The Publishing Industry in Scotland
Lorraine Fanning, Chief Executive Officer, Publishing Scotland

Last year was a very interesting time for the Scottish publishing industry. The challenges presented by the digital age, and the trading conditions for books, inspired the Scottish Publishers Association to reorganise into a new company, Publishing Scotland, which was launched on 2nd April 2007. The new company now has more of a development role, with a focus on Creative Industries, as well as that of its existing trade association – a function it performed as the Scottish Publishers Association for 33 years.

Publishing Scotland has three main arms: a core development and network organisation; publishing business services; and the two trading companies, the distribution company, BooksSource, and the information site, BooksfromScotland.com. Formerly, the Scottish Publishers Association, which was started in 1974 by a group of 12 publishers, was a trade association with strong networking power. The new company has formalised these networks and now offers two categories of membership – for publishers and for individuals, companies and organisations that work with or within the Scottish publishing industry.

Our new organisation is proud of the achievements in Scottish publishing of the last ten years. The reputation of Scottish literature has grown significantly around the world and Scotland’s publishers have enjoyed considerable success. Their output covers fiction and poetry, biography, history, politics, criticism, food and drink, humour and travel, and also academic, banking, education, legal, medical, reference, photography. Publishing from Scotland also includes online journals and web-based information resources, and comes in CD format, audio books, podcasts and downloads. Scottish-published books provide information and stories for successful film scripts, TV dramas, documentaries, and computer games. Publishers based in Scotland sell rights to the work of their writers in dozens of countries and territories throughout the world.

Some of the great names in publishing originated in Scotland, with companies such as Thomas Nelson, William Collins, A&C Black, Chambers, and Blackie & Son, following pioneers like Encyclopædia Britannica, building print and bookselling businesses alongside them. Scottish writing today comes from a tradition of great work from writers such as Robert Burns, Sir Walter Scott, Robert Louis Stevenson and James Hogg, who were celebrated worldwide. There were also scientists, philosophers and economists like James Hutton, David Hume and Adam Smith who added lustre to the Scottish Enlightenment of the 18th century. Indeed, this year, Scotland celebrates 500 Years of Printing in Scotland, promoted by the National Library of Scotland, the Scottish Printing Archival Trust and the Scottish Print Employers’ Federation and endorsed by the Scottish Government. A range of local
events and initiatives across Scotland throughout the year is planned (see p.179) and Publishing Scotland hopes to play a part in the celebrations.

We operate in a time when, despite many predicting the death of the book, UK book sales are strong. In 2006 the Scottish market was valued at an estimated £200m (invoice value). The Scottish book and journal publishing industry employs an estimated 1,300 people, with many freelance workers supplying services to the marketing, sales and distribution functions, as well as those working in editorial and production. Annually, we produce around 2,000 new titles from Scotland, while in 2006 the overall UK book market produced an estimated 787m books, with an invoiced value of £2.81bn, and overall value of £3.3bn at end purchaser prices. (Source: Publishers Association). Nielsen Bookdata recorded 1.6 million titles available for sale in the UK and recorded 266,000 new and revised titles in 2005, compared with 161,000 in 2004.

Bookselling, however, is changing dramatically: the growth of online and digital technology threatens the high street booksellers, as does the growing share of the book market by the supermarkets. Waterstone's completed its takeover of Ottakar's in 2006, and Simon Fox, chief executive of HMV Waterstone's put it well when he said that 'our markets are changing profoundly. Entertainment is being generated and consumed in entirely different ways - putting pressure on traditional retail space and traffic.' Publishing Scotland greatly appreciates the support from bookshops which have Scottish-interest sections, and must highlight the work of Scottish writers at regular intervals. We are pleased to be working so closely with the chains and independents in Scotland to create new opportunities for Scottish publishers, and very much value the relationship we have with Historic Scotland, VisitScotland and The National Trust for Scotland.

To promote the work of Scottish publishers, Publishing Scotland launched an internet bookselling site in December 2005, BooksfromScotland.com currently features over 75,000 titles.

Our objectives for the next year are to promote, maintain, improve and advance public education and to stimulate and educate the public interest in the Arts for the benefit of the community by fostering the growth of publishing in Scotland. We see our role as the network for trade, training and development. Among our aims are:

• to promote and sell Scottish writing to the world through the BooksfromScotland.com website
• to build the network - our network members include literary agencies, design professionals, illustrators, photographers and typographers as well as editors, project managers, and indexers
• to improve our free, useful and enjoyable programme of network events for both network and publisher members
• to be the leading participant in the EUCL (Edinburgh UNESCO City of Literature) project
• to liaise with the UK book trade through its committee
• to continue to publish our annual Publishing Scotland Yearbook
• to place Scottish writing at the heart of the Edinburgh International Book Festival
• to build on our network exchange programme
• to increase sales to libraries
• to develop bibliographic data
• to provide training for publishers and related individuals and companies

In the past year, through Publishing Scotland we have extended and formalised our links with educational establishments, libraries and individuals and companies in the creative sector. This has enabled us to build the new network for the reorganised company, and establish the new development role and infrastructure for Publishing Scotland. We are grateful for the cooperation and help we have been given by these sectors. It is significant that the Society of Authors in Scotland has joined us as a network member and we continue to give help and advice to both new and established authors.

Expanded sections in our 2008 Yearbook reflect our interest in areas, such as stories of how well-known Scottish writers first got published, indexing, changes to the library market, and how Dundee Libraries – one library publisher – has created an award and published a book aimed at encouraging children to read.

