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Independent Publishing

Making and Preserving Culture in a Global Literary Marketplace

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Independent Publishing: Making and Preserving Culture in a Global Literary Marketplace

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Executive Summary

This report results from a Programme of Enquiry funded and hosted by the Scottish Insight Universities Institute (Scottish Insight), on the theme of Independent Publishing: Making and Preserving Culture in a Global Literary Marketplace. A series of events was held from June-August 2011 in Scottish Insight's premises in Glasgow, with an additional event held at the Edinburgh International Book Festival in association with Publishing Scotland in August 2011. The events brought together publishers, authors, policy makers, government, librarians, academics from multidisciplinary backgrounds, publishing students, and others with an involvement in books and publishing from Scotland, the UK and beyond. The Programme was supplemented by a series of interviews with independent publishers.

The Programme examined the opportunities and challenges of the global literary marketplace for small and independent publishers, what they can learn from each other and from larger publishers, and how linkages between key stakeholders can be achieved in the creation of new markets. The Programme also addressed the role of digital technologies and looked at how small and independent publishers can successfully negotiate competing cultural, aesthetic, political and communicative demands, how publishing can best be supported through public and private policy initiatives and how an effective book culture, incorporating writers and readers as well as others in the book chain, can be sustained and developed.

Observations and Recommendations

The Programme of Knowledge Exchange made four key observations:

The eco-system of independent publishing has undergone a rapid rate of change in response to the possibilities made available by technology and delivery.

All publishing in the twenty-first century operates in a global literary marketplace and yet independent publishers often identify with a niche market or are significantly attached to ideas of the local or regional.

Independent publishers are central to a healthy culture of books and reading, yet it can often be difficult for small participants to identify, access and benefit from partners through shared investment.

Policy makers have the potential to shape independent publishing at a sector and individual level.

The headline recommendations made in response to these observations were that:

1. Independent publishers need to show a readiness to embrace digital culture by assessing the opportunities that the digital environment brings to their product and audience.
2. Independent publishing should seek to explore the positive interactions between the local and global environments.
3. Independent publishing would benefit from enhanced networks, both within the industry and across different stakeholder communities.
4. The commitments and responsibilities of policy makers should be made more transparent.

In more detail, the recommended activities and behaviours made by the Programme in relation to (1) are to:

prioritise investment in knowledge, acquisition and training in this field; give consideration to digitising backlist, exploring digital product formats, growing audiences through digital engagement (using technologies including social networks, Google Analytics, social reading sites);

explore the alternative business models offered by the internet environment, capitalising on the potential of the app marketplace, the 'freemium' model, free advertising on sites such as YouTube and Flickr, and exploring licensing possibilities including those offered by Creative Commons; develop visibility both for authors and books, as well as articulating cultural distinctiveness, through web 2.0 tools such as blogs, forums, podcasts;

identify niche markets and maximise the potential of the distinctiveness of the brand using search engine optimisation and analytics;

explore benefits of selling subsidiary rights, specifically for electronic and audio books; exploit alternative funding models, such as crowdsourcing, dual formats, transmedia opportunities (e.g. games, apps);

and explore collaborative ventures with technology partners e.g. Faber Factory; develop a strategic approach to preservation and archiving of material relating to editorial, marketing and promotion, production, e-communications and sales.

Recommended activities and behaviours in relation to (2) are to:

exploit the global range of publishing rights (including translation), and import and export opportunities;

exploit diversified sales channels that would support local interests (e.g. tourist centres, museums, festivals and live events);

advocate national support for independent publishers whose promotion of highly particularised or localised cultural and aesthetic values may otherwise be under threat in times of intensified international competitiveness;

and attend to best practice models of independent book selling in order to sustain and develop a healthy literary cultures at both the level of the local and the global, in the face of the rise of the online marketplace.

Recommended activities and behaviours in relation to (3) are to:

foster closer collaboration and dialogue among authors, publishers, libraries, readers, academics, archivists and statutory bodies (including cultural, educational policy-makers);

acknowledge and exploit the benefit of research conducted by universities and the relevant expertise in literary and publishing history, cultural politics, archiving and preservation, library and information science;

and give due attention to the flow of information between cultural institutions across the constituent parts of the UK, including Creative Scotland, Arts Council England, Arts Council Wales, trade associations (such as Publishing Scotland and the IPG), third sector organisations and local authorities.

Recommended activities and behaviours in relation to (4) are to:

promote equity, access and participation;

foster intersectoral relationships;

and build closer relationships between the making and preserving of culture.

Introduction

Publishing is a global industry dominated by large multinational conglomerates such as Bertelsmann and Holtzbrinck, Lagardère-Hachette and Pearson. Such huge firms have significant advantages that are not available to independent publishers: better resources from economies of scale in funding, production and distribution, geographical diversification, as well as new media and cross-media synergies from different portfolios and companies within the group. However, such clear advantages have not led to the end of alternative publishing ventures. Independent firms now operate within a radically different marketplace and business structure characterised by a polarisation between very large and small firms; unsurprisingly, the smaller publishers finding it hard to survive. The economic downturn, the closure of independent bookshops and high-street booksellers, and the reliance on heavily discounted internet selling have slashed profits. Closer to home, with the demise of Chambers-Harrap and St Andrews Press, publishing in Scotland is going through a difficult time.

