution of Scottish literature. Thus it has financially supported selected publishers and specific titles to be published. In the new Open Project Fund support mechanism, individual publishers are receiving grants, as they did in the previous Quality Production strand, though the rationale has always been that it was to support Scottish literature and not publishers' businesses.

Notwithstanding the publisher grant programmes, Creative Scotland does not have the remit to support book publishers as a creative industry through business assistance funding or other support programmes.⁷² That would be within the province of the business development agencies, notably Scotland Enterprise (SE) and its regional equivalents, such as Highlands and Islands Enterprise. Creative Scotland does financially support Publishing Scotland, which is governed by publishers, and Regular Funding directly supports publishing through training, making foreign contacts, and pilot programmes.

Many in the literature community have maintained that SE should be much more actively involved with the publishing sector.⁷³ However, publishing consists mainly of small to medium-sized enterprises (SMEs), and many micro-enterprises as has been noted earlier in this section. From further discussions with the publishing community, their view was that SE is not designed to address the needs of specific SME-dominated sectors like publishing. SE does work with creative industries, like video games developers, presumably putting a priority on sectors with a high growth potential. Highlands and Islands Enterprise, on the other hand, does focus on small business because it serves a much smaller economy. Creative industries are singled out as one priority sector, although the emphasis is still on companies that have a growth potential.⁷⁴

The *raison d'être* for supporting publishing has to lie in its potential support of the dynamic elements of the sector, ones that will help the literary economy in the digital age. The logic therefore, is to support those companies that adapt, and those which start with a fresh premise and a business plan based on the growth part of the industry. Therein lies the challenge. The business model for many smaller companies relies on publishing a portfolio of books of which only a proportion will be successful. Publishers of emerging writers cannot anticipate which will be commercially successful but must test this through publication. Similarly, smaller publishers looking to develop innovative business models that create markets in different ways, should also be able to access investment designed to stimulate SME innovation.

Discussions with the larger and more successful publishers indicate that growth in publishing may require investments outside of publishing. Recognising that the traditional model for publishing was changing rapidly, Canongate, for example, has been investing in other creative industry properties particularly TV, film, and music. Thus, some publishing companies are facing the growing challenge to traditional publishing by diversifying into other businesses based on IP. Capital required to finance such expansion would likely fall with the ambit of SE. However, they would need to develop more expertise in the new business models present in publishing and

⁷³ One Reference Group suggestion was that since Visit Scotland and Scottish Enterprise fund many tour companies, they should also support publishers – as there could be important economic impacts, e.g. literary tourism.

⁷⁴ See Highland and Islands Enterprise's Creative Industries Strategy, 2014-2019. Literature and publishing are not specifically mentioned, but the priorities in the Strategy are on growth companies in digital media and across the creative industries.

associated IP and content industries. There are growth opportunities in a 'book publisher plus' world, which should be brought to bear in discussions with SE.

Traditional publishers with ambition and growth prospects through expansion or acquisition can be start-ups, mid-size publishers, or medium to large companies. Greater access to capital, skills and market contacts will help them grow. They complement the promise of micro-enterprises and the role of community literature/arts hubs in the development and potential flourishing of literature enterprise.

At a basic level, it should be recognised that writers are an essential element of a significant part of creative industries as a whole – from literature to broadcast media, to live events, and from video games to film. There is a need for enterprise investment to equip writers to develop their work across a range of sub-sectors, and for publishers to explore new business models that meet this more integrated creative economy.

The current mechanisms for enterprise support are not configured to enable Scottish writers or publishers to seize opportunities from new business models. Expertise and funding reside in different investment mechanisms. The result is that writers, publishers and promoters have likely missed out on potential investment for development and finding new markets. Designing the instruments that can connect investment for growth, skills and innovation to the literature and writing sector is the challenge.

Conclusion 22 – There is a gap within the support mechanisms for the Scottish publishing industry as a business, or at least the innovative and growth segments of the industry, and at the micro-enterprise and cross-arts levels. Lack of coherence among the agencies and stakeholders affects the development prospects of these kinds of publishers in Scotland and inhibits the development of Scottish literature.

Recommendation 13 – It is recommended that Creative Scotland explore with the partners in SCIP, and Publishing Scotland – how the public development agencies can support: a) micro-enterprises, b) large publishing companies, and c) those in between.

Recommendation 14 – It is recommended that Creative Scotland ensure that these agencies consult and involve other stakeholders whose business it is to foster innovation and entrepreneurship across the arts, as well as relevant investors and innovative publishers.

Transition in Creative Scotland's approach to funding publishers

As noted above, the rationale for supporting publishers is that they are the primary route for writers to reach readers in Scotland, the rest of the UK and abroad. Scottish publishers specifically are necessary as they are often better at recognising Scottish talent and better at connecting Scottish readers with international writers by translating work into English, Scots or Gaelic.

In the past Creative Scotland (and its predecessor, the Scottish Arts Council) would review grant applications submitted by Scottish publishers for the support of specific works or writers, and select which applications merited grants via the advice of a panel of external specialists. As a result of changes implemented in 2010, the external advisors were removed, with Creative Scotland relying on in-house expertise and clearer accountability. Publishers continued to propose either a slate of potential works or single titles they wanted to publish, which were assessed accordingly, though Creative Scotland (and the Scottish Arts Council before them) always retained the right not to support every title within an application. Whilst the rationale for selection was not always transparent, one reason for this added flexibility was to encourage innovation and more diversity of titles affording publishers more opportunities for commercial risk.

There is a transition occurring in granting processes, whereby publishers are being given more leeway as to whom they publish, and the grantor does not select specific books. Creative Scotland has some awareness of the effectiveness of candidate publishers to work with writers and promote their works. However, there is a lack of clarity in the criteria around publishing and no transparency in the assessment process (at least for the publishers who participated in the Review consultation).

Scottish writers, publishers and readers benefit more from Scottish authored books that are widely read compared to those that are not from the same genre and category. However, commercial success is not currently an explicit criterion in Creative Scotland's selection process. For some genres of great artistic or cultural significance the commercial 'test' would be inappropriate. A work that reaches 10,000 readers is not intrinsically 'better' or more valuable than something that reaches 100, however, for some works – if the criterion is applied appropriately – a good track record of commercial success can be a factor in the evaluation of publisher proposals. There is little point in funding a published work that is not expected to have a readership; evaluating applicants' proposals to publish and promote work is as important for literature as it is for audience development and marketing plans of a theatre company applicant. An applicant publisher needs to clearly demonstrate that they have the ability to get a book to its maximum appropriate readership.

Publishers themselves are making business decisions as to which projects should be advanced, and results – good and bad – cannot always be foreseen. Publishers already base decisions on which projects to advance based on feedback from the trade, critical evaluation, market accessibility evaluation, and full costings (including projected sales). Not all projects will be successful, as this is not a predictable science but good publishers with good business acumen increase the likelihood of their success.

The question of how public investment in commercial development can be designed is a central one. The current position is relatively *ad hoc*, with Creative Scotland investing in certain publishers and books for publication, and Scottish Enterprise and Scottish Development International (SDI)⁷⁵ occasionally investing in specific companies. There remains the issue of marrying artistic quality and commercial viability in decisions to support publishers who contribute to Scottish literature.⁷⁶ Other jurisdictions make commercial criteria part of the panoply of criteria.⁷⁷ Others are planning to do so or do so indirectly by focusing on the attributes of commercial success.⁷⁸

The new Creative Scotland Open Project Funding mechanism provides a flexible approach to publishers, and requires applicants to demonstrate how they will connect work that is of artistic merit with markets. It will be important to review how this scheme performs for the sector and this should take place prior to the launch of the 2016 funding programme. For example, leeway is currently afforded to individual artists applying to Creative Scotland to support projects that do not always have a tangible outcome or product at the end of them; the same flexibility could be extended to publishers. There is also, however, a need to consider the strategic investment needs of the sector as some creative and market development lies beyond the scope of an individual project application or Creative Scotland's resources. Establishing a set of shared priorities amongst writers, the industry, Creative Scotland, enterprise agencies and the Scottish Government is needed. Such an agreement of shared priorities provides an excellent platform for stimulating inward investment into the sector.

⁷⁵ The Scottish Development International (SDI) is the international arm of Scotland's development agencies. See Section 7, which focuses on the international aspects of Scottish literature. There is no mention of Scottish expertise and capability in publishing or any of the creative industries among the sectors that SDI chooses to highlight.

⁷⁶ One Reference Group comment indicated that Creative Scotland needs to understand how publishing straddles the arts and cultural sectors. And that there should be two funding strands: 1) Funding publishing by title for the artistic, and 2) Funding publishers for their companies as a whole.

⁷⁷ The Books Canada programme, a federal one covering the whole country, uses commercial sales as an important criterion. Provincial governments in Canada tend to top up the federal subsidy as a means of selecting how much publishers obtain in subsidy – thus validating the commercial sales-based approach.

⁷⁸ For instance the recent Creative New Zealand Review of Literature established two new funding priorities, the second of which stated 'increasing and diversifying the readership and sales for New Zealand literature', accessed at creativenz.govt.nz.

Conclusion 23 – Notwithstanding the need to publish works of national or local cultural importance regardless of their commercial success, it would appear that measures to increase the effectiveness of the publishing ecosystem, especially publishers, would improve the return on investment in Scottish literature and the success of writers. Greater transparency in the selection process could be a useful start, as well as the consideration of the use of challenge funding through the new Open Funding scheme.

Recommendation 15 – It is recommended that Creative Scotland consider how to evaluate funding applications from publishers by including (in addition to existing artistic merit criteria) the delivery track record of publishers. Developments to assessment criteria should be made explicit and transparent via Creative Scotland communications. A best practice guide for publishers, relevant to the Scottish industry, should be developed by Publishing Scotland and should inform decision making by Creative Scotland.

Examining the potential of soft loans for publishers

For many years, Scottish publishers have been applying for grants to help support the publishing of Scottish writers. Whilst the publishers invest much of their own resource in the process, the risks are greatly attenuated by the public grants obtained from Creative Scotland. Earlier in this section, the evidence was provided that many Scottish publishers are subsidised by their owners, foundations, government grants, friends and family; yet there are still new publishers coming forth and some of those recently established, as well as some older ones, have fared well and are growing. Deployment of the right mix of investment incentives would be more effective in fostering growth amongst publishers as well as the general development of Scottish literature.

Among the options are:

- provide direct government investment in promising publishers, although governments cannot easily invest in companies as they then become de facto mini-crown corporations;
- design a system to reward success from grants by defining appropriate eligibility and evaluation criteria, although it should be noted that grants can get writers published but not necessarily successfully marketed; and
- extend credit rather than grants for some part of the funds directed toward publishers. In this way, the publishers who need investment to finance new initiatives (e.g. operational infrastructure and training, new product lines, investment in established Scottish writers, expansion abroad, etc.) can access cash through credit. If it works, the loans are paid back to finance other applicants.

If a company is faced with the choice between a grant and a loan – it will take the grant,⁷⁹ and so, the swapping of the current grants system with a soft loan mechanism will not be popular with publishers.⁸⁰ However, a mix of the two could go partway towards successfully publishing writers more efficiently from a government expenditure perspective. In particular, publishers are looking for development funding but find it difficult to obtain, and so, soft loans could be very helpful.

The Scottish Government is already considering this type of mechanism for screen industries funding: *‘subject to EU State Aid rules, Scotland could follow the Isle of Man’s example and provide equity investment to film and TV productions through a development fund. Alternatively, loans or subsidies could be offered to film or TV producers, under certain conditions, as is the case in Italy, Hungary and the Czech Republic’*.⁸¹

⁷⁹ The question of loans to publishers was recommended in 2004 and followed up by EKOS who found there was little appetite for it amongst publishers.

⁸⁰ Some publishers advocated guaranteed loans or some other form of soft loans. Others cautioned that merely substituting today’s grants for loans would not be popular. Loans are appropriate when the decisions are strictly economic, but less fine for projects with a doubtful financial return.

⁸¹ Scottish Government. *‘Scotland’s Future on Screen: Support to the Screen Sector in an Independent Scotland’*, accessed at gov.scot/publications.

Conclusion 24 – Some mix of soft loans or guaranteed loans would respond to the problem that publishers cannot easily obtain credit from commercial sources on the basis of their IP – which banks do not accept as collateral.

Recommendation 16 – It is recommended that Creative Scotland consider whether financial support in the future should be offered in the form of soft or guaranteed loans as a means of increasing publishers access to working capital.

The policy suggestions of publishers are in the general direction of these recommendations – provide incentives for private initiative (and investment) to stimulate publishing. If done effectively, such approaches will translate into positive economic impacts. They will also add to the competitiveness of other sectors such as video games, television production, and new forms of online storytelling. Thus, these approaches should create additional opportunities for Scottish writers to earn more and develop their skills more effectively, further supporting the micro-enterprise component of publishing.

Creative Scotland has the remit to support literature and creative industries, of which publishing is a part. This Review has analysed the traditional publishing industry, and identified an emerging component, which includes self-publishing, micro-enterprises, cross-arts creativity and entrepreneurship. In some ways, the fragmentation of the book publishing industry and the weakening of the publisher role, mirrors that occurring in music, video games, broadcasting and magazines. There are commonalities in terms of the challenges themselves and in the interventions to meet those challenges. The business cases for each of these creative industries have changed in the digital era and would provide insight into how the business case for publishing be re-articulated to take account of the paradigm shift in the business model.

Recommendation 17 – Creative Scotland should work with key industry figures to articulate the business case for the value of writing and literature within the cultural and creative industries to help sector organisations champion their initiatives – including book publishing being central to the development of IP as a potential high growth area.

If support for publishing in the future will be determined at least in part on the performance of publishers, it is important to understand the metrics of publishing. Collecting and disseminating data and market intelligence on the publishing industry to bring it into line with best practices internationally would help support organisations and publishers make better decisions.⁸² Understanding the extent and networking of micro-enterprises would be an important objective of any new metrics.

Such metrics would help evaluate whether intended outcomes are achieved as a result of policy initiatives or interventions. Among the clear aims for publishing are: encouraging start-ups; deploying digital technologies ahead of others; attracting inward investment; developing new international markets; backing more Scottish writers; and increased Gaelic and Scots language publishing.

Recommendation 18 – It is recommended that Publishing Scotland work with members of SCIP and relevant higher education institutions to develop mechanisms to better capture economic data for publishers, including the contribution of micro-enterprise publishers.⁸³

⁸² Canadian publishers return an annual statement to the federal government outlining which books have been published, how much authors have been paid etc. In this way they can gather meaningful statistics (which respects the companies' financial information confidentiality) about the size and scale of the sector and its value. In Finland they have an office of 'Cultural Statistics', which reaches into corporate performance as well.

⁸³ One Reference Group suggestion was to extend the data collection to other aspects of literature, e.g. festivals could have KPIs and accumulated short term impacts; economic impact data medium term; and a long term project to assess the full impact of writers across the cultural and creative industries (including games and screen based industries)

Publishing in Gaelic and Scots

The Gaelic Book Council (GBC) is central to Gaelic literature, as are Bòrd Na Gàidhlig and a dozen educational, arts, and other Gaelic organisations that share an interest in promoting the Gaelic language in Scotland. The Council has adopted a comprehensive approach based on specialist knowledge of the language, its creative potential and the market for Gaelic works. Developmental aims are embedded in legislation (The Gaelic Language (Scotland) Act 2005)⁸⁴ and policies such as Bòrd na Gàidhlig's National Gaelic Language Plan (2012 - 2017)⁸⁵ and Creative Scotland's Gaelic Language Plan 2012-2017.⁸⁶ In regard to Creative Scotland's key objectives, the Bòrd's plan is in alignment and it makes explicitly states its expectation *'that Creative Scotland will work in partnership with others, such as Highlands and Islands Enterprise and Scottish Enterprise, to ensure a strong strategic framework for supporting and developing the Gaelic creative industries sector'*.

There is a growth in interest in the Gaelic language throughout Scotland, with increasing numbers of people within the Central Belt learning the language.⁸⁷ This growth would suggest that there is potential for imaginative commissioning of cross-art works involving Gaelic writing.

To achieve its objectives, the Council has adopted a comprehensive approach to make sure the publishing ecosystem for Gaelic works can avoid bottlenecks. Investment in editorial and translation skills enables the development of more titles in a timely fashion. The Council is also investing in the talent of the next generation of writers (e.g. in contemporary fiction), which had been marginalised in the past.

A corollary of the Council's goals would be to make Gaelic more mainstream (i.e. be read and enjoyed by as many people as possible) and to become a normal part of development in the remits of the major institutions charged with some aspect of Scottish literature development.

Conclusion 25 – Beyond the development of specific aspects of Gaelic writing, reading, and publishing, mainstreaming the language and continuing to promote its accessibility to an ever wider audience are high priorities.

Support for publishing in Scots is at present less coordinated than that around Gaelic, although the potential readership is high. Whilst Scots writing is represented in many anthologies and journals, and particular publishers have lead in publishing exclusively Scots work (most prominently Itchy Co), there is scope for both development and expansion in this area. While no specific body has responsibility to support Scots writing and publishing development in quite the same way the Gaelic Books Council does for Gaelic, various organisations including the Association for Scottish Literature Studies, the Scots Language Centre and Scottish Language Dictionaries share expertise and experience in this area.

The subject of Scotland's languages is returned to in Section 6 as part of the sector ecosystem. However it should be noted that it was beyond the scope of this Review to evaluate the role of publishing in Scots or Gaelic in terms of their larger role in the development of each language respectively. The recommendations for the development of writers and publishing in Scotland elsewhere in the report should be interpreted alongside Creative Scotland's commitment to value and support work in all of Scotland's indigenous languages.

⁸⁴ UK Government, *Gaelic Language (Scotland) Act 2005*, accessed at legislation.gov.uk.

⁸⁵ Bòrd na Gàidhlig, *National Gaelic Language Plan (2012 -2017)*, accessed at gaidhlig.org.uk.

⁸⁶ Creative Scotland, *Gaelic Language Plan 2012-2017*, accessed at creativescotland.com.

⁸⁷ 'Around 10,000 Gaelic speakers in Glasgow and environs speak and understand Gaelic. Glasgow was the first local authority in Scotland to establish a dedicated 3-18 Gaelic school in 2006, and there are currently more than 800 pupils being educated in Sgoil Ghàidhlig Ghlaschu (the Glasgow Gaelic School). A second Gaelic school is due to be opened in Glasgow in August 2015 with an expectation that the number of pupils accessing Gaelic education in Glasgow will exceed 1,000 by 2017. Gaelic primary schools have now been established in Inverness and Edinburgh and there is no doubt that the growing interest in Gaelic Medium Education has helped to slow the decline in the overall number of Gaelic speakers, with the 2011 census recording a 0.1% increase in the number of Gaelic speakers under the age of 20 years of age'. Source: Gaelic Books Council

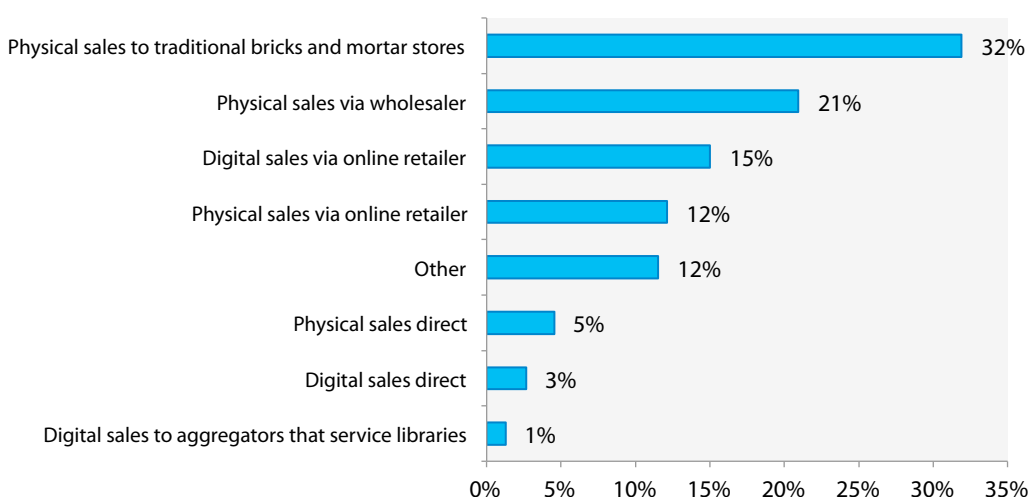
Booksellers' role in Scotland

As described earlier, the global upheaval in book distribution and retail continues to create major challenges for publishers who must embrace innovation with regards to ebooks and distribution, while continuing to nurture and support the higher margin print sales. The bookselling marketplace is very different from even 10 years ago and comprises the independent bookseller, the chain retailer, charity bookshops (particularly Oxfam) and the supermarkets. Their presence is also found online but dominated by that of Amazon, although it also includes localised initiatives like 'Books From Scotland'. Finally, there are ebook formats, which are more typically sold by the electronic distributors/retailers like Amazon but which can also be bought from conventional booksellers websites.

