

WORKING TOGETHER

PUBLISHING IN WELSH

WITH THE SUPPORT OF THE PUBLISHING

GRANT: A FIVE-YEAR STRATEGY

Drawn up by a Consultative Committee convened by the Welsh Language Board to co-operate with the Welsh Books Council to form a strategy for the publishing trade in Wales.

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CONTENTS

	Page
1 Summary	1
2 Performance Indicators and Targets	3
3 Introduction	4
4 Why the Assembly should Invest More in the Book Trade	6
5 The Present Structure	7
6 The Output	11
7 Book Buying and Reading	14
8 The Main Requirements for Implementing the Strategy	17
9 The Cost	21
10 APPENDICES	25-30
1: The Grant Thornton Report – Summary	25
2: Members of the Consultative Committee which drew up the Strategy	27
3: List of Those who Submitted Written Responses to the Draft Version	28
4: Publishers who Receive Grants Resourced by the Publishing Grant	29
5: Reports Referred to in the Body of the Document	30

1 SUMMARY

- .1 This strategy builds on the Grant Thornton report (GT), commissioned by the Welsh Language Board, and indicates the needs for publishing in Welsh over the next five years. It is the result of co-operation between the Welsh Books Council and a consultative committee convened by the Welsh Language Board to discuss the way forward, and the strategy will be presented to the Language Board and the National Assembly following a process of consultation.
- .2 The Grant Thornton report is a thorough and valuable document and is considered to be a suitable platform for further developments and improvements. However, although the report shows clearly that the Welsh language publishing world is in need of public funding and that the present investment gives value for money, it is the clear opinion of the industry that there can be no further improvements of any importance without substantial investment in three aspects: authors' terms, the infrastructure of the industry, and marketing.
- .3 **Objectives**
The objectives of the strategy can be summarised as follows:
- **to improve and extend the provision**
 - **to increase sales and reach more readers**
 - **to strengthen the infrastructure of the industry to enable publishers to develop and prosper while becoming less dependent on public funding.**
- .4 The main theme of Grant Thornton was that any additional investment should be conditional on increased sales. The strategy proposed in this document seeks to show that there is a good foundation on which to build and that there is considerable potential to reach more readers and book buyers through publishing an increased number of popular books of high standard, targeted specifically for the market, coupled with a policy of strengthening the infrastructure of the publishing houses on which the industry depends so much. Imaginative and vigorous marketing would also be essential and substantial resources would have to be set aside for this.
- .5 Recent research by the Aberystwyth Centre for the Book (*Public Libraries in Wales and the Welsh Book Trade*, September 2000) shows that libraries are pressing hard for a wider choice of reading matter, especially in the popular categories such as biographies and all kinds of fiction.
- .6 The National Assembly wishes to adopt clear and unambiguous standards for public libraries in Wales and a consultative document (provisionally entitled *Comprehensive and Efficient – Standards for Modern Public Libraries in Wales: A Consultation Paper*) has already been prepared. One of the recommendations refers to the need to set a minimum level of spending in each library authority on the provision of books and resources in Welsh, based either on an expenditure per capita of Welsh speakers within the library authority's area or on a minimum percentage of the authority's purchasing fund. If either were adopted, the increase in expenditure would be substantial – from c. £130,000 to c. £400,000 between all the authorities. In order to assist libraries to reach the expected standards, the choice of books on offer to them *must* be extended.
- .7 It is shown that there is a need to increase the Publishing Grant from the present

sum of £0.6 million per annum to c. £1.6 million. It is also shown that the Grant should continue at that level for about 5-7 years but with the hope of decreasing public investment in the long term. The additional investment is justified on cultural and educational grounds as well as on economic grounds and those of sustainable development.

- .8 The targets are listed at the beginning of the document. Assuming the increase which is sought, and with hard effort on the part of every sector of the market, we are confident that these ambitious targets can be reached.
- .9 The strategy takes account of all the Grant Thornton conclusions and recommends a way forward in each case.
- .10 The strength of the strategy is the way in which each single element contributes to a whole package of improvements. To ignore any of the elements would endanger the success of the strategy.
- .11 The strategy is in accord with the policy priorities in *A Culture in Common*, the report of the Assembly's Post-16 Education and Training Committee on the Arts, in putting the emphasis on improving the situation of authors, strengthening the publishing houses and extending the provision for young people.
- .12 The Books Council would be glad to co-operate with the publishing trade and other partners to formulate a parallel strategy for publishing in English, should the Assembly so desire.

2 PERFORMANCE INDICATORS AND TARGETS

We are convinced that the adoption of this strategy would lead to visible progress over the next five years, and the targets listed below are ones which we are confident can be attained, provided the increase in the Grant is obtained, and with hard effort on the part of every sector of the market.

.1 To increase sales of books in Welsh supported by the Publishing Grant

200,000 copies of the books supported by the Grant during 1997/98 were sold by March 2000.

AIM: To sell 300,000 copies of books supported by the Grant in the fifth year (taking the two-year sales figures for those books), **an increase of 50%**.

Taking into account the increase in the number of titles, this would be equivalent to increasing the average sales of new books from 1,000 per title to c.1,250 per title, an increase of 25%.

.2 To increase the turnover of the Welsh books industry

In 1998/99 457,000 copies of books of all kinds in Welsh were sold, i.e. those supported by the Publishing Grant and those supported by other bodies or published without grant. This was equivalent to almost one book for every Welsh speaker. The average in the United Kingdom is TWO English books for every English speaker.

AIM: To increase the figure to sales of 675,000 within five years, an increase of **50%**.

.3 To increase the number of readers of Welsh books and magazines

.4 To increase the number of buyers of Welsh books and magazines

The only statistics available are those gathered by Beaufort Research (for the Arts Council of Wales) between 1992 and 1997. More recent figures are needed concerning the habits of buying and reading books and magazines among the Welsh-speaking population. The first step therefore will be to obtain reliable statistics for the year 2000. These statistics will provide a basis for measuring the increase.

AIM: 25% increase in the percentage of readers and of buyers by the end of the five year period.

.5 Number of library borrowings of Welsh books

It is intended to co-operate with libraries to collect regular statistics of the number of borrowings in order to assess the extent of increases during the period of the strategy.

.6 To measure quality

The Books Council would intend to set up a Panel (including a representation of librarians, booksellers, educationists, critics and readers) to assess the output annually and to report back to the Grants Panel and to the trade, thus ensuring continuous improvement in the quality of the output.

3 INTRODUCTION

- .1 Governments since the 1950s have acknowledged the need to support the publication of leisure books in Welsh. At present, the Publishing Grant for leisure books, magazines and CD-ROMs for children and adults is nearly £624,000. From 1981, the Welsh Books Council was responsible for administering the Grant on behalf of the Welsh Office; since 1997 the Grant has been channelled to the Council through the Welsh Language Board.

