

Agenda – Culture, Welsh Language and Communications Committee

Meeting Venue:	For further information contact:
Committee Room 4 – Tŷ Hywel	Steve George
Meeting date: 20 September 2017	Committee Clerk
Meeting time: 09.30	0300 200 6565
	SeneddCWLC@assembly.wales

1 Introductions, apologies, substitutions and declarations of interest

2 News Journalism in Wales: Evidence Session 12

(09:30 – 10:15)

(Pages 1 – 77)

Douglas McCabe, CEO and Director of Publishing and Tech for Enders

Analysis – by video link

Break (10:15 – 10:30)

3 Independent Review of Support for Publishing and Literature in Wales: Evidence Session 1

(10:30 – 11:15)

(Pages 78 – 320)

Lleucu Siencyn, Chief Executive, Literature Wales

Damian Walford Davies, Chair, Literature Wales

4 Independent Review of Support for Publishing and Literature in Wales: Evidence Session 2

(11:15 – 12:00)

(Pages 321 – 335)

Helgard Krause, Chief Executive of the Welsh Books Council

Professor M Wynn Thomas, Chairman of the Welsh Books Council

5 Paper(s) to note



- 5.1 Independent Review of Support for Publishing and Literature in Wales:
Additional Evidence**
(Pages 336 – 356)
- 5.2 Correspondence from Department for Digital, Culture Media and Sport:
Future of S4C**
(Pages 357 – 361)
- 5.3 Letter from Cabinet Secretary for Economy and Infrastructure regarding
Thurley Review**
(Pages 362 – 368)
- 5.4 News Journalism in Wales: Additional Evidence**
(Pages 369 – 373)
- 6 Motion under Standing Order 17.42 to resolve to exclude the
public from the meeting for the following business:**
- 7 Funding for and access to music education: Consideration of Draft
Report**
(12:00 – 12:30) (Pages 374 – 415)

Agenda Item 2

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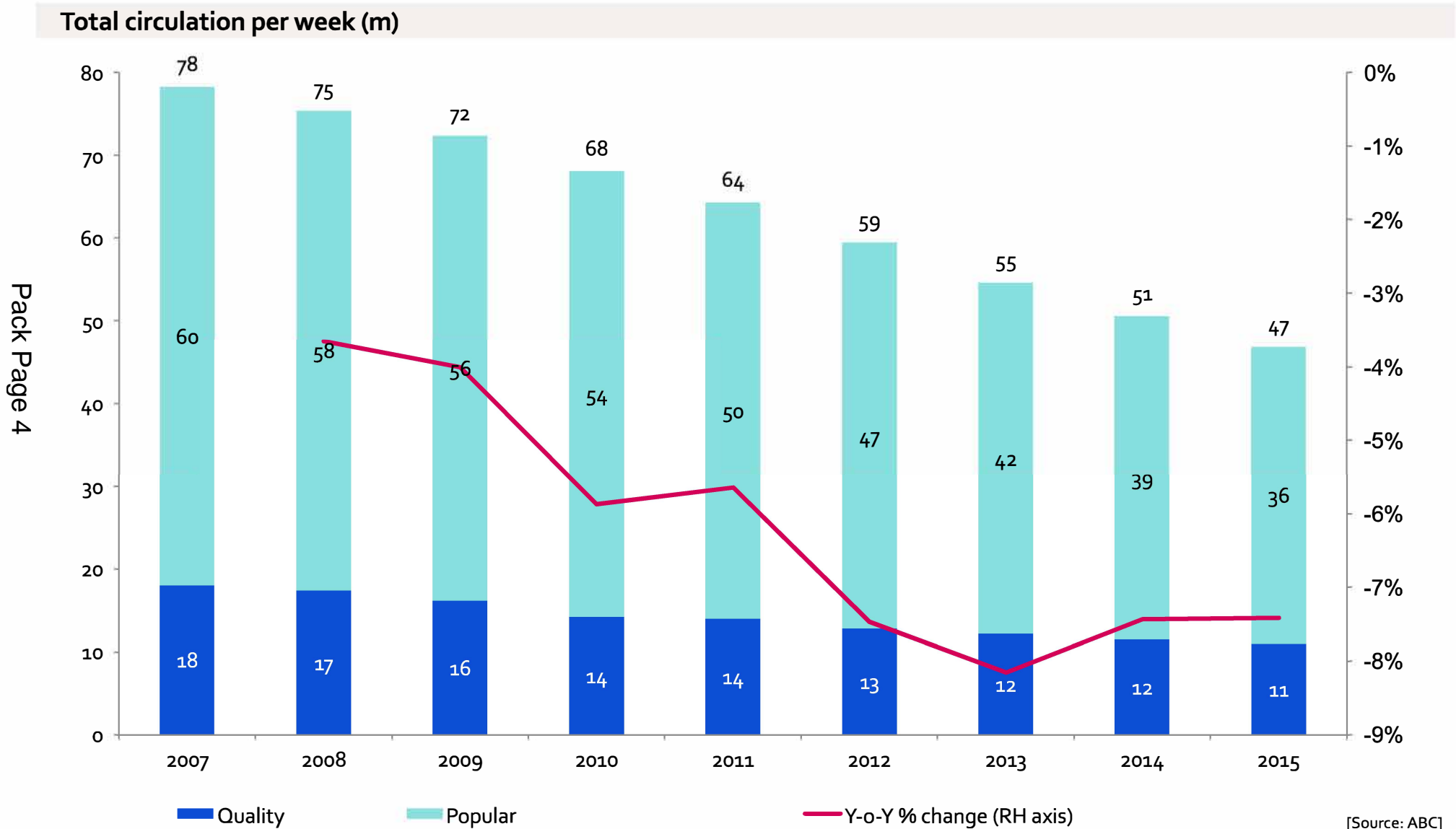
News media outlook

Culture Welsh Language & Communications Committee

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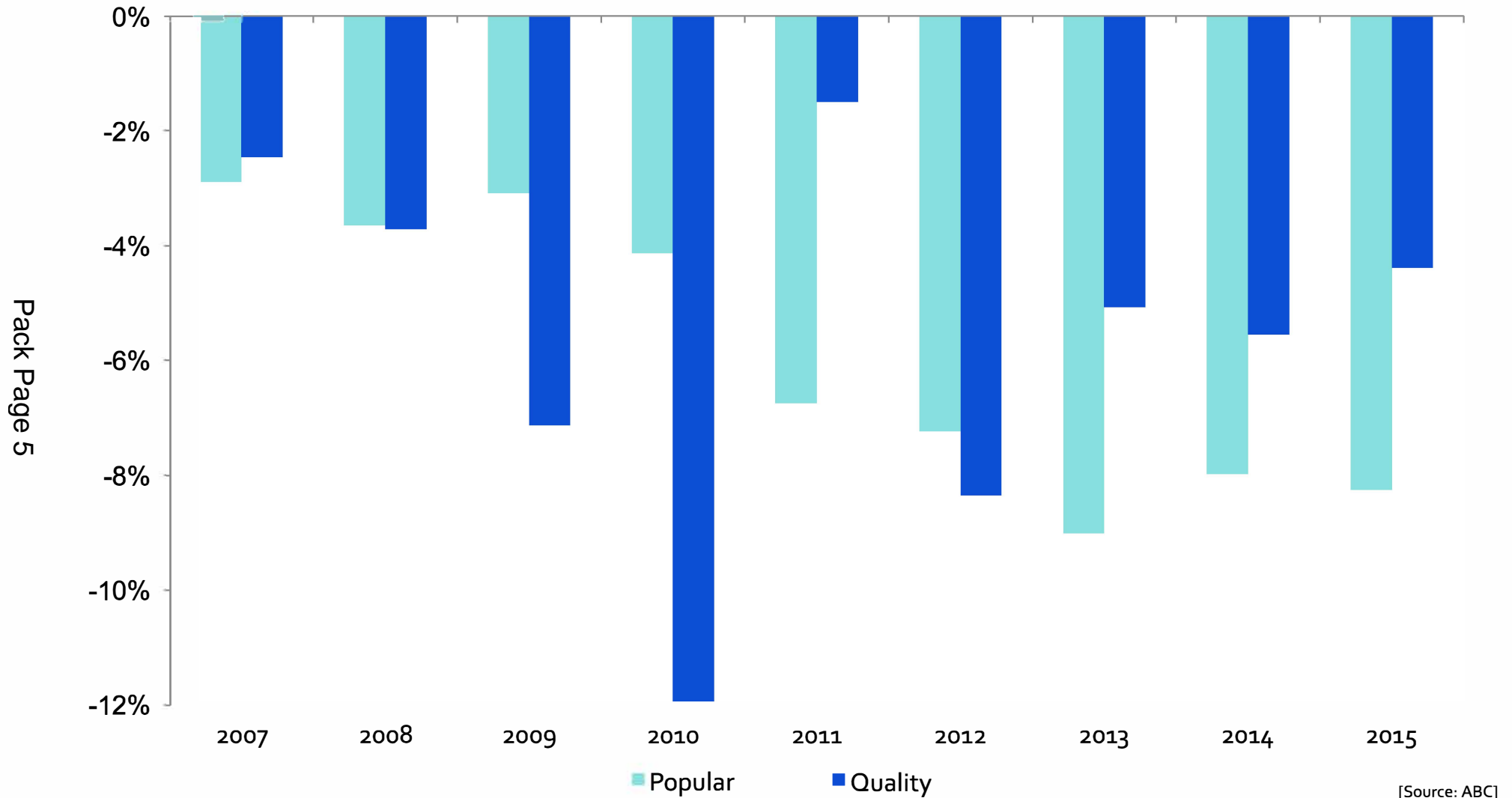
Alice Pickthall | alice.pickthall@endersanalysis.com | +44 20 7851 0900

Daily print news: relentless 8% decline



Shift from "quality" to "tabloid"

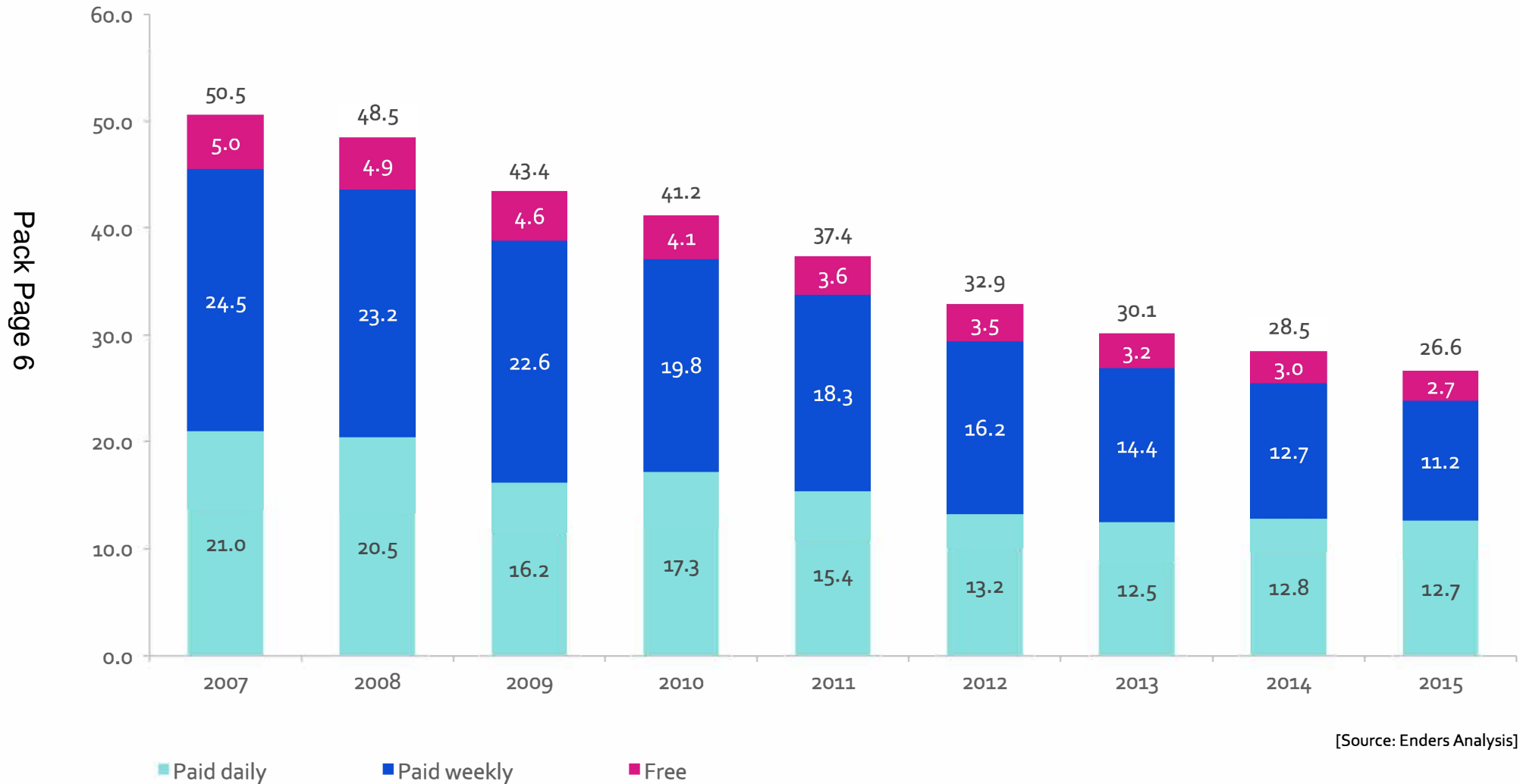
Circulation growth (Y-o-Y % change)



[Source: ABC]

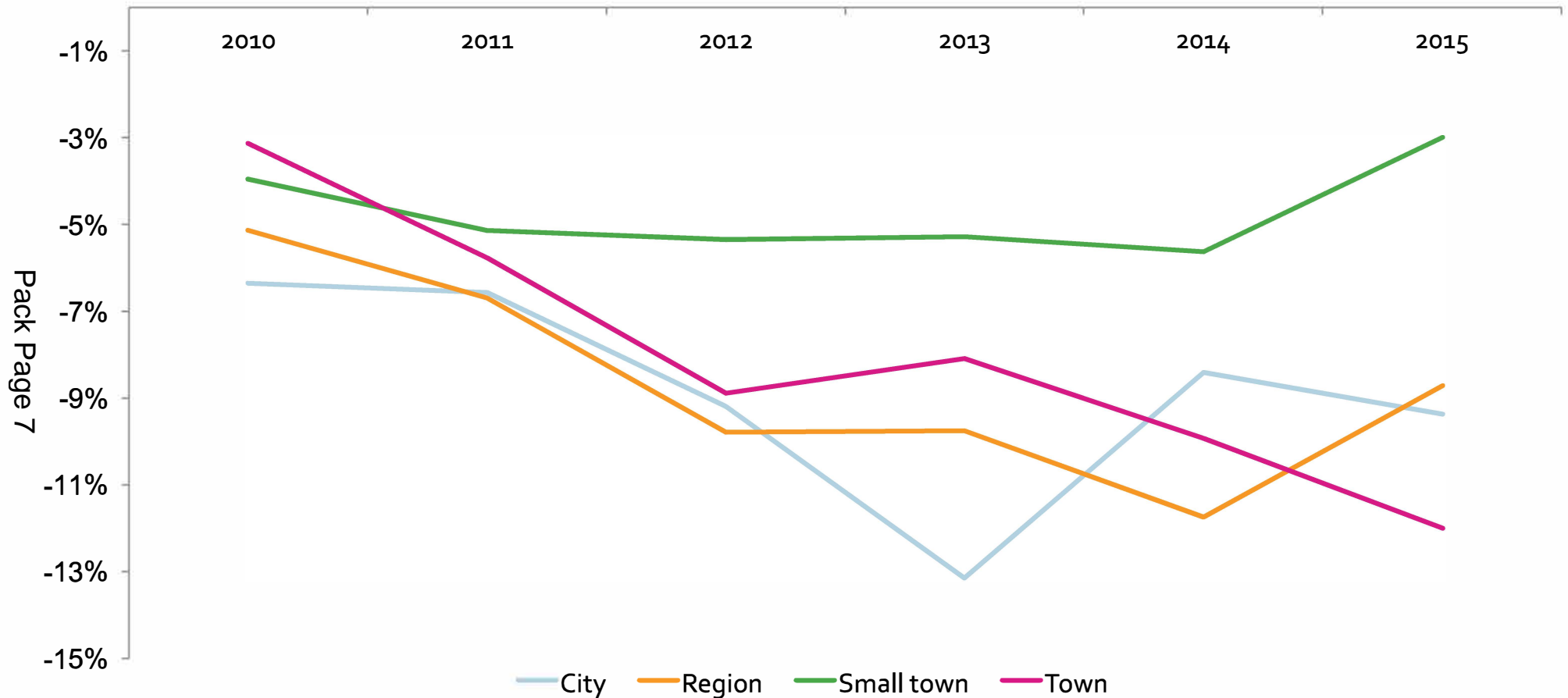
Local press volumes – falling even more quickly