The largest annual selection of Scottish publishers' books (over 8,000 titles) can be found each summer at the Edinburgh International Book Festival bookshop.

Figure 17 presents the breakdown of 2013 sales according to the retail sales channel. In 2013, physical book sales through a traditional bricks-and-mortar retailer still accounted for the largest share of sales (about one-third), however, the 27% of sales comprising both digital and physical sales via online retailer, largely represented the presence of Amazon.⁸⁸

Figure 17 – Breakdown of 2013 retail sales revenues to Scottish publishers (% market share)



Source: Nordicity Survey (2014)

One consequence of the growth of online sales (both of physical and electronic books) is the impact on booksellers with physical retail space. Competition from online book retail is very acute, especially on price.

⁸⁸ Amazon dominates the ebook market (94% market share) as well as physical distribution in the online market (93% market share).

Scottish Government statistics show that across the last 5-year period the number of booksellers has diminished (by approximately 25%) and that there has been a concomitant fall of about 20% in employment.⁸⁹

In terms of larger retail operations, the high street can be separated into Waterstones and the supermarkets or W.H.Smith.

James Daunt took the helm of Waterstones in 2011, to streamline a struggling business, adapt it to the modern book-buying environment, and manage expectations about their retail outlets. Waterstones cut staff and closed stores but importantly has refocused its outlets: emphasizing the employment of 'booksellers' rather than 'shop staff' and starting the process of rebranding themselves to be part of the community. In essence, they are learning from the independent sector and Daunt's own experience with his small chain of London outlets (Daunt Books) by trying to re-cast Waterstones as a chain of independents. While there remain challenges, views from the Reference Group suggested they believed Waterstones was moving into a more positive period in Scotland. However, the level of local autonomy is likely to determine the success of the strategy – will the centralised ordering system be opened up to allow the prospect of Scottish shops stocking titles specific to their locale and culture?

Supermarket chains and Bookseller Association members Sainsbury's, Tesco and Asda, have recently been joined by Morrisons ('we're proud to be a member of the Booksellers Association. Books form an integral part of the home and leisure departments in many of our stores'⁹⁰) however, this enunciation is not seen as any great boon to retail bookselling or Scottish publishing *per se*. The supermarkets stock few titles and keep prices low – they simply reinforce the status quo or whatever is in vogue, in terms of the authors or books they promote with no focus on developing readership or authors.

In addition to the high street, and as has already been identified by the Goring Report, the public sector is also a substantial retailer (e.g. Scottish Natural Heritage, Royal Commission on Ancient and Historic Monuments in Scotland, and National Galleries of Scotland). All of these organisations have substantial collections and cultural resources at their disposal and in some instances publish their own works as well.

Importance of booksellers to Scottish literature

Clearly, physical bookshops⁹¹ have suffered a severe impact, especially smaller stores. However, like publishers, lack of succession planning has been cited as a reason for closures. Those that remain are quite strong, including Mainstreet Trading in St Boswells, Edinburgh Bookshop, Far From the Madding Crowd in Linlithgow, The Watermill in Aberfeldy, and Yeadons in Banchory and Elgin to name but a few. Wigtown, Scotland's Book Town and currently home to over 20 book-related businesses, is both unique and internationally recognised. Despite difficult commercial circumstances, new booksellers are still appearing. For example, Looking Glass Books in Edinburgh was established in 2012 and is currently thriving (see quote from Gillian Robertson); and Toppings in St Andrews opened just before Christmas 2014. A part of the success of many of these

New 'indies' can thrive

"We believe we can thrive in the current environment by offering more than just a fantastic selection of books on our shelves. We have a busy cafe serving delicious hot drinks and cake making for a busy and buzzing atmosphere every day of the week - we've even been the venue for customers' birthday parties, christenings and a wedding reception! It's testament to the special a place people hold in their hearts for their local community bookshop."

– Gillian Robertson, Looking Glass Books

⁸⁹ Reduced from 85 (2010) to 65 (2014) registered enterprises with the SIC code 47.61 (retail sale of books in specialised stores), *Businesses in Scotland*, Scottish Government and ONS. Reduced from 1,400 (2009) to 1,100 (2013) employment with SIC code 47.61. Source: ONS, *Business Register and Employment Survey (BRES)*.

⁹⁰ The Bookseller. *Morrisons becomes a BA member*. Campbell, L (7 April 2015), accessed at thebookseller.com.

⁹¹ Additional - Some Scottish publishers argued for more consolidation in the physical storage and distribution of books in Scotland, with more consolidation offering greater efficiency, it was argued. Depending on whether there is consensus on this subject, it is possibly an area for collective action by publishers and distribution stakeholders alike.

ventures and established booksellers, are the close links to their local communities, helping them against competition from online and chain booksellers. Where booksellers differ from most other shops in Scotland's towns and cities is in how they can be embedded within the community and culture of their locales, and the loyalty and passion that they can command.

These independents recognise that just on price alone, they cannot compete with Amazon, and so, they offer service (not always for commercial gain) and extras. Booksellers have a special place in the high street because of the cultural value accorded to them and how they already sit squarely within their communities. Independents have worked very hard in moving on from just surviving to thriving, by positioning themselves at the heart of their communities in a multiplicity of ways. Event programmes are a cornerstone of this activity but can be expensive to run, with costs of catering to the insistence of some publishers that the price of a book be built into the event ticket price.

Another critical success factor for these independent books stores is visibility and overall promotion of books, authors, and the sector as a whole. Therefore, opportunities to tie independent retailers in with awards, and with festivals and events are important for the literature sector to consider.

In comparing the retail situation of independent booksellers in Scotland with those in France, we see a radically different environment. France is '*dirigiste*'⁹² in approach, which supports approximately 3,000 independents. France, in keeping with half of the EU, maintains a fixed book-pricing agreement (the UK had the Net Book Agreement until 1995). The French regime is known as the Loi Lang ('Lang Law') and has been in operation since 1981, it allows the publisher or wholesaler to set the price of a book, which can only be discounted to a maximum of 5%. These conditions now also apply to ebooks.⁹³

The political backdrop is also markedly different, as politicians in France have taken an activist role in supporting booksellers directly and in challenging and constraining the operations of global corporates such as Amazon and Apple.

There was a clear perception at the focus group on booksellers (conducted as part of this Review) that local and central government had little regard for the cultural value of bookshops in the high street and the maintenance of their presence. No concessions on rent or rates are made in Scotland for bookshops, and no incentives have been offered as they were to Amazon to locate its warehouse in Scotland.⁹⁴

A final consideration is the clear link between book retailers and the tourist economy. While Edinburgh is the obvious case where tourism and booksellers reinforce each other (especially during the Edinburgh International Book Festival), there are retailers in places like Inverness or Melrose whose revenues are directly related to sales of books and related products bought by tourists. While not directly related to literature, there is an important connection to be made between booksellers and tourism (see Section 8 for further discussion of tourism in the international context).

⁹² Meaning that France uses the law and central authorities to protect the sector.

⁹³ There are two additional bodies, the ADELIC and the CNL, which administrate further subsidies and loans. The ADELIC provides zero rate capital loans for creation, expansion, move, capital restructuring, working capital restructuring, renovation, redemption, and transfer of capital of independent booksellers. The CNL, a government arms' length body, has created a marque, the LIR, which is awarded to independent booksellers if they meet particular criteria and which then exempt the bookseller from the local business tax. In addition to the tax break, the CNL also offers zero rate loans and subsidies for the creation, development and acquisition of booksellers, as well as discreet hardship subsidies.

⁹⁴ Booksellers have some access to Live Literature funding but few independents are able to access this source. To obtain such funding the events need to be planned six months ahead, a timetable to which most independents cannot operate. A notable philanthropic initiative announced in 2014 was that of the £250,000 'Get Children Reading' donation by publisher and writer, James Patterson. This initiative provided grants for bookshops with strong and innovative schemes that would encourage children to read.

Conclusion 26 – The role of the independent book store – its on-going involvement with the community, its direct relationship with writers, and its partnership with libraries – all point to a high value in the development of Scottish literature.

Recommendation 19 – Independent booksellers should be encouraged to work more closely with libraries, Publishing Scotland, and other literature institutions with the objective of supporting writers and reaching out more widely to the reading public through collective action – possibly culminating in an Open Project Fund application to Creative Scotland.

Case Study 11: Electric Bookshop

Electric Bookshop was founded in Edinburgh 2010 as a series of regular events that brought together the literature, publishing, technology and design communities using presentations and demonstrations at the cutting edge of innovation and experimentation. Through these events and collaborations Electric Bookshop brought significant expertise and innovative thinkers to Scotland from around the world. Its three staff, with combined expertise in the fields of literature, journalism, digital humanities, social media, digital publishing markets and strategy also work hard to remain at the forefront of new reading technologies, formats and trends in readership and book consumerism.

They have also developed knowledge of the changing formats of literature, and the developing role of professional writers from authors and journalists, to video games writers and those experimenting with new forms of writing. Electric Bookshop has forged collaborations with the book trade, publishing sector, libraries, and literature and technology festivals and forums not only to develop and facilitate digital development but also to internationally connect Scottish concerns with the most innovative actors in the field.

Recently, Electric Bookshop was awarded funding from TTS: Digital (a Creative Scotland fund aimed at young people and digital) to work with Publishing Scotland to engage young people aged 16-25 to become part of a publishing house of the future. Across two days, the participants would design and lead creative projects that use cutting-edge and innovative technologies within the sector.

Case Study 12: Blackhearted Press / Glasgow Comic Convention

Over the past 5 or 6 years there's been a huge growth in comics over the whole of Britain and in 2011, Black Hearted Press (BHP) started micro-publishing comics and graphics novels in conjunction with producing the first Glasgow Comic Convention. Their aim was to reinvigorate the Scottish comic scene after many Scottish comic creators had become successful and moved to work with US publishers approximately fifteen years ago.

BHP publish approximately fourteen comics and four graphic novels per year, which are sold in independent comic book shops, at comic conventions, at some Waterstones outlets and online. BHP publications are available on ComicsFix (like Netflix for comics where publishers earn a per-read fee) and will soon be available on Comixology – a global digital app for digital comics, which was recently bought by Amazon. There are three full-time employees and, for the past two years, two unpaid interns, plus an occasional freelance administrator.

One of the main incentives to produce the Glasgow Comic Convention was that the main comic distributors, Diamond, take a large 55% commission. For micro-publishers who do not have the advantage of low production costs through mass production, this level of commission causes financial problems and BHP sought to sidetrack this by selling work and building their brand at the Glasgow Comic Convention.

The first year was funded entirely through personal investment, had eight or nine UK guest creator appearances and a capacity of five hundred, which was reached. It was a one-day event with between 10 and 20 tables for independent, Scottish publishers including BHP. Publishers made good sales – a trend which has continued at subsequent Glasgow Comic Conventions, for which they now have a reputation. By the second year, the Scottish comics scene had increased, partially due to the growth of micro-publishing/self-publishing, with a concomitant capacity increase to 1,200 and more vendor tables too. The Glasgow Comic Convention has now grown to sell out a 2,900 capacity with between 20-30 international guest creator appearances and a budget of £34,500 in 2014. It has been in the LIST top 100 events for the past two years and the popularity of the convention has extended into other areas of Scotland.

The convention has developed an audience over the years with many international fans returning each year. In 2014, audiences were 24% Glasgow/Greater Glasgow, 11% English, 6% North American and 46% female (with even more women proportionately in the younger age ranges). Currently, there are around 120 vendor tables across three buildings, with many independent Scottish comic creators selling work and most vendors selling all of their stock (e.g. BHP sold 800 comics at the last convention). The average audience spend on comics was £62. BHP now has to curate vendors, as there are high numbers of applicants due to the convention's reputation as a place where work sells.

BHP voluntarily set up an unfunded award scheme and collective in 2011: SICBA (Scottish Independent Comic Book Alliance). This is a free award that promotes writers and artists to each other, publishers, press and the public, and has been gaining significance.

Other events that BHP produce include: the thrice-yearly 'Glasgow Comic and Toy Fair', which focuses on Glasgow creators selling work and audience development (half of the audience is spontaneous footfall); 'Glasgow Print Studio Satellite Exhibition', which BHP are curating for the Glasgow Print Studio as part of the Glasgow Comic Convention; 'Sunderland Comic Convention', which follows the Glasgow model and hopes to draw large audiences as a result of the burgeoning comic scene there and the lack of other cultural provision; 'Capital Comic Convention', which will be the first Edinburgh-based comic convention for approximately 25 years and will take a more art-based approach than the Glasgow model; and lastly, 'Issue #One Comic Symposium' in 2014, which brought 130 industry professionals including academics, cultural funders, marketing professional and artists together to discuss the future of comics in Scotland.

6. THE SECTOR ECOSYSTEM

Scottish literature is more than readers, writers and the publishing industry. Scotland is home to a sophisticated network of organisations and projects that support the development of literature in myriad ways, which could be described as the literature ecosystem for the sector or the support ecosystem for Scottish literature. While this Review does not endeavour to produce an exhaustive list of all such activity, or review the effectiveness of individual organisations, Section 6 aims to categorise these programmes and projects, and begins to take a geographical view on the distribution of literature resources, seeking to identify collective challenges and opportunities presented by attempting to look at the sector as a whole.

Section 6 starts with a brief overview of the ‘*sector ecosystem*’. It presents a summary of how Creative Scotland’s financial support contributes to the sector, via the recently implemented Regular Funding programme, and provides a short statistical context which bridges the new system to previous grant funding processes. This section then examines gaps in the current provision before progressing to looking at potential ways to fund new activities or initiatives that have been identified in other parts of this Review – including access to EU funds, private foundations and trusts in Scotland.

Building on previous parts of this Review (and those which preceded it), it is recognised that literature development is in many ways local, and opportunity exists in both strengthening provision that is firmly rooted in community, and building on areas of excellence where they develop. A proposal is made for a series of connected literature ‘hubs’ which could form part of a broader Scottish network, supported by organisations working nationally. The nature of these hubs is described in earlier in this Review in Section 3 on writers and Section 5 on publishers. The central thesis is that these hubs focus on writing, while recognising that writers are deeply connected to other aspects of the arts, culture and creative industries.

Specific aspects of the ecosystem are considered in this section, including organisations outside the immediate ambit of literature but whose work greatly affects – or certainly ought to – the sector. Libraries are reconsidered after their preliminary treatment in Section 4 (on reader development), given their central role in literature development; book festivals are also considered separately in recognition of this enormous growth area for Scotland in recent years. Similarly, specific potential interventions in literary tourism are developed and recommended.

The literature ecosystem embraces many activities

In addition to the activities concerning the actual writing and publishing of Scottish literature (covered in Parts 3 and 5, respectively), the Scottish literature ecosystem embraces many activities and institutions, for example the following.

- Reading organisations and activities including book clubs
- Book festivals
- Event programmes, salons and creative writing groups
- Genre-specific organisations or programmes, including Playwrights’ Studio, Picture Hooks (for illustrators), and screenwriting labs
- Organisations supporting work in specific languages, including Scots and Gaelic
- Writers’ residencies and fellowships
- Well-being, health and justice-related activity or organisations (including Lapidus Scotland) or programmes within hospitals, care homes or prisons
- Organisations within, or connected to, academia or education
- Programmes targeting literacy
- Libraries and archives

- Critical or promotional coverage of books and reading, and awards
- Organisations representing writers, publishers or other sub-groups within the sector (Society of Authors, Association of Scottish Literary Agents, the Publishers Association of Scotland)

Focus of support organisations

The value in listing these categories is simply in demonstrating the range and breadth of literature activity already in existence. In the Nordicity survey, a number of respondents identified themselves as 'support organisations'. Figure 18 indicates the range of the main interests of the literature ecosystem. Reader development topped the list, whilst advocacy, promotion, professional development, training, and disseminating knowledge followed in that order.

Figure 18 – Relative focus of support organisations (increasing with more focus)



Source: Nordicity Survey (2014)

The literature ecosystem is funded from multiple sources, with Creative Scotland being an important source. The challenge for funders in increasingly difficult financial circumstances is in making decisions that benefit the sector as strategically as possible.

Following a competitive process, nine literature-focussed organisations and two literature-related organisations are currently in receipt of a three-year programme of support via Creative Scotland's £100 million Regular Funding programme. Creative Scotland's investment in this group of organisations (called RFOs) totals £8.6 million and represents the most significant long-term commitment towards Scotland's literature sector to date. Funding will be distributed between 2015 and 2018.

Investment in this portfolio of organisations provides support to Scotland's readers and writers in myriad ways and is intended to be in alignment with Creative Scotland's five ambitions as detailed in the 10-Year Plan.

A brief summary of each RFO follows.

Cove Park

Cove Park offers interdisciplinary programmes for both individuals and collaborating groups; offering time, space and freedom to make new work and to find new ways of working. Cove Park's residencies actively respond to the diversity of contemporary artistic practice in all the art forms, whether performing or visual arts, crafts, literature or music.

Edinburgh UNESCO City of Literature (EUCL)

Edinburgh was the first city in the world to be granted the status of a UNESCO City of Literature and the organisation continues to operate as the nexus of the worldwide UNESCO creative cities network. EUCL exists to champion and develop Edinburgh's position as a world-leading city for literature. Promoting the city's remarkable literary heritage and working to enhance the collective impact and draw of Edinburgh's literary organisations (many of whom operate nationally).

Edinburgh International Book Festival (EIBF)

The world's premier international book festival, EIBF invites more than 800 authors to Edinburgh every August to engage in the world's largest and most dynamic book festival. The festival has grown since 1997 to include over 700 events attracting over 220,000 visitors, and has also launched a Scotland-wide and year-round offshoot community programme.

Glasgow Women's Library (GWL)

A vibrant information hub housing a lending library, contemporary and historical artefacts, and archive collections relating to women's lives, histories and achievements. Reader and literature development opportunities for women are offered, with a strong emphasis on access.

Moniack Mhor: Scotland's Creative Writing Centre (MM)

An independent creative writing centre based in Highlands, with an extensive programme offering a range of creative writing courses aimed to support writers working at all levels. Support is offered via courses, retreats and events with industry professionals, awards and fellowships.