Owned by individuals, families, or formed as limited companies, independent publishers occupy a distinctive position in the literary marketplace. Some have a long history of publishing innovative writing or first-time authors, and of creating specialised niche markets for their books. Many are also motivated by social, ideological, cultural or aesthetic agendas, and are comprised of small multi-skilled teams who can sustain personal relationships with authors. Independent publishers, albeit not always, offer a space for more diverse aesthetic, cultural and regional voices to be heard at a time where large mainstream publishing lists are governed by fewer titles and concentration on profitability. Some have had a long history of publishing innovative writing or first-time authors, and of creating often specialised niche markets. In other words, independents generally operate with higher commercial risks in order to secure certain product benefits that are first and foremost of cultural, rather than financial, value.

Itchy Coo's translations of work into the Scots language or Birlinn's commitment to Scottish history and literature contribute to the making of a distinctive national culture. Other presses seek to cultivate international links while retaining a strong local presence; Carcanet, for example, based in Manchester and Scotland, publishes Anglo-European and Commonwealth poetry while Mango, Ayebia Clarke, Peepal Tree Press, and more recently, Flipped Eye, are important to fostering relationships with Africa and the Caribbean and their diasporic cultural communities in Britain. Still others, such as Canongate, have made the successful transition to more mainstream publishing, and Cargo Publishing, a more recent arrival on the publishing scene, publishes a range of Scottish writers but, under the imprint Cargo Crate, have ambitions to reach a global audience through their digital platforms.

The programme sought to bring together a multi-dimensional investigation of independent publishing in the production and circulation of literature amidst corporate giants and technological innovations in the delivery of the book through two themed seminars and a workshop, supplemented by a series of in-depth interviews with key publishers.

1. Overall Aims

The main aim of the Programme of Enquiry was to bring together publishers, academics, archivists, cultural policy makers, arts funders, and other stakeholders engaged in the promotion of book culture to examine the opportunities and challenges of the global literary marketplace for small and independent publishers. The programme sought to discover what lessons can be learnt, what good practices can be shared and what better linkages fostered, between key stakeholders as they negotiate competing cultural, aesthetic, political, communicative and technological demands to develop independent publishing environments that retain distinctiveness.

A core objective of the programme was to draw together national and international knowledge and professional, policy and academic research expertise in such a way as to create a collective conversation that addresses the range of challenges facing independent publishing in the United Kingdom and elsewhere. A series of in-depth interviews also provided opportunities for small publishers to raise concerns about challenges provided not only by the intensely competitive global and local marketplace of books but also by impact of ongoing digital and technological changes.

2. Main Questions Informing the Project

1. What are the opportunities and challenges of the global literary marketplace for small and independent publishers?
2. What effective practice can be learned from comparative publishing patterns from other small nation publishing? What can be learned from examples from larger publishing groups?
3. How can better linkages between key stakeholders be developed in the creation of new markets?
4. How might small and independent publishers develop sustainable publishing programmes in the emerging digital environment?
5. How best can small and independent publishers preserve and digitise their records, in order to develop effective business and historical archives?
6. How can small and independent publishers successfully negotiate competing cultural, aesthetic, political and communicative demands?
7. How can small and independent publishers retain their own commitment to their stated regimes of value (cultural, aesthetic and political) whilst balancing the demands of the marketplace?
8. How can publishing best be supported through public and private policy initiatives?
9. How can the cultural capital of independent publishing be articulated within UK and Scottish creative industries?
10. How can effective local, regional and national independent publishing cultures, incorporating writers and readers as well as others in the book chain, be sustained and developed?

3. Participation and Knowledge Base

The organisation and delivery of the series afforded opportunities to identify stakeholders within the field and to open up the possibility for further knowledge exchange and collaboration. In preparation for the seminars and workshop, contact was made with a number of organisations and projects who could speak to the new public funding landscape, reader development agencies, libraries, archivists as well as publishers across the spectrum from specialist and/or niche publishers to general publishers, and publishers who might showcase new digital innovations or provide examples of best practice. The seminars and workshop themselves were well attended, and included participants from the academic, business, public and voluntary sectors who were working in professional, business, civic, policy and research roles. The strength of the mix of participants offered a multi- and interdisciplinary dimension to the discussions, and provided multiple perspectives and complementary insights. Appendix 2 contains a full list of participants.

The Programme additionally drew on and extended recent inquiries into independent publishing undertaken by the Arts Council, England (Hampson and Richardson, 2005; Tranter, 2004) and the Scottish Arts Council (Sinclair, McCleery and Graham, 2004), into diversity and publishing (decibel 2004; dipnet and the Arts Council, England, 2004), the review into Scottish publishing (Sinclair, McCleery and Graham, 2004) the Literature Working Group policy report on publishing in Scotland (Goring et. al., 2010) and alongside the current Scottish Government Scotland's Creative Industries Partnership (SCIP) Creative Industries Publishing Reference Group. The project was also informed by McCleery and Finkelstein's history of the publishing in Scotland (2007), McCleery, Finkelstein and Renton's account of the Scottish book trade (2009), Squires's work on the marketing of literature (2007), questions on globalisation and literature, value and cultural diversity in anglophone publishing raised by Gupta (2007) and Low (2011), and Schiffrin's interventions on recent development in publishing and the book trade (2000; 2010), as well as a variety of other publishing studies texts. See Appendix 3 for details and links.