Regional newspapers circulation per week



Local press – circulation more resilient in smaller towns

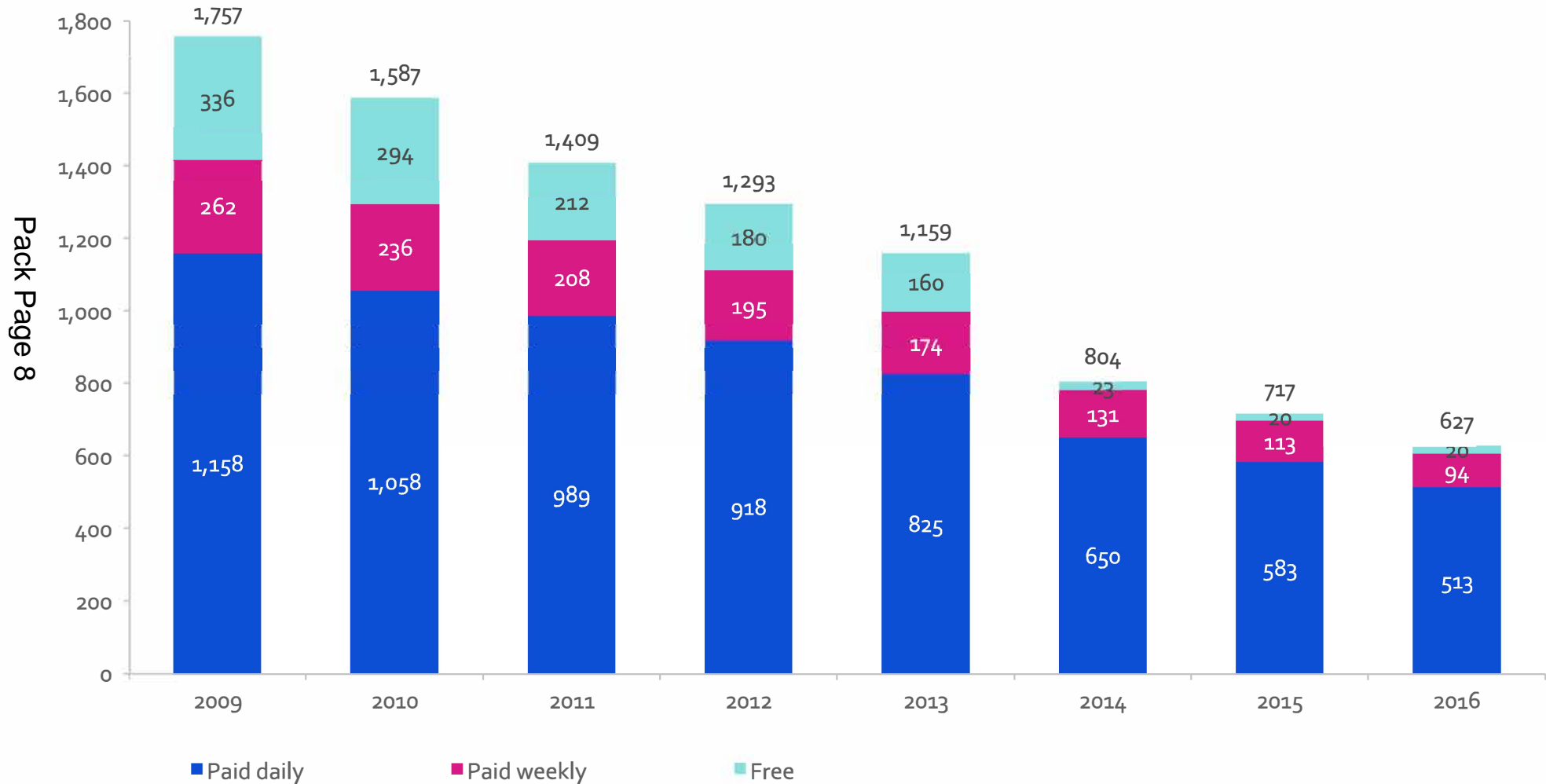
UK regional newspapers circulation by geography size y-o-y % change



[Source: Enders Analysis based on ABC]

Welsh press volumes follow UK trend

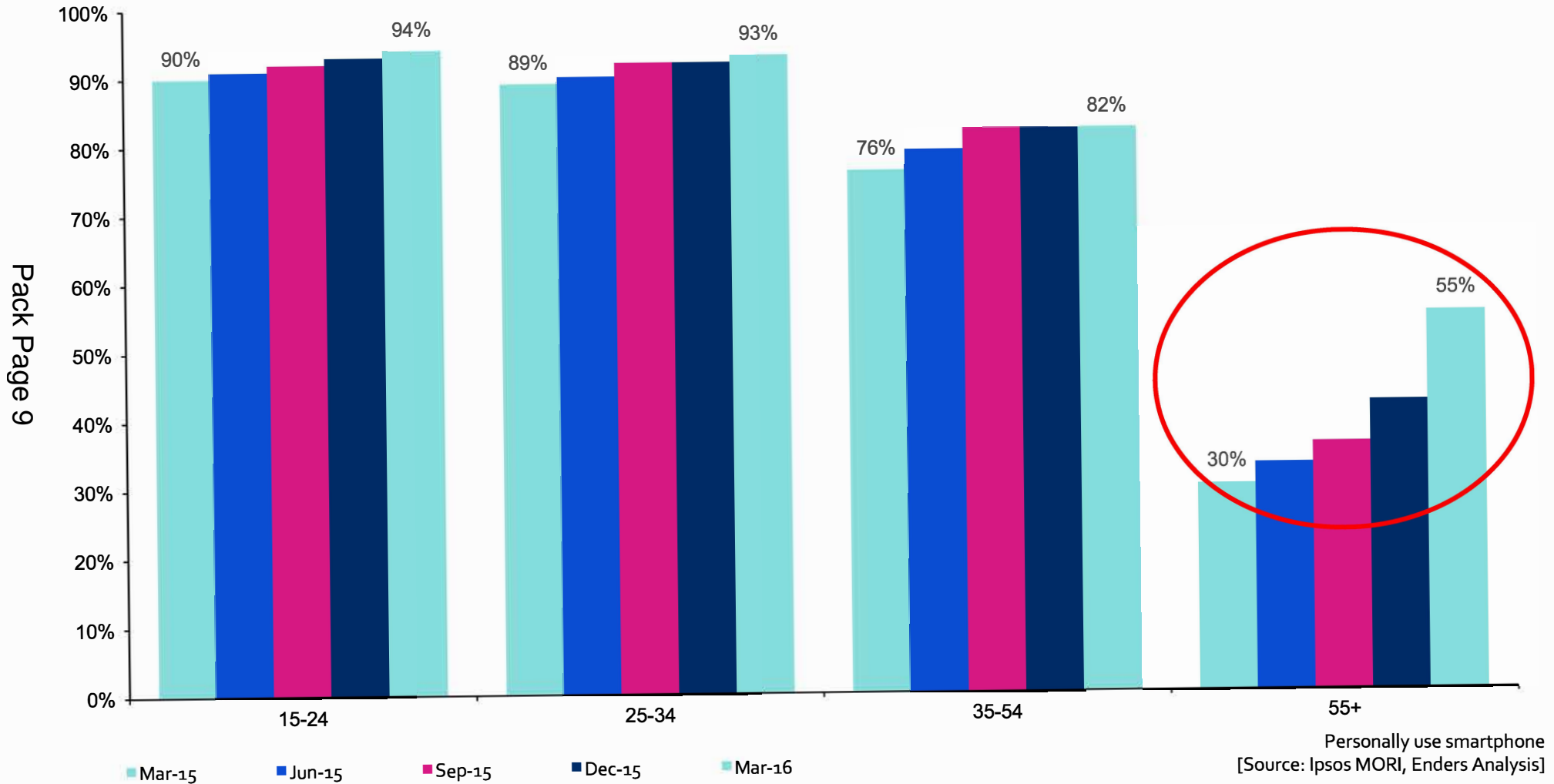
Welsh newspapers circulation per week (oocs)



[Source: Enders Analysis based on ABC]

Smartphones are a critical driver; and have shifted to older demographics

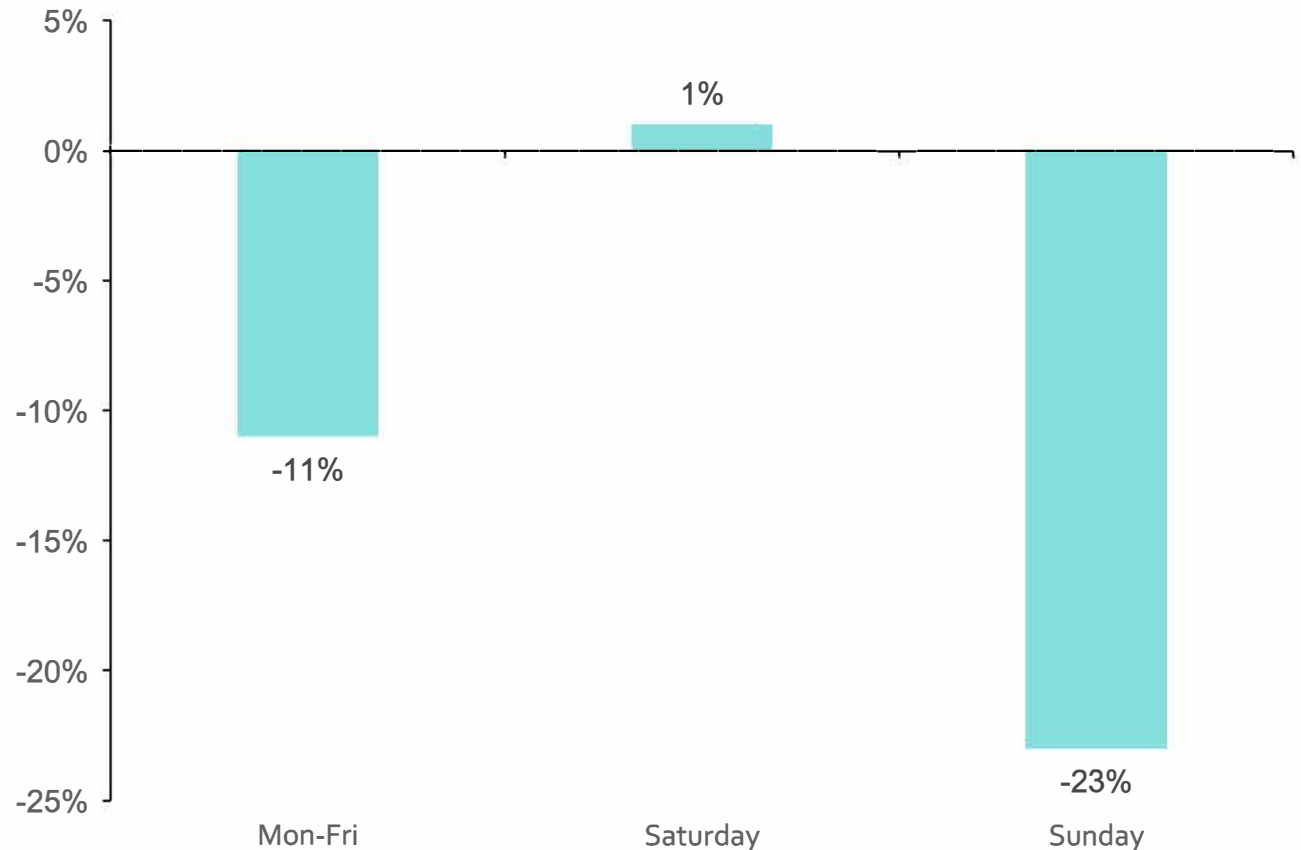
Smartphone adoption % by age group



The clear weekly trend: Saturday wins

- Erosion in daily newspaper purchasing is well understood, but the weekend market is changing more dramatically. Quality Saturday titles are very steady, while Sunday titles have fallen substantially. Sundays are turning into “just another day”, and the weekly digest – a very successful format in print – sits more comfortably at the start of the weekend than the end
- Greatest resilience in print news media – such as The Economist, the Weekend edition of the FT, The Week – provide weekly digest/commentary in a trusted brand package, which is a highly relevant print product in a 24/7 news environment
- Content that is not replicated anywhere online – Private Eye, for example – is relatively rare and also outperforms print media trends

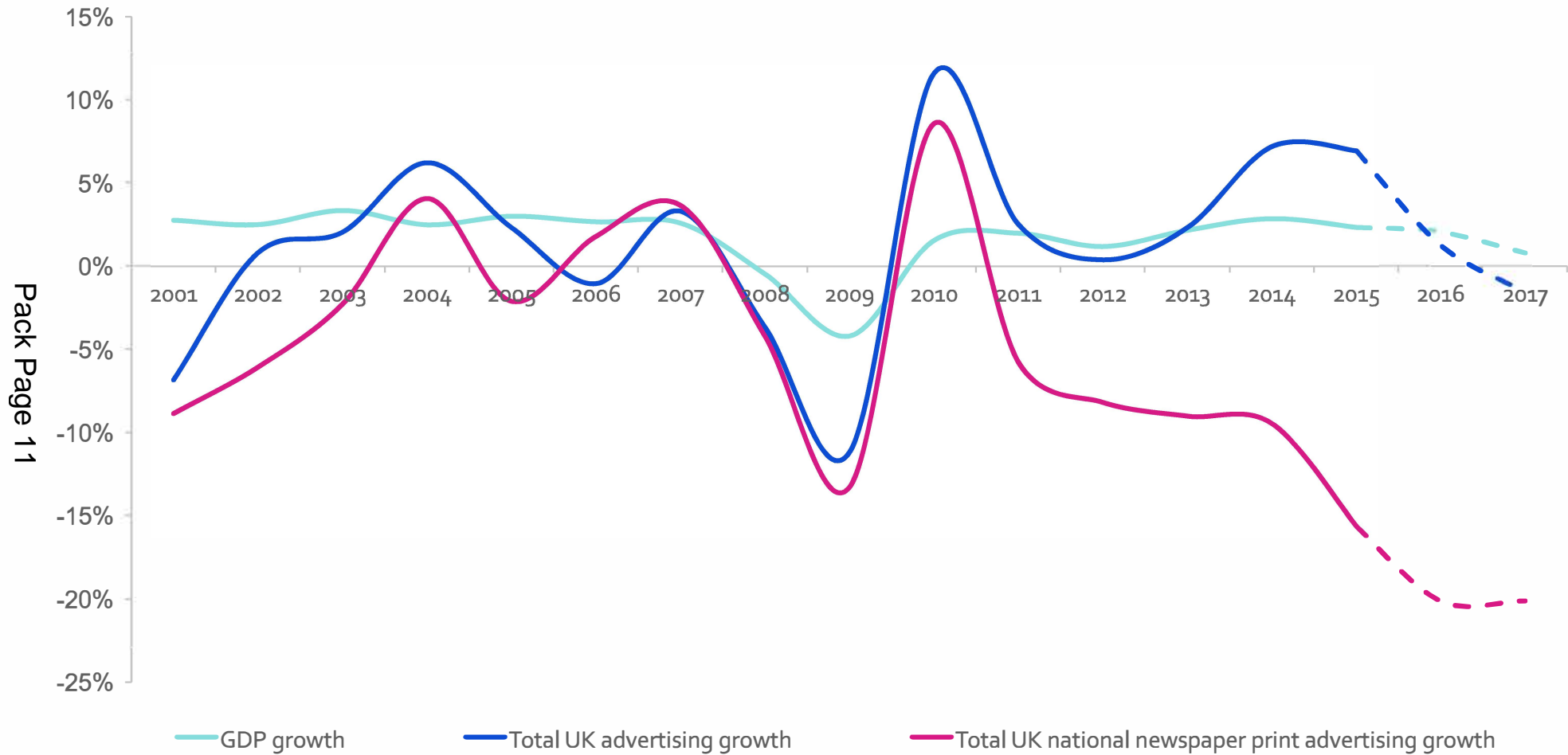
Sales volume growth, UK national quality press , 2012-2016