Publishing Scotland (PS)

Publishing Scotland is the network body for the book publishing industry in Scotland, working to promote and protect the interests of its members, both nationally and internationally. Offering training and funding programmes for publishers, PS also represents many of Scotland's publishers at London and Frankfurt Book Fairs, and in other trade opportunities.

Scottish Book Trust (SBT)

Scottish Book Trust is Scotland's national literature organisation supporting literacy and the development of readers and writers. As well as literacy interventions, training programmes and resources, fellowships, and awards, SBT also programmes and delivers Book Week Scotland annually, reaching 370,000 readers across the country.

Scottish Poetry Library (SPL)

The Scottish Poetry Library is a unique national resource and an advocate for the art of poetry, and Scottish poetry in particular. Offering access to its vast poetry collection, as well as a programme of events, workshops, publications, exchanges and development activities. The SPL also hosts the position of Scotland's Makar.⁹⁵

⁹⁵ The position of Scots Makar – the National Poet for Scotland – was created in February 2004 by the Scottish Executive. 'Makar' is the Scots word for the author of a literary work, and particularly for a poet or bard.

Gaelic Books Council (GBC)

The Gaelic Books Council is the lead organisation with responsibility for supporting Scottish Gaelic authors and publishers, and for raising the profile and reach of Scottish Gaelic books in Scotland and internationally. Offering funding and training opportunities for writers and publishers alike, as well as advocacy for literature in Gaelic.

Traditional Arts and Culture Scotland (TRACS)

Based in the Scottish Storytelling Centre, TRACS brings together Scotland's performance traditions of music, dance and storytelling to encourage collaboration between these three art forms, share resources for effective promotion of traditional arts activities and to develop partnerships

Wigtown Book Festival

The festival was founded in 1999 and has grown into a 10-day event comprising 175 activities. The event takes place in a market town in South West Scotland that is now Scotland's National Book Town.

Given that Creative Scotland is in its first of three years of the Regular Funding programme 2015 – 2018, the next logical step is to engage the RFOs in discussion about the findings of this Review, including a more inclusive, expanded definition of literature, the emphasis on innovation and collaboration in joint initiatives, and the larger role to be played in advocating on behalf of literature both domestically and internationally.

RFOs should consider ways to respond to the Review and its recommendations, possibly by stretching or refocusing their resources through greater collaboration, or by leveraging their resources to help other organisations achieve these objectives. RFOs have bid, on the whole, based on their own priorities. The Review provides the beginnings of a strategic set of priorities for the literature sector, and RFOs could be expected to consider their contribution to these shared priorities.

Whilst the RFOs outlined proposals for the duration of the funding period of three years, they are expected to review progress and make annual adjustments as they go along. The recommendations from this Review should provide further direction for these organisations including how to approach these opportunities collaboratively with other partner organisations.

Recommendation 20 – It is recommended that Creative Scotland enter into dialogue with the RFOs as they develop plans for 2016-17 to explore how initiatives emerging from this Review would be integrated into their priorities, and how they can achieve greater results in that aim through more collaboration.

Along with encouraging RFOs to consider the recommendations of the Review in developing their plans in future, there is enormous scope for joint initiatives between other parts of the sector. In fact, such collaboration may be the key to unlocking and creating an entirely new layer of service provision in Scotland. It could help bring literature to parts of society that are at present underserved. By forging better links between elements of the sector that have yet to collaborate, new opportunities can be created. One example is the opportunity to bring literary expertise and experience to much greater prominence within the education and health sector, where creative writing has proven to be an effective healing tool. Literature has also proven popular in approaches to creative aging, such as Slam workshops and Luminare (Scotland's creative aging festival).

In this Review, there are several recommendations for initiatives that span readership, writing, and publishing. Though competition for Creative Scotland's Open Project funding is fierce, it is designed to be flexible and encourage innovation and experimentation. Despite the fund running for only 9 months at the time of publication, examples of this are already beginning to emerge.

- Funding to work in partnership with rights holders in France and Belgium to publish new translations of Asterix and Tintin in Scots and Gaelic
- Support for a Glasgow-based publisher to publish books in partnership with Glasgow Life, the Hunterian Museum and Myriad Pictures

- Funds for a project to increase and enhance the practice of bibliotherapy in health, social care, libraries, mental health and related settings throughout Scotland
- Funding to develop a partnership between the Scottish Prison Service, Scottish Prison Arts Network and offenders to produce a high quality magazine featuring creative writing and visual art

Conclusion 27 –There is a role for both Creative Scotland and the whole literature ecosystem in facilitating more opportunities to share knowledge and expertise, showcase best practice and explore joint initiatives. The Open Project Funding mechanism is a logical option for such activity and a vehicle for greater coordination among organisations that need to partner to achieve their goals.

Recommendation 21 – It is recommended that organisations representing the literature ecosystem demonstrate how the opportunity presented by the Open Project Fund to support collaborative working could be achieved. Relevant partners (including for example, Creative Scotland and Literature Alliance Scotland) to facilitate regular networking opportunities for the sector in its broadest definition, including offering opportunities to showcase work to agencies or organisations more tangentially connected to literature. The aim is to explore opportunities for smaller events or round tables for sub-sections of the literature sector to share expertise.

Provision of funding through a geographical lens

Creating a balanced geographical spread of provision in literature development is a difficult challenge but important to achieve. Although it is not possible to map all activity in Scotland, this Review can provide a geographical overview of Creative Scotland and the Scottish Arts Council's funding in recent years. Whilst the new Open Project Funding offers the opportunity to track geographical spread more accurately than in previous systems, the fund is too new at the time of this Review to offer meaningful data in this area. Additionally, the Creative Scotland Creative Places Awards have been a direct response to the potential for place-based planning and delivery of cultural activity. Literature has figured in a number of these partnerships, such as Wigtown (Winner in 2012).

Prior to its re-organisation of the support system into the current arrangements, Creative Scotland and its predecessor, the Scottish Arts Council, formerly awarded grants in a number of programmes. For context, the following is a multi-year record of grants in terms of total amounts per year for the main funding programmes. It shows a regional dispersion to some extent at least, with some shift away from Edinburgh (Lothian) to Glasgow in the 2011-14 period, and a reduction in grants to Scottish recipients living outside the nation.⁹⁶

Table 4 – Creative Scotland literature/publishing grants awarded by region, 2011-14 (key word listings)

Region	Count	Percentage
Central Scotland	30	2%
Glasgow	316	25%
Highlands and Islands	132	11%
Lothian	414	33%
Mid Scotland and Fife	87	7%
North East Scotland	54	4%
Outside Scotland	44	4%
South Scotland	112	9%
West Scotland	57	5%
Grand Total	1,246	100%

⁹⁶ In interpreting the data, which shows a strong bias towards Edinburgh/Lothian, it should be made clear that most organisations with a national remit are based in Edinburgh or Glasgow.

Source: Nordicity calculations based on Creative Scotland data assembled through data sorting via key words associated with the literature sector.

Table 5 – Creative Scotland/Scottish Arts Council grants awarded by region, 1994-2011 (Literature)

Region	Count	Percentage
Central Scotland	105	2%
Glasgow	782	15%
Highlands and Islands	509	10%
Lothian	2,240	43%
Mid Scotland and Fife	377	7%
North East Scotland	181	3%
Outside Scotland	418	8%
South Scotland	449	9%
West Scotland	161	3%
Grand Total	5,222	100%

Source: Nordicity calculations based on Creative Scotland data assembled by a tally of the literature department in the former Scottish Arts Council, i.e. 'owned' by that department

Some initial analysis across all categories of literature funding since the change to the new system shows that the grants are still quite diversified across all regions (see Table 4 and Table 5). However, there are some unexpected results (e.g. Glasgow is low and the Highlands and Islands are high). However, they may be anomalies, and it represents only a partial year – and the categories are different from the preceding data sets.

Impact of Regular and Open Project Funding

The key element in Creative Scotland's resources and influence in literature is underpinned by the new three-year Regular Funding to major literature organisations, of which nine were selected in 2014 as RFOs.⁹⁷ In a total of just under £100 million for a three-year period across all sectors, the nine literature organisations have been awarded a total of nearly £7 million in committed funds for that period.

Whilst each RFO contributes to multiple and overlapping benefits, when taken together, these RFO flagship investments by Creative Scotland support the sector in seven key ways as indicated below.

- Support for writer and reader development is exemplified by investment in the Scottish Book Trust, amongst others.
- Celebration of reading, energising communities and connecting Creative Scotland's work with that of libraries across the country is exemplified by investment in Book Week Scotland, amongst others.
- Diversity, equality and geographical reach across the sector is supported by all RFO investments, exemplified by investments in the Glasgow Women's Library as a national model for supporting gender equality, skills, training and reader development across the country; the Scottish Poetry Library for its work with the community; Moniac Mhor for its work with writers from across Scotland and abroad, and

⁹⁷ The nine RFOs are Scottish Book Trust, Gaelic Books Council, Edinburgh UNESCO City of Literature, Glasgow Women's Library, Scottish Poetry Library, Moniac Mhor, Wigtown Book Festival, Edinburgh International Book Festival and Publishing Scotland. In addition, there are 2 multi-arts RFOs, which have been awarded some funding for their literature-related activity: Traditional Arts and Culture Scotland (TRACreative Scotland) and Cove Park.

Wigtown Festival Company for its work in literature development on a local and national level, amongst others.

- Scotland's two less widely spoken indigenous languages are supported through a number of RFO investments, exemplified by the Gaelic Books Council and Traditional Arts and Culture Scotland, amongst others.
- Cementing Scotland's literary heritage and future is exemplified by investment in Edinburgh UNESCO City of Literature, amongst others.
- Scotland's artistic and commercial international reach is exemplified by investment in Edinburgh International Book Festival, amongst others.
- Network support and market exposure across the sector is exemplified by investment in Publishing Scotland, amongst others.

Regional diversity and networking local literature hubs

Whilst Creative Scotland's grants show a reasonable geographic dispersion of funds, there are still areas in Scotland where one could conclude there is under-representation. This gap should not lead to the suggestion for some form of strict spreading of funds to be exactly equitable everywhere. Rather, the objective can be framed as leveraging the strengths of organisations and regions to ensure that there is the availability of opportunity throughout the nation.

Access to literary culture in Scotland is more of a 'post code lottery' than it needs to be. A simple mechanism that aims to deliver more elements of the literary scene to more people in more places should be considered, and the proposal is to do so via a series of networked literature and writing hubs. This should sit on existing platforms and infrastructure such as arts centres, literary RFOs, libraries, festivals, and even retailers. It will be important that this framework provides both access to literary activity and opportunities to create literary work. It will also need to 'add value' to the work of existing organisations and individuals in an area. These 'houses for literature and writing' will be locally defined, nationally networked, and internationally connected. They will also need to be feasibility tested, including looking at comparators from different countries and sectors.

One lever for Creative Scotland and other literature stakeholders is the concept of regional/local hubs for ensuring that the RFOs and other literature assets organise services to be more readily available across Scotland. Hence, the notion of regional/local hubs that can function as gateways to access the best service – whether that is in the form of mentoring, shared services, contacts and knowledge or even financing. In this model, the major literature institutions can serve a wider public in many more communities.

To explain how regional diversity and services availability can be constructed through the power of a network with hubs, it is useful to summarize how this Review has expressed the nature of hubs in terms of reader development, writer development, and publisher development.

In the Section 3 on writers, the hub concept focused on the writers, who could collaborate in a physical centre or operate within a network, linked via a web-based platform. Writers could benefit from the hubs that could provide information, mentorship by more experienced writers and networked access to services, including those facilitating self-publishing.

In the Section 4 on reader development, this Review discussed the concept of centres where writers and readers could congregate, typically in public libraries or in booksellers. These centres are hubs in their simplest manifestation, although the concept being proposed is more than physical congregation.

In the Section 5 on publishers, the hub becomes an extension of the writer as micro-enterprise, with the accent on entrepreneurship and the convergence of other formats for writers, e.g. in video games, multi-media theatre, film and TV programme production, and the more 'industrial' of creative industries.

In terms of the literature ecosystem, the nature of the hub has yet another aspect, as the fulcrum for addressing the issues arising from inequalities as a result of regional diversity. It is a platform that varies enormously across Scotland, reflecting differences in the way that the arts, libraries and cultural provision shape how audiences and readers engage the written word in different communities. Since each area of Scotland is culturally unique, the active platform of support for readers and writers varies throughout the country. Each currently has one or more centres of activity, or hubs that constitute a dynamic literary culture infrastructure at work in any area.

The form or origin of a hub in any community could be an arts centre, a library, a festival, a writer-led initiative, an educational institution, or a bookshop. The literature ecosystem infrastructure consists of many organisations that have enormous assets, some of which are hubs already, and some with broader potential reach, e.g. Moniack Mhor, Ullapool Book Festival, Scottish Writers' Centre, and Cove Park to name a few. Others in the pipeline, such as Edinburgh's Netherbow, or the Peter Pan Moat Brae Trust in Dumfries offer enormous future potential. These organisations have – or could yet – become gateways for others in their region or across Scotland, enhancing their literary impact via connectivity with the regional or local hubs, for instance, Edinburgh UNESCO City of Literature.

Reference Group discussions sparked the concept of nurturing and networking the various literature hubs. The concept is for social media or a networked online platform to be a developmental hub for everyone in the area interested in literature and writing. It would also be a network where national and international work, initiatives and opportunities can connect, where tours can be routed, and where local procurement is enhanced. In general terms, the network would provide for greater sharing of services, best practices, and resources, as well as more partner connections.

Within the concept for the networked set of hubs, each of the nine RFOs, which are located across the country, could be a hub member and access points that service all regions of the nation. Each would take the lead in their field of expertise.⁹⁸ For example, Moniack Mohr could take the lead on artist residencies and upon request could equip regional and local hubs with a toolkit. Moniack Mohr would remain the centre of expertise for that particular field but would transmit this expertise through the hubs network. Similarly, Wigtown Book Festival (for small to mid-scale festivals) and the Edinburgh International Book Festival (for international linkages) could be joint hub leads for festivals across the nation.

For this literature hub network concept to succeed, there would need to be some form of opting into being part of the network via an agreement amongst the parties. Part of this agreement would include the designation of literature institutions as to which ones would 'own' (but not monopolise) a specific area. Many elements of the literature hubs already exist, so this concept is definitely constructed by building up from what already exists rather than forcing a top down structure. In short, it is a matter of aligning elements of the literature ecosystem in a more strategic manner.

Whilst the networking of hubs to create greater access to resources could be a dynamic initiative for the literature sector, there are several issues to work out. One immediate question is whether the hubs should be part of a broader creative hub to support a range of arts and creative sector development. That would build on growing practices and needs of writers and publishers to work collaboratively with artists and entrepreneurs in other industry sectors. It could be linked to an investment strategy that reflects micro-enterprise and cross-arts collaboration as discussed in Section 5.

At a practical level, there is the governance question as to who should take the lead to connect the fragments, and how the underlying agreement would be structured. The authors of this Review do not countenance starting a process where absolutely everything has to be coordinated and figured out in advance – it is too daunting a prospect. The literature ecosystem should be encouraged to develop proposals, perhaps in the context of the Open Project Funding process. Progress would be made organically and ultimately leading to a sector of effectively networked hubs, reinforced by access to the best of Scotland's existing literature support organisations knowledge and experience.

Conclusion 28 – As there is evidence that literature hubs are already developing in various forms all across Scotland, it is well worth exploring the concept of a network of literature hubs that would make the Scottish literature ecosystem’s expertise, best practices, and resources more accessible to Scottish communities.

Recommendation 22 – It is recommended that interested parties convene to explore the networked hub concept as to possible design, partners, funding, benefits, regional take-up, and operational sustainability. This coordinating role may be one the Literature Alliance Scotland would consider undertaking.

A conclusion earlier in this section sought to encourage the RFOs to participate in the follow-up to this Review by re-examining their priorities within their three-year programmes. The recommendation immediately above also suggests they could participate by seizing opportunities for joint initiatives. RFOs have bid for their three-year funding, on the whole, based on their own priorities. This review provides the beginnings of a strategic set of priorities for the literature sector, and RFOs could be expected to consider their contribution to these shared priorities.

In this Review, there are several recommendations for initiatives that span readership, writing, and publishing areas. Though competition is fierce for Open Project Funding, it is designed to be flexible and encourage innovation and experimentation. This Review is indicating that strategically important initiatives requiring collaboration from a range of organisations are needed to improve the reach and impact of the sector. To do so would require a partnership funding strategy that allows RFOs to contribute to new initiatives, encourages Creative Scotland to seek ways to make direct strategic funding allocations, and encourages inward investment from other sources.

Conclusion 29 – The Open Project Funding mechanism is a logical route for collaborative initiatives across literature development in Scotland, and represents a vehicle for greater coordination for organisations that need partners to accomplish their goals.

Recommendation 23 – It is recommended that the literature team within Creative Scotland should ensure that Open Project Funding is more widely promoted, and that RFOs should be able to become at least minority partners to future applications.

Developing EU links and access to funding

EU funding for culture and creative industries is important in supporting new and partnership based initiatives. As well as bringing money directly into the sector, it offers the potential for increased partnership in EU projects for Scottish institutions with non-Scottish partners.

The criteria of the EU Creative Europe programme (2014 -2020) are a good match with the kinds of developmental initiatives described in this, and other sections, of this Review.⁹⁹ Reaching out to potential partners across Europe would help both devise and secure investment for future initiatives. The programme is organised in four tranches: co-operation projects; literary translation projects; European networks; and European platform projects. Most funding is located in co-operation projects but the literary translation projects strand has an allocation of €31.8 million and supports projects with funding of up to €100,000. Organisations new to the programme often decide to be a ‘junior’ partner initially, considering taking a lead partner role once they are familiar with the scheme.

The process suggested to facilitate applications would be to coordinate them through one sole agent representing the other organisations involved. The Open Project Funding mechanism is a logical route for

⁹⁹ Creative Europe’s presentation on how to access EU funding at the January 2015 Publishing Scotland Conference was reported to have been valued by the industry and stimulated substantive discussions.

collaborative initiatives across Scottish literature development, and represents a vehicle for greater coordination among organisations that need more partners to accomplish their goals. There is a role for both Creative Scotland and the whole literature ecosystem to facilitate more opportunities to share knowledge and expertise, showcase best practice and explore joint initiatives. The experience of Vagabond Voices¹⁰⁰ (the only known Scottish publisher to have accessed this EU funding) could be used as an exemplar of how to apply for EU funds by other applicants.

The scope of the literature and writing sector includes culture, cultural industries, creative industries, research, entrepreneurship, learning and placemaking. This activity translates into potential eligibility for a raft of EU investment streams, from Horizon 2020 to locally managed European Structural and Investment Fund allocations. A systematic appraisal of developmental priorities in the sector against the criteria of EU funds and identification of the timings of the various calls for funding, would provide the preparatory work necessary for partnership development and competitive bid preparation to the appropriate EU deadlines.

There are significant challenges in making funding applications to Creative Europe and other EU funds, due to their scale, complexity, and the number of partners that could potentially be involved. Consequently, this option may not be a solution that suits the capacities of every project or organisation but this is where partnership working plays a very strong role. Creative Scotland, and particularly the Creative Europe desk located within it, are well placed to help facilitate in this area.

Conclusion 30 – Creative Europe among other EU programmes could become an important partner for supporting networks of writers, public programming around books and ideas, and promoting better regional development. Whilst not a panacea and certainly an arduous journey, it is timely for the sector to embrace greater pan-EU involvement.