Recently the Board commissioned the firm of Grant Thornton to carry out an independent review of the Council's work in the distribution of the Grant. A summary of the main conclusions of that report is contained in Appendix 1.

The purpose of this strategy is to build on the Grant Thornton report, and to offer a comprehensive strategy for the publishing industry over the next five years.

- .2 This is being done at the request of the Welsh Language Board and following a meeting arranged by the Board (11 April 2000) which included members of the consultative panel which advised Grant Thornton together with representatives of the publishing industry and of the Books Council (see Appendix 2 for a list of the names). In that meeting, the value and thoroughness of the Grant Thornton report were acknowledged and the fact that the company had consulted widely with every sector affected by the grant was welcomed. Nevertheless, although the report justifies the existing investment, which is to be welcomed, the unanimous opinion of the committee was that the company had been very reluctant to recommend any developments likely to lead to a financial increase in the Publishing Grant. This was confirmed by the chief consultant and members of the consultative panel appointed by the Board to advise Grant Thornton, each of whom was well qualified in the field of preparing, publishing and reading Welsh books, and each of whom wished to see additional investment in order to improve the provision further.
- .3 It was thus agreed that it was necessary to carry the work a stage further by creating a strategy for the next five years and that the report provided a suitable platform for fulfilling that task. The work of drawing up the strategy was entrusted to the Books Council and the committee convened by the Board. When the committee had completed a draft version of the strategy, extensive consultation on the document took place among the industry and other relevant bodies, and a copy of the document was placed on the Internet. A list of the written responses received is given in Appendix 3. The committee gave detailed consideration to all the responses in drawing up the final version. **In the committee's view, this strategy is a fair reflection of the views of an overwhelming majority within the Welsh publishing industry and the books world in general. Very positive responses were received from bodies representing the interests of libraries and authors.**
- .4 The strategy also takes into account important developments which have taken place since the publication of the Grant Thornton report, in particular:
- the launch of *gwales.com* – the book inquiry and ordering service on the Internet
 - the publication of the first part of the current research project of the Aberystwyth Centre for the Book into the publishing trade: *Public Libraries in Wales and the Welsh Book Trade* (Aberystwyth Centre for the Book, September 2000).

.5 Objectives

The objectives of the strategy can be summarised as follows:

- **to improve and extend the provision**
- **to increase sales and reach more readers**
- **to strengthen the infrastructure of the industry to enable publishers to develop and prosper while becoming less dependent on public funding**

.6 We are glad to see that the policy accords with the policy priorities of *A Culture in Common*, the report of the Assembly's Post-16 Education and Training Committee on the Arts.

The strategy emphasises:

- better financial recognition for authors
- strengthening the publishing houses so that they can become more prosperous and progressive
- extending the provision of books for adults and young people and developing a particular kind of magazine for the young

These are also given prominence in *A Culture in Common*, e.g. at 3.63 – 3.64 (authors), 3.37 – 3.42 (business development), 3.30 – 3.31 (youth).

WHY THE ASSEMBLY SHOULD INVEST MORE IN THE BOOK TRADE

.1 Cultural and educational reasons

- The Welsh language is an essential part of our culture. Our literary tradition is undoubtedly one of our main glories.
- A living language must be read and written as well as spoken. Raising levels of literacy is a Government priority within the Assembly, and we strongly believe that the only way to do so is through the encouragement of reading on every level. Research shows that there is a direct connection between children's grasp of the language and their readiness to read. As Professor Colin Baker has said, 'the more children read, the more their writing improves'. (*Foundations of Bilingual Education and Bilingualism*, new edition 1996.)

The same expert has said, 'Welsh oracy without literacy is like a body devoid of limbs'. (*Aspects of Bilingualism in Wales*, 1985, p.21)

- Two of the basic objectives of *A Strategy for the Welsh Language* (Welsh Language Board, 1995, pp.4, 9-14) are:
 - providing opportunities to use the language
 - changing habits of language use and encouraging people to take advantage of the opportunities provided.

It is not possible to fulfil these objectives without a population that is confidently literate in Welsh. In order to ensure that, reading material of all kinds in Welsh – community newspapers (*papurau bro*), newspapers, magazines, books – must form a natural part of everyday life for a substantial section of the Welsh-speaking population. Reading Welsh ought not to be relegated solely to the education of children and young people. There must be wide provision of leisure reading material in Welsh for people of all ages if Welsh speakers are to be able to live a full life through the medium of their language.

- Numerous surveys have shown that reading continues to be one of the main leisure activities of a substantial proportion of the population, e.g. according to one recent report books are read in 90% of homes in the United Kingdom (*Reading the Situation: Book Reading, Buying and Borrowing in Britain*, Book Marketing Ltd, 2000).
- Reading is relevant to the Assembly's policy of promoting lifelong learning. With the increasing emphasis on promoting Wales as a bilingual country, reading and writing skills in both languages must be fostered.
- The promotion of literacy and reading are also crucial to the Assembly's policy of developing an inclusive society where all are given the opportunity to fulfil their potential.

.2 Economic and sustainable development reasons

- The printing/publishing industry is a native one, much of it in areas recognised to be underprivileged (and now within the scope of Objective 1) which are also strongholds of the Welsh language.

- By strengthening the infrastructure of our publishing houses and bookshops, we would help them to become more progressive and dynamic businesses and thus more profitable.
- The development of *gwales.com* provides the potential to reach a wider, indeed a world-wide, market, but the small businesses of Wales need to be helped to take advantage of e-commerce technology to promote their products.

.3 The Welsh publishing industry has improved greatly over the last two decades, and this is recognised by Grant Thornton. ('There have been clear advances in design, presentation, promotional schemes and editorial content and overall book sales have probably doubled over the last 20 years.' [GT, p.2])

It is the definite view of the industry that there will be no further improvements without substantial investment in the infrastructure of our publishing houses and the provision of better remuneration for authors.

A great deal has been achieved in the field of children's books. We believe that the challenge now is to ensure a range of titles over the whole spectrum and to put mechanisms in place to reach the greatest possible potential in respect of readers and book buyers of all ages.

5 THE PRESENT STRUCTURE

.1 Publishers

Some 20 publishers receive grants regularly from the Books Council for publishing books (see Appendix 4), and five of these publishers (Gwasg Carreg Gwalch, Gwasg Gomer, Gwasg Gwynedd, Gwasg y Dref Wen, Y Lolfa) receive 80% of the money earmarked for books. Of these five, four are printer-publishers and the other specialises in adaptations for young children. It is no accident that the printer-publishers are so prominent since it is recognised that publishing in Welsh to any regular extent is extremely difficult, especially as publishers are obliged to depend on a grant system which contributes mainly to production costs.

Grant Thornton shows clearly that there is no waste in the system of subsidies. In analysing publishers' income, it acknowledges that '[it] is unlikely to generate any significant levels of profit' (GT, p.19). This only echoes the comments made by the Cardiff Business School in a previous report in 1993.