[Source: Enders Analysis]

Newspaper print advertising collapsed during an advertising boom

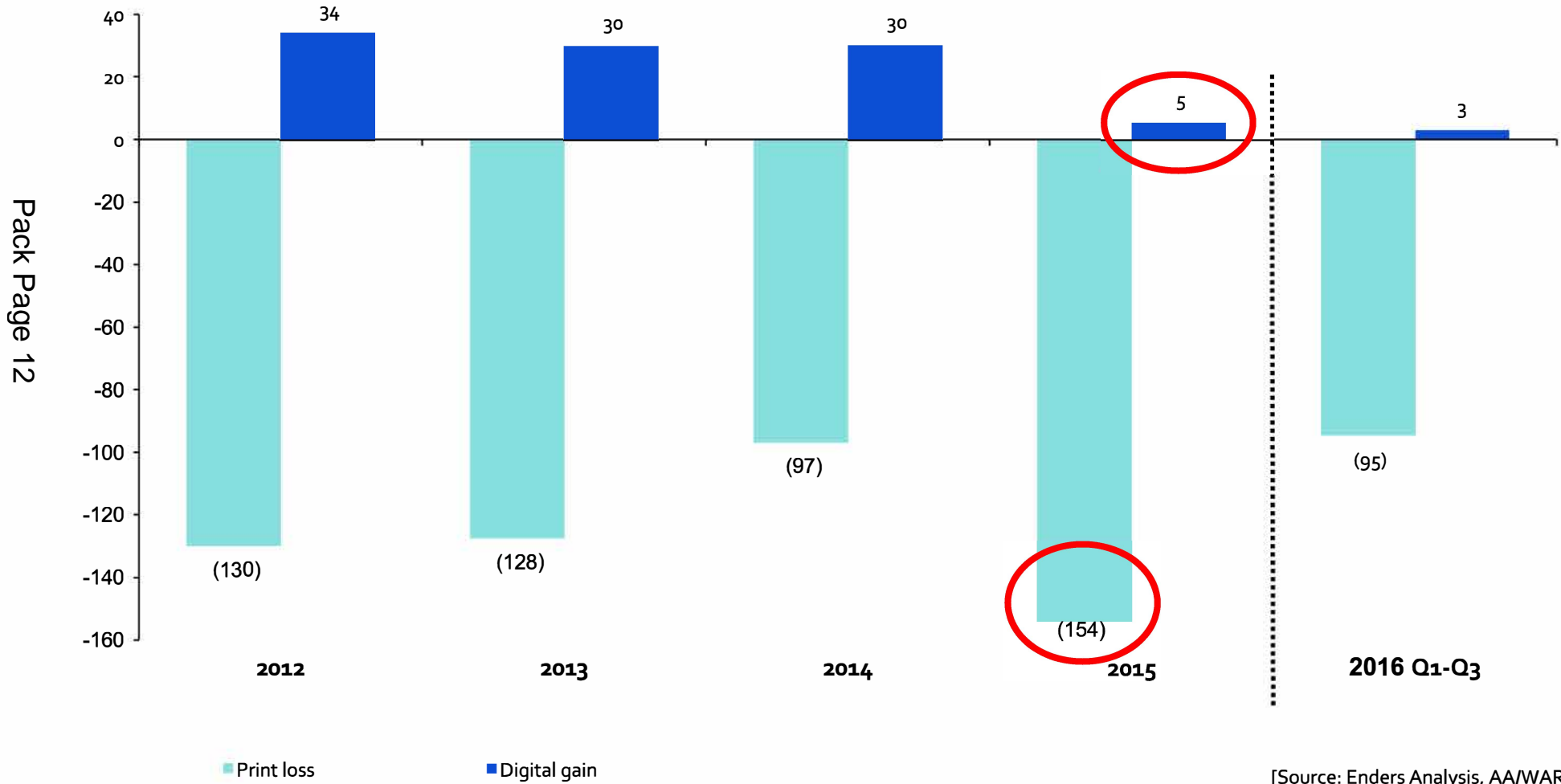
UK display advertising, national newspaper print display advertising and GDP (Y-o-Y % change)



[Source: AA/WARC, ONS, BoE, Enders Analysis]

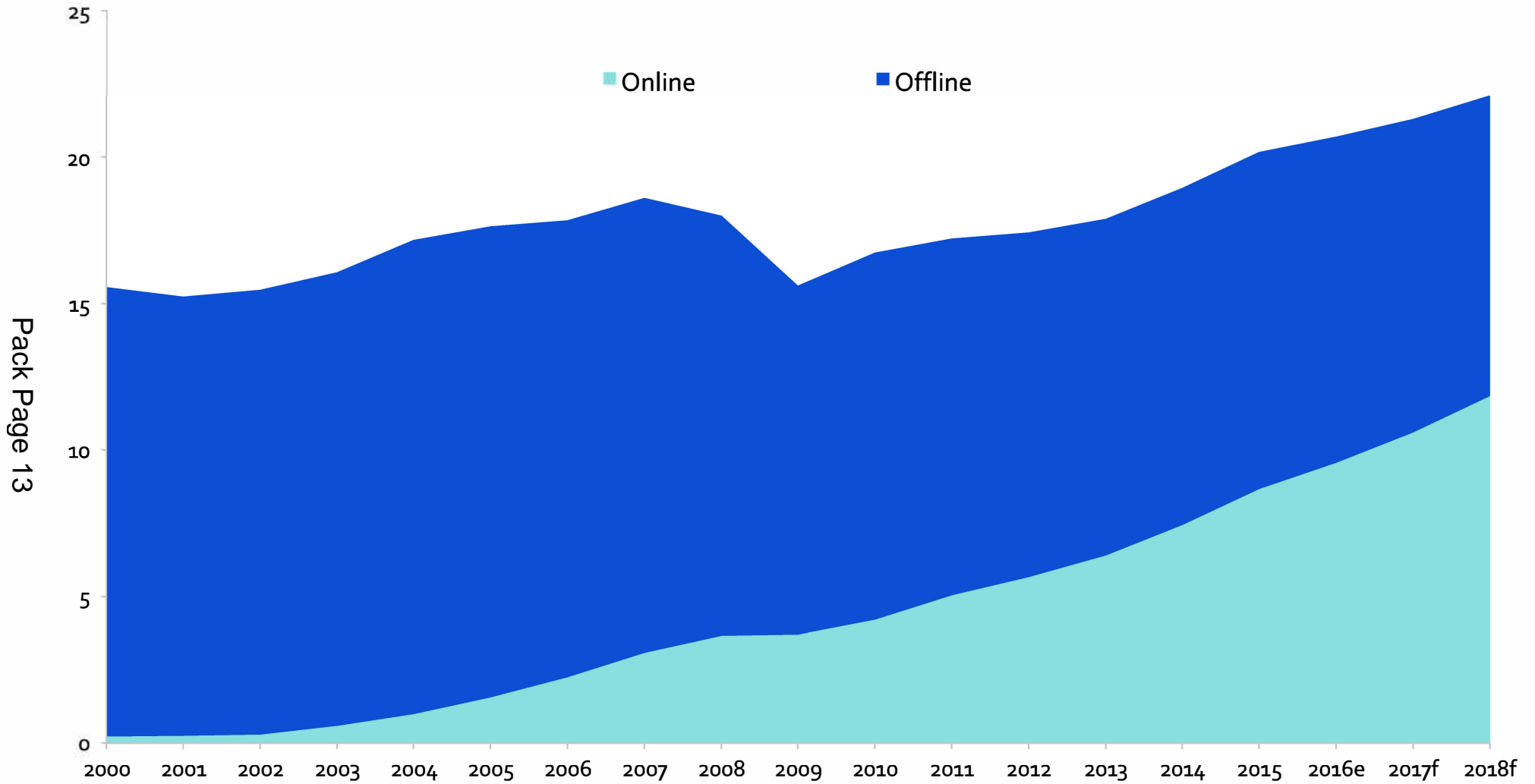
£30 in print lost for every £1 gained in digital

Digital gain versus print loss in national newspapers (£m)



Digital advertising has reached a tipping point – 50% digital

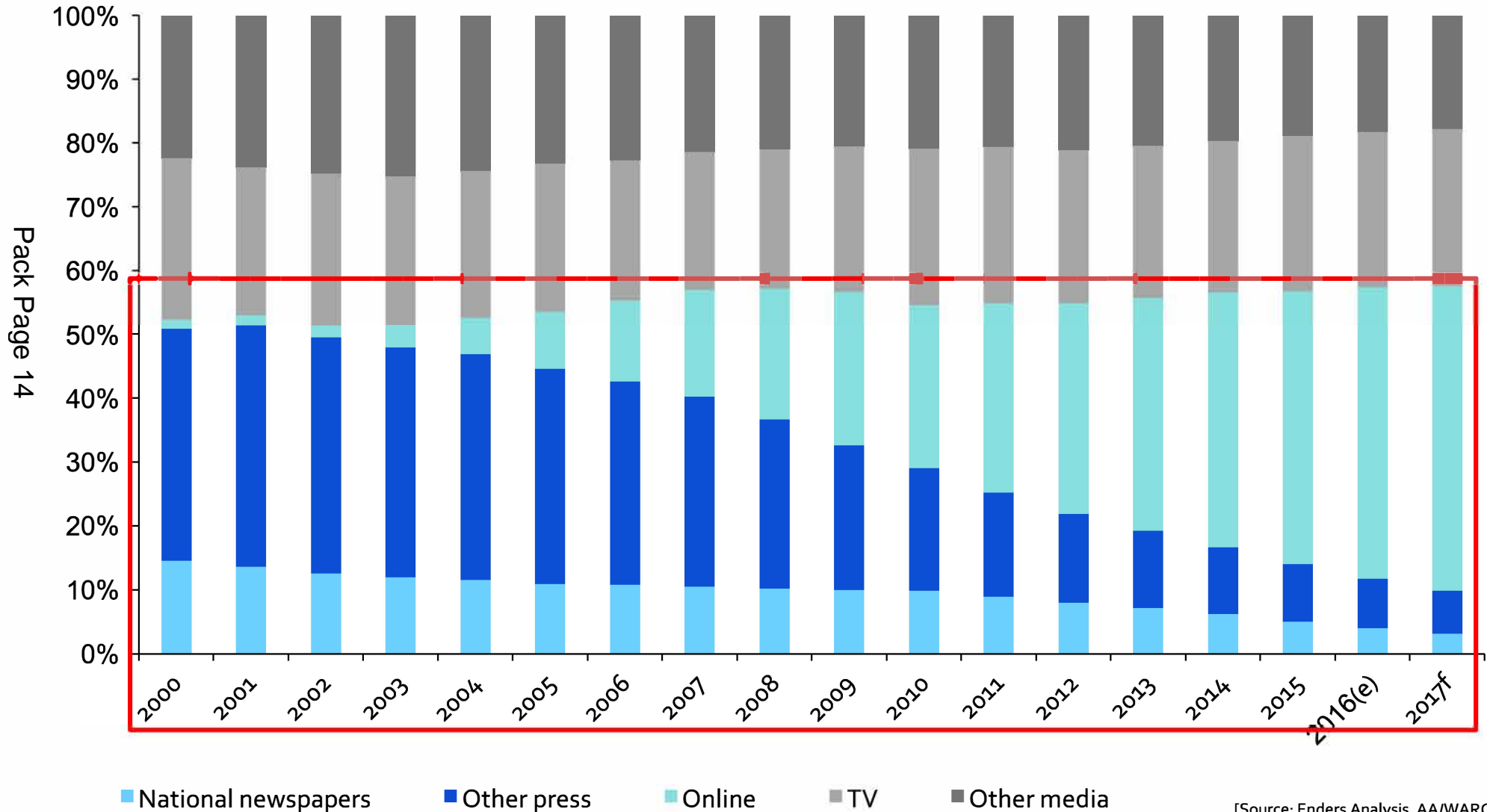
UK advertising spend (£bn)



[Source: Enders Analysis based on AA/Warc]

Press to online advertising substitution is very clear and accelerating

Share of advertising by medium (%)