Recommendation 24 – It is recommended that Creative Scotland and Creative Europe organise a series of briefings at appropriate literature conferences and platforms to advise potential applicants, and to more widely publicise the capacity of the Creative Europe Desk to support this work.

Even with a more effective matching of opportunities for funding and potentially more high quality applicants, there will be a dearth of funding available.

Looking elsewhere, the non-profit sector can be seen to support literature activity in Scotland to some extent, whether it is literature organisations or standalone projects. Despite this, there was some resistance in Reference Group discussions about exploring further the potential of investment by trusts and foundations. There was a perception these options had been considered in the past and had been fruitless, and so before literary organisations or initiatives could consider applying to such putative sources, some investigation would be required to establish their viability or otherwise. Small organisations can ill-afford to waste valuable resource on applications for funds where there is little or no chance of success. Nonetheless, this Review believes there is value in determining whether trusts or foundations could become an additional funding strand in the future.

Given the desirability of encouraging innovation and supporting SMEs identified in the Review, some liaison with innovation-oriented organisations like Nesta, RSA Scotland and universities about the potential for inward investment is recommended.

Crowdfunding is another way to raise funds for certain kinds of projects – typically where the proponent already has ready access to a community interested in the project. There are several crowdfunding platforms, and a

¹⁰⁰Founded in 2008 and based in Glasgow, Vagabond Voices is an independent publisher that is both Scottish and fervently European in its aims. According to its website, 'Vagabond is committed to introducing new titles from Scottish authors and translating fiction from other languages' and that its 'library reflects its aims to promote literary ambition and innovative writers, and to challenge readers'. With its collection of challenging literary titles, Vagabond Voices suggest it might be described as the art-house cinema of Glasgow's publishing scene. Source: vagabondvoices.co.uk

recent conference in Glasgow (October, 2014) on the subject noted that crowdfunding in the UK and Scotland is booming, including in the creative sectors.¹⁰¹

There is at least one crowdfunding platform in Scotland called Scotland Crowdfund, which is aimed at the arts and creative industries. *'Scotland Crowdfund aims to help everyone in need, support small start-up business, University, School Project and student projects. We love Art, Music, Films, Media'*.¹⁰²

Crowd funding is a way for businesses (often creative businesses) to raise capital from investors where the securities legislation permits. However, it is also a way to raise money for worthy projects, or at least those deemed worthy of a small contribution from many contributors.

Recommendation 25 – It is recommended that the literature sector should expand its reach and access to existing trusts, foundations and social enterprises and determine ways of introducing new sources of funding to support writers (e.g. crowdfunding). Institutional support for professional development in fundraising in the sector should be encouraged, perhaps in collaboration with other art forms where a need has been identified in this area (for example the theatre sector).

Advocating for Literature in Scotland

During the course of this Review, it was remarked that whilst writers will sign petitions or write letters to the editor, they generally do not advocate 'noisily'. From the consultation with industry stakeholders, where advocacy does occur it appears to be uncoordinated and not representative of the whole sector – particularly the less established and emerging voices. Many called for a planned, coordinated and inclusive advocacy strategy that would be much more effective. Such advocacy, of course, also needs to be based on a set of priorities that are agreed across much of the sector.

The concern around a lack of advocacy was also based on the premise that the visibility of the sector would be improved by promoting Scottish literature's strengths. Examples of ways to champion or raise interest in the sector were legion, ranging from Scotland's unique relationship with three indigenous languages; the worldwide popularity of Scottish crime fiction; the recent energy and dynamism in spoken word and performance poetry in Scotland; and the inherent potential for children's literature in the nascent Moat Brae Peter Pan venture. These activities and possibilities raise the profile of Scottish literature at home and abroad, and illustrate that Scotland's literary heritage includes both the contemporary and the ancient and that opportunity exists in both literary trails in the West of Scotland, as well as in the buildings of Canongate.

The overall framework for advocacy in the literature sector in Scotland has grown organically, rather than as a result of a particular strategic approach. Every country has its own way of marshalling support for its own writers. Despite the clear support for the sector by high level champions, like Fiona Hyslop, Cabinet Secretary for Culture, Europe and External Affairs, there has been no strategic plan and investment case. There are also questions as to the coordination and marshalling of advocacy from the sector.

The Literature Alliance Scotland (formerly the Literature Forum for Scotland) has traditionally been called on to provide advocacy for literature in Scotland, and has played an active leadership role in many areas, not least in its facilitating coordination and trust within the sector, as well as generating the original *Literature, Nation* document from which this Review evolves. However, in terms of advocacy, members have been the first to acknowledge that their impact has been less effective than was hoped. With this lack of positive outcome in

¹⁰¹ Report from the Nesta conference website: *'In 2013, almost £1 billion was raised through crowdfunding and peer-to-peer lending in the UK providing funds for more than 5,000 SMEs and many community and creative projects. Scottish companies have successfully used these alternative finance sources for their development and the market is growing rapidly here'*.

Source: Nesta. *Spotlight on Crowdfunding – Glasgow*. (17 October 2014), accessed at nesta.org.uk.

¹⁰² Scotland Crowdfund, accessed at scotlandcrowdfund.com.

Scotland has a history of creativity and acumen in financial products, and it would appear that crowdfunding has not been neglected. For example, there is a 'Lending Crowd' platform that matches borrowers and lenders, accessed at lendingcrowd.com

mind the Literature Alliance Scotland is working to re-energise and re-focus its work to be more effective. It will be important that Creative Scotland, Publishing Scotland and the Literature Alliance Scotland align their efforts to avoid duplication and ensure an accumulated impact.

Conclusion 31 – Championing literature causes is a necessary complementary activity to the core work of Scottish literature institutions – even more so in the future, as the sector evolves and engagement proceeds on many levels. A coordinated platform, most naturally the Literature Alliance Scotland, would be the most effective vehicle by which to undertake this work.

Recommendation 26 – It is recommended that Scottish literature interests review how best to promote and champion the ways in which Scottish literature and publishing positively impacts the literature and other sectors and subjects, and equip them with the tools and arguments to do so.

Scotland's languages

One of Scotland's unique and distinctive assets in literature terms is its rich heritage in three indigenous languages – English, Gaelic and Scots.

While it is outside the (already extensive) scope of this review to analyse or evaluate the status of development of Gaelic or Scots in contemporary Scotland, the recommendations should be read in context of Creative Scotland's commitment to supporting activity in all of these languages. For example, the recommendations made for writers to be supported to gain better business skills in Section 3 of this Review should of course be read as being equally applicable should the writer be working in Shetlandic or Gaelic.

It should also be noted that Creative Scotland's policy and approach with respect to Gaelic and Scots will be further explored via the forthcoming Arts Strategy, due for publication in 2016. Gaelic publishing specifically is referenced in Section 5 of this report, in relation to the work of the Gaelic Books Council in its representation of, and support for writers and publishers working in Gaelic. As no equivalent body currently exists for Scots, a summary of current activity is offered below.

Scots is one of the three indigenous languages of Scotland that comprise the nation's trilingual literature tradition. Today, four dialects and numerous sub-dialects and variants are spoken throughout Scotland with the 2011 census recording that approximately one in three people in Scotland (1.5 million people) use the Scots language.¹⁰³ It has been recognised by the European Charter for Regional or Minority Languages, and consequently has been accorded special protection and promotion within the UK. Within the Scottish Government, responsibility lies with the Minister for Scotland's Languages, the Scots and Gaelic Unit and the temporary Ministerial Working Group on the Scots Language, the last of which produced a seminal report in 2010 that has guided the Scottish Government's policy direction¹⁰⁴.

Scots had been facing a steady decline and, despite its widespread use, it has lacked status and visibility,¹⁰⁵ which was facilitated in the past by the suggestion that it was not a language of writing or literature in Scotland. In recent years, there has been a systemic, if gradual, change in the treatment of Scots and a shifting in popular perception too. Today Scots is now taught in schools in its own right, is part of the education agenda for government, and many cultural organisations include Scots. Examples of the vibrancy and embrace of Scots within literature, writing and publishing can be seen throughout this Review. The main advocacy body is the Scots Language Centre/Centre for the Scots Leid, providing resources for teachers, schools and pupils on Scots within the curriculum, as well as those with a wider interest. More grass roots organisations also exist, such as

¹⁰³ Census: Key Results on Population, Ethnicity, Identity, Language, Religion, Health, Housing and Accommodation in Scotland – Release 2A, accessed at scotlandcensus.gov.uk.

¹⁰⁴ Scottish Government. *Report of the Ministerial Working Group on the Scots Language (2010)*, accessed at gov.scot/resource.

¹⁰⁵ The work preparing for the 2011 census identified a lack of understanding by what is meant by Scots, *2011 Census Question Testing – The Language Question (2009)*, accessed at gro-scotland.gov.uk.

the Scots Language Society, which has the objective to further and uphold the Scots language and to give a 'heize-up' to Scots literature and traditional music.¹⁰⁶

Education Scotland has done much work to valorise Scots and provided support to Local Authorities considering the teaching of Scots within schools. Through their Scots Language Coordinator posts, Education Scotland has adopted a new approach to inclusivity and flexibility in their delivery.¹⁰⁷ Education Scotland is encouraging the teaching of Scots as it sees it as a way of nurturing successful learners more broadly – Scots is readily intelligible but offers unique features of grammar and a rich, additional lexicon. It develops confident individuals, proud of their mother tongue and able to relate directly to famous Scots works by those such as Burns and MacDiarmid.¹⁰⁸ Their approach advocates that studying Scots (and Gaelic) raises pupils' awareness of the linguistic and cultural diversity of the country within which they are growing up and should encourage responsible citizens. Lastly, Scots could add value to tourism and the creative industries, adding to Scotland's cultural heritage and diplomacy.

For Scottish writers responding to the Nordicity survey, Scots was the spoken and written language of expression for 32% and 28% of writers, respectively. Within the same survey, Scots along with Gaelic, was identified as being important to the future of Scottish culture.

Figure 19 – Language of expression for Scottish writers (written and spoken)

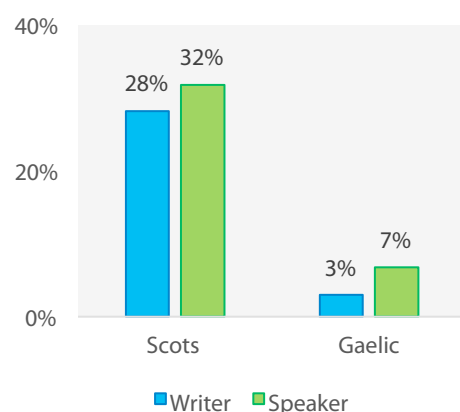
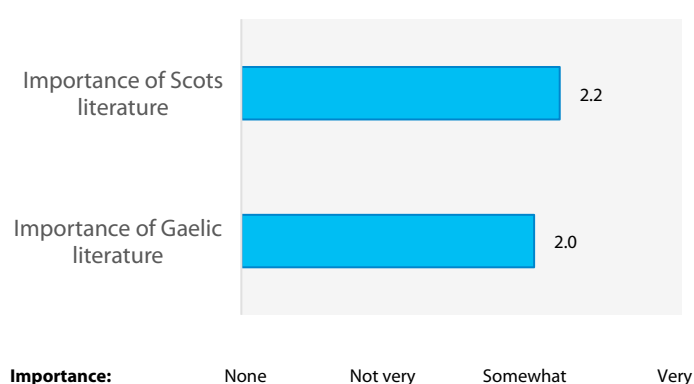


Figure 20 – Importance of Scots and Gaelic to the future of Scottish culture



Source: Nordicity Survey (2014)

Creative Scotland has recently announced its Scots Language Policy,¹⁰⁹ which takes a direct and proactive approach, aimed at arts organisations and fostering the enhancement of Creative Scotland's own approach. A key element of the policy is the appointment of a Scots Scribe (a joint initiative with the National Library of Scotland). The Scots Scribe is to produce original creative Scots works, across the dialects and art forms, as well

¹⁰⁶ The 'Scots Leid Associe... haes among its objects tae forder an uphaud the Scots leid an tae gie a heize tae Scots leiterature an tradeitional music.' Scots Leid Associe.

¹⁰⁷ A nationwide Scots Language Ambassadors scheme was launched at the Scottish Storytelling Centre in 2014, with ambassadors including prize-winning writer James Robertson and poet and Dundee Laureate W.N. Herbert having signed up to support and foster 'a love of the Scots language in Scottish Schools'.

¹⁰⁸ As an example of Scots language in education, the Arts Across the Curriculum project provided a better understanding of the Scots language and its history and addressed issues such as spelling and dictionaries by compiling text based on the Scots vernacular of Langholm using the poetry of Hugh MacDiarmid through creative writing.

¹⁰⁹ Creative Scotland, *Scots Language Policy* (3 June 2015), accessed at creativescotland.com.

as to hold a high profile role in increasing awareness, appreciation and use of Scots across the whole nation and within all parts of the population.

It is clear that much groundwork has been done, from a Scottish Government audit of Scots language provision in 2009¹¹⁰ and the Scottish Government's Literature Working Group,¹¹¹ to the Ministerial Working Group on Scots Language,¹¹² all of which led to the Scottish Government setting out the next steps in the *Scots Language Working Group Report: Response from the Scottish Government* in 2011.¹¹³ Whilst momentum for delivery has been fragmentary, the public and political will appears strong at this juncture, and thus this Review welcomes Creative Scotland's Scots Language Policy as one of the means to deliver on the promise of the early analytical work.

Scottish Government figures reveal that in Scotland in 2013, a total of 143 languages were spoken as the main home language by pupils in publicly funded schools in Scotland.¹¹⁴ With Scotland becoming increasingly multicultural, there is great creative potential in this breadth of richness and diversity.

Literature and tourism

The tourism industry is an important element of Scotland's economic prosperity, and it offers a chance to show Scottish culture to the world. Scotland has an internationally recognised literary heritage. This linking of literature and tourism is present in destinations like Ayr and Dumfries, and there is potential to develop more joined up visitor attractions in other parts of Scotland. Jointly working with heritage bodies like the National Trust for Scotland and Historic Scotland offers the potential for paving the way for more direct retail and income opportunities, and for visitor initiatives, such as literary trails and tours.

Scotland's literary festivals offer a good developmental platform for literary event tourism. Festivals across the country, not least the Edinburgh International Book Festival, provide a concrete demonstration of the impact of literature on tourism. Enhancing promotion within both the domestic and international tourism markets connects visitors to different areas of Scotland and as such should be prioritised beyond the sector itself. One example of how Scotland's literature sector has invested in literary tourism is the establishment of the Tourism Innovation Fund in a partnership by Edinburgh UNESCO City of Literature Trust, Scottish Enterprise and the Edinburgh Tourism Action Group to support businesses in developing new literary products and literary tourism.

Edinburgh's Netherbow is well positioned to develop into a world-class magnet for Scottish literature. The impetus to create a Literary Quarter in Edinburgh has grown over the 10 years since the capital achieved the world's first designation as a UNESCO City of Literature. This further initiative will transform the historic Netherbow area of the city, where Scotland's first books were published, into a major international literary destination. In turn, a new gateway will be created for Scotland's literary heritage, with enormous potential to create literary trails and promotions across the whole country.

Research into the tourism opportunities afforded by capitalising on Scottish film locations may also provide a useful avenue into further exploration of this area, with partnership working with the film sector a feasible and attractive opportunity.¹¹⁵

¹¹⁰ Scottish Government. *Audit of Current Scots Language Provision in Scotland* (January 2009), accessed at gov.scot/publications.

¹¹¹ Scottish Government. *Literature Working Group Policy* (17 February 2010), accessed at gov.scot/publications.

¹¹² Scottish Government, *Report of the Ministerial Working Group on the Scots Language* (November 2010), accessed at gov.scot/publications.

¹¹³ Scottish Government, *Scottish Government Response to the Scots Language Working Group Report* (March 2011), accessed at gov.scot/publications.

¹¹⁴ Scotland's National Centre for Languages (SCILT) assembled statistics on languages in Scotland, including data from the *Summary Statistics for Schools in Scotland* (Scottish Government, 2013), accessed at scilt.org.uk.

¹¹⁵ In a recent article for *The Scotsman*, Professor David Martin Jones of Glasgow University argues for investment in film tourism for the benefit of both domestic and international audiences, which is directly applicable to literature: *'film tourism has an untapped potential to enrich the education of our children, inspire workers into the industry, and preserve a distinct aspect*

There are more immediate challenges however. Several writers and publishers consulted in the Review pointed to the paucity of Scottish-authored books available to foreign visitors and there is potential to make these books more available through Historic Scotland and National Trust for Scotland properties for example.

In broad terms the linking of Scottish literature to the policies and priorities of VisitScotland would seem to be a good introductory initiative, as opposed to simply inserting Scottish books into the inventory of books made available to visitors. Historic Scotland, National Trust for Scotland, and VisitScotland have the potential to be enthusiastic and proactive partners in any such initiative.

Conclusion 32 – There is opportunity to increase the access to and use of Scottish literature in Scotland’s tourism sector (e.g. more literary heritage destinations, literary trails, festivals and events and unique promotions, securing a strong Scottish impact from Edinburgh’s UNESCO City of Literature status and the Netherbow project).

Recommendation 27 – It is recommended that the case be substantiated and made to appropriate tourism authorities and tourism product distributors to trigger investment in and expansion of literary tourism in Scotland, leveraging existing resources.¹¹⁶

Getting more from book festivals

The nearly 50 book and literature festivals in Scotland represent an almost unique element of cultural development, reaching across the whole of the country and involving a wide variety of writers, storytellers, and communities. They are an increasingly important delivery component for Scottish literature, including providing both financial and promotional support for writers.

The Nordicity survey data showed growth in attendance, number of speakers, book sales, and media coverage for the vast majority of festivals, although there is a few which illustrated a slight decline in media coverage in recent times. The least change reported was in the fees paid to speakers. However, as noted in Section 3, writers are better paid at Scottish festivals than is generally the case in the rest of the UK – and derive important income from this source.¹¹⁷

Scotland’s myriad festivals are places for people to engage in cultural activity based around what the Scottish Household Survey identifies as the premier leisure activity for Scottish people, namely that of reading. There is great value in festivals as vehicles of cultural identity, artistic expression, civic engagement, and as an intersection with politics, both local and national.¹¹⁸ Finally, they provide valuable commercial and economic impacts for communities and municipalities.

Besides authors’ readings and book sales at festivals, the festivals are increasingly expanding their activities, including the following:

- The largest festival, Edinburgh International Book Festival (EIBF), is a worldwide leader in major festivals (as part of the Word Alliance of major book festivals) and can bring Scotland’s literature interests to

of our cultural heritage’. Source: The Scotsman, *Scots movie industry deserves better billing*, Martin-Jones, D (12 June 2015), accessed at scotsman.com.

¹¹⁶ One reference Group member recommended that the sector would benefit from a literature tourism study (of impacts and benefits) for Scotland. It would demonstrate the quantitative and economic impacts of literature within Scotland’s tourism offer. This proposition could be an extension of documenting the case as necessary. Another suggestion was to leverage Scotland’s huge diaspora (estimated 40 million globally), as similar activity with the Irish diaspora has been a major boost for Ireland in America.

¹¹⁷ One Reference Group member pointed out that festivals are a cost to publishers who have to provide large numbers of copies of books and in some cases make payment towards cost of media and bookseller promotion if shortlisted.

¹¹⁸ Some members of the Reference Group had concerns about the limited reach of festivals, with them ‘*preaching to the converted*’. They felt that some people are intimidated at festivals and so, festivals needed to do more to engage a wider and more diverse audience.

international fora. EIBF has also developed an outreach programme to connect with literary culture and communities across Scotland. This is a positive development in a culture where connecting international festivals with wider community interests is an on-going challenge.