'For most of those involved the financial rewards are undoubtedly quite meagre. Welsh language publishing has been and remains largely a labour of love, and one cannot but admire the perseverance, dedication and commitment of those who have kept the industry alive.' (Report of the Cardiff Business School, 1993, p.68)

What is not demonstrated clearly enough in the Grant Thornton report is how fragile the industry is in reality, depending as it does on a small number of regular publishers. Even our most productive publishing house, Gwasg Gomer (which publishes more than 100 books a year, around 60-65 of them in Welsh) has only four full-time posts in the publishing department with three part-time posts for administration and distribution.

The infrastructure of our main publishing houses is therefore dangerously weak – a point underlined by the two other publishers who receive the greatest proportion of

grants, including small grants from the Council to support editorial posts:

‘There is only just enough incentive under the present system to maintain the commercial interest of publishers in the field of Welsh books and there is only a fine line for publishers between growing tired of the conditions and turning to the production of more profitable goods.’

‘The report does not recognise the strong element of hidden subsidy which the presses give to their publishing work, and the good will and personal interest which motivate them...the continuation of those elements cannot be guaranteed...in an increasingly competitive business world.’*

If there is a move towards a system of financing complete publishing programmes rather than considering individual titles in the case of the main publishers, and thus allowing them more freedom to develop their output (the main recommendation of Grant Thornton; see Appendix 1), there is general agreement that the infrastructure of those publishers must be strengthened. Here is another quotation from a letter sent to the Language Board by one of the main publishers:

‘To create a two to three year programme however would require more resources and staff and commissioning money in advance in order to draw up professional contracts with authors. Publishers cannot have ‘more freedom’ without more financial resources.’

Helping small businesses to become stronger and more profitable is a key element of this strategy and indeed the cornerstone of our plan for further improvement in the provision.

.2 Bookshops

The weakest link in the publishing industry in the view of many is the bookselling sector. The Distribution Centre has about 380 active accounts in Wales. There are about 36 Welsh shops throughout Wales who give priority to selling material in Welsh.

Although the Books Council has recently invested heavily in its Distribution Centre, and although the *gwales.com* service is an ambitious scheme to promote Welsh and Welsh-interest books in a world-wide market, many of our shops still need support and training in using the technology to its fullest potential. A number of them also need help to improve the image of their shops, to widen their circle of customers and to offer an efficient and reliable service.

It is evident that there is potential to sell more of some kinds of books through supermarkets and through the Internet and there should be development in those directions as a matter of urgency. However, the contribution of the small independent shops established specifically to promote material in Welsh should not be overlooked. With appropriate support, these shops would be in a unique position to become worthwhile specialist outlets, displaying a wide range of material and offering useful advice, in addition to developing the distance selling side of their business through the Internet and other methods.

* These are comments from Gwasg Carreg Gwalch and Y Lolfa in correspondence with the Language Board following publication of the GT report.

.3 Authors

It is an undeniable fact that children's books have improved greatly over the last two decades. This is particularly true of illustrated stories and factual books where translation and adaptation can lead to comparatively inexpensive full-colour publications.

In the adult field, however, it can be claimed that the main demand is for *original books*, which often take a long time to write. It is generally agreed that it is not possible to improve the provision for adults/young people without the ability to increase very substantially the payments made to authors.

Authors' payments at present are totally inadequate. Original authors receive royalties on their books but this usually amounts to only a few hundred pounds – for example, a £5.95 book selling 1,000 copies would produce £595. In addition to this, fees are paid for some types of book, mainly novels and biographies, and these vary from a few hundred pounds to a maximum of £2,000 in the case of a commission which may be, for example, for a novel that might take up to a year to write. As a result, there is a great shortage of books written specifically for the market, and when good ideas arise for such books, it is often necessary to wait years for them to be finished. **Writing books in Welsh is to a very large extent an occasional leisure activity depending on good will and a labour of love.**

It is true that the Arts Council of Wales has a bursaries scheme (worth £69,000 in 2000/01) for literary works in Welsh and English and that ACCAC pays realistic hourly rates when commissioning educational material. Those schemes are not relevant in this connection except that they are examples of enabling authors to devote their full time to writing in those fields and perhaps attract authors away from schemes which pay less.

In presenting evidence to Grant Thornton, the Books Council argued strongly for a commissioning fund to make it possible to commission a minimum of twenty books a year, allowing sums of up to £10,000 for each (representing six months' work). That would be a means of ensuring a crop of popular books of high standard on a regular basis and reaching a wide market.

After receiving consistent evidence from every direction, from publishers, libraries and bodies representing the interests of authors, Grant Thornton accepts the need:

'Some longer term incentives for book authors is likely to be increasingly important to the success of the book market in Wales.' (GT, p.20)

'The support of authors is an area that requires a sympathetic and positive response from WLB.' (GT, p.41)

.4 The role of the Books Council

In addition to its role in distributing the Publishing Grant (channelled through the Welsh Language Board since 1997), the main function of the Books Council, which is financed through the Assembly and the local authorities, is to provide a range of services to the publishing industry in Wales – in the editorial, design, marketing and distribution fields – and also to stimulate interest in reading and in books generally. Public libraries also make a key contribution in this connection (see .6 below).

This is nevertheless a supporting role, and although important and far-reaching developments have taken place during the past decade (in the Distribution Centre, for example, with the next-day delivery service and the development of *gwales.com*) a central body whose brief and resources are restricted can never make up for deficiencies at the core of the different sectors of the industry. **The Books Council and the consultative committee are strongly of the opinion that it is necessary to strengthen the infrastructure, on the publishing and book selling side, in order to have a flourishing industry, professional in character, with the public and private sectors reinforcing each other.** Objective 1 funding should offer possibilities in this connection.

The Publishing Grant distributed by the Books Council is £623,704 (2000/01), for the support of leisure/general material in Welsh across all age ranges, and it supports books, magazines, audio cassettes and CD-ROMs.

.5 The role of the other funding bodies

There are three other bodies apart from the Books Council which deal with aspects of publishing books and relevant materials in Welsh.

- **Arts Council of Wales** – a body which distributes grants throughout the arts with a Literature budget of £1.25 million (2000/01). Support is given to organisations, presses, authors, books and magazines in Welsh and English but the grants are confined to material considered to be literary-artistic. The same criteria apply to the National Lottery in the literary field, distributed by the Arts Council.
- **ACCAC** – a comparatively new body (established in 1994) distributing c. £1.4 million (plus £300,000 administrative costs) annually on commissioning Welsh or bilingual books and educational material for the National Curriculum.
- **Welsh Joint Education Committee** – books and other relevant materials for school use are supported chiefly through a guaranteed sales scheme in partnership with local authorities. The annual budget is c.£250,000.