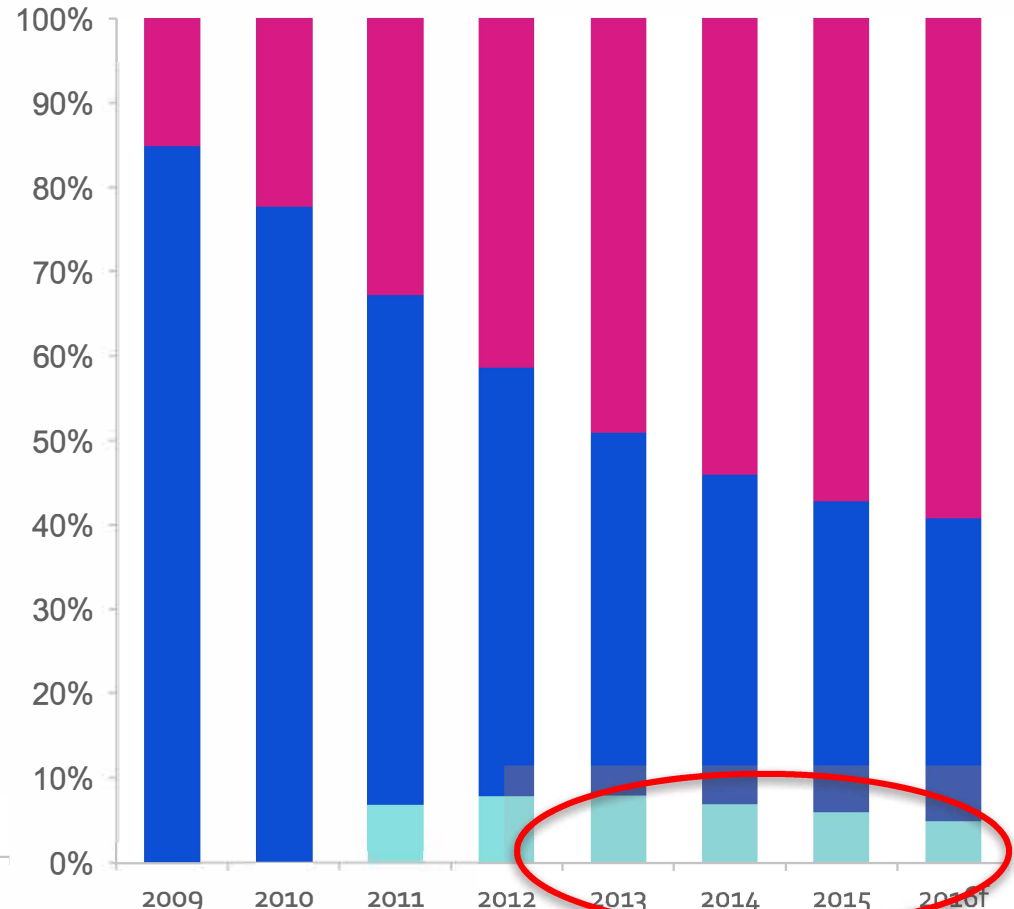
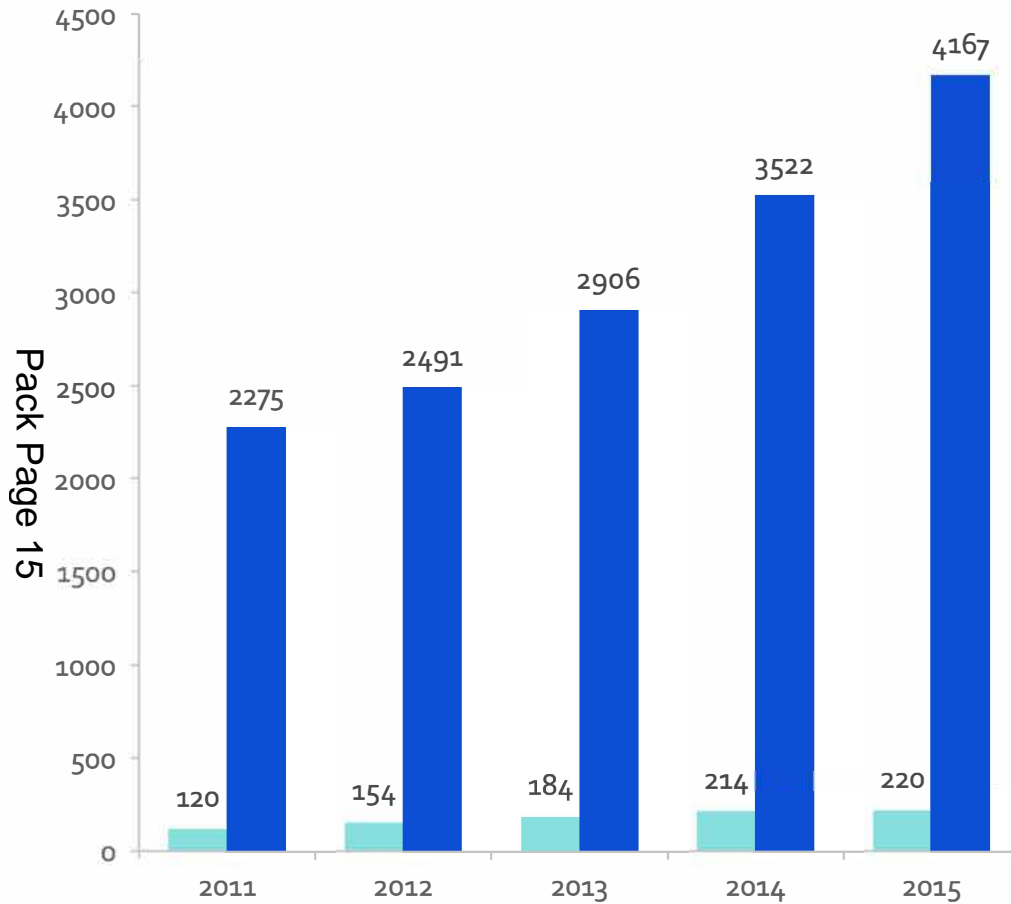


[Source: Enders Analysis, AA/WARC]

Newspapers are minnows in digital advertising and market share is falling

National news digital advertising vs total UK digital* (£m)

Internet display sales by publisher type (%)



■ National newspaper digital advertising revenue ■ Total internet revenue

■ National newspapers
■ Content publishers
■ Social media

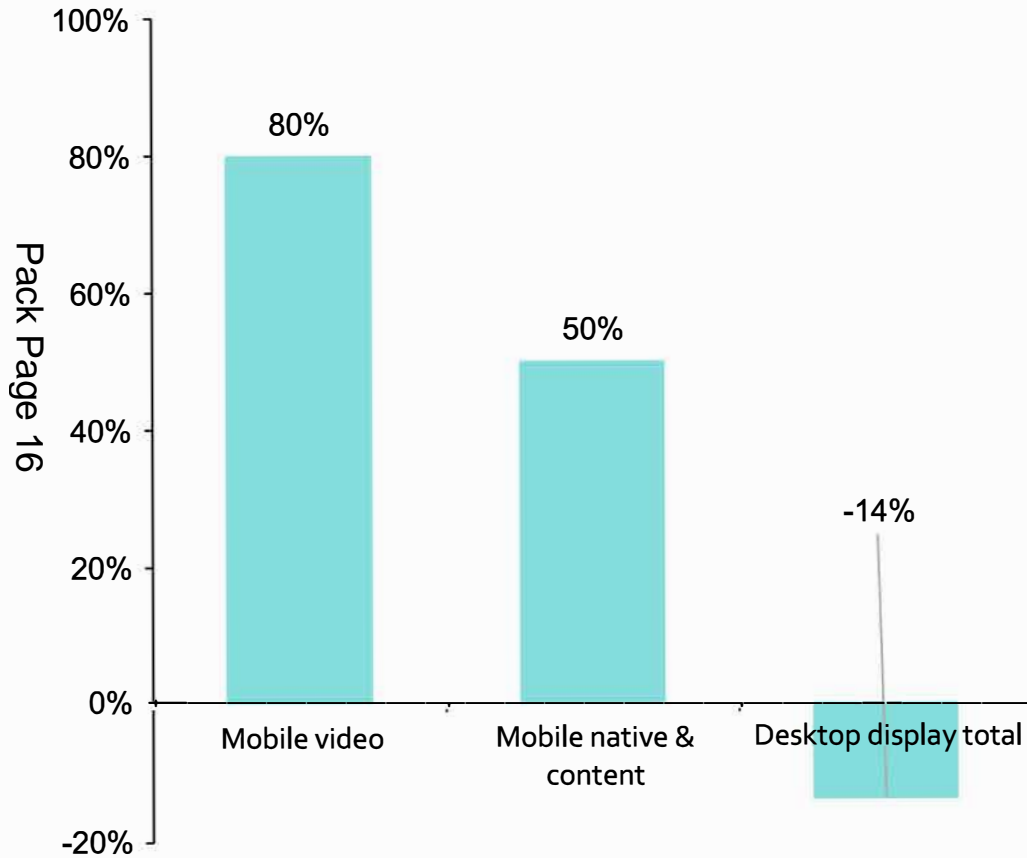
[Source: AA/WARC]

[Source: Enders Analysis estimates based on IAB and AA/WARC]

*Total UK digital advertising excludes search

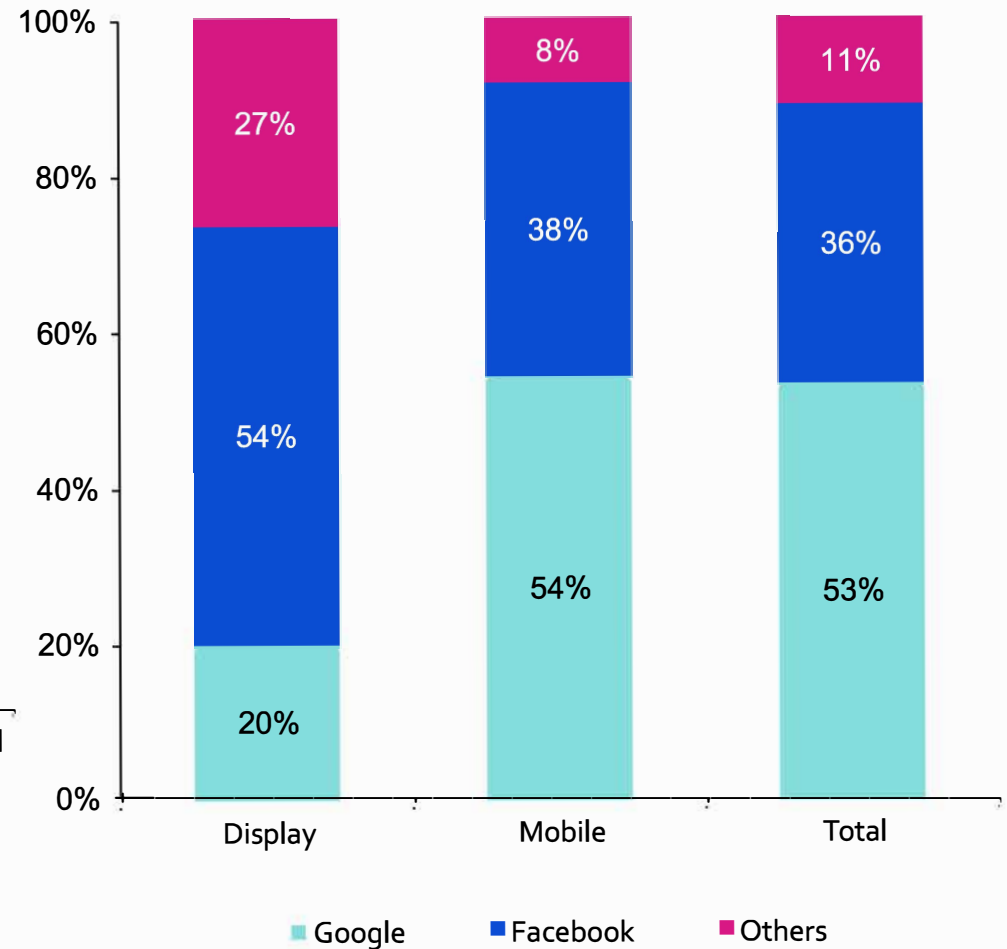
Digital adspend growth is Google and Facebook growth

2016 YoY growth, select display categories (%)



[Source: Enders Analysis]

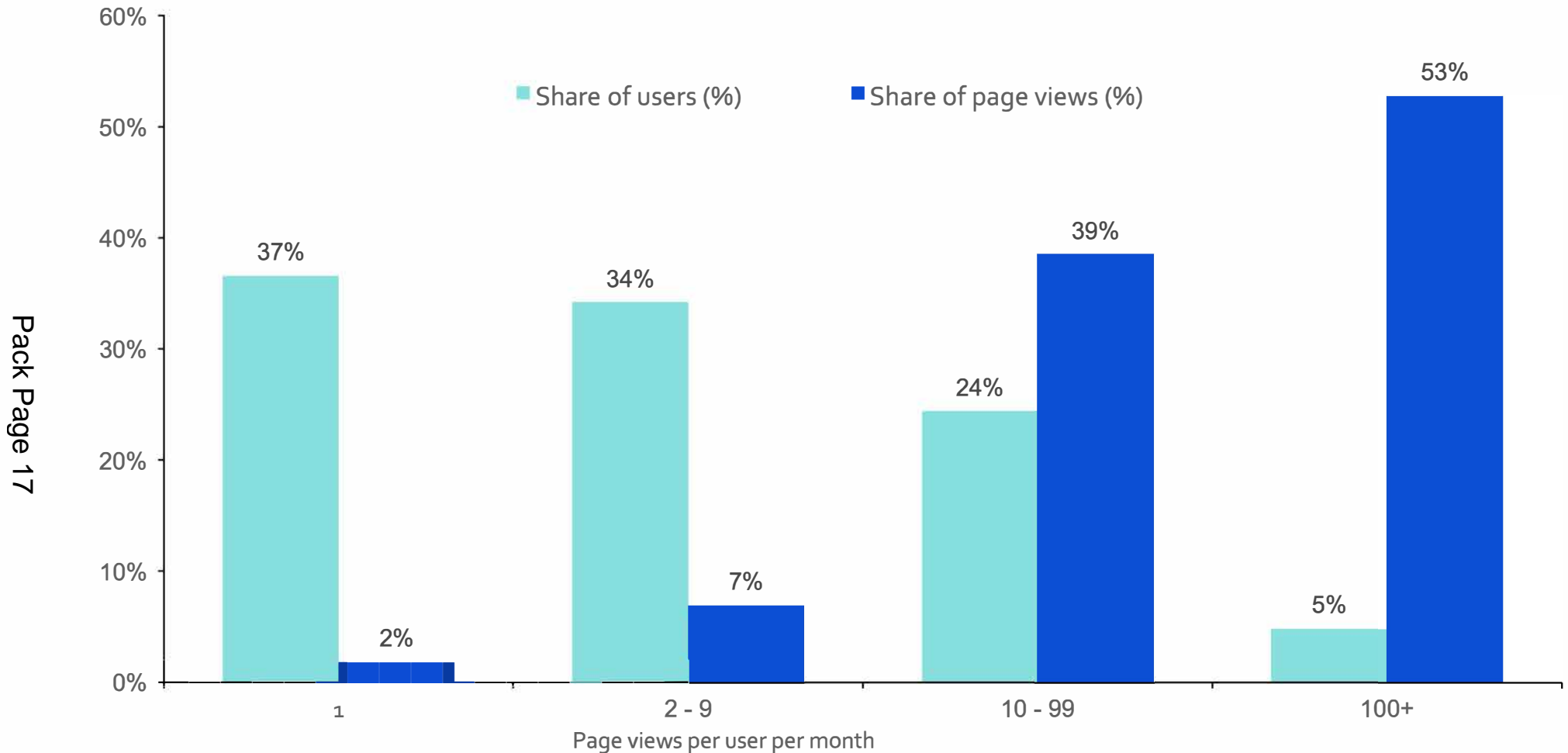
Google & Facebook shares of 2016 YoY growth, UK digital (%)



[Source: Enders Analysis]