- Wigtown Book Festival, capitalises on its location and enhances its literary impact across the region by offering a broad cultural festival covering a series of film and book exhibitions, cafes, gallery spaces and cross-art form initiatives, as well as expanding its reach to offer year-round literature development support.
- Small festivals such as Bloody Scotland can provide leadership in specific genres via a more boutique approach – in this case, a crime writing festival that has both capitalised on and further developed Scotland’s reputation as a leader in crime fiction.

The nation’s near 50 literary festivals represent a wonderful way to enable Scottish readers to get to know Scottish and other writers. In an age where book promotion is becoming more difficult – with fewer opportunities to read literary criticism in newspapers, even online – festivals offer unique promotional opportunities. Just as importantly, festivals allow writers and audiences to meet, writers to share ideas amongst themselves, and as a public arena for citizen discussion and development.

The strength and reach of Scotland’s literary festival and event scene is reflected in the aspirations of some promoters to expand their operations geographically and across the year. This is a welcome development that is already resulting in new inward investment for the literary sector. Whilst currently *ad-hoc* through bookshops, in many cases, the year-round programmes could be located in local arts centres, in libraries, theatres, and in the local or regional literary hubs.

Collaboration among festivals

Festivals now collaborate on such issues as the rates that writers should be paid for readings and other podium appearances. While that is a start, it seems that festivals could also benefit from other forms of collaboration such as insights, joint projects, common procurement, sharing of skilled resources and promotion. Some festivals have demonstrated innovative ways to organise or market their festivals and can serve as models of best practice (e.g. for year-round promotion via social media and other platforms. Another Reference Group suggestion raised the potential of sharing mobile infrastructure (just like the ‘Screen Machine’¹¹⁹ for cinema, but in this case it would be a ‘book van’).

In the Review consultation, the view was expressed that festivals had not yet achieved as much as they could as a network, despite previous collaboration via the Book Festivals Scotland initiative.

For example, the consultation identified that too little is known about the collective economic, social and cultural impact of festivals, and about their potential for growth. Despite, festivals being required to gather economic impact data in order to make applications to EventScotland, this information to date has not been collated and analysed. A cursory look at the scope of Scotland’s literary festivals would suggest how important they are to Scottish culture, to the economy and to communities. However, this observation needs to be evidenced by data, and so, Scotland’s literary festivals need to institute a common evaluation process to capture social, economic and cultural impact, as well as identifying a small number of shared priorities for development.

As a comparator, the Edinburgh’s festivals are evaluated and are worth £261 million to the Scottish economy, and have adopted a strategic approach to development, including: deepening and widening engagement, developing international partnerships and taking advantage of digitisation.

Conclusion 33 – Book festivals are in the ascendance in Scotland but greater collaboration by networking would provide access to best practice, services, and joint initiatives; different festivals would supply

¹¹⁹ The screen machine is under review at present as new digital/satellite platforms are increasingly providing cinema across rural areas.

different expertise. If several festivals can come together, it would make a desirable application to Creative Scotland's Open Project Funding programme.

Recommendation 28 – It is recommended that there is leadership development in the festival community to enhance coordination, collaboration and knowledge transfer across Scotland's breadth of literary festivals and events – covering specialisation, best practice implementation, calendar coordination and greater use of shared services.

Literature and Equalities, Diversity and Inclusion

As evidenced throughout this Review, there are many examples of literature organisations and programmes addressing inequalities.

The Equality Act 2010, places a duty on all public bodies, including Creative Scotland, in the exercise of their functions to have due regard to the need to:

- eliminate unlawful discrimination, harassment and victimisation and other conduct that is prohibited by the Equality Act 2010;
- advance equality of opportunity between people who share a relevant protected characteristic and those who do not; and
- foster good relations between people who share a protected characteristic and those who do not.

It is vital, however, that equalities goes beyond the legal imperative and it is clear that Creative Scotland does not underestimate the influence that the arts, screen and creative industries can have in promoting and embedding equalities and diversity, and in meeting these duties.¹²⁰ Moreover, it sees literature as a powerful medium to transform and improve the lives of the people in Scotland through imagination and creativity, and it is well placed to do so through literature given how literature permeates through Scottish culture and people's daily lives. The languages used in Scotland also reflect the diversity and richness of local cultures.

As part of the consultation process, a set of interviews was conducted, which specifically addressed the issues around equalities, diversity and inclusion; this consultation augmented the desk research. Overall, there was a consensus that Scotland has many strengths, however, high-level advocacy work would abet the maintenance of current partnerships and the fostering of new partnerships with other sectors, such as education, health, justice, social care and third sector organisations, to increase awareness of the full value of literature and the arts more broadly.

Elsewhere in this Review examples are given of on-going programmes by organisations such as the Scottish Book Trust, Glasgow Women's Library, Scottish Poetry Library, Wigtown Book Festival and the Scottish Storytelling Centre among others, targeting older people (including those in residential care), prisoners, young people, BAME communities, and those with mental health issues.

In addition, we identified a host of other initiatives and organisations engaging with equality groups, such as the Young Person's Storytelling Festival, multisensory storytelling by Flotsam and Jetsam, the Scottish Poetry Library's BSL poetry programme, the Scottish Book Trust's work with disabled artists, programmes in libraries across Scotland such as Craigmillar Library, and work in prisons and hospitals with writers and storytellers.

Indeed, writers themselves come from all walks of life and tell the stories of people in Scotland with diverse backgrounds. As cited elsewhere in this report, the vast majority of writers actively participate in public events in educational and community settings, and nearly half have worked with people with protected characteristics.¹²¹

¹²⁰ Creative Scotland, *Equalities, Diversity and Inclusion Report 2015* (30 April 2015), accessed at creativescotland.com.

¹²¹ Nordicity Survey (2014)

In addition to the high-level advocacy to develop more initiatives with other sectors, further gaps in provision or areas that needed further consideration were identified.

The potential for a longitudinal study investigating the impacts of equalities work, the challenge of engaging with diverse communities in remote areas, insufficient skills, and knowledge-sharing opportunities between artists and organisations indicate the breadth of ideas suggested in this area which were beyond the scope of this Review.

Creative Scotland is embarking on a Review of Equalities, Diversity and Inclusion in 2015, via which there may be opportunity to investigate some of the issues identified. The organisations that are in Creative Scotland's Regular Funding Portfolio will be developing their own Equalities Plans as a condition of funding, by March 2016. Support, guidance and training will be offered to those organisations, and there will be opportunities for others to be involved in creative conversations around equalities in 2016.

Conclusion 34 – There are many significant initiatives that reach out to different parts of the community across Scotland, which could be applied in other contexts or geographic areas. While strong partnerships exist within the sector, intersectional partnerships across sectors could be strengthened and new partnerships forged.

Recommendation 29 – It is recommended that the diversity of provision that already exists within the literature ecosystem be shared, and that one of the support bodies takes the lead in collating and disseminating the many examples of best practice that deliver equalities and diversity.

Scottish literature contribution to other Scottish priorities

Much has been made in this Review of the need for and benefits of collaboration across the literature ecosystem. As well, in the section on reader development, the obvious synergies between literature and education were articulated. Reader development has a specialised connotation when the recipients are engaged in other government programmes, like health and wellbeing, employment and education, and justice and prisons.

These other programmes have particular goals and literature may help them reach those goals in more ways than simply developing readers. Put simply, an elderly person who is read to in their own home by a writer as part of Ullapool Book Festival gets more from the experience than a little extra time spent with a book.

The Scottish literature sector contributes to all of the Scottish Government's 15 National Outcomes.¹²² This Review's remit did not capture the full range of this activity but the research has revealed a real appetite across the sector to further develop this contribution. Writers, publishers, academics, promoters and performers have all highlighted different areas where literature can do more. Examples range from literary heritage and tourism income, to writers working in health-care, to storytellers in prisons and authors working in schools. There is also appetite to grow. As a sector comprising a wide variety of components parts, many of which operate at the micro-level, it has found it difficult to mobilise and react to profound changes in the industry but it has. The challenge for policy makers and funders is to support those in the sector that can translate change into growth opportunities.

This ecosystem section concludes with a recommendation that projects a long-term agenda of the literature sector to increase its synergy with the other government priorities.

¹²² Scottish Government. *National Outcomes* (2007), accessed at gov.scot.

Recommendation 30 – It is recommended that Scottish literature institutions demonstrate the value of and uses for Scottish literature to advance the aims and ambitions of other sectors, including the relevant Cabinet Portfolios.¹²³

¹²³ Examples of the relevant Cabinet Portfolios include (1) Finance, employment and sustainable growth; (2) Health, wellbeing and cities; (3) Education and lifelong learning; (4) Justice; and (5) Culture and external affairs.

7. INTERNATIONAL PROMOTION AND MARKET DEVELOPMENT

Scotland has a growing international profile. The Scottish independence referendum in particular and the recent political transformation in Scotland have brought the country a higher level of global attention.¹²⁴ Direct relations with the EU are being consolidated alongside the strong, extant diaspora links Scotland has, particularly with the rest of the Commonwealth, where both immigration and emigration have enriched Scotland's culture. This enrichment continues and is further powered by Scotland's universities, both through direct academic linkages, and through the staff and students that come from around the globe.

Scotland's cultural diversity is also rooted in relations with its neighbours. The West and North West of Scotland have strong linkages with the Celtic tradition, Irish and most notably the Gaelic language. Whereas, the North and North East look across the North Sea to Scandinavian culture, not least again through the historical influence of language. As a whole, Scotland's literary heritage is a living one that continues to be important in mediating the country's relationship with the world. Support for the literature and publishing sector as a whole, therefore, should develop new and existing international links in order to sustain and continue growing the sector, the wider creative industries and the economy and social wellbeing of the country as a whole, as well as further enhancing Scotland's international standing.

Scottish literature is distinctive, with its own historical tradition and canon. Scottish writers have an international perspective that can be traced from Walter Scott and Robert Louis Stevenson, through Muriel Spark and Alastair Reid to many of today's foremost Scottish writers. Unsurprisingly, therefore, Scottish publishing has a unique history, which in the face of international disruption across the publishing sector, is undergoing its own particular evolution. Alongside the writers and publishers, Scottish literature support organisations are also truly unique, in many instances world class, and on a national scale they present a comprehensive offer to writers, publishers, readers and others across the sector ecosystem.

Despite many of these strengths, however, according to the consultation there is a widely held feeling across much of the sector that not enough is done to coherently showcase, champion and build upon these contributors to literature in international terms. This view was widely expressed by individual writers, publishers and organisations alike.

Section 7 of this Review is devoted to this question, of what can be done to coherently showcase, champion and build upon the sector's strengths, beginning with the overall logic in crafting a strategic approach to 'Scottish literature international'. A reprise of the issues and the potential for writers, publishers, and indeed the literature support ecosystem follows, and the subject of translation is addressed as it pertains to both writers and publishers. Finally, Section 7 integrates the different suggestions as to the way forward and lays out recommendations that fit the evidence and consultations on the international theme.

The scope of this Review considers literature as an art form, as cultural heritage and as an industry. There are compelling reasons to encourage an international approach to each of these categories. Scotland is reaching out to the world at present and has new strategic policies for international relations and also specifically for its work with the EU.

There are four considerations to bear in mind for international promotion and market development of Scotland's literature sector.

- **Its contribution to international relations and 'soft' diplomacy** as an internationally significant and recognised cultural brand. Scotland is a world leader in working with cultural heritage and literary heritage is an important component. Edinburgh's next phase in development as a UNESCO City of Literature is a strong platform to take this forward.
- **Transnational cultural collaboration** results in creative, cultural, social and economic benefits for the sector, and for the people that work in it. Supporting the development of more international sectorial

¹²⁴ Including the Smith Commission Report recommending further devolution to Scottish Parliament.

partnerships will provide a base for transnational projects that include creative and business innovation, as well as stimulating transnational dialogue and exchange.

- **Opening up markets for Scottish literature** through a more focused and active approach to supporting the sector in establishing an increasingly effective presence abroad. More and better co-ordinated approaches to working with Scotland's internationally focused literary organisations are needed. Encouraging publishers to seek investment for more translation of Scottish writing, and for international initiatives with Scots and Gaelic language, should be addressed.
- **Incorporating an international aspect** to reader and literary cultural development in Scotland will enhance the current offer, and provide opportunities for transnational knowledge exchange and collaboration. This approach also offers opportunities to align the sector better with the wider curriculum, including languages, as well as research and Higher Education.

Need for a strategic approach

Although contemporary Scottish literature in many respects enjoys a strong international reputation, literature from around the world is more readily available than ever before, and consequently the current international market is increasingly competitive. English speaking countries and regions have aggressively developed policies and funding support that has paid dividends in international exposure. Whilst the US has for example been a net exporter of books for a century, sector driven strategies, such as the coherent approach in Ireland to the international promotion of Irish writers, has been enormously successful for smaller markets.

Apart from English speaking countries, smaller nations in Europe and elsewhere have also asserted themselves effectively in the international literature equation. Countries such as Iceland and Finland invest impressively in their literature, with sophisticated support structures and a long-term strategic commitment to the development and promotion of their literature internationally. It is done both for the benefit of their citizens and for the purposes of creative industries growth alongside cultural tourism and diplomacy. Support for translation into more widely read languages is a critical tool in their arsenal of support mechanisms.

Importance of International Perspectives on Writers

What would the works of Adam Smith be without the enormous contribution that global economic thinking made on his *Wealth of Nations*?

Scotland and, to a varying degree, Wales both share the opportunities and challenges of being represented under the UK umbrella globally. Within the UK framework, the British Council (among other institutions) promotes the English language and British culture around the world. Although this Review did not specifically examine the role of the British Council in promoting Scottish literature, it the institution does pay attention to Scottish literature, though it is more English-language orientated in terms of works and promotion. Nevertheless, the British Council is a major asset for Scottish literature and presents an opportunity that should be cleaved to, leveraging its global reach to help achieve Scottish objectives. Indeed, in the case of England, Arts Council England (ACE), which is not afforded the international remit bestowed upon Creative Scotland, achieves some of its international reach through a highly joined-up approach to collaborative working with the British Council.

Past literature reviews have pointed to the need for a more robust international thrust for Scottish literature.¹²⁵ It has been the subject for discussion throughout the numerous consultations and Reference Group meetings,

¹²⁵From Literature Forum for Scotland, the MMM Project The Legacy Final Report: Literature Nation (Oct 2009) as one of its guiding purposes stated *raising the prestige of Scotland's literature nationally and internally*. Specific aims included: strategic framework for the promotion of Scottish writers in key markets & festivals internationally; and a whole section with aligned aims on literature and tourism – literary tourism shouldn't be seen as an adjunct but should be central, with Scotland aiming to be an international model. Accessed in Appendix 2 at scottish.parliament.uk.

whether in the context of writers, publishers or literary organisations. Furthermore, such international focus is in line with the development strategies of other countries with whom Scotland shares some attributes; for example, in 2015 New Zealand completed a review of its national literature sector which provided clear recommendations and specific steps to develop its international presence. Likewise, in the same year Wales began undertaking a forward-looking review of international working and opportunities in the literature sector in Wales, focusing on strengthening its international institutions.

Conclusion 35 – Given the sector-wide appetite for a new direction to the promotion of Scottish literature internationally and the growing sophistication of the international strategies to promote national other literatures worldwide – a more strategic overview for Scottish literature internationally is appropriate. Such an overview would lead to for greater visibility of Scottish writers and writing, and increased sales and distribution of Scottish books.

Recommendation 31 – It is recommended that leading literature institutions and publishers convene a summit for laying the groundwork for a strategic and coordinated international presence. This work would be well positioned to inform the development of Creative Scotland’s International Strategy, forthcoming in early 2016.

Scottish literature international – writers’ and literary ecosystem perspective

The views and priorities of individual writers in determining more coordinated and strategic approaches to international working across the sector are presented below. On the basis of the consultation with writers conducted in this Review, the following factors are considered important in the international context:

- **Importance of travel** cannot be understated, both within the UK and abroad. Travel for both individual writers, their support teams and publishers can be critical for varying purposes, including for the creative activities (research, inspiration and intellectual engagement, to pursue residency opportunities, to meet other writers and build networks, etc.) as well as market activities (international sales, market development, etc.);
- **Supporting the development of international relationships** as a platform for collaboration and market development. This approach should consider partnerships across the scope of the sector, such as cultural cooperation projects, SME innovation, literary heritage and cultural tourism;
- **Making more productive and better co-ordinated use** of existing internationally focused organisations and individuals in the sector. This approach should aim at deepening and widening impacts in the literature sector, as well as developing the sector’s contribution to Scotland’s international strategy and working;
- **Building an international profile**, most visibly through use of digital and online tools;
- **Supporting the negotiation of better terms**, and establishing better contacts internationally; and
- **Translation and promotion** in foreign markets.

There was also strong support for the introduction of a new travel funding mechanism that responds to the short-term and fast turnaround needs of writers. In order to complement support structures for travel associated with longer-term strategic planning and targeting specific markets and partner bodies, a more flexible approach would support writers in responding to new opportunities.

Scotland’s literature sector celebrates significant international activity and initiatives, such as the poet-to-poet exchanges between Scotland and Iraq run by Reel Festivals. Many of these successes have arisen out of the sharing of best practices, including those in which Scottish organisations have played a leadership role on the world literature stage. Nevertheless, it was noted in the consultative process that there is a lack of coherence in many of the sector’s international activities. Whilst autonomy and the ability to respond and innovate individually is important for the success of the sector, enhanced coordination and knowledge sharing would

help align initiatives and introduce opportunities for further joined-up approaches, efficiencies and effectiveness in achieving collective international mandates.

Creative Scotland prioritises the ambition for Scotland to be 'a distinctive nation connected to the world', putting international working high on the agenda. As such, Creative Scotland's forthcoming international strategy will be informed by the findings and conclusions of this Review.

Conclusion 36 – From the discussions on the international dimension of literature organisations, there emerged the strong conclusion that there should be a sustained and effective international strategy for Scottish literature that represents the interests of writers, publishers and the wider sector with specific means and outcomes identified.

Which model is right for Scotland?

As indicated earlier, whilst Scotland has an international presence, other jurisdictions have deployed specific international development strategies. Norwegian Literature Abroad (NORLA), Ireland Literature Exchange (ILE), and Finnish Literature Exchange (FILI) are somewhat similar organisations that are well established to promote their countries literature through exchanges and translation – rather than focus on trade. For the purposes of writers' exposure and promotion, these formulations are of interest to Scotland. A brief description of these institutions follows.

Finnish Literature Exchange (FILI)

FILI is the central organisation that for Finland aims to:

- support the translation, printing and publication of literature, and
- promote the awareness of Finnish literature around the world.

Linguistically, Finland has three languages, Finnish and two minority indigenous languages: Sami and Finland-Swedish. Finnish literature encompasses all three.

There is a clear coordinated focus to all FILI's work which seeks to align the various support mechanisms to meet particular project goals. Most importantly and recently, this included Finland's presence at the 2014 Frankfurt Book Fair as the Guest of Honour nation. Other priorities currently include: minority indigenous languages, comics and the graphic novel; and the mentoring of new translators through their masterclass pilot.

FILI provides Finnish publishers and authors with a variety of grants for translation, both into and from Finnish, publishing grants for non-fiction Finland-Swedish works, translation and printing grants for Swedish fiction, translation grants for Sami into Finnish, as well as printing grants for such works and printing grants for original Sami works.