.6 Libraries

Public libraries obviously have a key role in encouraging reading and fostering social inclusiveness. They are open to all, and it has always been at the heart of their ethos to bring books within the reach of as many people as possible.

With the concern about levels of literacy, there has been renewed emphasis throughout Britain on activities to promote reading, and libraries in Wales have been very alert to the possibilities (cf. such schemes as Book Start; Reading Relay; Branching Out) in spite of the financial constraints which they encounter. Libraries have also been major partners of the Books Council in the events of the National Year of Reading and they contribute extensively to World Book Day activities.

Libraries will have a key part to play in ensuring the success of this strategy. The same is true of the press and the media, and the Books Council and book trade will continue to urge them to give better coverage to books.

.7 Publishing in English

Although this strategy deals with publishing in Welsh, it is important to note that there

is no strong tradition of publishing in English in Wales, for a large number of reasons, including historical and economic ones. This is highly relevant as we consider the nature of the small businesses which sustain the publishing trade in Wales, and the Welsh-language trade in particular.

The central services of the Books Council are for material in both languages. Nevertheless, it is not within the Books Council's brief to give publishing grants to books in English. The Arts Council of Wales restricts its grants to *literary* books in Welsh and English.

The Books Council would be glad to co-operate with the publishing trade and other partners in drawing up a parallel strategy for publishing in English, should the Assembly so wish. In the same way, that strategy should look at ways of strengthening the industry's infrastructure and should consider the need for a variety of reading matter of Welsh interest on every level, for children and adults. It becomes increasingly clear that a policy of supporting literary/artistic books alone is insufficient in the existing situation in Wales and that it is necessary to strengthen the English-language provision also, especially in the popular categories, as shown in the report on libraries.* Nevertheless, it is important that this should not hinder the progress of the strategy for publishing in Welsh.

6 THE OUTPUT

.1 Books

Around 600 books a year are published in Welsh at present, mostly receiving subsidy from one source or another. Around 200 of these receive grants through the Books Council.

With all the emphasis in recent years on improving the provision for children, it is not surprising that considerable imbalance has developed between the provision for children and that for adults, and it is interesting to compare the position with the provision for English books in the United Kingdom.

CHILDREN / ADULTS		
	Welsh Books	English Books (UK)
Children	68%	12%
Adults	32%	88%

In analysing further the provision for children it will be seen that educational material now dominates in Welsh, chiefly because of the substantial resources recently given in the educational field through ACCAC.

LEISURE / EDUCATION (CHILDREN'S BOOKS)		
	Welsh Books	English Books (UK)
Leisure	32%	67%
Education	68%	33%

The facts for English Books are taken from *Book Sales Yearbook 1999* (Bookseller Publications). The statistics are for the year 1998.

* *Public Libraries in Wales and the Welsh Book Trade*, Main Conclusions 7.6.

Here are some relevant points:

- In spite of the imbalance, one can take pride in the provision now available for children, although there are still some weak spots (e.g. factual leisure material for older children).
- The position is very different for young people and adults, where it is recognised that the material is thin in many areas.
- This is confirmed by the Grant Thornton report which quotes the response of booksellers and libraries (GT, pp. 49-50). It is strongly confirmed by the report on libraries published recently by the Aberystwyth Centre for the Book.*
- It is considered essential for the Books Council to give more support to popular material for adults, without impoverishing the provision for children, where demand continues to rise and educational books are in danger of dominating.
- It is recognised that fair and realistic payments to authors are crucial in order to fulfil the strategy. It is a fact acknowledged by Grant Thornton that the real 'best sellers' are adult books and that original books, not adaptations, almost invariably sell best in the adult field. (GT, p. 16)

.2 Magazines

Nine magazines (for children and adults) receive grants through the Books Council amounting to a total of £135,000 a year (1999/2000). Six Welsh-language literary magazines for adults receive a total of £138,000 through the Arts Council.

Grant Thornton is generous in its praise of the Books Council's policy for magazines, using such terms as 'innovative' and 'progressive' (GT, p. 37) in referring to what has been achieved in respect of:

- rationalising the number of magazines since 1982
- increasing the number of fields of interest supported
- marketing and market research schemes
- commissioning to fill gaps

It is also noted that the magazines supported by the Books Council reach approximately 100,000 readers (estimating three readers per copy) while the literary magazines supported by the Arts Council reach 25,000 by the same formula. This is a significant but not unexpected fact since the target audience of the magazines supported by the Books Council is in the leisure/general market.

It was therefore disappointing to see that Grant Thornton had not recommended any developments in the field of magazines although there is strong evidence, supported by market research, that the two areas needing development were young people and current affairs. The efforts of the Council to support *Atolwg* (an insert for young people in *Golwg*) and the newspaper *Y Cymro* are only temporary solutions until more resources are available.

* *Public Libraries in Wales and the Welsh Book Trade*, Main Conclusions 7.6.

The problems of publishing Welsh magazines are worse, if anything, than those of books, because of the size of the market and the low income which can be attracted through advertising, the fierce competition from English publications, and the fact that most magazine publishers are not printer-publishers. Nevertheless, one company, Golwg, has shown the way forward in this connection by specialising in magazines and publishing several titles, and there are obvious advantages and economies of scale in doing so. This is considered a pattern to be followed, and it conforms with the general policy of seeking to assist small and viable businesses to develop in a progressive and dynamic way.

.3 **Audio cassettes and compact discs**

Because of limited resources, audio cassettes have been given very little priority so far by the Books Council (approximately £5,000 a year is earmarked), and the grants have been restricted to audio cassettes for children where the spoken element assists reading.

On that basis, Grant Thornton comes to the conclusion that this is a 'marginal' area from which withdrawal is recommended (GT, p.42).

We believe that audio cassettes (and more recent developments such as compact discs and mini-discs) constitute a field which needs developing, and there is every reason to suppose that this could be done successfully, taking into account that this is a growth area in English and that there are strong indications that the use of audio cassettes strengthens reading skills. It is important to realise that audio cassettes are not gimmicks; rather they offer a valuable service to many users – e.g. children starting to read, learners of all ages, those with visual impairment or with reading difficulties, not to mention those who enjoy listening to tapes at home or while travelling.

The clear opinion of libraries in the report of the Centre for the Book is that there is 'substantial demand for audio books among first-language Welsh speakers and learners, both children and adults'. *

An excellent application to the National Lottery by a company wishing to specialise in this field was recently rejected, apparently for the reason that the scheme was unlikely to become self-supporting in the short term. This is an area which is ripe for development and the interest and skills are available within institutions in Wales, who could work in partnership, to produce material of high quality.

.4 **CD-ROMs and electronic publishing**

In 1997 a report on CD-ROMs was prepared by Dr Geraint Evans and Jane Del-Pizzo of the Department of Information and Library Studies, University of Wales Aberystwyth. The report recommended that a minimum of £100,000 per annum was needed for three years to experiment in this field. Subsequently the Language Board set aside £20,000 per annum for developing this area, insisting at the same time that the Books Council develop the area within the current budget.