Publishing Scotland’s work continues with the Department of Culture Media and Sport in creative industries and it looks forward to a challenging year ahead.
Publishing Scotland

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Services offered: Information, advice, consultancy, training, events, marketing, export and promotional services.

A description of the company's services to members is below.

Origins of Publishing Scotland

The Scottish Publishers Association (SPA) was set up in 1973 by a group of 12 publishers as the Scottish General Publishers Association, with Robin Lorimer as the first chairman. The Scottish Arts Council gave financial support and the membership grew.

In order to match 21st century developments, it was decided in April 2007, to change the SPA to a new organisation, Publishing Scotland. This new company takes responsibility for the representation and development of the publishing sector in Scotland.

Publishing Scotland maintains the SPA's aims of helping publishers in Scotland to conduct their book-publishing business in a professional manner; of marketing their output to the widest possible readership within Scotland, the UK and overseas; and of encouraging the development of a literary culture in Scotland but it also offers much more.

Membership

There are now two categories of membership of Publishing Scotland – publisher and network.

- Publisher membership is open to all book and print-based publishers or online and electronic publishers (including digital publishers). Companies must be based in Scotland or publish predominantly Scottish material. Membership is also open to content providers, packagers and organisations of institutions who produce or trade in books or intellectual property. Please see our website for a list of the publisher membership criteria.

- Network membership is open to those individuals and companies who work within or with the publishing industry but who are not actually publishers themselves. It is also open to non-publishing libraries. Current network members include illustrators, designers, literary agents, editors, translators, print and digitisation companies, authors (through the Society of Authors in Scotland membership) and universities. Network members must be based in Scotland, supply goods and/or services to publishers, have training and expertise and work professionally within the publishing sector.

Services to Members

Publisher members benefit from an annual programme of activities which offer opportunities to all publishers, whatever their size, scope, specialty or geographical location. These activities are organised on the basis of business in order to save costs and administrative time. They include attendance at book fairs (home and abroad); marketing to bookshops, schools and libraries; publicity and advertising services; catalogue mailings and website information; provision of professional training facilities in publishing skills; information resources and business advice. We also work on liaisons with the UK bookchairs. In addition, Publishing Scotland implements research, develops projects and liaises with outside organisations which are considered to be of interest and benefit to the membership of Publishing Scotland, for example with the Publishing Training Centre, universities, the British Council, the Scottish Executive and Scottish Enterprise.

Publisher and Network members benefit from the following:

- Regular information bulletins about marketing opportunities, trade fairs, employment, manuscripts available, bookshops, overseas markets and general publishing news.

- Information and advice from Publishing Scotland's staff members and access to Publishing Scotland's resource library (see bibliography, pp.260-263).

- Access to services provided by expert advisers, the Department of Trade and Industry, Scottish Trade international and information on promotions, funding and advertising opportunities overseas.
Other services offered are charged at low rates. They include:
- regular advance information and catalogue mailings to major bookshops, wholesalers, library suppliers and press contacts
- new books information distributed to the UK book trade, media, libraries and individuals
- mailing labels from an extensive database
- representation at book fairs in the UK and abroad

Members may display their books on the Publishing Scotland stand even if they do not attend the fair personally. Fairs attended in the past have included: Bologna Children's Book Fair, BookExpo America, Edinburgh International Book Festival, Frankfurt Book Fair, Gothenburg Book Fair, Sweden, London Book Fair, Prague BookWorld, Scotland's International Trade Fair
- promotional activities include joint advertising, press and media campaigns, book display facilities, new book catalogues, and web site events and book listings
- export sales consortium to develop overseas sales.

Member publishers are also offered the services of BookSource, the distribution company, in which Publishing Scotland has a major interest.

Network members benefit from the following:
- an annual programme of free network events given by subject experts and covering a wide range of topics. This year's events have covered such subjects as electronic publishing, contracts and negotiating skills. These events are also open to publisher members so that they become excellent networking opportunities.
- a regular bulletin to network members giving details of trade issues, up-and-coming Publishing Scotland events and other events run by different organisations which may be of interest to the network membership
- reduced-price entry into the Publishing Scotland Yearbook, together with a free copy once published
- information and advice from Publishing Scotland's staff members and access to Publishing Scotland's resource library (see Bibliography pp.200-203).

All members of Publishing Scotland are also able to take advantage of the following:
- training courses and seminars on a wide range of publishing issues at reduced member rates (these also available to non-members for a higher fee) see our website for an up-to-date listing.
- hire of a conference suite with full powerpoint and sound system facilities or hire of a smaller meeting room for a reduced member rate (also available to non-members for a higher fee).
- a loyalty card scheme whereby a member has their loyalty card stamped for each free member event they attend. (Once three stamps have been collected, a place on a training course can be booked for a 50% discount on the membership rate.

Financing Publishing Scotland
Financial assistance comes from the Scottish Arts Council, subscriptions paid by members and charges made for services.

How Publishing Scotland is Governed
Publishing Scotland is governed by a Board which is made up of five publisher members, two network members, Publishing Scotland CEO, Publishing Scotland Member Services and Marketing Manager and four non-executive members. The current Board consist of: Christian Maclean, Floris Books
Kathleen Anderson, Canongate Books
Keith Whittles, Whittles Publishing
Mike Miller, Geddes & Grosset
Ann Crawford, Saint Andrew Press
Kathleen Brown, Trilogy Publishing
Brian D. Osborne, author
Lorraine Fannin, CEO, Publishing Scotland
Sheena McDonald, presenter and broadcaster
Eddie Rob, Bell Lomax Agency
Simon Brown, Anderson Strathern
There is currently one non-executive member place free.