The series has resulted in fostering new links between different fields and networks in addition to widening opportunities for future collaborative research and development activities.

4. Seminar and workshop structure and content

The Programme seminars and workshop are summarised in this section, with full details of all the agenda, speakers and topics covered, as well as links to the presentations and associated podcasts, in Appendix 1.

4.1. Seminar 1: Digital Technologies and Independent Publishing (9-10 June 2011)

This seminar addressed the opportunities and challenges the global literary marketplace presents for independent publishers, especially in a digital context. Along with a number of independent publishers, authors, archivists, academics, technologists and booksellers were in attendance, and this fostered an exciting dialogue over two days. The panels focused on: the impact on device use and developing digital products and formats for emerging platforms; the preservation and archiving of digital, material and textual artefacts; how independent publishers could optimise and harness digital technologies to enable them to compete effectively; the changing relationships between publishers,

booksellers and readers; the fate of intellectual property and copyright in the digital age. Key topics were:

Digital and the independent publisher: Creative commissioning and marketing were the strengths demonstrated by the independent publishers who presented case studies, who harnessed different elements of the internet to put them on the same footing as much bigger players. Can of Worms, for example, showed how a joined-up marketing campaign which was designed to engage young readers both online and offline led to industry-wide recognition and online sales, despite not being stocked by high street bookshops. Canongate's strategy to deal with the threat from Amazon was to make the most of their extra content—instead of focusing on books, Canongate instead offers multimedia content that will be of interest to their readers, thus maximising the potential of the brand while not trying to beat Amazon at its own game. Freight's dual strategy of producing high-end books as well as e-books capitalises on an emerging trend for an increased fetishised interest in the book as material object. The disintermediation of the value chain was also made explicit by mention of Faber Factory which serves as a digital production house for smaller independents. The potential of the app marketplace was showcased by Winged Chariot whose success with digital products for very young children exploits the haptic interactivity of digital devices to their fullest potential.

All the publishers presenting demonstrated that while commissioning high quality content is key, it is also necessary to innovate and commission using new digital paradigms. While it was agreed that digitising backlists was an important element of making the most of one's digital presence, workflows need to be reconceptualised in order to accommodate the now essential editorial practice of conceiving content and its mode of electronic presentation simultaneously. Concerns were raised regarding the misinformation that prevails regarding e-book figures, though it might be prudent to be monitor on how Amazon's increasing involvement with independent publishers will affect e-book sales and distribution. Alternative publishing models such as granular content (Blackwell's custom educational text books) and dynamic pricing (Perini) were also discussed, showing how customisation using technology will be the ideal vehicles to keep customer loyalty. Discussion of the implications of the recently released Hargreaves Report (2011) for publishers concluded that the government needs to respond to how consumers and users of digital content were already accessing electronic products, and that SMEs stood to gain the most from the report's findings.

Social networking was cited as a significant and economical tool for both authors and publishers to reach a particular audience, demonstrating that marketing in publishing is increasingly about catering to the niche. It allows for readers to have personal relationships with both brand and authors, which lends authenticity to the consumer experience.

Formats: The need to move beyond 'squeezing' print formats into electronic environments was emphasised, and publishers were urged to match content to specific platforms, while keeping the readers' needs in mind. The user interface and functionality still needs to be optimised, and publishers have a stake in ensuring progress on this front. Utilising such functionality for bilingual or simultaneously translating editions, or commissioning work that uses dynamic, kinetic typography are just a few possibilities that suggest themselves in a digital climate that rewards innovation.

Socio-cultural impact: Concerns were expressed regarding the effects of digital reading on cognitive development, and how it is essential to track how the shift from print to digital might affect our ability to engage with long-form text, for example. As the bricks and mortar bookshop disappears from the high streets and libraries are increasingly threatened with closures, keynote speaker Chris Meade

urged that spaces to collaborate, create, contemplate and connect still have a space in literary culture and might be key to creating new publishing possibilities.

Preservation: Initiatives such as the Colophon Project and the Digital Preservation Coalition emphasised the need for preserving paratextual material pertaining to the publishing process, but also the necessity to be judicious about what is preserved.