Once again, Grant Thornton drew attention to the 'particularly successful' work of the Books Council in this connection over the first two years (GT, p. 43) while agreeing with the Council's view that it should not be given priority *at the expense of* books and magazines.

* *Public Libraries in Wales and the Welsh Book Trade*, Main Conclusions 7.6.

As well as continuing to support CD-ROMs, the Council wishes to support progressive schemes in the field of electronic publishing. Financial assistance has been offered by the Assembly's Economic Development Committee to commission research which will provide practical guidance concerning the whole range of options, from on-demand printing to electronic books. The purpose of the research will be to enable the Council to develop this field in a meaningful way, and in parallel with traditional publishing, accepting that there is a place for both.

In the meantime, and in connection with this strategy, we adhere to the original application for £100,000 per annum, over three years, for CD-ROMs and electronic publishing while continuing to maintain that support for this area should not be at the expense of publishing books and magazines in the traditional form.

7 BOOK BUYING AND READING

Although the Grant Thornton report is generally commendatory and raises no doubt about the 'value for money' of the present investment, the main theme of the report is that any substantial increase in resources should be conditional on being able to show an increase in sales. It is important to note also that Grant Thornton shows little interest in the deficiencies in the choice of books available, or the restricted reading opportunities which result, in spite of receiving strong evidence concerning those deficiencies from every section of the industry, including the consultative panel appointed to advise them.

The main purpose of this section is to show that the *total* sales of books in Welsh have risen substantially (see point 1 below). Although the average sales of the books supported through the Publishing Grant have not increased, the fact that they have not decreased is a great achievement considering that the choice of children's books has grown enormously of late, as a result of the work of ACCAC, and the WJEC, and also that there has been a very substantial decrease in purchases by public libraries in Wales over the past five years. By now, figures are available (which were not available to Grant Thornton) showing the exact extent of the decrease in library purchases:

'Our study shows that there was a substantial reduction in the number of copies of popular Welsh-language novels purchased by library authorities for adults following the demise of the Library Grading Scheme (e.g. a reduction of 62% in the number of copies of Grade A books that are now bought compared with the number at the end of the 1980s).' *

We are confident that the turnover of books will increase if this strategy is implemented since it will lead to the publication of more popular titles for adults, coupled with the intention to strengthen the infrastructure of publishers and ensure imaginative and energetic marketing. It is considered that there is sufficient potential for improvement within the leisure spending sector where books have to fight for their share of the market. It must be remembered too that Welsh books are in constant competition with the abundance of English books available. It is reasonable to argue that to increase the range of choice would result in giving Welsh speakers the opportunity to buy a Welsh rather than an English book in a particular genre. In many fields, this choice does not exist at present.

It must also be remembered that the National Assembly is in the process of preparing *Standards for Modern Public Libraries in Wales: A Consultation Paper*. Among the recommendations on which the Assembly wishes to consult is one that sets a minimum

* *Public Libraries in Wales and the Welsh Book Trade*, Main Conclusions 7.3.

expenditure for providing books and resources in Welsh, based on either an expenditure per capita of Welsh speakers within the library authority's area, or on a minimum percentage of the library authority's purchasing fund. If either were to be adopted, the increase in expenditure would be substantial – from c. £130,000 to c. £400,000 between all the authorities.

At the same time, the report of the Centre for the Book shows that librarians wish to see an increase in the choice of popular books for adults in their libraries, with some arguing that they are unable to spend their budget fully at present because of the lack of choice.* **The appeal from libraries is for more choice, not for more copies of the material already available, and if libraries are to attain the standards expected of them, the choice available to them must be extended.** This strategy makes provision for that.

Accepting therefore that it is possible to increase sales, we wish to demonstrate that a great deal has been achieved over the last two decades and that we have a good basis on which to build, considering the size of the potential market.

The following are points for consideration:

1 **The increase in book sales through the Books Council's Distribution Centre**

The increase in the value of books in Welsh sold through the Books Council's Distribution Centre between 1980 and 1999 was at least 70% higher than the increase to be expected in line with inflation (GT, pp. 17-18). This is attributed to the increase in number of books published, especially in the field of education and leisure books for children. It also shows clearly that an increase in the number of books published means an increase in the size of the total market. On this basis, it is reasonable to suppose that increasing the choice in the adult field likewise extends the market.

2 **How many people buy Welsh books?**

In the Grant Thornton report (p. 13) research by Beaufort is quoted showing that about 18% of Welsh speakers *buy* a Welsh book at least once a year, corresponding to 90,000 people. This can be compared with the number *buying* a community newspaper (*papur bro*), viz c. 67,000 people. (The Grant Thornton report is misleading when it compares the number of book *purchasers*, 90,000, with the number of *readers* of community newspapers, 200,000, i.e. purchasers x 3, and this has influenced its conclusions.)

3 **What are the average sales of Welsh books?**

The average sales of new books supported through the Publishing Grant are 1,000. The number of English speakers in the United Kingdom is more than 100 times greater than the number of Welsh speakers (half a million against 60 million). Broadly speaking therefore sales of 1,000 in Welsh correspond to sales of 100,000 in English, a figure cited by Grant Thornton (GT, p.18).

A figure not known to Grant Thornton is that the number of English titles selling more than 100,000 copies a year is less than 50. (*Book Sales Yearbook 1999*, p.39)

* *Public Libraries in Wales and the Welsh Book Trade*, Main Conclusions 7.3.

4 **How do sales of Welsh books compare with those of English books?**

In 1998, 457,000 books in Welsh were sold through the Books Council's Distribution Centre. **This was nearly one book for every Welsh speaker in Wales.** The figure given for sales of books in English in the United Kingdom according to one of the main trade works of reference is 124 million (*Book Sales Yearbook 1999*, p.17). This corresponds to approximately two books for every English speaker, in the context of the huge choice of new books constantly appearing (over 100,000 titles per annum).

8 THE MAIN REQUIREMENTS FOR IMPLEMENTING THE STRATEGY

.1 To strengthen the infrastructure of publishers

The cornerstone of this strategy is the strengthening of the infrastructure of the publishers to enable them to continue to foster the appropriate skills and expertise, to take more responsibility for the nature, content and success of their publishing programmes, and to be seen as truly professional businesses in character and outlook with prospects of being more profitable and viable in the long run.