For foreign publishers (and literary magazines), FILI offers translation grants for Finnish literature into other languages, as well as a specific strand for Nordic publishers of Finnish and Finland-Swedish works into other Nordic languages. They also offer specific printing grants for foreign publishers to produce children's picture books and comics/graphic novels that have been translated from the three indigenous languages.

In total, the grants amount to over €600,000 pa (approximately £550,000) and cover about 300 projects. Alongside these grants, there is a coordinated programme of outreach and 'matchmaking'. With the former, FILI focuses on having a stand at the book fairs in London, Bologna, Gothenburg and Frankfurt, as well as at the Angoulême international comics festival. With the latter, FILI actively tries to bring international publishers and editors to Finland to connect them with relevant publishers and authors, as well as focusing specifically on non-fiction publishers, childrens/young persons' literature publishers and German publishers and editors during Helsinki Book Fair. Arranging visits to other book fairs and literary events are also undertaken.

To increase opportunities, competence and their profile of translators of Finnish literature, FILI offers travel grants and a residency programme, grants with which to produce sample translations from all three indigenous languages, specific events to develop translators, a register of talented translators and an online platform to engender a community of Finnish translators so as to facilitate contact between practitioners from across the globe. However to increase the flow in of translators, they offer internships to students from abroad who are considering or starting a career in translation. To increase the visibility of translators FILI nominates a recipient for the State Award for Foreign Translators.

These various mechanisms result in 200+ titles published in 40–50 languages every year.

In addition, FILI produce and maintain an online portal to an online English language journal of Finnish literature, as well as maintaining a translation database for reference.

Norwegian Literature Abroad (NORLA)

NORLA, akin to FILI and WLE, is the central organisation charged with promoting Norwegian literature and the dissemination of knowledge of Norwegian books and writers abroad. Founded in 1978, NORLA has contributed to translations of Norwegian books into 63 languages. It coordinates participation in international book fairs and provides advice and guidance to translators.

NORLA organises its activities around three constituencies: translators, agents & publishers and non-Norwegian organisers. For translators, NORLA's approach is two-fold – offering funding schemes that encourage translation of Norwegian works, and schemes that raise the competency of translators. The aim of NORLA's translation subsidies is to contribute to increasing the number of Norwegian books that are translated, published and distributed abroad and so, to this end, they have established criteria which are regularly reviewed and which bestow prioritisation for those books that meet these criteria.

Translators are offered subsidies on sample translations from Norwegian fiction or non-fiction, whether adult or children's, as well as travel grants to Norway to meet with Norwegian publishers, agents and authors. Following the success of the Translators Hotel pilot project in 2014, NORLA is offering the opportunity for two-week residencies in central Oslo, which affords translators the opportunity to scope new work, initiate new contacts with writers, agents, publishers and institutions (including NORLA staff), and to meet with writers whose work they have or are translating.

NORLA has also started a mentor scheme to raise the competence of translators, addressing both beginners who are struggling (to help them avoid common pitfalls), as well as experienced translators who need new inspiration or help with a new challenge, such as a new genre or language.

For agents and publishers, NORLA has made available a series of subsidies and grants for translation, production and travel. All agents and publishers are eligible for subsidies for sample translations from Norwegian works. Foreign publishers, including those from other Nordic countries, can apply for subsidies of whole Norwegian works (both fiction and non-fiction). NORLA also participates in a Nordic Council programme that offers subsidies for translation of quality work in one Nordic language into another – preference being given to small region languages, poetry, drama and children's & young persons' literature. A specific translation grant is available for the translation of contemporary dramatic Norwegian works into other languages for the express purpose of production/ presentation of those works. In addition, travel grants are available for agents and publishers (and members of the press) to travel to Norway to meet with Norwegian publishers, agents and writers.

Lastly, there are a number of specific travel grants that will fund authors and lecturers invited to festivals, conferences, and institutes of higher learning, as well as a travel grant for authors to attend book launches or presentations organised by foreign jurisdictions.

As a sign of the value it places on translation, NORLA awards an annual prize of 20,000 Norwegian kroner to a translator who has *'contributed significantly to the translation of Norwegian literature into foreign languages, as well as to the promotion of Norwegian literature abroad'*.

Ireland Literature Exchange (ILE)

ILE, a not-for-profit organisation, was established in 1994 and is funded by Creative Ireland and the Arts Council of Ireland. It is charged with being the national organisation for the international promotion of Irish literature, in English and in Irish (Gaelic), abroad. It is based at Ireland's oldest university, Trinity College Dublin, and is an constituent member of the Centre for Literary Translation. Up to 2015, ILE supported the translation of 1,650 works of Irish literature into 55 languages around the world..

The ILE has a tight focus to its work, concentrating on three core programmes.

- **Translation Grant Programme:** ILE's translation grants are available to international publishers who are seeking support for translations of Irish literature* and to Irish publishers for translations of foreign literature into English or Irish. ILE offers a substantial contribution towards the translator's fees.

*Eligible genres: literary fiction, some literary non-fiction, children's/young adult literature, poetry and drama.

- **Residential Bursary Programme:** ILE runs an annual programme of residential bursaries for professional translators working on already publisher-commissioned translations of Irish literature. The purpose of the bursaries is to enable translators over 3 weeks in Ireland to immerse themselves in the cultural, linguistic and artistic environment of contemporary Irish literature, whilst meeting authors, working on a translation and carrying out research in Irish libraries.
- **Author and Translator Events:** ILE runs a limited number of international author and translator events during the year.

In addition the ILE:

- produces an annual catalogue, *New Writing from Ireland*, of the best latest Irish writing for which translation rights are available;
- coordinates attendance at and participation in international book fairs, at which the best latest Irish writing is promoted – the ILE has partnered with Culture Ireland;
- partners with the Oscar Wilde Centre, the School of Languages, Literatures and Cultures (Trinity College Dublin) and Dalkey Archive Press in the establishment of the new **Centre for Literary Translation**. This cluster initiative colocates culture, business, research and training of practitioners with the aim of stronger, more diversified collaboration and cultural exchange and enrichment. It is intended as a facilitator for improved community outreach to Dublin, Ireland and abroad, as well as for generating increased funding for literature and translation activities;
- has established a **Translator-in-Residence** in collaboration with the self-same Centre for Literary Translation;
- participates in international translation projects; and
- provides information to publishers, agents, translators, authors, journalists and other interested parties.

Strategically, the ILE has focused on the potentially vast Chinese market: by producing a Chinese-English catalogue; disseminating an essay in Chinese extolling Irish literature (*The Irish Literary Tradition & the Contemporary Irish Novel*); in 2014 it awarded the residential translator bursaries to Chinese translators and the *Translator-in-Residence* to the young Chinese translator Huiyi Bao; and has inaugurated an Irish-Chinese Literature Translation Prize, which went to Ma Ainong, translator of Claire Keegan's *Walk the Blue Fields*.

Reykjavik – Iceland’s Literary City

Reykjavik, Iceland’s capital city, demonstrates the makings of a small and remote - yet vibrant and flourishing - literature and publishing success story. Celebrating amongst the highest literacy rates in the world today and a 1,000 year history of literature dating back to the medieval Icelandic Sagas, literature plays a central role in the culture, economy and lives of its citizens. Icelandic literature is respected, cherished and upheld by government, industry and Icelanders themselves, demonstrated through the vast range of institutions, events and traditions found across the country.

- **Reykjavik UNESCO City of Literature** The fifth city in the world to be designated a UNESCO City of Literature, and inspired by Edinburgh’s success before it, Reykjavik is home to the majority of Iceland’s writers and publishers and became the first to be honoured where English was not a native language.
- **“The Book-Flood Before Christmas”** Jólábókaflóð is the nationwide tradition instilled in Icelanders from all walks of life, where Icelandic literature is celebrated across society and new Icelandic books are released in the months before Christmas. From October through December, publishers distribute books through booksellers, libraries, cafes, bars, schools and workplaces. The most apparent tradition is the act of buying a loved one a book for every Christmas. In fact, books are known to be the most popular Christmas gift and every a book catalogue is delivered to every household.
- **Frankfurt Book Fair Guest of Honour** In 2011, Iceland as the first Nordic country to become a Guest of Honour, providing the opportunity to promote and distribute Icelandic literary culture to the world. An estimated 200 titles (Icelandic titles and German titles on the subject of Iceland) were published in the German language markets during this initiative.
- **Reykjavik International Literature Festival** Since 1985, the biannual literature festival has become an increasingly important platform for both readers and writers, attracting numerous international and Icelandic writers, publishers, translators and other stakeholders with an aim of increasing local audiences and connecting Reykjavik to the world.
- **International Children’s Literature Festival** Since 2001, the biannual event expands reader development amongst young people and has co-hosted the International Poetry Festival.
- **Literature a component to all cultural festivals** All major cultural festivals in Iceland have proudly featured a literary component, ranging from programming at Iceland Airwaves music festival, the Reykjavik Arts Festival, Reykjavik Culture Night, the Winter Lights Festival and the Reykjavik Children’s Culture Festival.
- **World Language Centre** The Vigdis Finnbogadóttir Institute of Foreign Languages is establishing the centre in order to provide the facilities and resources for teaching, researching and disseminating knowledge of languages and culture – encouraging language skills and cultural literacy in Iceland.
- **A strong indigenous publishing sector** Iceland boasts an extraordinarily high number of titles published, numbering five titles published for every 1,000 Icelanders, and where the average print run for fiction literature is 1,000 copies. In fact it is estimated that one in every ten Icelanders will publish a book.
- **Literary tourism** For both Icelanders and international visitors, literature has stimulated the country’s tourism sector, with tours including saga destinations.
- **Reykjavik City Library** The nation’s largest public library welcomed 2.5 times more visitors than the population of the city itself in 2009, totalling 1.2 million book loans. Libraries are integral to society, and every council is required to have one.
- **Thriving booksellers** Iceland boasts the highest number of booksellers per capita in the world.
- **Investment in translation** Iceland boasts the highest volume of importing and translating per capita in the world.*
- **Supportive media** Literature is celebrated across Icelandic media, including through regular weekly television broadcasting, newspaper coverage and radio programming.
- **Cross-fertilisation with other art forms** – Literature features prominently in all other art forms in Iceland, and collaborations between film, television, music and theatre are commonplace.

* Wilcox, Jonathan and Latif, Zawiah Abdul (2007). [Cultures of the World: Iceland](#).

Conclusion 37 – For Scotland, an organisation which is an advocate for Scottish literature internationally could have a very positive impact on Scotland’s global presence. Its remit could include supporting travel, facilitating exchanges, translation, and coordinating activity across the country. The organisation should develop a wide range of international contacts and opportunities. It would be both a champion and shop front for Scotland’s writers, publishers and organisations. Ideally, it would also lead to the development of more and better relationships with international organisations, including within the EU and prospective bidding partners for EU funds, offering in turn a major impact on capacity to explore new initiatives.

Recommendation 32 – It is recommended that Scotland investigate the establishment of an international literature promotion organisation in the long term with the following remit:

- **Increase the level of travel and exchange for Scottish writers but recognise that writers need flexibility in determining the international opportunities most appropriate for them, which may or may not coincide with the more strategic opportunities or those of benefit to the industry.**
- **Develop a repository of international resources and information (e.g. partnership and funding opportunities, residencies or events, service providers such as agents, or avenues for publication in international markets, including anthologies and journals, etc.).**
- **Keep track of which countries writers visit to develop a more robust intelligence base for counterpart organisations in foreign countries, as well as the literature contacts in those countries.**
- **Promote to foreign publishers the opportunity to apply for translation grants and create a clear mechanism via which foreign publishers can access support for translation costs.¹²⁶**

The remit for a ‘Scottish Literature Exchange’ (SLE) should be one of presenting a coherent, international image of Scottish literature and generating greater international awareness, both as a way of increasing exposure of writers and their work. The role would therefore also be one of cultural diplomacy and advocacy on the world stage.

The new ‘SLE’ would work with others, bringing coherence to the activities, celebrating the successes of Scottish literature and other activities, such as the Creative Europe Desk, international agendas for hubs, linking universities, international partnership development, operating a central repository of information for international travel among writers, both to and from Scotland. The SLE could also take on a role as an observatory for the sector, tracking and communicating international developments, trends and partnership opportunities.

A range of tools were suggested which might be developed to assist this work, ranging from the straightforward, such as physical or digital marketing materials (e.g. a kit) to promote Scotland’s literature sector for international trips, or the negotiation of a searchable ‘Scottish fiction index’ or location within online books retailers, to more complex advocacy work such as exploring the opportunity to promote literature to Scottish diaspora worldwide.

In the current economic climate, finding funding for a new organisation is likely to prove challenging, so prioritising as a sector and building on what exists may be key in the shorter term.

¹²⁶ Note that Creative Scotland is developing such a mechanism with Publishing Scotland, and it will be launched imminently.

Scottish literature international – publishers’ perspective

Section 5 indicates that publishers sell mostly outside Scotland – and identifies the most important market as the rest of the UK, whilst the rest of Europe is important too. Individually, Asia, North America and Australia/New Zealand were relatively smaller markets for Scottish publishers but important as a whole.

There is a range of models for publishers to sell rights into new markets. Larger publishing companies have their own rights sales teams, whereas smaller publishers tend to contract rights agents to broker deals on their behalf. In the main in Scotland, the Scottish Association of Literary Agents represents these agents. In general, larger individual publishers invest in exhibition space at the Frankfurt Book Fair, London Book Fair and other appropriate trade opportunities. Amongst Scottish publishers, only Canongate and Edinburgh University Press choose to exhibit solo at significant book fairs. Publishing Scotland represents the interests of a range of Scottish publishers at the aforementioned fairs, whilst companies such as Birlinn are represented by Independent Publishers Group (IPG). In addition, Scotland’s independent literary agents attend most of the important literary fairs across Europe. Publishing Scotland currently facilitate attendance for publishers at international book fairs via the Go See Fund.

A publisher such as Canongate constantly watches trends and maintains a strong network of international publishers, distributors, and other key sources of market intelligence. Other publishers benefit from having years of international experience, exposure, relationships and sales expertise. Meanwhile, a number of publishers rely on a few key distributors and may not even exhibit in the Publishing Scotland stand at the Frankfurt Book Fair.

Scotland’s international presence in these trade contexts is important and could be assisted by greater representation from other agencies with a vested interest in the creative industries. The first attendance at the preeminent international book fair in Frankfurt in October 2014 by Creative Scotland, as well as attendance at and greater engagement with smaller key fairs including Pisa and Vilnius book fairs, has spurred collaborative working and new demand from foreign publishers for support to translate Scottish works, bringing them to new markets. For international trade, the impact of face-to-face meetings has bolstered Scotland’s presence internationally and helped to develop new and maintain existing strategic relationships.¹²⁷ As with other aspects of the sector it is evident that the institutional weight Creative Scotland can bring in terms of visibility can be leveraged to the advantage of the sector itself.

The needs of Scottish publishers in addressing international development of markets are not uniform, and care must be taken to develop flexible solutions that respond to this reality. It is also important to recognise that, in the words of one Reference Group member, ‘not all books travel,’ and that the most significant audience for a particular title, or indeed list, may still be within the UK or Scotland specifically. Not all publishers will have the ambition or editorial desire to expand in this direction. A summary of the needs of publishers with an interest in international development is as follows.

- Scottish publishers need exposure and generally seek to gain better recognition among booksellers and book buyers; they need critical press for their titles, including getting on sales lists for London.
- Scottish publishers need financial support to travel to book fairs, festivals and literary events, in order to promote their work and improve their craft. Such visits also have the added benefits of cultural exchange, which can enrich the writers’ works and lend towards cultural diplomacy for Scotland.
- Scottish publishers need maintain their existing networks and develop new contacts with foreign distributors, agents, and publicists in order to boost rights’ sales for foreign territories.

¹²⁷ Such interactions need not be formal exchange programmes but organisations need to be alert to such exchanges for the opportunities they could present. For instance, in trying to establish links between the crime-writing festivals of Bloody Scotland and Barcelona’s BC Negra, individuals from Bloody Scotland went to Barcelona, so as better understand each other’s local literary ecosystem and writers. This not only will result in a potential exchange of Scottish and Spanish/ Catalan writers but a return visit from a delegation from Barcelona, has led to stronger relationships being established between Edinburgh and Barcelona city authorities and literature bodies, as Barcelona prepares a bid for UNESCO City of Literature status.

Whilst writers traveling to book festivals stimulate book reader interest in their works, which is mutually beneficial for both writers and publishers, they do not substitute the efforts publishers need to make themselves in order to develop their presence at book fairs.

A major issue raised by Scottish publishers was a lack of international support. For some sector stakeholders, gaining support from bodies such as SDI was a challenge, due to publishing not being identified as one of their priority sectors. Support from these bodies can come in the form of active or passive initiatives, involving varying levels of effort ranging from lower-investment and high-impact marketing support such as its pre-existing market-facing material (e.g. website) to higher-investment and high impact support such as travel, trade and investment.

This Review has identified momentous industry appetite for collaboration with Scotland's support bodies such as SDI and Scottish Enterprise to further their international reach. Meanwhile, SDI's officers abroad – or the Scottish Government Innovation Hubs proposed as part of the new International Framework – could be provided with the appropriate kit so they are aware of what Scottish publishers are looking for in their markets, and possibly participate in some distinctive events at book fairs where Scottish presence is strong or with a high return offering.

There are opportunities for Scotland's international support bodies such as SDI to support the publishing sector in inbound foreign investment. Inbound investment is particularly timely for the sector as there has been very little foreign investment in Scottish publishing over the past several years.¹²⁸ In fact, over the last decade, some London-based publishing groups have retreated from Scotland (e.g. Wylie). Such dis-investment is likely part of a global phenomenon of consolidation.

In order to attract foreign investment in publishing, it would be important for Scotland to convey the message of its highly hospitable business environment; the flourishing Scottish publishing and writing scene; the environment of innovative structures for writers and models; and the high growth potential of new initiatives in publishing (e.g. linked to new market niches or technology exploiting literature IP in novel ways).

Part of the positive story for publishing is the growing importance of writer and self-publishing hubs discussed throughout this Review. Attracting foreign writers – as well as international agents and publishers – is conducive to the continuing development of a fertile environment for writers and the sector ecology as a whole. It helps shape the awareness that Scotland continues to be a centre of literature.

¹²⁸ The exception has been in persuading Amazon to invest in building its largest UK distribution centre near Edinburgh with the help of a regional assistance grant of £2m and a training grant of £500,000 by Scottish Enterprise, supported by its inward investment arm Scottish Development International. While this Review has not assessed this particular inbound investment in terms of impact on the publishing industry, it is noted that the investment has had its detractors among Scottish publishers, particularly in terms of the high cost of jobs created. Source: The Scotsman, *Amazon jobs come at a high price for Scotland*, Andrew, H. (8 December 2011), accessed at scotsman.com.

Scotland's International Framework

The Scottish Government's International Framework for Development also holds potential opportunity for the development of literature and publishing at an international level. Although in its early stages of development, initial ambitions and proposals in the framework are as follows:

Businesses and Institutions

- Are globally competitive.
- Are able to cooperate with international partners to exchange knowledge and best practice.
- Are able to positively respond to export and trade opportunities.
- Are innovative and able to access international funding opportunities.

Targeted support

'We will provide targeted support and advice to assist our people, businesses and institutions identify and seize international opportunities; helping them capitalise on international opportunities through developing domestic capability.'

Collaborative working

'We will develop One Scotland Partnerships and Innovation and Investment Hubs to promote and deliver greater coordination and collaborative working, investment, innovation and knowledge exchange.'