Quality news brands chasing advertising is a fantasy

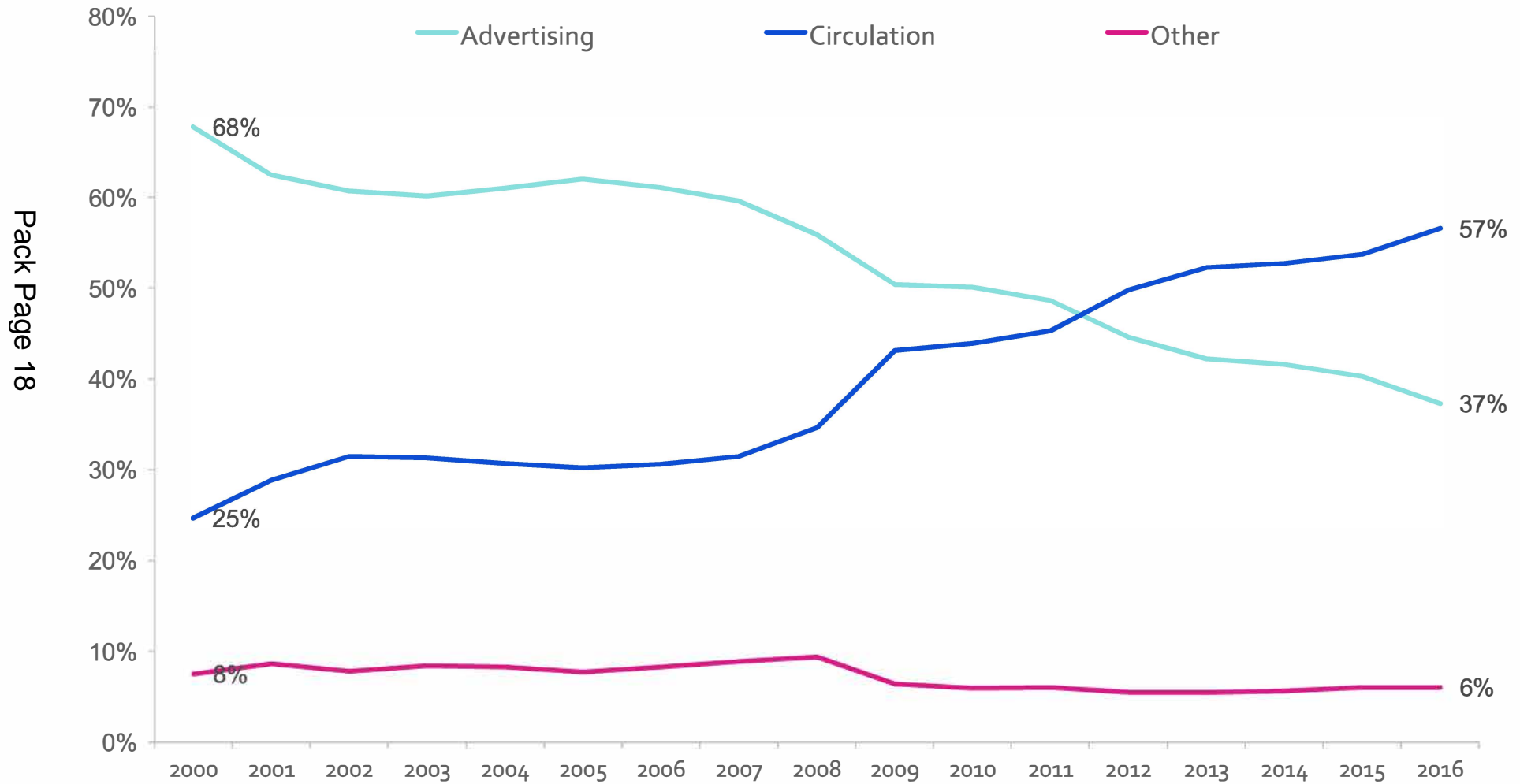
Newspaper online usage pattern



Based on an anonymised newspaper, September 2014
[Source: Enders Analysis from AGOF/Zeitung 2014/15
Bonn: Bundesverband Deutscher Zeitungsverleger (p.170)]

New York Times moves from split revenue to membership model

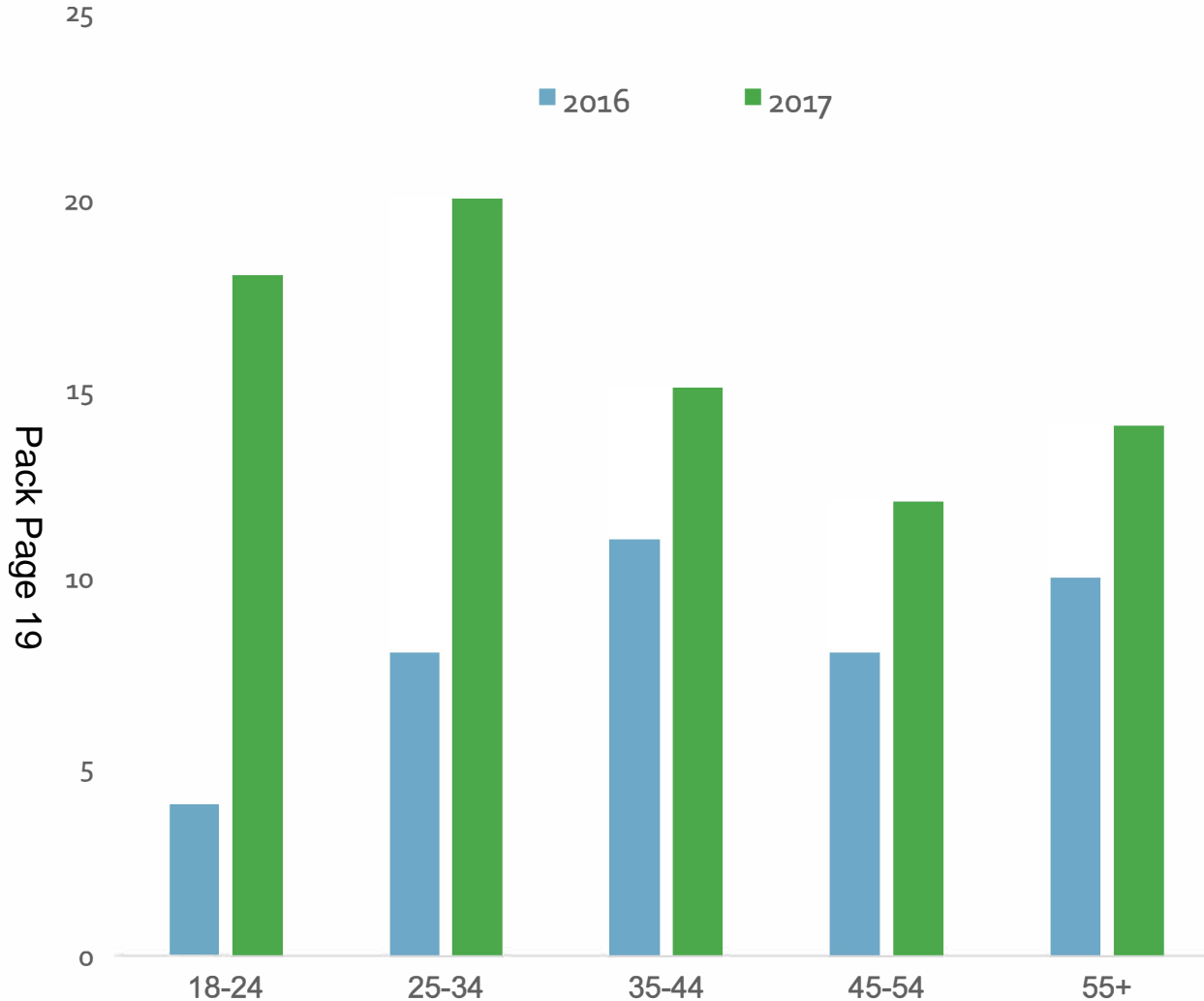
New York Times revenue mix 2000-16 (%)



[Source: New York Times Company and Enders Analysis]

Propensity to pay for news – signs of change?

Survey query: have you paid for online news in the last year?



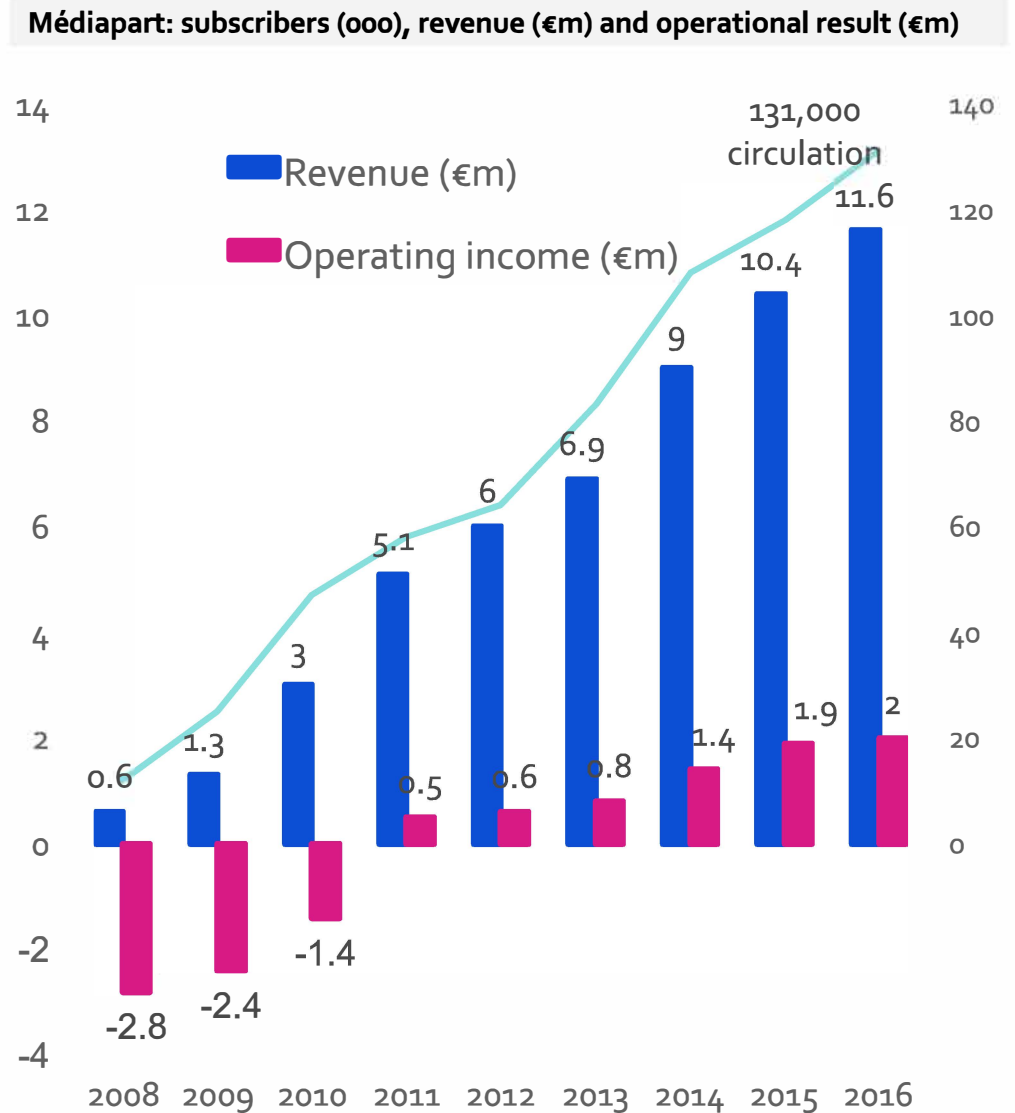
1. Shift in attitude for a variety of reasons – “fake news”, extraordinary political change
2. Also a shift in attitudes to content media, with the *need* to pay for it replacing the expectation for free
3. Also, build the *right* service, and consumers subscribe – Spotify, Netflix
4. Contrary to assumptions – older demographics are stubbornly reluctant to pay

[Source: Reuters Institute Digital News Report 2017, US audience data]

Médiapart case study

- *Profitable, membership, native news service*
- Subscription only, hard paywall
- Investigation and opinionated journalism
- Scoops and star journalists on TV generate brand recognition and sampling
- 74 staff o/w 55 journalists, transparent P&L
- Founders and employee-owned
- Brand-support blogs, events, forums, publications: membership
- No advertising – therefore, an option to scale up?

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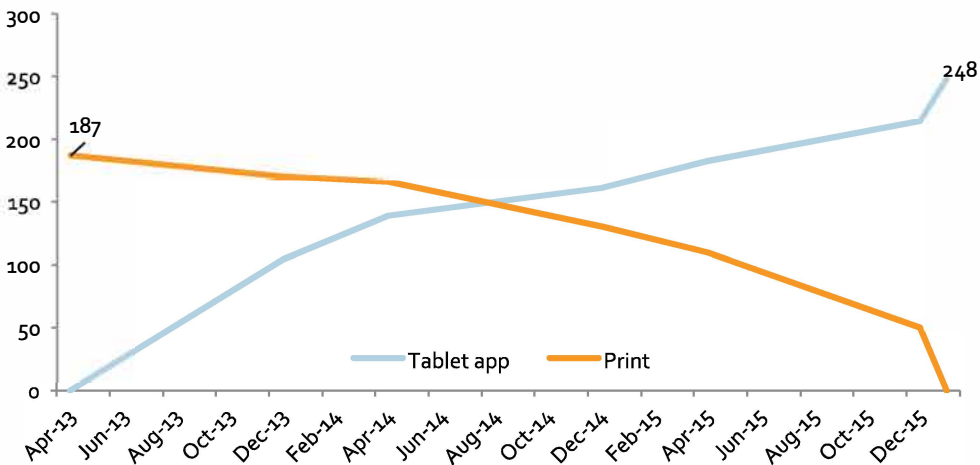
[Source: Enders Analysis from Médiapart]

La Presse case study

- La Presse in Canada abandoned its print edition and centred on a tablet service (which is HTML in a native wrapper)
- In so doing, it **increased** its editorial commitment, but dramatically reduced all other costs
- It transitioned relatively small advertising revenues over
- Broadly speaking La Presse went from breakeven to breakeven, though the business is little more than half the scale it was
- But the two revenue streams should be in growth, completely repositioning the spirit and opportunity of the organisation
- Users spend 44 mins per day – 20% greater than the UK reader’s engagement with **print editions**

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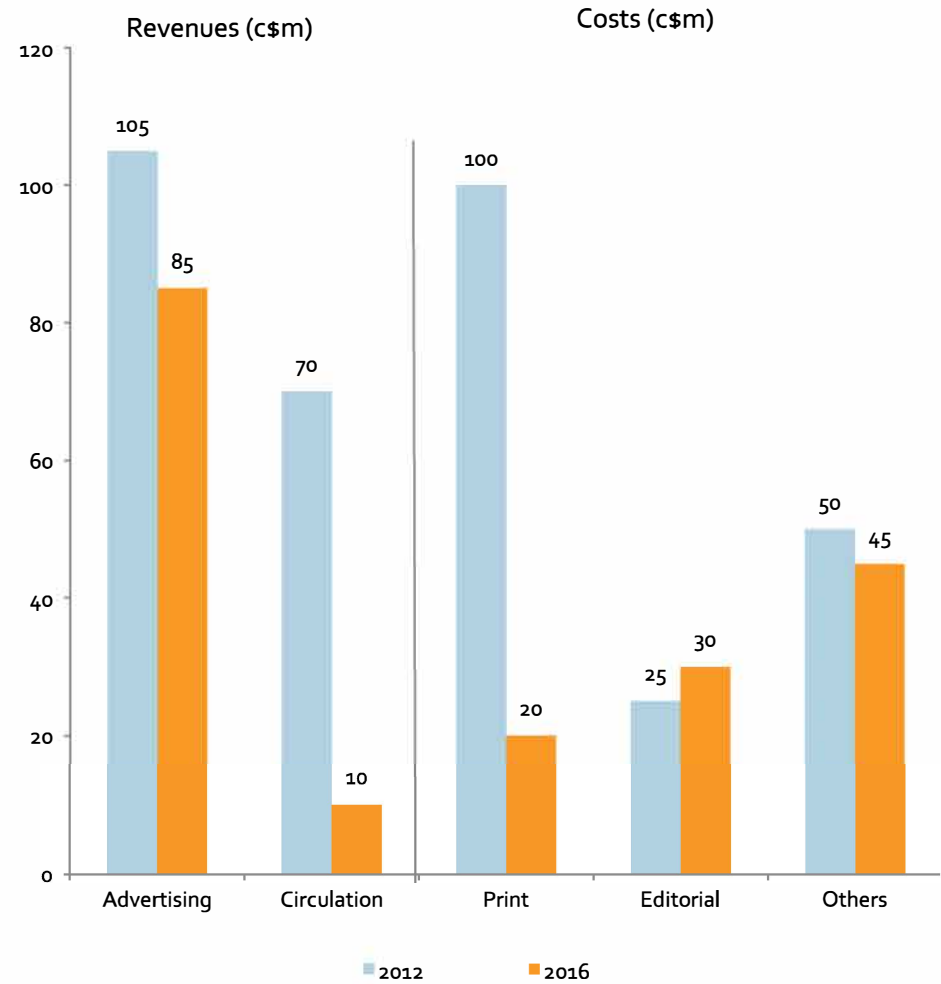
La Presse's M-F circulation per issue (oos)