4.2. Seminar 2: Globalisation and Independent Publishing (23-24 June 2011)

This two day seminar set out to investigate the opportunities and challenges of globalisation including the generation and translation (or blockage) of value, translation, as books attempt to reach beyond their specific locales, translation, language-group publishing within and outside of the UK, and to see what can be learnt from comparative publishing situations and contexts (Caribbean/UK, Africa/UK, India, Catalan and Scots language publishing), rights sales and management by publishers, and from specific poetry presses. There were panels on the 'Local and the Global', 'Poetry Publishing', 'Regional Languages and Publishing', 'Translation and Intellectual Property', 'Managing Creativity and Small and Medium Enterprises', 'Cultural and Aesthetic responsibilities' as well specific case studies of individual independent presses. Key themes emerging from panels and discussions were:

Funding: Independent publishers work in an environment that operates both commercially and through subvention. Policy is affected by the extent and nature of the financial base. Government funding, in the form of grants from the Arts Councils and Creative Scotland, was acknowledged as crucial, especially in relation to ventures such poetry publishing, experimental work, and cultural and ethnic diversity agendas which are not deemed sufficiently 'mainstream'. Funding does not always come from within the country; in the case study of Salmon Poetry in the Republic of Ireland, for example, funding streams now also come from the US, with the consequence that many more US-Irish poets have appeared on Salmon's list and audiences have emerged from the US. Public funding agendas have had an impact on small presses; they may benefit writers by encouraging professionalism and continuity of work but they may also drive more innovative and experimental practices away from funding. Articulating the interests of the presses with that of funding bodies, and translating the objectives of the presses into a language that can mesh easily with the funding matrices, was judged to be important. In this context, the championing of mentoring in the Arts Council was raised.

New Technologies: Publishers are concerned about the challenging advent of new digital technologies (ebooks, Kindle, poetry apps etc.) and their impact on reading and production. Retailing and reading were identified as vital to the future of independent publishing. Print-on-demand methods were also acknowledged to have allowed greater flexibility.

With regard to public funding, the Arts Council emphasis on digital downloads and 'paperless poetry' was discussed. One challenge to smaller poetry presses might be to find a niche in electronic publishing.

The interplay between national and international markets: The interface between the local and the global was also a key discussion point. Canongate emerged as a very successful and visible press on the international stage in part through their sales of international and translation rights. Publishers, by virtue of their products, often tap into transnational circuits of production and consumption. Peepal Tree (based in Leeds) offered an example of a press with a substantive material and institutional presence in the Caribbean islands, functioning essentially as a transnational publisher of Caribbean

writing in a region that lacked an overall funding organisation or distribution facilities. Questions raised in discussion concerned how texts travelled and what values accrue to these texts as they travelled between cultures; despite the avowed 'internationalisation' of writing and writers by larger global multinationals, certain sorts of writing and writers still remain (relatively) invisible, and presses such as Peepal Tree and Mango may offer a home for these publications. Ayebia presented a case study of a press that publishes African and Caribbean writing that relied substantively on international educational (including higher educational) outlets for its market.

Conflicting demands: How small and independent publishers (or writers) retain their own commitment to their stated regimes of value (cultural, aesthetic and political) whilst balancing the demands of the marketplace and/or fundholders were recurring themes throughout the seminar. Independent publishing emerged as a key outlet for the expression of non-commercial values that are common to many definitions and experiences of the aesthetic, or of social activism that sought to forge a reciprocal exchange between authors, publishers and readers. While independent publishers, it was also argued, run the risk of being under-capitalised, they had more freedom of manoeuvre, could remain close to markets, track changes in taste and address with greater speed the topicality of social and political issues.

Promotion: Cargo and Flipped Eye outlined digital and new publishing initiatives that exploit social media and live events. Festivals and book fairs were also identified as an important publicity and sales outlet for independent publishers. Non-conventional outlets such as tourist gift shops emerged as important outlets for Scottish books.

Translation and small language presses: The importance of translation rights as key to the survival and flourishing of key small language publishers and the possibilities of growing readerships from small beginnings were raised as by the story of Itchy Co. Future independence of Scotland may offer Scots a higher profile nationally and internationally. Problems associated with bilingualism were raised in relation to dominant languages, for example, small language presses being passed over in favour of the 'international' languages in Catalan publishing. Questions about potential problems associated with the close links between publishers and education systems were asked, for example, as particular language texts enter curricula does this institutionalisation become limiting and linguistic diversity reduced? Questions about branding ('Brand Scotland'/'Brand Catalan') also asked us to consider the limitations deliberately chosen by (or foisted) on small language publishers. The difficulties of negotiating and juggling a global and local readership were addressed, specifically, the cultural advantages in pursuing limited markets rather than always having to maximize and expand global readerships. However, evidence from the *Diversity Report* (2010) suggested that translation flow across Europe provides a more diverse model of cultural and commercial exchange than a narrative of global English-language hegemony might suggest.

4.3. Workshop: Cultural Policy (22-23 August 2011)

This one-day workshop, plus a public event at the Edinburgh International Book Festival featuring keynote speaker André Schiffrin in association with Publishing Scotland, set out to investigate how best to develop and sustain a healthy book culture of writers and readers. Specifically, it aimed to discuss how both small and medium-sized publishers can negotiate competing cultural, aesthetic, political or communicative demands, a healthy eco-system for independent publishing might be supported through public and private policy initiatives. Key themes emerging from panels and discussions were:

Distributing to the local: Corporate ownership has arguably narrowed publishing policy as well as impeding the maintenance and sustenance of niche genres. The decline of high street bookshops and independent booksellers has further contributed to a greater uniformity in book culture. Within this context, independent publishing has an important role to play in addressing and sustaining local cultural concerns that are often marginalised by corporate publishing and bookselling policies.