As things are at present, it is not easy to foresee that they will make much profit out of publishing in Welsh (except in some niche categories) but success in those categories can perhaps help to decrease the need for public funding in time and in some fields, especially as the number of Welsh speakers grows in line with the objectives of the Welsh Language Board and the Assembly. It is also possible to foresee that progressive publishers can increase their income by publishing some bilingual or English-language books for the popular/leisure market (as some do at present), by selling rights in their titles to other media and by developing the 'packaging' aspect in order to sell their original Welsh-language material to overseas publishers, in the form of co-publications. It is possible that there will also be other opportunities in the 'digital content' field as publishers develop the electronic side of their business. This is a medium-term development, and it is foreseen that it will be necessary to continue investing at the level recommended in this strategy for at least 5-7 years, but with the hope of decreasing the public investment or re-directing it for supplementary purposes in the long term.

In order to assist small businesses to grow and flourish, and to ensure standards of excellence, the following will be necessary:

- i) To give financial assistance to maintain editorial posts (creative and/or copy editing) and marketing posts in the main publishing houses. The Books Council will contribute 75% of the salaries in the first year, decreasing steadily over five years to 45% in the fifth year. The intention would be to support up to ten posts in a minimum of five publishing houses throughout the period of the strategy.
- ii) Higher payments to authors (see 8.3 below) will be essential for the implementation of the strategy.
- iii) Hard marketing of individual titles or groups of titles will become an indispensable element in publishing, and realistic resources will be allocated to publicising the books and promoting their sales. The results of the research by the Centre for the Book will give guidance in this area.
- iv) It is not anticipated that the average grant per book will change greatly but more variation will be allowed, in order to encourage better books in respect of content, design and production and recognising the costs attached to the production of high quality books.
- v) Depending on the ability to strengthen the infrastructure of the main publishers, the Books Council would move towards a system of considering publishing programmes rather than individual titles in the case of those publishers who produce the greatest number of titles under the grant. (At present five publishers receive 80% of the book publishing grants, and none of them receives grants of less than £20,000 per annum.)

Targets would be agreed in advance with the publishers in respect of the nature and balance of the programme and probable sales.

Other publishers would continue to receive grants title by title as at present, but they too will be able to benefit from payments made available for authors and marketing, and it will be possible to move from one system to the other if the circumstances of individual publishers change.

.2 To maintain and extend the provision

i) Books

At present about 85 new books a year are published for adults/young people with the support of the Publishing Grant. **The intention would be to increase the number to 135 per annum, i.e. 50 additional titles, with the emphasis on popular books of good quality, written specifically for the market.** This would be done in the light of market research and in consultation with librarians and the trade. The number of new books for children would be maintained at the present level of about 90 books a year.

Within the present provision, it is acknowledged also that there is a need to continue supporting adult books of a high standard for which often there is not a wide market. The Council already supports some such books (e.g. historical and literary studies), but it is true that there are excellent books which fail to obtain grant support from any direction at present. In order to provide a wide choice of material for all kinds of readers, and to give recognition and support to those authors who choose to write such books in Welsh, it is vital to provide this support. The Books Council will undertake to support up to 20 books a year in this category.

Reprints and new editions should continue to receive support in those cases where it is not practicable to publish them without grant-aid.

Provision should also be ensured for readers with special needs, such as large-print books. (Audio cassettes are also important in this connection.)

ii) Magazines

- Giving priority to young people's magazines, a feasibility study should be commissioned to propose a pattern for producing an attractive magazine which would meet the demand and reach the largest possible number of readers. It would be necessary also to consider the possibilities of an electronic connection.
- A sum of £30,000 to be added to the budget for magazines to respond to new applications or development plans by the existing magazines.
- The Language Board to consider transferring the responsibility and the budget for community newspapers (*papurau bro*) (£52,500 in 2000/01) to the Books Council in line with the Grant Thornton recommendation.

iii) Audio cassettes and CDs

There should be an experimental scheme of 10-12 audio cassettes/compact discs per annum targeting a wide range of listeners/readers.

iv) **CD-ROMs and electronic publishing**

The provision of four CD-ROMs in a two-year period as hitherto is not sufficient to make an impact on the market or attract customers. A budget of £100,000 per annum over three years is required in accordance with the recommendation of the report by Dr Geraint Evans and Jane Del-Pizzo, with a reduction in the sum after the first three years. This will allow for experimenting with some applications for electronic publishing as well, beginning with magazines.

Further research into the whole area of electronic publishing will guide the Council's decisions in this field into the future.

.3 **Improved payment for authors**

- i) Since royalty payments are, of necessity, small, it is recommended that publishers be enabled to offer a specific payment, additional to royalties, for an extensive proportion of the books supported. The exact financial terms, and such matters as whether to exclude some categories of books, could be discussed in consultation with authors' and publishers' unions.
- ii) In addition, it is recommended that a commissioning fund be established to enable authors to work full-time for periods of up to six months, with a maximum payment of £10,000 for six months' work. This fund will make it possible to write about twenty books a year for young people and adults and priority will be given to popular books for which there is a demand. (This is in addition to the Arts Council's Bursaries Scheme intended for creative literary works.)

.4 **Marketing requirements**

A specific budget of £75,000 per annum is needed for marketing, to be divided as follows:

- i) A specific sum to promote titles earmarked as 'best-sellers'. These would mainly be books for adults but children's books could be included where the intention is to print more than 3,000 copies. The emphasis of this marketing would be to create hype in the press and the media in order to attract customers into bookshops. Consideration could perhaps be given to appointing a qualified individual or company to undertake the work on behalf of the publishers.
- ii) The remainder of the money to be available for individual publishers' publicity/ marketing schemes.
- iii) Marketing needs cannot be discussed without taking into account the key role of bookshops and the Books Council's Distribution Centre, and marketing schemes should make full use of them (see below).

.5 **Strengthening the infrastructure of bookshops**

Solving the problems of book-selling is outside the brief of the Publishing Grant, unfortunately, although some of the weaknesses have been described in Section 3.2 above. It may be that some new opportunities to develop this sector will arise as a

result of Objective 1 funding, and the Books Council will play a prominent part in promoting and supporting those opportunities.

Within the remit of the Publishing Grant two schemes can be proposed:

- i) It will be possible to allow larger discounts to booksellers when working out the publishing grant in the case of 'best-sellers' so that all shops without exception will be able to stock and sell substantial numbers of copies. This would be allowed on books where the publisher undertakes to print 3,000 or more copies and this should mean no higher cost to the grant since the expected income will be greater.
- ii) A fund will be established (c. £40,000) to respond to applications from shops for interior signs, point-of-sale materials, and individual or joint promotional schemes.

.6 **Market Research and Training**

- i) £15,000 per annum should be set aside for commissioning research which will be a basis and a guide for decision making and will ensure that public funding is channelled in the right directions. The initial emphasis of the research would be on establishing a foundation of meaningful statistics with regard to reading and purchasing publications in Welsh at present.

The research into the book trade by the Aberystwyth Centre for the Book continuing and is being published section by section. Following the report on public libraries published in September 2000, two other studies are in hand, one concerned with the nature and state of book selling in Wales and the other with the publishing industry.