Note: Print figure is average for the year

[Source: La Presse, AAM certified]

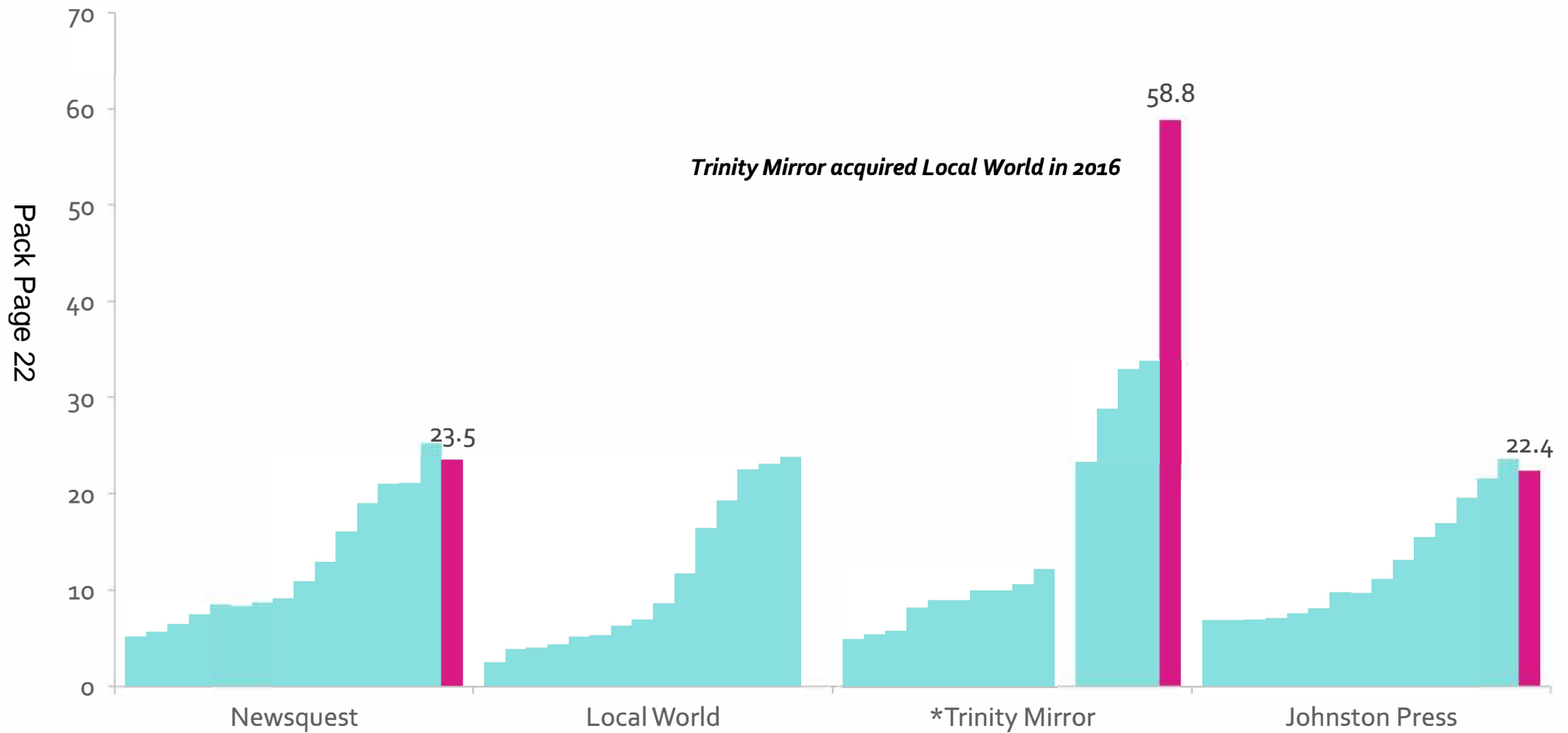
Revamped model, rising editorial resources



[Source: Enders Analysis estimates]

Local news media audience scale has grown substantially

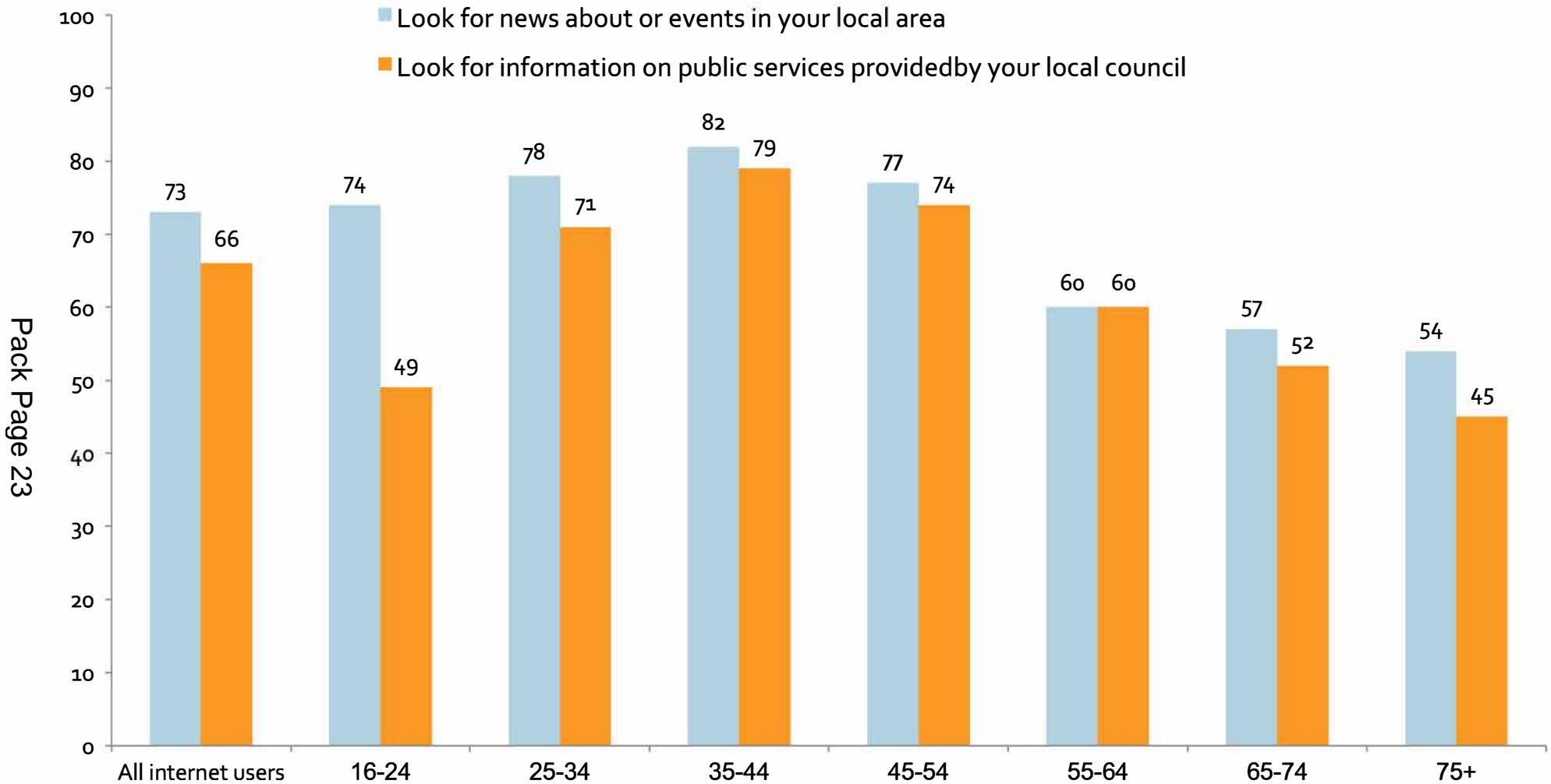
Digital traffic (monthly servers, m) H1 2009-H2 2016



[Source: ABC]

Young and old are looking for local info online

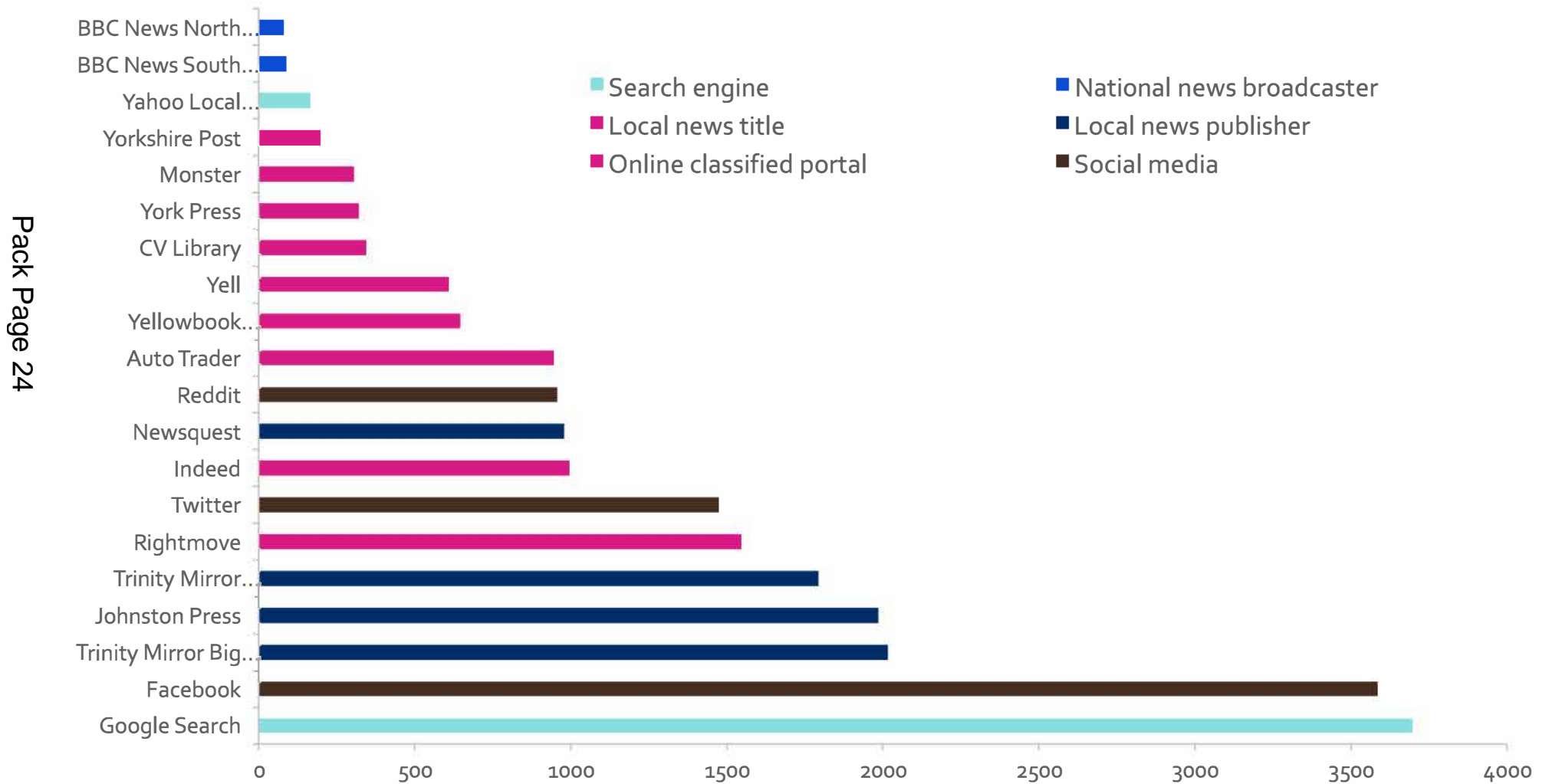
UK % share of age groups accessing local information online



[Source: Ofcom Media Usage Survey, April 2016]

Local example of local news media scale – Yorkshire

Yorkshire audience (ooo)



[Source: Enders based on comScore]

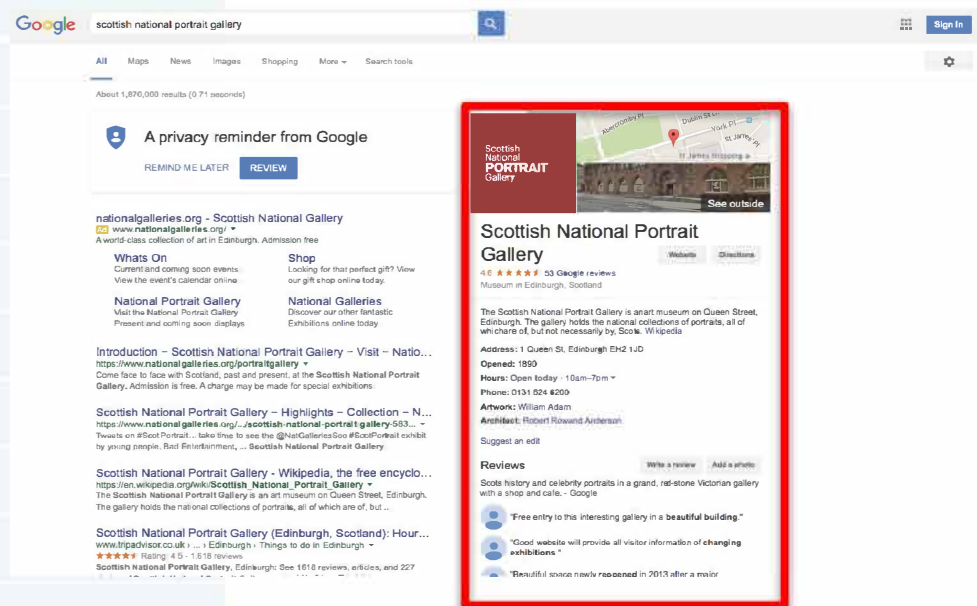
Use-case gap: who is looking for “an online newspaper”?