- Independent publishers rely very heavily on internet sales. Heavy discounting by Amazon and large internet booksellers imposes serious constraints. Successful policy involves building a core community through publishers' own websites, e-newsletters and so on. By creating an infrastructure that ensures a more targeted marketing policy geared towards reviews, local and live events, and academic and educational communities, independent publishers can access alternative channels of distribution. In Scotland, book festivals and education programmes have sought to address the problem of reading and access to texts. More sustained connections with festivals, education authorities, and local activist and community groups is necessary to develop these initiatives.
- In the context of Scotland, there is a need to balance the desire to move out of Scotland to tap into a greater market with the desire to contribute to a local economy and culture. Independent Scottish publishers are seeking to add value to the economy by working with local communities to build content and value collaboratively. There is an urgent need to cultivate networks to bring books to communities, and a corresponding need to develop a coherent cultural tourism strategy.

Networks of Benefit: Comparative models of publishing ecosystems from the UK, US and Europe indicate varied practices in the extent and strategic role of state sponsorship of publishing, libraries and bookselling. In contrast to France, for example, UK political ideologies have helped evolve a non-interventionist approach to culture. Barriers to change involve the inevitable difficulty that increased funding for books and libraries must flow from existing resources. Shifts in local and national policies are required.

There is a need for greater communication between the component parts of the public and private sectors. The Scottish Government's recent policy on creative industry partnership (SCIP) offers a welcome model of inclusion, and the Arts Council England's Strategic Framework for the Arts, 'Achieving Great Art for Everyone' (2010), helpfully promotes work in conjunction with libraries and Higher Education. These initiatives need to be sustained. Particularly important is the library sector. The success of the City of Edinburgh Council in generating key partnerships with publishers, Creative Scotland and universities is an example of good practice. However, the outsourcing of procurement has narrowed the extent to which libraries can attend to local concerns. Libraries have been isolated in decision-making and need a place in the collaborative chain.

A series of possible and necessary governmental policy interventions were identified of particular relevance for the Scottish situation:

- A soft loan scheme for publishers for company development, where government arts bodies would pay interest on loans from the private sector
- Funding for internships for recent publishing graduates for smaller or indigenous companies;
- A statutory scheme for libraries to buy books from Scottish publishers
- A 'Live' literature funding scheme, to include publishing professionals to talk about their books and creative industries

- Strategic support for translation
- Fuller exploitation of digital communications, e.g. the development of a smartphone app for Books from Scotland

A focus on readers?: The Arts Council England's Strategic Framework for the Arts, identifies the importance in policy-making of the end-user – the reader. Funding has been awarded to initiatives that set out to build audiences. Making and preserving culture depends upon nourishing readerships: the key issue might not be sustaining independent publishing but sustaining the readers who support the publishing infrastructure.

5. Publisher Interviews

A series of eleven in-depth interviews were conducted with the following publishers, with funding provided by the Carnegie Trust:

- Tony Ward and Angela Jarman, Arc Publications
- Becky Clark, Ayebia Clarke
- Hugh Andrew, Birlinn
- Francis Bickmore, Canongate
- Michael Schmidt, Carcanet
- Mark Buckland, Cargo
- Nii Ayikwei Parkes, Flipped Eye
- James Robertson, Itchy Co (series published in conjunction with Black and White Publishing)
- Gavin MacDougall, Luath
- Joan Anim-Addo, Mango
- Jeremy Poynting and Hannah Bannister, Peepal Tree

Taken together these represent a diverse range of general trade and specialist presses based in Scotland, the North East, North West and the South; they also include two relatively recent entrants to publishing. Publishers were asked a series of questions about the history and formation of their houses, staffing levels, publishing information (titles published each year, average print run, sales revenue, earned income, grants and public subsidies), recruitment of authors, use of (new) digital technologies, promotion and retail, and future outlook and plans. Key themes and issues that have emerged from these interviews are:

Diversity: Despite the very small sample, the publishers interviewed reflect the diversity of content and publishing practices that are a feature of the independent sector. The presses interviewed include specialist poetry presses (Arc and Carcanet), minority ethnic and/or publishers who have high regional content or who specialize in specific cultural contexts such as the Caribbean, Africa and Scotland (Peepal Tree, Ayebia, Mango, Birlinn, Luath and the Itchy Co series), publishers who offer an unusually high degree of writer development (Flipped Eye), publishers who offer an exclusively digital imprint (Cargo), publishers who specialize in international rights sales (Canongate). While most, if not all, are run as businesses, many publishers interviewed put their aesthetic, social or political agendas ahead of commercial concerns, and the degree of hidden unpaid labour and sector cross-subsidy would seem to support these assertions. Cultural policy is not always sensitive to diversity in publishing situations and contexts.

Digital technologies: All publishers have a significant web presence and most have social media sites and recognise the need to acquire new skill sets and meet the opportunities and challenges of publishing in a digital age. In the case of more established publishers, new appointments have either been made in this area (for example, Canongate) or bought in (Mango, Peepal Tree); newer entrants such as Flipped Eye and Cargo have positively embraced challenges thrown up by developing technologies. This area represents the greatest uncertainty and change for independent publishers.