Source: Scottish Government. *Scotland's International Framework* (2015), accessed at gov.scot/internationalframework

While more focused on the trade and industry aspect of publishing, there is opportunity within this framework for the sector. It will be important for the sector to capitalise on this opportunity as it develops.

Conclusion 38 – Scottish literature and Scottish publishing represent assets for those agencies equipped to foster foreign interest in Scottish industry and society, so bodies such as SDI and the British Council have a stake in increasing their understanding of the potential of the sector.

Recommendation 33 – It is recommended that Creative Scotland, and those in the sector leading on advocacy, work with relevant parties to develop the story and materials required to equip stakeholders with a role to play in the sector (including SDI and the British Council). The objectives would be both to communicate the positive environment for writing and publishing in Scotland, and to foster the connections to increase inbound investment in literature.

Which model is right for promoting Scotland's publishers internationally?

Whilst the proposed Scottish Literature International should help promote Scottish writing and commerce to some extent, it is not primarily a service to publishers. What is needed is a vehicle to concentrate on the more business-focused initiatives recommended in this Review. Recently, some countries have appeared to be taking different routes to international sales, as they have not been satisfied with the results for commercial book sales internationally through literature exchange organisations:

- **New Zealand**, which by its own admission is not fully equipped for supporting its publishing sector,¹²⁹ has concluded that it will seek to commission a group that can provide a turnkey service to promote New Zealand books internationally;
- **Wales** is contracting a consultant to work with the Welsh literary sector to devise the best approach to fulfil its international ambitions – implicitly acknowledging that the Wales Literary Exchange on its own is not sufficient, and a more cohesive approach to sector support is desirable.

In many jurisdictions the publishers, either themselves or through their representative groups or trade bodies, have promoted their interests abroad. For example, the Publishing Association in London acts on behalf of English, Welsh, and Irish – but not Scottish – publishers in terms of supporting international sales. They do so primarily by convening publishers in fora where they can share information about different markets – typically global regions such as Africa and the Middle East. The Publishing Association conducts these sessions in a manner that complies with the country's competition policies, providing a safe environment for discussion.

There are variations, meanwhile, such as Books Canada, which is a non-profit body mainly funded by Canada's federal government. It is mandated to organise presence at international book fairs for Canadian French- and English-language publishers. On a provincial (or regional) level, Canadian provincial governments also contribute towards travel and other support for publishers. The Canada Council for the Arts, Canada's national non-departmental public arts council body, administers the major literature translation grants, which are considered more directly aid to writers.

Publishing Scotland, in developing their 2015-2018 business plan for submission to Creative Scotland's RFO funding programme, placed a much greater emphasis on developing the scope of their international activity. For example, for the first time in 2015, the organisation will host an International Fellowship programme, part funded by Scottish Development International (SDI) designed to meet some of the needs outlined above. In a programme of activities designed to showcase Scottish writing, publishing and literature sector activity, ten editors from a range of countries will visit Scotland in 2015. The Fellowship is set to coincide with the Edinburgh International Book Festival, maximising the opportunity to showcase as much Scottish work as possible in a relatively short time frame. The programme will also overlap with the newly expanded literature 'cluster' of an international showcase programme, Momentum. The Momentum programme is a joint funded initiative by Creative Scotland, British Council and Festivals Edinburgh designed with similar goals but aimed specifically at Festival Directors and international literature programming professionals.

Conclusion 39 – Given the need to direct more resources toward the business end of international development, and that publishing is a marginal activity for Scottish trade development authorities, some organisation should be designated with more authority and resources to promote Scottish publishing abroad.

Recommendation 34 – It is recommended that Publishing Scotland be approached to carry out the support role in international markets – as the best positioned agency to pursue this line of activity – and to work with Scottish Development International (SDI), Scottish Enterprise and, potentially, with the Scottish Government via the International Development Framework, to increase their involvement.

Priorities would include coordinating business and sales activity between other Scottish organisations, including bringing buyers to Scotland, expanding Scottish Enterprise capacity, and building a knowledge base in SDI and relevant initiatives so they include literature and publishing. An expanded role would require the support and endorsement from other agencies with a vested interest in developing Scotland's creative industries on an international stage.

¹²⁹ Creative New Zealand. *Review of Literature*, (9 March 2015), accessed at creativenz.govt.nz.

Helping Scottish publishers prepare for international fairs would be an important role, especially where maintaining and developing international relationships is needed. Meanwhile, a more 'intelligence' driven approach to promotion is likely to result in more impact through attendance at smaller or targeted book fairs such as Bologna International Children's Fair or the Prague Book Fair (which has a poetry presence).

At the same time, given Scotland's greater presence internationally across other spheres of public life and the current strength of Scottish writers, publishers and the wider sector ecosystem, the major opportunity of becoming Guest of Honour nation at Frankfurt should be considered. Whilst such an endeavour would require significant investment (in the millions of pounds) along with sector buy-in from the Scottish literature community, it would contribute towards long-term goals and ambitions of the sector. Whilst Scotland would need to be market-ready in order to take advantage of the presence, other countries who have already invested in becoming a 'Guest of Honour' report significant increases in sales after their exposure in Frankfurt, or at the London Book Fair.¹³⁰

One prominent Scottish publisher remarked how the Frankfurt and London Book Fairs were good for meeting international partners, but as a delegate there was little time to establish a rapport and whilst publishers and others do attend, their attention should also be brought directly to Scotland in order to generate more interest and business. A campaign to obtain that designation from Frankfurt would be needed, and the whole preparation would take a number of years. Indeed, other European literature markets view Frankfurt as their main book fair. The Danish Arts Council and Swedish Arts Councils, for example, exhibit at both Frankfurt and smaller or more niche book fairs for a balance, as 'it's important to even out the chances'.

Recommendation 35 – Assuming that Publishing Scotland becomes the international development vehicle for Scottish publishers, it should work with publishers and other key stakeholders to devise an international book fair strategy, including careful consideration of the cost-benefits of going after Guest of Honour status at Frankfurt.

Translation – domestic and international relevance

Translation has a significant role to play in bringing Scottish literature to an international market and to potentially millions of readers worldwide. There are various aspects to the issue of literary translation – that of translating Scottish work (from any of the three indigenous languages) into other languages; the translation of work of other languages into English/for the English language market; and writer and reader development activity around translation.

Translating Scottish work into foreign languages

Consultation for this Review was chiefly focussed around the first of these dimensions to the discussion – translating Scottish work into another language. As noted, translation is an integral part of any literary ecosystem, serving as the bridge between the literature of one language and the readers of another and offering enormous market potential for writers and publishers alike. The Literature Alliance Scotland, in its submission to the Scottish Parliament's Education and Culture Committee ahead of the Scottish independence referendum, stated its view that translation was a vital part of Scotland's cultural diplomacy.¹³¹ To that end, translation is supported by the vast majority of cultural agencies in Europe. Scottish Arts Council (SAC) and Creative Scotland

¹³⁰ Creative New Zealand reported that as a direct result of New Zealand being Country of Honour at the 2012 Frankfurt Book Fair the international rights to at least 243 New Zealand works have been sold. The number of applications for translation support (including by overseas publishers) has increased reaching a high of 24 translation grants in 2013-14. Source: Creative New Zealand. *Review of Literature*, (9 March 2015), accessed at creativenz.govt.nz.

¹³¹ The Literature Forum for Scotland's (now the Literature Alliance Scotland) submission (2014) to the Scottish Parliament's Education and Culture Committee's Scotland's Educational and Cultural Future Inquiry, accessed at scottish.parliament.uk

have long recognised the importance of translation – in 2007, SAC commissioned a study on the importance of translation.¹³²

In 2015, a new translation fund was devolved to Publishing Scotland via Creative Scotland to provide support to foreign publishers to incentivise buying translation rights to Scottish titles, and thus profiling Scottish writers internationally. Details of the fund are to be launched in summer 2015 with the first of two annual intakes of applications scheduled to follow the Frankfurt International Book Fair 2015. Although the initiative is welcome, it is noted that as of 2015, funds will only support a proportion of previous levels of activity and are not expected to come close to meeting a high demand. Throughout the consultation the importance of increasing activity in this area was cited on many occasions.

Aside from providing direct support to foreign publishers, individual publishing companies indicated there were a number of additional ways in which they might be supported, according to their unique circumstances, to sell more international rights to Scottish work – although as noted it is often agents or writers themselves who retain these rights. Creating and maintaining a better network of international contacts was one such example.

Conclusion 40 – There is sector wide recognition of the importance of translation. Scottish publishers have varying degrees of market presence abroad, and manage relationships with a wide variety of distributors, agents, publicists, and foreign publishers. Likewise they retain varying degrees of responsibility for managing the international rights’ of their books. It is important that publishers and agents are kept informed of available subsidy in order that they might use this as leverage in negotiations.

Recommendation 36 – It is recommended that Creative Scotland work with Publishing Scotland to brief the sector on relevant activity and to ensure that key foreign publishers understand how to apply for translation grants. Collective opportunity – such as training or introductions to specific markets – should be identified and supported.

With respect to translation subsidies and their administration, foreign models for international development that have been explored as part of this Review have generally included translation in their remits. The Irish Literature Exchange (ILE), Welsh Literature Exchange (WLE), Finnish Literature Exchange (FILI) and Norwegian Literature Abroad (NORLA), for example, all include translation support. The literature exchange model is a logical champion for translation, enabling the coordination to be done by the same actors developing the international relationships and network of Scottish and foreign writers, festivals and other literature stakeholders.

Recommendation 37 – Administering funding for translation, as well as the outreach to key foreign publishers so that they understand how to apply for translation grants, would fit neatly within the remit of the Scottish Literature International model proposed above.

Translation of foreign language work into English

In terms of the translation of work from other languages into English, and Scottish publishers developing these ‘product lines’, it should be noted that the UK in general trails woefully behind most other European nations. A recent study from ‘Literature Across Frontiers’ cited the percentage of titles of literature in translation sold in the UK as compared to the number of titles sold totally averages around 4.5%.¹³³ Publishers cite this as a notoriously difficult market to crack amongst UK readers, and publishing literature in translation represents high risk in

¹³² Scottish Arts Council. *Research into Translating Literature: A Strategic Approach for Scotland* (October 2007), accessed at scottisharts.org.uk.

¹³³ Literature Across Frontiers. *Three percent? Publishing data and statistics on translated literature in the United Kingdom and Ireland* (Dec 2012), accessed at lit-across-frontiers.org.

investment terms. However, there are benefits for readers in expanding their horizons, and some publishers have been able to leverage the subsidy to explore this potential.¹³⁴

Developing greater expertise in translation

One potential avenue for developing the practice of translating foreign works into English may be closer engagement on behalf of publishers with the third element to translation noted above – that of activity related to the development of writers and readers in translation. Many Scottish organisations including Cove Park, Scottish Poetry Library, Scottish PEN and Edinburgh International Book Festival offer platforms which present international writers to Scottish audiences, or programmes specifically aimed at increasing skill and interest in translation as an art form, including residencies and workshops run by Cove Park and SPL respectively, and translation slams or bilingual readings offered by festivals such as StAnza. Consultation from the Review found that further celebration of translation would be welcome by a wide-range of the literature and publishing community, and promoting excellence in the craft through the expansion of awards and prizes would also raise awareness and potentially retain and attract talent in the profession.

Only nine people in the Nordicity survey identified themselves as translators and there is undoubtedly room for growth in the business of translation. There are established translation programmes within higher education (such as at Heriot-Watt University and the University of Edinburgh) as well as newer programmes, for example, at the Universities of Stirling (2010) and Glasgow (2012). The University of Edinburgh also hosts the annual Scottish Universities International Summer School (SUISS) at which the Edwin Morgan Translation Fellowship (funded by Creative Scotland) offers a funded place on the six-week Text and Context course to professional translators with an interest in 20th century and contemporary Scottish writing. Support for the practice of translation in the UK generally looks set for reinvigoration via the recent merger of the British Centre for Literary Translation into the National Writers' Centre, Norwich. There is optimism that this will extend to additional support for translators based in Scotland, perhaps through partnership working with Scottish organisations.

¹³⁴ Scottish Publisher of the Year, Sandstone Press has received funding from NORLA to translate and publish a series of Norwegian crime novels. In addition to scooping several international prizes, the books have gone on to be bestsellers for the publisher. Sandstone has, in turn, sold the rights to some of its titles into Scandinavian markets through its association with NORLA. Creative Scotland also part-funded these translations. In Addition, English PEN provides financial support for translation open to publishers across the UK.

8. BRINGING IT ALL TOGETHER

In bringing this Review to a conclusion, there are two underlying conditions that permeated the body of the study: (i) disruption and expansion of scope, and (ii) reinforcing mainstream societal goals.

Disruption and expansion of scope

Literature has enormous historic legacy for Scotland. Today, as has been described, the traditional publishing model is in flux, and the literature output is more diverse in format, audience and appeal than ever before. It is also more intertwined with other creative sectors than in the days when they were separate pillars without much integration amongst them. Framing any direction concerning Scottish literature must bear these trends in mind.

- This Review articulates the extension of the scope of Scottish literature to encompass a wider pool of writers working in new environments – with fellow writers and with creators in other sectors.

Reinforcing mainstream societal goals

Scottish literature policy is not divorced from the broader socio-economic goals of Scotland. Indeed, this Review acknowledges and identifies the links the sector has to these goals – in education, social development and wellbeing, skills upgrading and jobs for young people, and tourism and economic development. Policies designed to advance literature from a cultural perspective should also be framed to foster improvements in these other policy areas beyond culture.

- This Review challenges Scottish literature to elevate its game and forge stronger partnerships with Scottish institutions with education, health and well-being mandates.

Meanwhile, literature sector stakeholders have not been idle in these directions in the past. Far from it – many individuals and organisations are pushing ahead with enthusiasm and purpose. It is hoped that the articulation emanating from this Review will highlight, focus and energise literature development in all the manifestations examined, and make the case to such institutions that they have as much to gain as the literature sector in this two-way, mutually supportive exchange.

This Review aims to further mark the distinctiveness of Scottish literature through Scottish writers, publishers and other stakeholders that promote and nurture literature. It profiles writers and publishers, drawing some conclusions as to what directions they should head. It outlines the crucial stakeholders within the Scottish literature ecosystem, and presents the development of new opportunities to promote and sell Scottish literature abroad. Throughout this Review, the data, facts, literature sector knowledge-base and parallel experience came first, upon which conclusions were drawn and recommendations for action articulated.

Identifying the gaps

In this Review, many gaps were identified, in particular problems or issues not addressed, or priorities not set, or responsibilities not established. Some of the major gaps include:

- **Writers:** insufficient support for writers throughout their career; gaps in provision of skills to meet the needs of a changing sector and publishing environment; lack of support for the standardisation of arrangements and contracts between writers and third parties; lack of support or coordination for international initiatives; and a decline in critical coverage.
- **Publishers:** lack of responsible party to help grow publishing as an industry; lack of data and understanding of the breadth of innovation in publishing to make the case for the Scottish publishing sector; issue of transparency in terms of Creative Scotland support, and commercial accountability; lack of coordination for support of independent and community oriented booksellers; and transition paths to replace lost revenue in the digital era.

- **Literature ecosystem:** increased support of geographic diversity and addressing equalities issues; weak relationships with EU on co-funding (though recognising it is complex and progress requires investment); potential for networking across new literature hubs; gap in alignment of libraries and tourism with Scottish literature output; lack of networks amongst festivals for knowledge sharing and leadership; not full appreciation of translation.
- **International presence:** no lead organisation; need for dual track institutions; lack of strategic and long term international planning.

Setting the strategy

One of the objectives of this Review was to provide strategic direction for the literature sector and community. Throughout the 38 recommendations, the Review has opted for strategic guidance, typically looking for leadership within the literature community to seize different opportunities and address the priority issues.

As illustrated by the recommendations concerning the nurturing and organising the network of literature (or creative sector) hubs throughout Scotland, the themes of connection, coordination, and collaboration leave the most lasting impression of what this Review is attempting to communicate. In so many ways the consultations expressed the pulling all the pieces together, developing partnerships, building new relationships or coordinating the activities of disparate entities (like libraries, bookstores, and festivals) – in other words, ‘the whole is greater than the sum of its parts’. There was a groundswell of consensus around creating and connecting literature hubs (for writers, readers, self-publishing and cross-arts) and carving out a more pronounced international presence.

Of course, processes change, and new organisations and new collaborations mean nothing unless they translate into new or revitalised existing programmes and support. To do so takes resources, which are finite within the direct remit of literature institutions. An effective job of galvanising the sector could increase the share of these resources, given the way Creative Scotland has organised its funding programmes. But it is still finite, and very competitive. Some new sources of funds or ways to stretch more with the same funding could make a real difference to the literature sector in Scotland. This Review concludes broadly that there is no resources panacea, but that there are avenues that could increase the yield for the literature sector through a new type of cross sector leadership

Drawing up an implementation plan

The literature and publishing sector review process concludes at the completion of this report. However, this Review provides Creative Scotland and literature stakeholders the basis with which to draw up an implementation plan. Accordingly, a final recommendation is proposed as a vehicle for doing so.

The funding environment demands that new collaborations and partnerships are forged to ensure that the opportunities can be collectively identified in the short, medium and long term and delivered by and through the literature sector and community.

Recommendation 38 – It is recommended that Creative Scotland launch the sector review with a summit event that connects up the whole sector, with multi-agency hosted sessions devoted to each area of potential action. Following the summit, and with the support of the sector Creative Scotland could help to facilitate the creation of a relevant industry/practitioner working groups devoted to mutually agreed on priority aspects of the findings of the review.