- ii) £15,000 per annum should be set aside for training courses for authors, editors, designers, marketing officers and booksellers. Taking into account the strategy's strong emphasis on introducing a greater degree of professionalism into the industry, and ensuring that the material produced is of the highest standard, training opportunities need to be provided on a regular basis.

9 THE COST	ACTUAL EXPENDITURE 1999 – 2000	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
		+ 15 books	+ 25 books	+ 50 books	+ 50 books	+ 50 books
	£	£	£	£	£	£
1 Publishing grants *	316,455	365,000	396,000	458,000	472,000	486,000
2 Authors *	74,665	377,000	388,000	400,000	412,000	424,000
3 Design and illustration		25,000	25,000	25,000	25,000	25,000
4 Posts in publishing houses *	14,000	150,000	144,000	134,000	114,000	93,000
5 Marketing	---	75,000	75,000	75,000	75,000	75,000
6 Magazines *	136,400	175,000	180,000	245,000	252,000	259,000
7 Audio Cassettes/Compact Discs	3,750	40,000	40,000	30,000	30,000	25,000
8 CD-ROMs and Electronic Publishing	19,500	100,000	100,000	100,000	75,000	75,000
9 Bookshops	---	40,000	40,000	40,000	40,000	40,000
10 Market Research and Training	---	30,000	30,000	30,000	30,000	30,000
11 Administration *	58,934	67,000	69,000	71,000	73,000	75,000
	623,704	1,444,000	1,487,000	1,608,000	1,598,000	1,607,000
12 Community newspapers (Papurau Bro) *	---	53,000	54,500	56,000	57,500	59,000

* Inflation of c.3% has been allowed for the items marked with a * after the first year.

9 THE COST (continued)

NOTES

.1 Publishing Grants (see 8.2 (i))

The estimates are based on the following:

- Starting at a base of £315,000 for:

85	new books for adults/young people
90	new books for children
—	
175	new books
35	reprints
—	
210	books

This reflects the average in respect of books supported in the period 1997 – 2000.

- Giving a grant of £2,000 for every additional book published for adults. This is the average grant for adult books at present.
- £10,000 is included to support up to 20 titles per annum in large print format for readers with impaired sight.
- Allowing an increase in grants of c. 3% per annum. The present grants are very tight and this was accepted by Grant Thornton. It would not be fair to expect grants to be kept at the present level for years ahead with no increase at all.

.2 Authors (see 8.3)

The sum indicated, £377,000, is based on the following:

- i) A specific fee (in addition to royalties) for authors who do not receive a full-time commission:

<u>Children's books</u>		
90 books x £500 (average)*	£45,000	
<u>Adult books</u>		
110 books x £1,200 (average)	£132,000	
	—————	£177,000

ii) <u>Full-time commissions</u>		
20 books x £10,000 (6 months)	£200,000	
	—————	£200,000
		—————
		£377,000

* The average allows for a range of up to £1,000 in the case of children's books and £2,500 in the case of adult books.

.3 Design

A small additional fund of £25,000 is sought in order to provide additional assistance for design and illustrations in the case of some ambitious books (for children or adults) with high potential sales.

.4 Posts in publishing houses

The scheme provides for supporting 10 posts in publishing houses at an average annual salary of £20,000. The Books Council will contribute a total of 75% of the cost in the first year, decreasing year by year to 70%, 65%, 55% and finally 45% in the fifth year.

.5 Marketing

See 8.4

.6 Magazines (see 8.2(ii))

Provision will be made for:

- An additional £30,000 to respond to new applications or to development schemes by the existing magazines.
- £10,000 per annum over the first two years (i.e. £20,000) for a feasibility study into the provision for young people.
- £75,000 per annum from Year 3 onwards to support a magazine for young people. It is possible that this would be partnership funding, since the necessary support could be considerably more than £75,000.

.7 Audio cassettes and compact discs (see 8.2(iii))

Support for 10 – 12 audio cassettes per annum with an average grant of approximately £3,000 per cassette. The support could be somewhat reduced at the end of the period when the number of cassettes available had increased substantially.

.8 CD-ROMs and electronic publishing

See 8.2(iv)

.9 Bookshops

See 8.5

.10 Market Research and Training

See 8.6

.11 **Administration**

The administrative costs in the Grant to the Council have been substantially eroded over the years, and the sum expended at present (£59,000) does not reflect the true administrative costs. This is why an increase in the base line to £67,000 is requested together with subsequent increases in line with inflation.

.12 **Community Newspapers (*Papurau Bro*)**

The community newspapers have been promised grants of £52,500 by the Welsh Language Board in 2000/01.

THE GRANT THORNTON REPORT – SUMMARY

A review of the Publishing Grant was commissioned by the Welsh Language Board in 1998, and the work was carried out by the firm of Grant Thornton. The final report was submitted in September 1999.

The following is a brief summary of the main conclusions and recommendations in the report.

1 Administration of the Publishing Grant

The report's conclusions concerning the Books Council's administration of the Publishing Grant are in general favourable.

- .1 It is demonstrated that the administrative costs are low and give good value for money. The substantial voluntary contribution made by members of the two Panels concerned with the work is also acknowledged. (p. 28)
- .2 It is accepted that the administration of the books grant is efficient, and that the Books Council's policy is to allow the minimum grant which will enable the book to be published, and thus to ensure that the greatest number and widest choice of titles can appear. (pp. 31-32)
- .3 It is confirmed that the system is a fair one: 'WBC work hard to be open and fair to all applicants and to ensure that the right balance exists between category of book and individual publishers'. (p.31)
- .4 Special praise is given to the Council's work in respect of magazines ('innovative and progressive', p. 37) and CD ROMs ('particularly successful', p.43).

2 The main conclusions regarding the books situation

- .1 The need for public support for publishing in Welsh is accepted. (p.13)
- .2 It is accepted that publishers' income is low and that publishing with a grant 'is unlikely to generate any significant levels of profit'. (p.19)
- .3 It is accepted that authors' income is very low, and that action is needed to change this. 'Some longer term incentives for book authors is likely to be increasingly important to the success of the book market in Wales'. (p.20)
- .4 The report praises the 'significant improvement' which has taken place in the quality of books with regard to content and design, and attributes that in part to the Council's work with the Publishing Grant. However, since 'the main focus throughout the book publishing industry in Wales is on output and production' (p. 17), insufficient attention is given to the demand for books, what kinds of books are in demand, and how they are to be effectively marketed when produced.