Transnational and international links: All publishers interviewed have an international presence; these take a variety of forms such as specific publishing partnerships (Canongate), targeted North American linkages on certain projects (Cargo) or functioning as 'transnational' firms with writers and niche markets outside the UK such as Peepal Tree, Ayebia and Mango. Canongate operate a successful scheme of rights sales to generate greater readerships for its book and authors. The interplay between national and international markets, and the local and the global, was a key feature of all publisher interviews but not all publishers have identical aims and goals.

Funding: Most small publishers have at some time been in receipt of public subsidies in relation to core funding or the funding of specific projects. These are seen to be vital; greater dialogue and transparency with regard to the funding applications would be helpful.

Readerships and marketing: Retailing and marketing campaigns are important to most (if not all) of the publishers interviewed though some had more funds set aside for specific campaigns than others. Some publishers have been able to better service and exploit niche markets such as academic communities or regional markets (including tourist venues). Live events were seen to be an important opportunity to generate readerships and some publishers such as Cargo and Flipped Eye generate substantive sales through these promotions.

Authors and Books: Publishers have stressed the importance of keeping backlist 'live'; this is now made much easier with digital technologies. Most have good relations with their authors though some put more resource into writer development than others. The acquisition of authors varies from word-of-mouth and informal contacts through to rights sales via agents and auctions; some authors that have been dropped by larger publishing houses because of 'poorer than expected sales' are now being published by smaller independent companies.

Succession: For older established independent publishers, question of succession can be an area of concern.

6. Project observations and recommendations

Observation	The eco-system of independent publishing has undergone a rapid rate of change in response to the possibilities made available by technology and delivery.
Recommendation	<p>Independent publishers need to show a readiness to embrace digital culture by assessing the opportunities that the digital environment brings to their product and audience. They should:</p> <ul style="list-style-type: none"> • prioritise investment in knowledge, acquisition and training in this field • give consideration to digitising backlist, exploring digital product formats, growing audiences through digital engagement (using technologies including social networks, Google Analytics, social reading sites) • explore the alternative business models offered by the internet environment, capitalising on the potential of the app marketplace, the 'freemium' model, free advertising on sites such as YouTube and Flickr, and exploring licensing possibilities including those offered by Creative Commons • develop visibility both for authors and books, as well as articulating cultural distinctiveness, through web 2.0 tools such as blogs, forums, podcasts • identify niche markets and maximise the potential of the distinctiveness of the brand using search engine optimisation and analytics • explore benefits of selling subsidiary rights, specifically for electronic and audio books • exploit alternative funding models, such as crowdsourcing, dual formats, transmedia opportunities (e.g. games, apps) • explore collaborative ventures with technology partners e.g. Faber Factory • develop a strategic approach to preservation and archiving of material relating to editorial, marketing and promotion, production, e-communications and sales
Observation	All publishing in the twenty-first century operates in a global literary marketplace and yet independent publishers often identify with a niche market or are significantly attached to ideas of the local or regional.

Recommendation	<p>Independent publishing should seek to explore the positive interactions between the local and global environments. They should:</p> <ul style="list-style-type: none"> • exploit the global range of publishing rights (including translation), and import and export opportunities • exploit diversified sales channels that would support local interests (e.g. tourist centres, museums, festivals and live events) • advocate national support for independent publishers whose promotion of highly particularised or localised cultural and aesthetic values may otherwise be under threat in times of intensified international competitiveness • attend to best practice models of independent book selling in order to sustain and develop a healthy literary cultures at both the level of the local and the global, in the face of the rise of the online marketplace
Observation	<p>Independent publishers are central to a healthy culture of books and reading, yet it can often be difficult for small participants to identify, access and benefit from partners with a shared investment.</p>
Recommendation	<p>Independent publishing would benefit from enhanced networks, both within the industry and across different stakeholders. They should:</p> <ul style="list-style-type: none"> • foster closer collaboration and dialogue among authors, publishers, libraries, readers, academics, archivists and statutory bodies (including cultural, educational policy-makers) • acknowledge and exploit the benefit of research conducted by universities and the relevant expertise in literary and publishing history, cultural politics, archiving and preservation, library and information science • give due attention to the flow of information between cultural institutions across the constituent parts of the UK, including Creative Scotland, Arts Council England, Arts Council Wales, trade associations (such as Publishing Scotland and the IPG), third sector organisations and local authorities

Observation	Policy makers have the potential to shape independent publishing at a sector and individual level.
Recommendation	<p>The commitments and responsibilities of policy makers should be made more transparent. They should:</p> <ul style="list-style-type: none"> • promote equity, access and participation • foster intersectoral relationships • build closer relationships between the making and preserving of culture

7. Outputs and dissemination

The project team will maximise the sharing of the knowledge obtained during the course of the programme.

- All materials developed – including the programmes, the introductory and summary briefings developed for the first two seminars, and the presentations (including audio recordings and slides) produced by the participants – will be uploaded to the project website, www.independentpublishing.stir.ac.uk.
- An event was held in association with Publishing Scotland at the Edinburgh International Book Festival, featuring keynote speaker André Schiffrin.
- Both seminars and the Edinburgh International Book Festival were tweeted via @stirpublishing.
- A selection of papers from the seminars will be written up as special issue of a refereed academic journal.
- All the audiovisual recordings and transcripts of the interviews with individual publishers will be deposited in archives at Universities of Dundee, Reading and Stirling.
- The programme team will seek to meet with representatives from the Scottish Government, Creative Scotland and Arts Council (England) to present an overview of the programme, to share the report findings and to ask for feedback.
- Selected papers from the Globalization and Independent Publishing seminar will be placed in a peer-reviewed scholarly journal.
- A Leverhulme grant application is being made to take further some of the issues and questions raised in the Globalization and Independent Publishing seminar.