Lists

Conclusions

Conclusion 1 – The need to consider ‘literature’ in its contemporary as well as historical tradition, influences the setting of new directions for literature – to be inclusive of its participants. In light of the widened scope of the sector, the challenge is to reorganise the support network around literary works of high quality whatever the form, genre, format or combination with other art forms.....	19
Conclusion 2 – Writers work through a rich medley of developing and established writing genres and forms, so that ‘literature’ must now be considered as inclusive of many traditional and new expressions of the written and spoken word. This conclusion mirrors conclusion 1 in Section 2 in terms of the widening breadth of literature.	21
Conclusion 3 – Whilst the incomes from writing for all but a small minority of writers remain low, many combine other jobs or forms of support to earn a living. This state tends to persist throughout their careers, so a long-term perspective is warranted in considering support measures, with a careful bias toward quality writers – at any stage of their practice.....	24
Conclusion 4 – Writers fees for speaking engagements, performances and events are a critical source of income for writers. Yet, there is a wide disparity in rates and conditions for different types of engagement.	25
Conclusion 5 – The relationship between writers and publishers is undergoing substantial change whereby both are discovering new models by which to collaborate, market and disseminate written works.	27
Conclusion 6 – Creative Scotland’s new funding model is intended to be more flexible than previous iterations. Clear communication about how writers can access Creative Scotland’s Open Project Fund will encourage further applications.	29
Conclusion 7 – Whilst Creative Scotland is one route to funding, there are other possible routes to be explored. A more systematic collection and accessible presentation of funding and training opportunities beyond Creative Scotland would enable more Scottish writers to take advantage of the appropriate financial support.....	29
Conclusion 8 – Travel within Scotland and beyond is important for the development of all writers and writers travel for a multiplicity of reasons. The international markets pursued by writers vary but there are commonalities; more coordination across the sector, improved financing and greater flexibility to allow strategic initiatives may lead to increased impact.....	33
Conclusion 9 – As a result of the deteriorating economics of traditional media, the decline of the professional review of literary works by print and broadcasters is expected to continue, and in part give way to the on-going proliferation of citizen journalism and online recommendation sites. However, neither new nor traditional media should be ignored in promoting good literary criticism.....	36
Conclusion 10 – As the marketing and promotion of artists as a ‘personality of commercial value’ has been previously championed in other creative industries (such as the music sector), Scotland’s writers may benefit from the approaches learned and executed by artists in other art forms.....	36
Conclusion 11 – In general, it is necessary for Scottish writers to become more efficient and effective in the areas of marketing and self-promotion by working collaboratively, sharing knowledge and pooling resources. ..	36
Conclusion 12 – Whilst this Review did not set out to make an exhaustive evaluation of the training opportunities available to writers, there are clear areas for possible improvement, both in coordinating and showcasing the current offer, and in developing new programmes. The end objective would be an integrated programme of skills development and training tailored to the needs of writers, publishers, and other stakeholders working in the wider literature sector. A single platform showcasing all related opportunities would be immensely beneficial to the sector.	39
Conclusion 13 – There are opportunities inherent in a greater engagement between formal education and the literature sector. Young people stand to be the primary beneficiaries of any positive outcomes.	48
Conclusion 14 – The literature sector’s importance to education is clear but there appears to be a relative paucity of Scottish literature in the everyday school system. The inclusion of more Scottish work, taught by well-resourced and equipped teachers, on school curricula, is critical to the development and continued health of Scottish literature.	49
Conclusion 15 – Scottish literature organisations should broaden their relationship with Education Scotland, beyond the excellent relationship now held by SBT.....	49

Conclusion 16 – Increased partnership with libraries could lead to greater all-round engagement between these important stakeholders and Scottish literature. It could contribute towards re-energising public libraries to explore new ways of resourcing for Scottish literature. A number of tangible areas of shared ambition and endeavour have been outlined, so there is certainly scope for much greater partnership working at a strategic level with libraries.....	51
Conclusion 17 – There has been a gradual decline of traditional publishing both in terms of number of publishers and employment, yet there are companies bucking the trend and indeed innovating. Support measures could take into account differences in ambition, adaptability and success in publishing.	56
Conclusion 18 – Much of the publishing sector is generally fragile because of a heavy reliance on non-market sources of working capital. Some are not profitable, like poetry or publishing in Gaelic, because the potential audiences are small. However, they still operate as enterprises, and should be treated as such – although likely requiring different interventions than those publishers with significant growth potential. .	58
Conclusion 19 – Any measures to boost Scottish literature through the participation of publishers must take into account the fact that on publishers publish non-literary material, and publish non-Scottish writers as well as Scottish ones.	59
Conclusion 20 – London-based publishers – and those in other global publishing centres – try to sign up the most commercially successful Scottish writers, and thus compete with Scottish publishers for these rights.	61
Conclusion 21 – Whilst the models have not been articulated completely, micro-enterprises and literature hubs – both place-based and virtual – should form part of the overall publishing and writing ecosystem to be nurtured and developed.	65
Conclusion 22 – There is a gap within the support mechanisms for the Scottish publishing industry as a business, or at least the innovative and growth segments of the industry, and at the micro-enterprise and cross-arts levels. Lack of coherence among the agencies and stakeholders affects the development prospects of these kinds of publishers in Scotland and inhibits the development of Scottish literature.	66
Conclusion 23 – Notwithstanding the need to publish works of national or local cultural importance regardless of their commercial success, it would appear that measures to increase the effectiveness of the publishing ecosystem, especially publishers, would improve the return on investment in Scottish literature and the success of writers. Greater transparency in the selection process could be a useful start, as well as the consideration of the use of challenge funding through the new Open Funding scheme.....	68
Conclusion 24 – Some mix of soft loans or guaranteed loans would respond to the problem that publishers cannot easily obtain credit from commercial sources on the basis of their IP – which banks do not accept as collateral.	69
Conclusion 25 – Beyond the development of specific aspects of Gaelic writing, reading, and publishing, mainstreaming the language and continuing to promote its accessibility to an ever wider audience are high priorities.....	70
Conclusion 26 – The role of the independent book store – its on-going involvement with the community, its direct relationship with writers, and its partnership with libraries – all point to a high value in the development of Scottish literature.....	74
Conclusion 27 – There is a role for both Creative Scotland and the whole literature ecosystem in facilitating more opportunities to share knowledge and expertise, showcase best practice and explore joint initiatives. The Open Project Funding mechanism is a logical option for such activity and a vehicle for greater coordination among organisations that need to partner to achieve their goals.	80
Conclusion 28 – As there is evidence that literature hubs are already developing in various forms all across Scotland, it is well worth exploring the concept of a network of literature hubs that would make the Scottish literature ecosystem’s expertise, best practices, and resources more accessible to Scottish communities....	84
Conclusion 29 – The Open Project Funding mechanism is a logical route for collaborative initiatives across literature development in Scotland, and represents a vehicle for greater coordination for organisations that need partners to accomplish their goals.	84
Conclusion 30 – Creative Europe among other EU programmes could become an important partner for supporting networks of writers, public programming around books and ideas, and promoting better regional development. Whilst not a panacea and certainly an arduous journey, it is timely for the sector to embrace greater pan-EU involvement.	85

Conclusion 31 – Championing literature causes is a necessary complementary activity to the core work of Scottish literature institutions – even more so in the future, as the sector evolves and engagement proceeds on many levels. A coordinated platform, most naturally the Literature Alliance Scotland, would be the most effective vehicle by which to undertake this work.	87
Conclusion 32 – There is opportunity to increase the access to and use of Scottish literature in Scotland’s tourism sector (e.g. more literary heritage destinations, literary trails, festivals and events and unique promotions, securing a strong Scottish impact from Edinburgh’s UNESCO City of Literature status and the Netherbow project).	90
Conclusion 33 – Book festivals are in the ascendance in Scotland but greater collaboration by networking would provide access to best practice, services, and joint initiatives; different festivals would supply different expertise. If several festivals can come together, it would make a desirable application to Creative Scotland’s Open Project Funding programme.	91
Conclusion 34 – There are many significant initiatives that reach out to different parts of the community across Scotland, which could be applied in other contexts or geographic areas. While strong partnerships exist within the sector, intersectional partnerships across sectors could be strengthened and new partnerships forged.	93
Conclusion 35 – Given the sector-wide appetite for a new direction to the promotion of Scottish literature internationally and the growing sophistication of the international strategies to promote national other literatures worldwide – a more strategic overview for Scottish literature internationally is appropriate. Such an overview would lead to for greater visibility of Scottish writers and writing, and increased sales and distribution of Scottish books.	97
Conclusion 36 – From the discussions on the international dimension of literature organisations, there emerged the strong conclusion that there should be a sustained and effective international strategy for Scottish literature that represents the interests of writers, publishers and the wider sector with specific means and outcomes identified.	98
Conclusion 37 – For Scotland, an organisation which is an advocate for Scottish literature internationally could have a very positive impact on Scotland’s global presence. Its remit could include supporting travel, facilitating exchanges, translation, and coordinating activity across the country. The organisation should develop a wide range of international contacts and opportunities. It would be both a champion and shop front for Scotland’s writers, publishers and organisations. Ideally, it would also lead to the development of more and better relationships with international organisations, including within the EU and prospective bidding partners for EU funds, offering in turn a major impact on capacity to explore new initiatives.	103
Conclusion 38 – Scottish literature and Scottish publishing represent assets for those agencies equipped to foster foreign interest in Scottish industry and society, so bodies such as SDI and the British Council have a stake in increasing their understanding of the potential of the sector.	106
Conclusion 39 – Given the need to direct more resources toward the business end of international development, and that publishing is a marginal activity for Scottish trade development authorities, some organisation should be designated with more authority and resources to promote Scottish publishing abroad.	107
Conclusion 40 – There is sector wide recognition of the importance of translation. Scottish publishers have varying degrees of market presence abroad, and manage relationships with a wide variety of distributors, agents, publicists, and foreign publishers. Likewise they retain varying degrees of responsibility for managing the international rights’ of their books. It is important that publishers and agents are kept informed of available subsidy in order that they might use this as leverage in negotiations.	109

Recommendations

- Recommendation 1 – It is recommended that Creative Scotland and organisations that represent literature in Scotland consider and engage with Scottish literature in inclusive terms to embrace a wider set of writers, publishers and other stakeholders involved in literature. 19
- Recommendation 2 – It is recommended that Creative Scotland and other literature organisations offer appropriate support which can be accessed regardless of whether a writer is new, mid-career or established – along with assessment methods that ensure emerging writers who produce high quality product have sufficient opportunities to access funding. 24
- Recommendation 3 – It is recommended organisations representing writers continue to work closely with the sector in setting standards and terms of engagements for activities (travel, speaking engagements, residences, etc.) that accurately reflect the complexities, diversity and realities of the sector. Creative Scotland and other organisations then have a responsibility to ensure writers are paid according to best practices and agreed to standards set. 25
- Recommendation 4 – It is recommended that writer support mechanisms and funding opportunities offered be reflective of change within the sector. Such mechanisms should encourage innovative approaches and support the ever-evolving new models as they emerge. 27
- Recommendation 5 – It is recommended that Creative Scotland facilitate the development of an ongoing comprehensive repository of writer grants and other sources of financial and training support. 29
- Recommendation 6 – It is recommended that more literary reviews and criticism should be supported, both in traditional and online formats, including being vocal with traditional print media; such support would also include the continuing support of literary journals, training for literary criticism, and negotiating better literature coverage with local and national media. 36
- Recommendation 7 – It is recommended that Creative Scotland work with the Scottish Creative Industries Partnership members to review training offered via the sector and post-secondary institutions that deliver training, in order to determine any gaps and design joint initiatives to fill those gaps. Areas such as promotion and marketing in the internet age, rights negotiation/management, general technical and business skills, editorial support, screen writing, and working in participatory settings ought to be explored. 39
- Recommendation 8 – Creative Scotland and Education Scotland should establish shared goals specific to literature and collaborate in strengthening the links between the literature sector and formal learning. 48
- Recommendation 9 – Rather than set schools minimum requirements for stocking Scottish titles in their libraries, it is recommended that key partners such as ASLS, Publishing Scotland, SBT, SLIC, possibly with Scottish Government support, collaborate on a joint initiative over several years to encourage and enable schools to include Scottish writing as a prominent element in their resources. 49
- Recommendation 10 – It is recommended that Creative Scotland lead and support organisations to develop stronger links with Education Scotland. The latter should be encouraged to be more proactive in fostering more strategic relationships with Scottish writers and literature organisations, and in engaging with Scottish texts and writers, specifically. 49
- Recommendation 11 – Once the CoSLA strategy delivery mechanisms are set, Creative Scotland and relevant literature sector organisations should initiate regular meetings between the two groups to discuss furthering joint initiatives to meet literature and library goals. 51
- Recommendation 12 – It is recommended that micro-enterprises and cross-arts collaboration with artists and entrepreneurs in other creative industry sectors be supported, particularly in local and regional hubs, whether place-based or virtual. 65
- Recommendation 13 – It is recommended that Creative Scotland explore with the partners in SCIP, and Publishing Scotland – how the public development agencies can support: a) micro-enterprises, b) large publishing companies, and c) those in between. 66
- Recommendation 14 – It is recommended that Creative Scotland ensure that these agencies consult and involve other stakeholders whose business it is to foster innovation and entrepreneurship across the arts, as well as relevant investors and innovative publishers. 66
- Recommendation 15 – It is recommended that Creative Scotland consider how to evaluate funding applications from publishers by including (in addition to existing artistic merit criteria) the delivery track record of publishers. Developments to assessment criteria should be made explicit and transparent via Creative

Scotland communications. A best practice guide for publishers, relevant to the Scottish industry, should be developed by Publishing Scotland and should inform decision making by Creative Scotland.....	68
Recommendation 16 – It is recommended that Creative Scotland consider whether financial support in the future should be offered in the form of soft or guaranteed loans as a means of increasing publishers access to working capital.	69
Recommendation 17 – Creative Scotland should work with key industry figures to articulate the business case for the value of writing and literature within the cultural and creative industries to help sector organisations champion their initiatives – including book publishing being central to the development of IP as a potential high growth area.	69
Recommendation 18 – It is recommended that Publishing Scotland work with members of SCIP and relevant higher education institutions to develop mechanisms to better capture economic data for publishers, including the contribution of micro-enterprise publishers.	69
Recommendation 19 – Independent booksellers should be encouraged to work more closely with libraries, Publishing Scotland, and other literature institutions with the objective of supporting writers and reaching out more widely to the reading public through collective action – possibly culminating in an Open Project Fund application to Creative Scotland.	74
Recommendation 20 – It is recommended that Creative Scotland enter into dialogue with the RFOs as they develop plans for 2016-17 to explore how initiatives emerging from this Review would be integrated into their priorities, and how they can achieve greater results in that aim through more collaboration.	79
Recommendation 21 – It is recommended that organisations representing the literature ecosystem demonstrate how the opportunity presented by the Open Project Fund to support collaborative working could be achieved. Relevant partners (including for example, Creative Scotland and Literature Alliance Scotland) to facilitate regular networking opportunities for the sector in its broadest definition, including offering opportunities to showcase work to agencies or organisations more tangentially connected to literature. The aim is to explore opportunities for smaller events or round tables for sub-sections of the literature sector to share expertise.	80
Recommendation 22 – It is recommended that interested parties convene to explore the networked hub concept as to possible design, partners, funding, benefits, regional take-up, and operational sustainability. This coordinating role may be one the Literature Alliance Scotland would consider undertaking.	84
Recommendation 23 – It is recommended that the literature team within Creative Scotland should ensure that Open Project Funding is more widely promoted, and that RFOs should be able to become at least minority partners to future applications.....	84
Recommendation 24 – It is recommended that Creative Scotland and Creative Europe organise a series of briefings at appropriate literature conferences and platforms to advise potential applicants, and to more widely publicise the capacity of the Creative Europe Desk to support this work.....	85
Recommendation 25 – It is recommended that the literature sector should expand its reach and access to existing trusts, foundations and social enterprises and determine ways of introducing new sources of funding to support writers (e.g. crowdfunding). Institutional support for professional development in fundraising in the sector should be encouraged, perhaps in collaboration with other art forms where a need has been identified in this area (for example the theatre sector).	86
Recommendation 26 – It is recommended that Scottish literature interests review how best to promote and champion the ways in which Scottish literature and publishing positively impacts the literature and other sectors and subjects, and equip them with the tools and arguments to do so.	87
Recommendation 27 – It is recommended that the case be substantiated and made to appropriate tourism authorities and tourism product distributors to trigger investment in and expansion of literary tourism in Scotland, leveraging existing resources.	90
Recommendation 28 – It is recommended that there is leadership development in the festival community to enhance coordination, collaboration and knowledge transfer across Scotland’s breadth of literary festivals and events – covering specialisation, best practice implementation, calendar coordination and greater use of shared services.	92
Recommendation 29 – It is recommended that the diversity of provision that already exists within the literature ecosystem be shared, and that one of the support bodies takes the lead in collating and disseminating the many examples of best practice that deliver equalities and diversity.	93

Recommendation 30 – It is recommended that Scottish literature institutions demonstrate the value of and uses for Scottish literature to advance the aims and ambitions of other sectors, including the relevant Cabinet Portfolios.	94
Recommendation 31 – It is recommended that leading literature institutions and publishers convene a summit for laying the groundwork for a strategic and coordinated international presence. This work would be well positioned to inform the development of Creative Scotland’s International Strategy, forthcoming in early 2016.	97
Recommendation 32 – It is recommended that Scotland investigate the establishment of an international literature promotion organisation in the long term with the following remit:	103
Recommendation 33 – It is recommended that Creative Scotland, and those in the sector leading on advocacy, work with relevant parties to develop the story and materials required to equip stakeholders with a role to play in the sector (including SDI and the British Council). The objectives would be both to communicate the positive environment for writing and publishing in Scotland, and to foster the connections to increase inbound investment in literature.	106
Recommendation 34 – It is recommended that Publishing Scotland be approached to carry out the support role in international markets – as the best positioned agency to pursue this line of activity – and to work with Scottish Development International (SDI), Scottish Enterprise and, potentially, with the Scottish Government via the International Development Framework, to increase their involvement.	107
Recommendation 35 – Assuming that Publishing Scotland becomes the international development vehicle for Scottish publishers, it should work with publishers and other key stakeholders to devise an international book fair strategy, including careful consideration of the cost-benefits of going after Guest of Honour status at Frankfurt.	108
Recommendation 36 – It is recommended that Creative Scotland work with Publishing Scotland to brief the sector on relevant activity and to ensure that key foreign publishers understand how to apply for translation grants. Collective opportunity – such as training or introductions to specific markets – should be identified and supported.	109
Recommendation 37 – Administering funding for translation, as well as the outreach to key foreign publishers so that they understand how to apply for translation grants, would fit neatly within the remit of the Scottish Literature International model proposed above.	109
Recommendation 38 – It is recommended that Creative Scotland launch the sector review with a summit event that connects up the whole sector, with multi-agency hosted sessions devoted to each area of potential action. Following the summit, and with the support of the sector Creative Scotland could help to facilitate the creation of a relevant industry/practitioner working groups devoted to mutually agreed on priority aspects of the findings of the review.	112

Figures

Figure 1 – Most frequently selected genres for Scottish writer survey respondents.....	21
Figure 2 – Factors contributing to the development of Scottish writers’ careers	22
Figure 3 – Literature-related activities earning Scottish writers their income.....	23
Figure 4 – Importance of Scotland-specific sector issues.....	28
Figure 5 – Scottish writers’ relationship with other elements of the sector	31
Figure 6 – Geographic destination of Scottish writers travelling to promote, perform and sell their works.....	32
Figure 7 – Source of financing for Scottish writers who travel (by income)	33
Figure 8 – Writers receiving formal training as a writer	36
Figure 9 – Type of formal training received by writers.....	36
Figure 10 – Skills writers derived from formal training	36
Figure 11 – Genres read by survey respondents	44
Figure 12 – Writers participating in public events in educational or community/well-being settings.....	48
Figure 13 – Writers working with minority groups/those with protected characteristics*	48
Figure 14 – Most important sources of financing for Scottish publishing companies.....	58
Figure 15 – Number of titles published in 2013 (by genre)	59
Figure 16 – Share of 2013 sales by geographical market	60
Figure 17 – Breakdown of 2013 retail sales revenues to Scottish publishers (% market share).....	71
Figure 18 – Relative focus of support organisations (increasing with more focus)	77
Figure 19 – Language of expression for Scottish writers (written and spoken).....	88
Figure 20 – Importance of Scots and Gaelic to the future of Scottish culture	88

Tables

Table 1 – Writer income from literature and non-literature activities	23
Table 2 – Frequency of attending cultural events and visiting places of culture in the last 12 months*	43
Table 3 – Survey results indicating Scottish reading propensity of respondents	44
Table 4 – Creative Scotland literature/publishing grants awarded by region, 2011-14 (key word listings)	80
Table 5 – Creative Scotland/Scottish Arts Council grants awarded by region, 1994-2011 (Literature)	81

Nordicity

Nordicity is an international consultancy, based in the UK and Canada, providing research and evaluation, strategy, policy and economic analysis for the arts, cultural and creative industries.

Drew Wylie

Drew Wylie Ltd. is based in East Lothian and works across the creative and cultural industries in Scotland and internationally.

For more information, contact: shignell@nordicity.com

Report by Nordicity in association with Drew Wylie Ltd. NGL15-05-28



ALBA | CHRUTHACHAIL

NGL150618
nordicity.com