- Most local media publishers have helpful audience segments – by demographics and lifestyle
- However, it is critical for publishers to develop detailed *use-cases*, to
 - Optimise journeys;
 - Encourage consumer engagement;
 - Create compelling marketing opportunities for local and national businesses
- Too many publishers are publishing their local newspaper online, optimised for search and social
 - This model assumes the answer to any consumer query should be “a 900-word article”
- Meanwhile, publishers undervalue the power of the printed product in the multimedia strategy - perhaps this should be the *only* way of consuming some long-form journalism, for example?
- Most consumers are not looking for a local online newspaper. So what are they looking for?
 - Most consumers are looking for **information**: local news brand digital content should be selected, structured, curated as *inventory in a local information database first* – and, where appropriate, also *presented* as news
 - Many consumers will be inspired by an intelligent **local discovery** service. Discovery takes many forms – one of them is information; one of them is the opinion and authority of the local media brand; one of them is news
 - Many consumers are looking to be engaged, inspired, or to help develop some element of control within their local community: **campaigns and engagement tools** on key issues for a wide variety of age groups and parts of the community are a critical development
- In summary, if marketing and display marketing (and also employers) are the key commercial opportunities for local publishers, content models need to be reengineered to deliver on them – advertisers and recruiters are not looking for “local newspapers online”, any more than consumers are

Trivial but revealing example – the gap between supply and demand

Scottish National Portrait Gallery – top 30 google search results

1. National Galleries (introduction)	16. Pagepark projects
2. National Galleries (highlights)	17. BBC News
3. Wikipedia	18. Saatchi Gallery
4. Tripadvisor	19. Lonely Planet
5. Visitscotland	20. Rampant Scotland
6. National Portrait Gallery (collections)	21. Culture24
7. National Portrait Gallery (beyond the gallery)	22. About Britain
8. Artfund	23. Royal Collection
9. The List	24. Euan's Guide
10. Facebook	25. Parkopedia
11. Twitter	26. The Guardian (2011 review)
12. Telegraph (review)	27. Time Out
13. Carbontrust	28. ECS Scotland
14. Tickets, Edinburgh Fringe	29. Tripadvisor
15. 38 Degrees	30. Sophie Gerrard



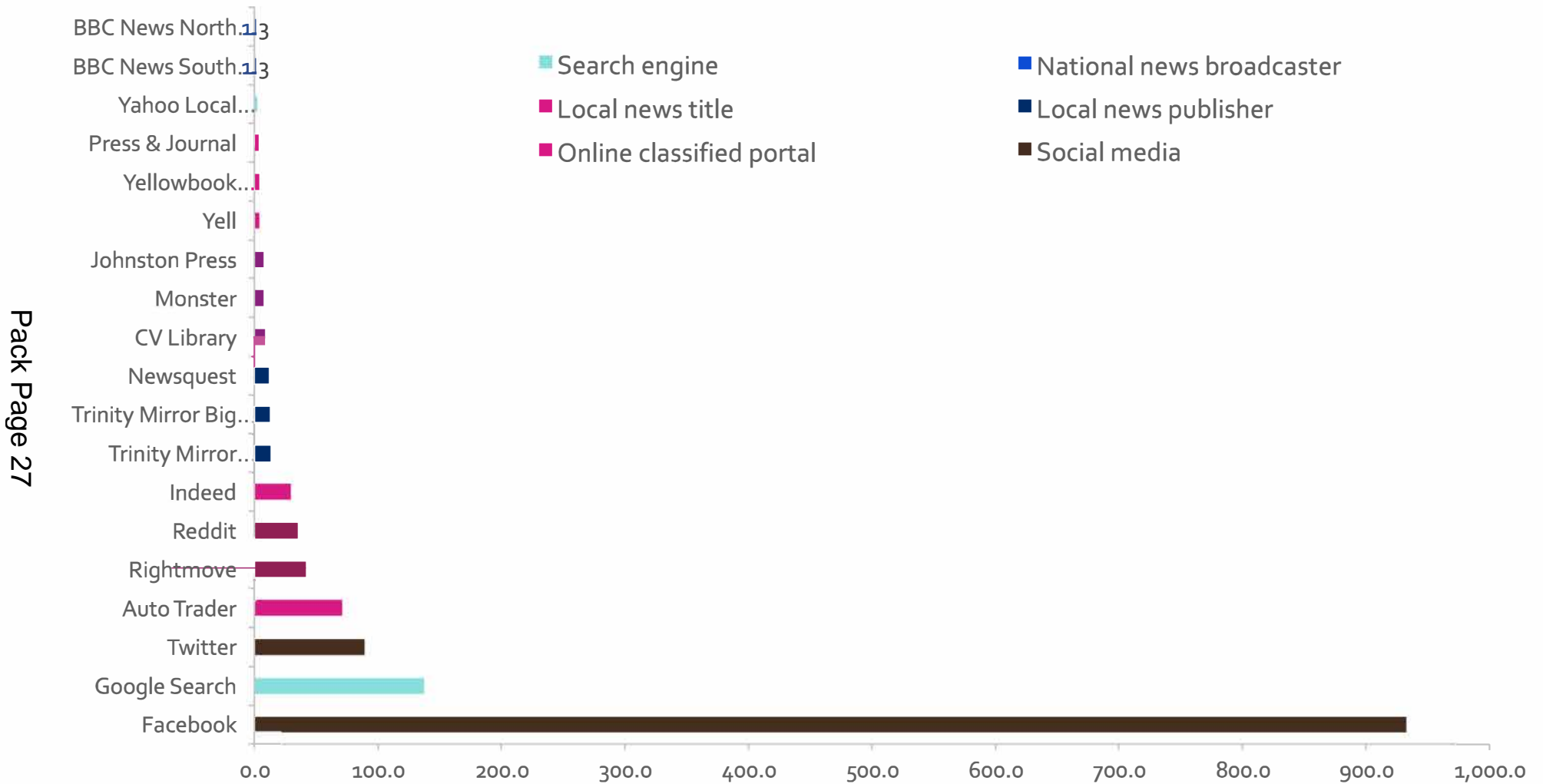
*Local newspapers run stories on (say) galleries when there is a new show, or when they burn down;

But they should have structured data about every such institution/person/business/body – and become *the* permanent content home and go-to place for locals and visitors to engage, discuss and contribute

[Source: Google UK search results for "Scottish National Portrait Gallery" on 5th May at 14:41]

But frequency and overall engagement is far greater

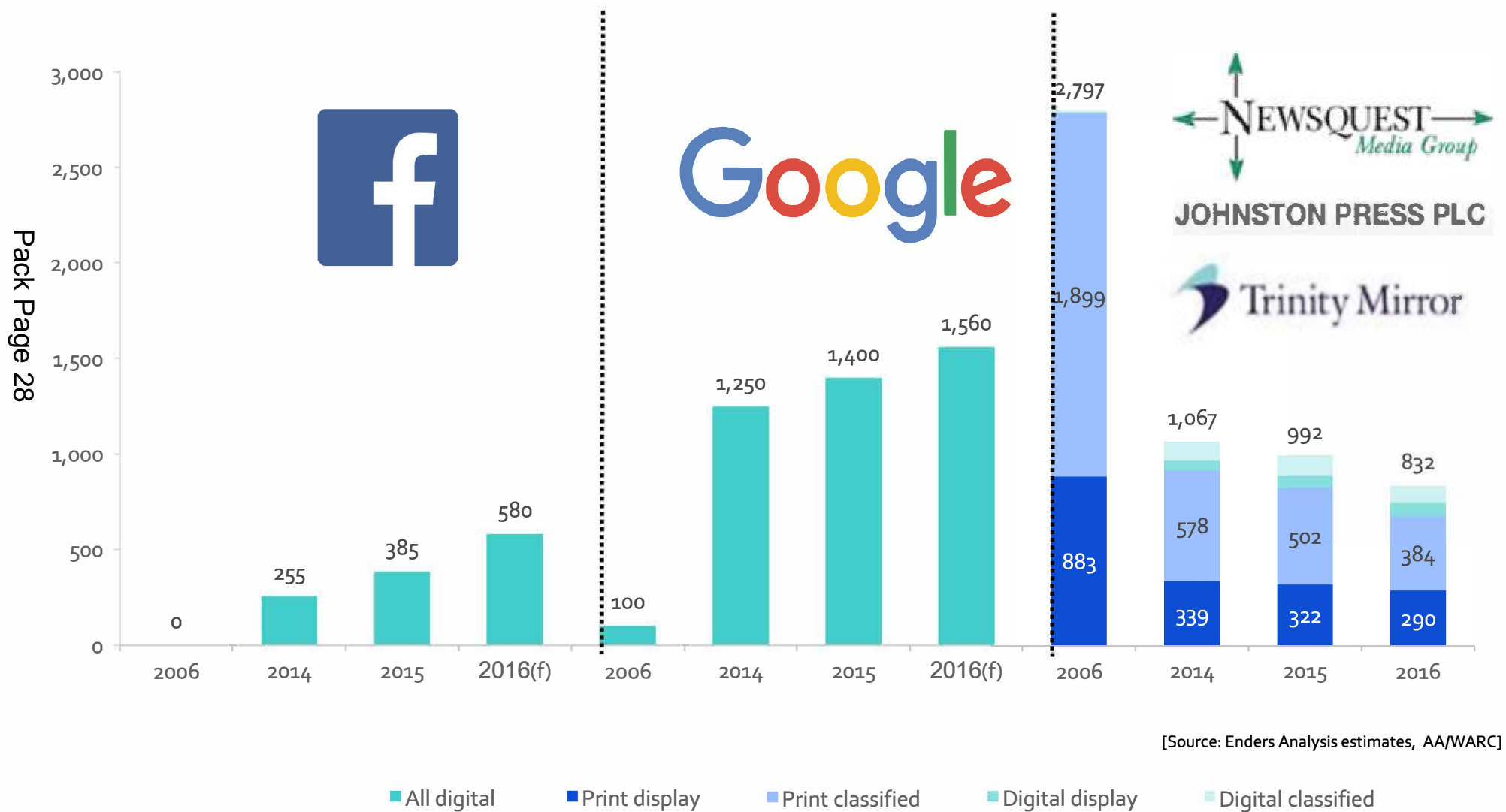
Yorkshire (minutes per user)



[Source: Enders based on comScore]

Facebook now bigger than the whole of local press in SME display

UK SME advertising spend Google, Facebook & local newspaper brands

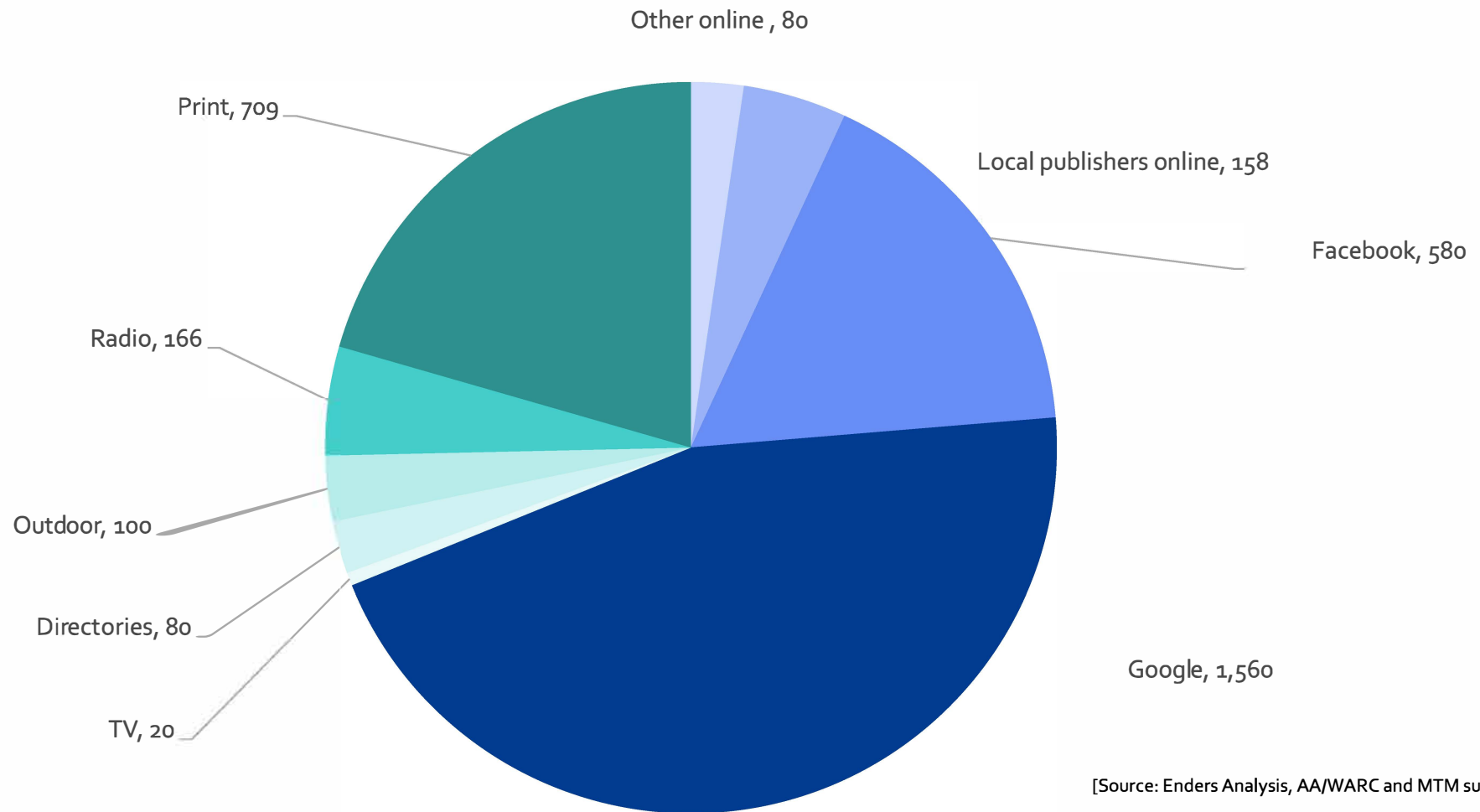


[Source: Enders Analysis estimates, AA/WARC]

Local advertiser spend in UK as a whole

UK local advertising spend 2016 (£m)

2016 UK total local advertising spend £3.5bn



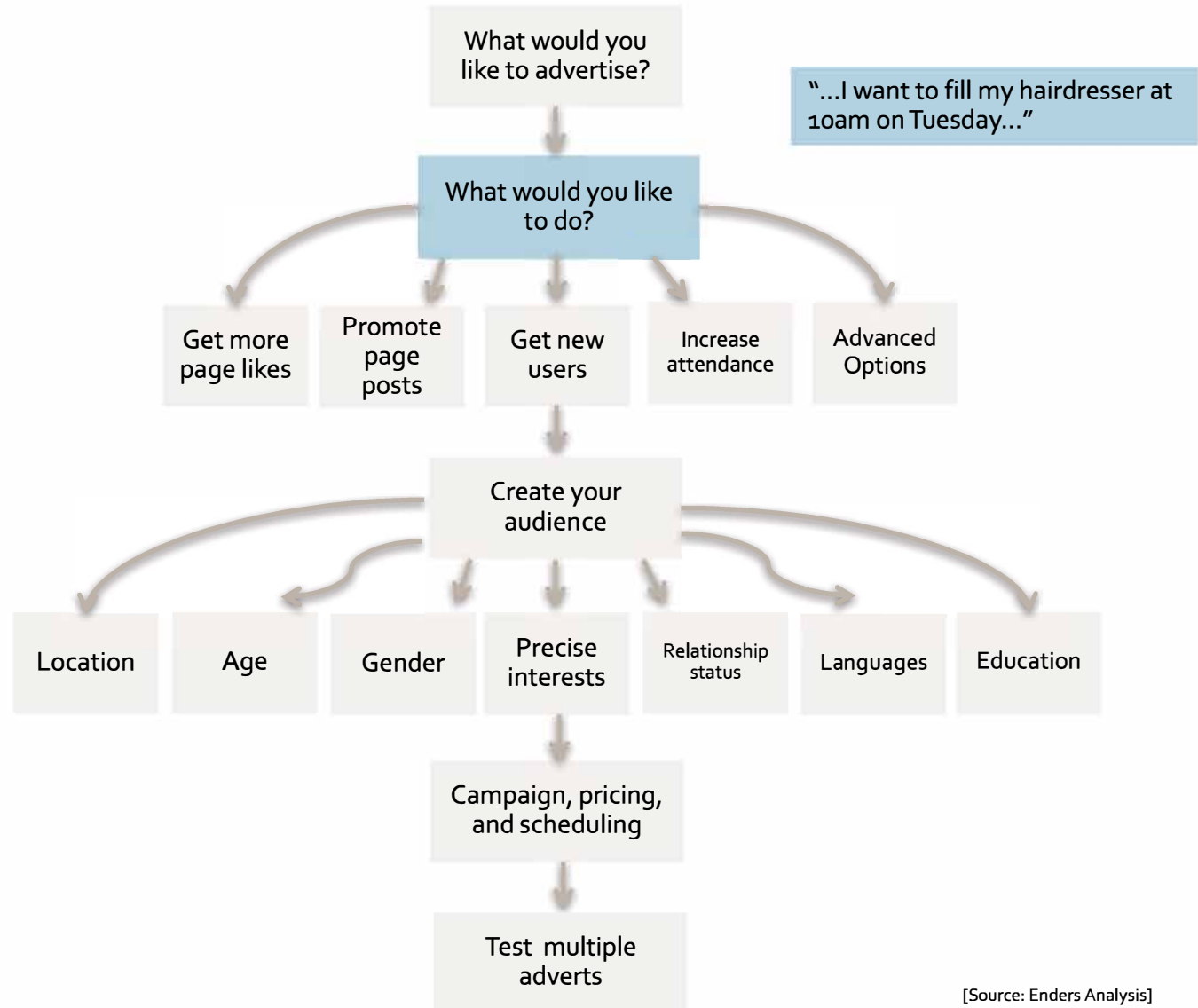
[Source: Enders Analysis, AA/WARC and MTM surveys]