Appendices

Appendix 1: Seminar and workshop programmes

1.1. Digital Technologies and Publishing 9-10 June 2011

DAY ONE – Thursday 9 June 2011

Digital Authors, Digital Publishers, Digital Readers

Chair: Chris Meade (Institute for the Future of the Book)

- Sara Sheridan (author of Secret of the Sands and I'm Me)
- Forbes Gibb (University of Strathclyde and Lomax Press), 'How do I work this?'
- Adriaan van der Weel (University of Leiden), 'Reading in the Digital Age'

Cultural Heritage in the Digital Age

Chair: Andrew Nash (University of Reading)

- William Kilbride (Digital Preservation Coalition), 'Our Digital Memory Tomorrow'
- Samantha Rayner (Anglia Ruskin University), 'Preserving Publishing: Paratextual Problems of the Digital Age'

Digital Publishing Case Studies

Chair: Padmini Ray Murray (University of Stirling)

- Cate Cannon (Canongate)
- Neal Hoskins (Winged Chariot)
- Adrian Searle (Freight)
- Tobias Steed (Can of Worms)

Breakout and Review Session: Independent Publishing Digital Dilemmas

Keynote Lecture

Chair: Padmini Ray Murray and Claire Squires (University of Stirling)

- Chris Meade (Institute for the Future of the Book), 'The Amplified Author in the Unlibrary'

DAY TWO – Friday 10 June 2011

Devising the Digital

Chair: Samantha Rayner, Anglia Ruskin University

- Padmini Ray Murray (University of Stirling), 'Game-changing: what publishers can learn from the other creative industries'
- Paul Squires (MD, Perini), 'Magazines: the beginning of the end, or the end of the beginning?'
- Chris Gibson (University of Strathclyde) 'Dirt-e-Books'

Digital Switchovers

Chair: Adriaan van der Weel (University of Leiden)

- Helena Markou (Publishing Innovation Consultant), 'Developing a Custom Textbook Publishing Service at Blackwell Retail'

- David McMenemy (University of Strathclyde): 'Public Libraries, Digital Services, and Readers'
- Iain Stevenson (UCL), 'Copyright and IP in the Digital Age'

Archiving the Publisher

Chair: Gail Low (University of Dundee)

- Alan Bell (University of Dundee)
- Andrew Nash (University of Reading)

Closing Panel: Digital Conclusions, Digital Beginnings

Chair: Claire Squires (University of Stirling)

- Eleanor Logan (ChapterTwenty)
- Simon Meek (Tern Digital/The Story Mechanics)

1.2. Globalisation and Independent Publishing 23-24 June 2011

DAY ONE: Thursday 23 June 2011

The Local and the Global

Chair: David Finkelstein (Queen Margaret University, Edinburgh)

- Jeremy Poynting (Peepal Tree Press)
- Suman Gupta (Open University)
- Joan Amin-Addo (Mango Publishing and University of London)
- Andrea Joyce (Canongate)

Poetry Publishers

Chair: Timothy Morris (University of Dundee)

- Jessie Lendennie (Salmon Poetry)
- Simon Jenner (Waterloo Press)

Translation and Intellectual Property

Chair: Claire Squires (University of Stirling)

- Tony Ward and Angela Jarman (Arc Publications)
- P Duygu Tekgul (University of Exeter)
- Rüdiger Wischenbart (Rüdiger Wischenbart Content and Consulting) via video link

Case Studies

Chair: Andrew Nash (University of Reading)

- Mark Buckland (Cargo Publishing)
- Becky Clarke (Ayebia)
- Gavin MacDougall (Luath)

Keynote Lecture

Chair: Gail Low (University of Dundee)

- Simon Gikandi (Princeton University), 'The Scene of Reading and the Literary Marketplace: Some Postcolonial Reflections'.

DAY TWO: Friday 24 June 2011

Regional Publishers and Languages

Chair: Gemma Robinson (University of Stirling)

- James Robertson, writer and publisher (Itchy Coe and Kettillonia)
- Daniel Boswell (Edinburgh Napier University)

Managing Creativity and SMEs

Chair: Alistair McCleery (Edinburgh Napier University)

- Edward Milford (Independent Publishers Guild)
- David Graham (Aurum)
- Femi Folorunso (Creative Scotland)

Publishing and Cultural/Aesthetic responsibilities

Chair: Sarah Brouillette (Carleton University)

- Nii Parkes (Flipped Eye)
- Michael Schmidt, writer, publisher (Carcenet) and academic (University of Glasgow)
- Kirsty Gunn, author (University of Dundee)

Final Round Table

Chair: Alison Donnell (University of Reading)

- Simon Gikandi (Princeton University)
- Jeremy Poynting (Peepal Tree Press)
- Padmini Ray Murray (University of Stirling)

1.3. Cultural Policy and Independent Publishing, 22-23 August 2011

Monday 22 August 2011

Event at the Edinburgh International Book Festival, in association with Publishing Scotland.