- .5 The grant is efficiently managed, but the report expresses some concerns about its effectiveness. There is 'no clear evidence that the grant is promoting an increase in sales' or in the number of readers. (p.3)
- .6 Although the current grant mechanism has 'served its purpose well' and is administered cost effectively, thus having 'a significant impact on the quality and range of books in Wales', the report takes the view that the mechanism should be developed so that it 'gives greater freedom to publishers whilst ensuring the spread of titles and increase in book sales is maintained'. (p.55)
- .7 In order to identify the needs of the market, regular market research is needed. (p.51)

3 Main recommendations

- .1 At present each application for grant from each publisher is considered individually. The main recommendation of the report is to change the system in the case of the leading publishers (presumably the five largest, who already receive 80% of the grants for books) so that the Council would finance publishing *programmes* presented by them. Since grant allocations would be promised for programmes continuing as long as two or three years, manuscripts would not be seen before the allocation of a grant as is the case at present. But agreement would be reached on such matters as: the number of titles and to which category they would belong; sales targets; publication dates; and other touchstones of quality and standards. (pp. 5, 56-57)
- .2 In the case of other publishers, the system of considering applications for individual books could be continued. (pp. 5, 57)
- .3 It is recommended that there should be a commissioning fund for authors combining the various schemes at present in existence. (pp. 6, 57)
- .4 Recommendations in respect of magazines include the following:
- Financing a feasibility study into a magazine for young people.
 - Research into the possibility of developing a magazine or magazines in electronic format. (pp. 8, 39)
- .5 Consideration should be given to asking the Books Council to distribute grants to community newspapers (*papurau bro*), which at present are distributed directly by the Welsh Language Board. (pp. 8, 40)
- .6 The report is in favour of paying more attention to the marketing of books. (pp. 11, 52-53)
- In this context, it is in favour of developing the present Appointments Scheme (where the Council gives partial financial support to two editorial appointments in publishing houses) to include marketing staff. (pp. 8, 41-42)
- .7 Market research should be carried out regularly to discover the needs of the market and give direction to the work. Emphasis is also put on the need for reliable statistics on all aspects of publishing. (pp. 10, 52)

MEMBERS OF THE CONSULTATIVE COMMITTEE WHICH DREW UP THE STRATEGY

- * Dr Glyn Tegai Hughes
- * Professor Geraint H. Jenkins
- * Robat Arwyn Jones
- * J. Elwyn Hughes
- * Robin Llywelyn
- * Bethan Evans

Mairwen Prys Jones – Gwasg Gomer

Myrddin ap Dafydd – Gwasg Carreg Gwalch

Ashley Drake – Ashley Drake Publishing

Selwyn Evans – Siop y Siswrn

Professor Hywel Roberts (representing the Welsh Books Council)

Gareth Davies Jones (representing the Welsh Books Council)

Officers

Gwerfyl Pierce Jones

Richard Owen

Philip Davies

The six members marked with a * were also members of a consultative panel appointed by Grant Thornton and the Welsh Language Board to give specialist advice to Grant Thornton during the review. The chief consultant was Dr Glyn Tegai Hughes.

LIST OF THOSE WHO SUBMITTED WRITTEN RESPONSES TO THE DRAFT VERSION

21 written responses were received to the draft version of the strategy.

Publishers

Cymdeithas Lyfrau Ceredigion – Dylan Williams
 Gwasg Gwynedd – Gerallt Lloyd Owen
 Gwasg Pantycelyn – Dr Brynley F. Roberts
 Gwasg Prifysgol Cymru/University of Wales Press – Susan Jenkins
 Gwasg y Dref Wen – Roger Boore
 Y Lolfa – Robat Gruffudd

Organisations and bodies

Department of Education, Culture and Leisure, Gwynedd Council – Hywel James
 The Society of Chief Librarians (Wales) – Rona Aldrich
 Welsh Joint Education Committee – Iolo Walters
 Welsh Library Association – Huw Llywelyn Evans
 Writers' Guild of Great Britain –
 Sion Eirian
 Dafydd Huws
 Geraint Lewis
 Gareth Miles
 William O. Roberts
 Roger Williams

Authors/Individuals

Hedd ap Emlyn
 Catrin Puw Davies
 Eleri Hopcyn
 Geraint Vaughan Jones
 Harri Pritchard Jones
 Huw Onllwyn Jones
 Professor M. Wynn Thomas
 Rol Williams

PUBLISHERS WHO RECEIVE GRANTS RESOURCED BY THE PUBLISHING GRANT

1 Book publishers

The Books Council has supported over 60 different book publishers at various times since 1981. Listed below are those publishers who received support during 1997 – 2000.

As is noted in the document (p.5), 80% of the Grant is allocated to five publishers, viz:

Gwasg Carreg Gwalch, Llanrwst
Gwasg Gomer, Llandysul
Gwasg Gwynedd, Caernarfon
Gwasg y Dref Wen, Cardiff
Y Lolfa, Tal-y-bont, Aberystwyth

The other publishers supported from 1997 – 2000 were:

Cyhoeddiadau Barddas, Swansea
Cyhoeddiadau Curiad, Pen-y-groes, Caernarfon
Cyhoeddiadau Sain, Llandwrog, Caernarfon
Cyhoeddiadau'r Gair, Bangor
Cymdeithas Alawon Gwerin Cymru, Aberystwyth
Cymdeithas Lyfrau Ceredigion, Aberystwyth
Gwasg Bryntirion, Bridgend
Gwasg Gee, Denbigh
Gwasg Pantycelyn, Caernarfon
Gwasg Prifysgol Cymru, Cardiff
Honno, Aberystwyth
Hughes a'i Fab, Cardiff
Llyfrau Madog, Porthmadog
T? John Penri, Swansea
Urdd Gobaith Cymru, Aberystwyth

2 Magazine publishers

The magazines supported at present are published by the publishers and societies listed below:

Cwmni Golwg, Lampeter
Cymdeithas Hanes Amaethyddiaeth Cymru
Gwasg Carreg Gwalch, Llanrwst
Merched y Wawr
North Wales Newspapers, Mold
Pwyllgor Rheoli *Cristion*
Urdd Gobaith Cymru, Aberystwyth

REPORTS REFERRED TO IN THE BODY OF THE DOCUMENT

- 1 'Cardiff Business School Report'
Evaluation of the Efficiency and Effectiveness of the Grant Support Scheme for Welsh Language Publishers, D.R. Thomas and D.N. Marriott (Cardiff Business School, March 1993).
- 2 'Grant Thornton'
Review of the Publishing Grant Administered by the Welsh Books Council (Grant Thornton, September 1999).
- 3 *A Survey into Welsh CD-ROMs in the Leisure Sector*, Geraint Evans and Jane Del-Pizzo (Department of Information and Library Studies, University of Wales, Aberystwyth on behalf of the Welsh Books Council, July 1997).
- 4 *Public Libraries in Wales and the Welsh Book Trade*, Gwilym Huws and Jane Del-Pizzo (Aberystwyth Centre for the Book, September 2000).
- 5 *Comprehensive and Efficient – Standards for Modern Public Libraries in Wales: A Consultation Paper* (July 2000).
- 6 *A Culture in Common – A Report from the Post-16 Education and Training Committee* (National Assembly for Wales, November 2000)