Chair: Claire Squires (University of Stirling)

- André Schiffrin, 'A Visionary Promoter of Independent Media'

Tuesday 23 August 2011

The Publishing Ecosystem - André Schiffrin (The New Press)

Chair: Claire Squires (University of Stirling)

Coalitions of Value

Chair: Femi Folorunso (Creative Scotland)

- Hugh Andrew (Birlinn)
- Jeremy Poynting (Peepal Tree Press)
- Nii Parkes (Flipped Eye)

Networks of Benefits

Chair: Gail Low (University of Dundee)

- Gavin Wallace (Creative Scotland)

- Marion Sinclair (Publishing Scotland)

Advocacy and Funding

Chair: Andrew Nash (University of Reading)

- Clare Hollowell (Scottish Government)
- Liz McGettigan (The City of Edinburgh Council)
- Antonia Byatt (Arts Council England)

Concluding Remarks: Andrew Nash (University of Reading)

Appendix 2: List of participants

Name	Organisation
A.H. van der Weel	Leiden University
Adrian Searle	Freight Books
Alison Donnell	University of Reading
Alistair McCleery	Edinburgh Napier University
Allan Cameron	Vagabond Voices
Andre Schiffrin	The New Press
Andrea Joyce	Canongate Books
Andrew Nash	University of Reading
Angela Jarman	Arc Publications
Antonia Byatt	Arts Council England
Becky Nana Ayebia Clarke	Ayebia Clarke Publishing Ltd
Cate Cannon	Canongate
Chris Gibson	University of Strathclyde
Chris Meade	if:book
Chris Powici	Northwords Now Magazine
Claire Squires	University of Stirling

Clare Hollowell	Scottish Government
Daniel Boswell	Edinburgh Napier University
David Finkelstein	Queen Margaret University, Edinburgh
David Graham	Aurum Press
David McMenemy	University of Strathclyde
Doris Ruth Eikhof	Stirling Management School
Samantha Rayner	Anglia Ruskin University
Duncan Lockerbie	The Lumphanan Press
Duygu Tekgul	University of Exeter
Edward Milford	IPG
Eleanor Logan	ChapterTwenty
Erin Kuker	Independent
Femi Folorunso	Creative Scotland
Fiona MacLeod	Glasgow Museums / Glasgow Life
Forbes Gibb	University of Strathclyde
Frances Sessford	University of Stirling
Francis Shennan	FrancisShennan.com
Gaia Poggiogalli	Fledgling Press

Gail Low	University of Dundee
Gavin MacDougall	Luath Press
Gavin Wallace	Creative Scotland
Gemma Robinson	University of Stirling
Gonzalo Mazzei	Grace Note Publications
Hannah Bannister	Peepal Tree Press
Helena Markou	Independent Publishing Consultant
Hugh Andrew	Birlinn Ltd
Iain Stevenson	University College London
Irini Pitsaki	Northumbria University
James Robertson	Kettillonia/Itchy Coo
Jeremy Poynting	Peepal Tree Press
Jessie Lendennie	Salmon Poetry
Joan Anim-Addo	Mango Publishing and Goldsmiths, University of London
John Storey	Gaelic Books Council/Comhairle nan Leabhraichean
Karen Cunningham	Glasgow Life
Kirsty Gunn	University of Dundee
Lauren Nicoll	University of Stirling

Liz McGettigan	The City of Edinburgh Council
Mark Buckland	Cargo
Melanie Ramdarshan Bold	Loughborough University
Michael Schmidt	Carcanet and University of Glasgow
Neal Hoskins	Winged Chariot
Nii Ayikwei Parkes	Flipped Eye publishing
Padmini Ray Murray	Stirling Centre for International Publishing and Communication
Paul Squires	Perera
Paula Igoe	Fledgling Press
Rüdiger Wischenbart	Rüdiger Wischenbart Content and Consulting
Sara Hunt	Saraband
Sara Sheridan	Society of Authors / 26
Sarah Brouillette	Carleton University / Queen Margaret University
Scott Russell	Scott Russell Publishing Services
Shafifa Alamri	University of Dundee
Sherri McLain	Author
Simon Jenner	Waterloo Press/Survivors' Poetry
Simon Meek	Tern

Stephanie Craighill	Edinburgh Napier University
Suman Gupta	The Open University
Susan Pacitti	Glasgow Museums Publishing
Timothy Morris	University of Dundee
Tobias Steed	Can of Worms Enterprises Ltd
Tony Ward	Arc Publications
William Kilbride	Digital Preservation Coalition
Xiaomei Wang	University of Stirling
Yvonne Barlow	Bookline & Thinker Ltd

Appendix 3: Links and references

Project website:

www.independentpublishing.stir.ac.uk

Other links and references:

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http://www.wischenbart.com/diversity/report/Diversity-Report_2010.pdf.

Stirling Centre for International Publishing and Communication:
www.publishing.stir.ac.uk