Self-service and new marketing expectations

Traditional advertising route



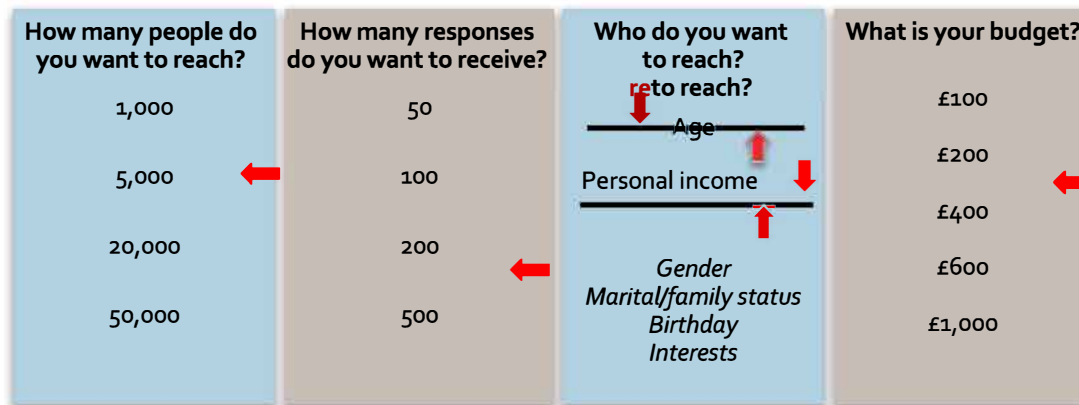
New marketing route



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Self-service is critical: but with Facebook as a competitor, the solution has to be outstanding

Illustrative SME marketing administration self-service on a newsbrand local platform hub



[Source: Enders Analysis]

- Local newspapers sell to circa 15% of all SMEs in their coverage area (Enders Analysis estimates, based on a range of conversations)
- This is not to say that local newspapers are on average missing out on 85% of expenditure value; but it does highlight a material gap
- Self-service is a critical means of bridging that gap
- With more native digital businesses, and fewer High Street locations, the “visibility” of sales opportunities for traditional sales teams is inevitably declining

Disclaimer

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Local media: new structures emerging

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16 April 2015 [2015-032]

Local newspaper circulation continues to decline precipitously, while decline in some categories of print advertising has slowed marginally

Digital traffic exploded in 2014, however, substantially outperforming the market generally, resulting in signs of stabilisation across print and digital in some marketing categories, notably recruitment and pockets of display

Industry leaders have moved beyond cost-cutting and are no longer reproducing their print products online: local platform solutions, and strategic technology and business partnerships, mean fundamentally different companies are emerging in local media

There are some hopeful signs in local media. Enormous traffic growth in the last year to 18 months provides some hints that a scale digital future at least looks a possible scenario for the most ambitious publishers. Some signs of stabilisation in aggregated print and digital advertising spend in some categories in some geographies are encouraging, even if it is far from certain that these trends will continue. A sharp downturn in the UK economy during the next few years, for example, could impose a vicious collapse in marketing commitment from Small and Medium Enterprises (SMEs). But, for now, the signals are more positive than otherwise, and our forecasts suggest total advertising decline could fall below 3% in the next year or two (though downside risks remain).

Furthermore, recent rumours that Trinity Mirror is in talks with Local World could trigger consolidation in what is still a highly fragmented, and over the last 10 years a massively shrunken marketplace. But even if this does not happen in the immediate future, developments by individual companies to rewire their businesses into local marketing platforms - often using external partners to step change the process, culture and quality of technology solutions - should accelerate companies to a more sustainable digital future.

In this report we look at the key local media trends in consumption and revenues, including advertising, but we also take the opportunity to explore how publishers are responding to structural challenges, observing that transformation strategies are creating fundamentally new types of organisation. We start by analysing the current market trends (and we provide our forecasts for advertising in figure 19 at the end of our report).

Part one: Overview of the current market

Print trends

Local newspaper circulation continued to fall through 2013/2014, albeit at a reduced rate, down -9.0% in 2014 after double digit declines in 2011 and 2012. According to our estimates, the industry now distributes 24m copies a week of which 15m are paid and 9m are free.

But at the same time fresh digital content strategies are starting to bear fruit as the four main regional news publishers all recorded significant upticks in traffic growth in 2014. Monthly global browser numbers submitted to ABC show that year-on-year traffic growth in the second half of 2014 ranged from 29% at Johnston Press to over 100% for Trinity Mirror's online regional news properties.

Figure 1: Regional and local newspaper industry KPIs

	Value		Year-on-year % change	
	2013	2014	2013	2014
Circulation per annum (m)*	1,381	1,257	-9.4%	-9.0%
<i>Of which UK paid (m)</i>	885	783	-10.7%	-11.6%
<i>Of which UK free (m)</i>	496	474	-6.9%	-4.4%
Consumer spend (£m)*	572	555	-2.8%	-2.9%
Average cover price (£)	0.65	0.71	8.8%	9.8%
Print advertising spend (£m)	1,161	1,075	-7.4%	-6.1%
<i>Of which display (£m)</i>	537	492	-5.1%	-10.9%
<i>Of which classified (£m)</i>	624	583	-13.1%	-12.7%
Print advertising spend per copy (£)	0.74	0.74	-0.4%	0.2%
Digital advertising spend (£m)	139	172	8.0%	23.7%
Digital as share of advertising (%)	11%	14%

*Circulation and consumer spend are Enders estimates based on performance of titles continuing to report to ABC; average cover price is consumer expenditure divided by paid circulation per annum

Advertising spend sourced from WARC and incl. Evening Standard

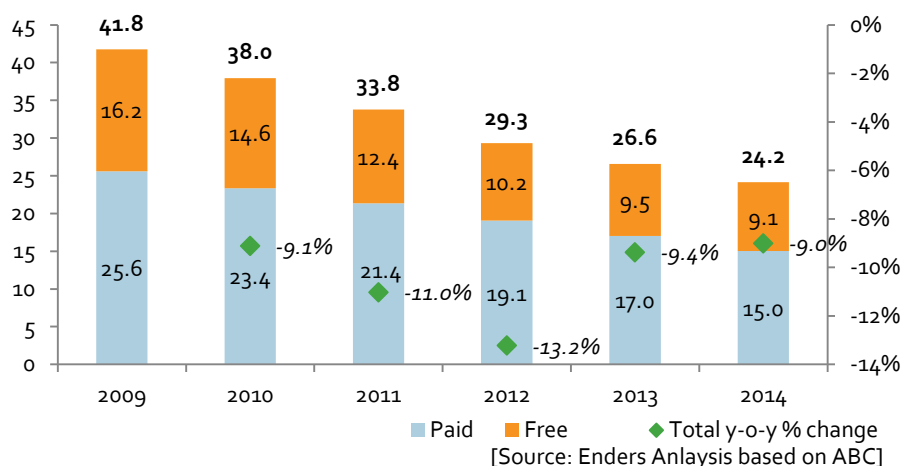
[Source: Enders Analysis based on ABC and AA/WARC data]

Promising traffic growth to regional newsbrand websites is also being accompanied by improved revenue trends. Our latest advertising estimates based on WARC data for Q1-Q3 suggest digital spend on local news brands increased 23% in 2014 vs. a growth rate of 14% for total UK internet advertising spend. However, the monetisation of online audiences remains a pressing challenge as digital revenues still only accounted for 14% of local newsbrand advertising. To continue accelerating digital revenue growth and effectively compete with the search and social giants, local news brands will need to maintain their current audience growth rates while improving the targeting and general service of their digital platforms for advertisers.

Improved circulation performance in 2013/2014 has been driven by a marked recovery in free title distribution. In fact, the slowing of volume losses has been entirely dependent on publishers' supply of free newspapers as paid circulation has continued to accelerate reflecting the erosion of consumer demand for local news in print.

In 2012 we estimate that weekly circulation of free local newspapers shed 2m copies, down -17.5% year-on-year. This compares to a loss of 0.4m free copies per week in 2014. In contrast, paid circulation has now experienced three consecutive double digit annual percentage declines and accelerated to -11.6% last year.

Figure 2: Circulation per week (m)



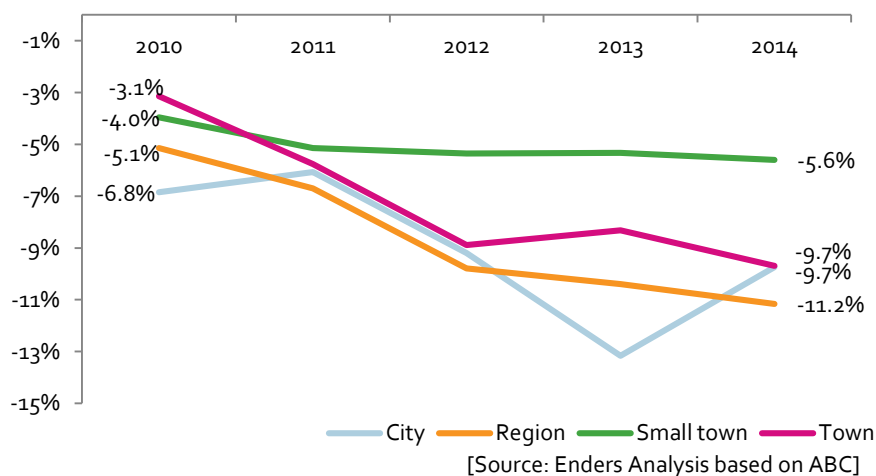
Paid print: Circulation decline across the board, revenues buttressed by pricing

This fall in demand is being felt across all paid local newspaper formats. On a like-for-like basis and excluding titles that changed frequency:

- Sunday paid circulation fell -10.4% to 0.6m copies per week
- Daily paid circulation fell -12.2% to 11.5m copies per week
- Weekly paid circulation fell -11.7% to 2.9m copies a week

Titles covering smaller geographic areas have outperformed the market significantly (see figure 3). Overall, decline is being driven by titles with larger circulations covering regions and cities such as the Birmingham Mail where circulation per issue fell -20% to 30,597 copies per issue in H2 2014 and the Express and Star where circulation fell -13% to 71,585. Publishers have continued to offset circulation falls with bold pricing strategies. As a result, local press consumer revenue has been comparatively stable, declining -8% over the 4 years to 2014 compared to a -26% decline for total advertising revenue.

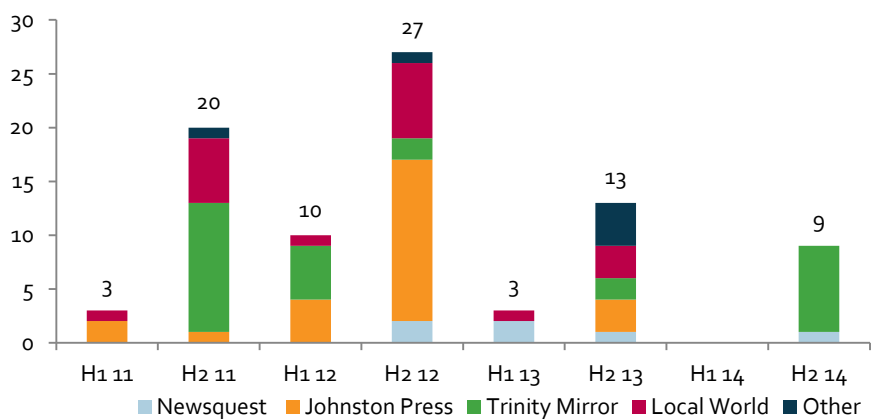
Figure 3: Circulation by geography y-o-y change (%)



Free print: Slowing of closures

Free newspapers' improved circulation can be attributed to a drop off in the number of newspaper closures in 2013/2014. After 37 closures among ABC audited titles in 2012, 35 of which were free publications, publishers have weeded out the weakest performers in their portfolios. We have identified only 9 title closures from the ABC audit for H2 2014 after Trinity Mirror announced the closure of 7 of its Surrey and West London titles in November. In 2012 we estimate that closed titles accounted for 28% of lost copies by ABC, this share fell to 8% in 2013 and 6% in 2014. Paid titles also constituted a significantly larger share of the copies lost to closures in 2013/2014. Of the 25 closures we have identified over the past two years, six have been paid titles, including Trinity Mirror's Reading Post, Surrey Herald and Liverpool Post.

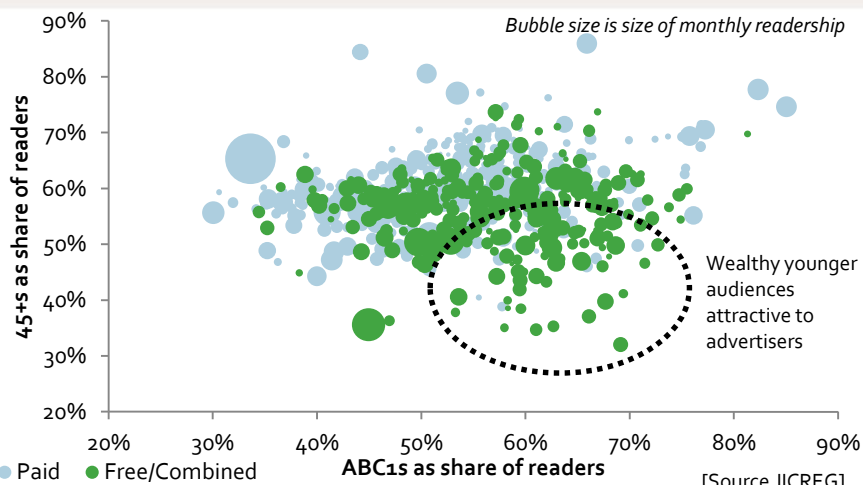
Figure 4: Title closures 2011-2014



[Source: Enders Analysis based on ABC]

The wider reach offered by free newspapers is augmented by their readership demographics which are broader than paid titles and more skewed towards the younger wealthier audiences that appeal to advertisers. Our analysis of JICREG data suggests that on average 40% of free local newspaper readers are over 45 compared to 45% of paid title audiences. The contrast is even starker in terms of socioeconomic status where 68% of free readers are ABC1 compared to 48% of paid title readers (see figure 5).

Figure 5: Regional newspaper demographics share

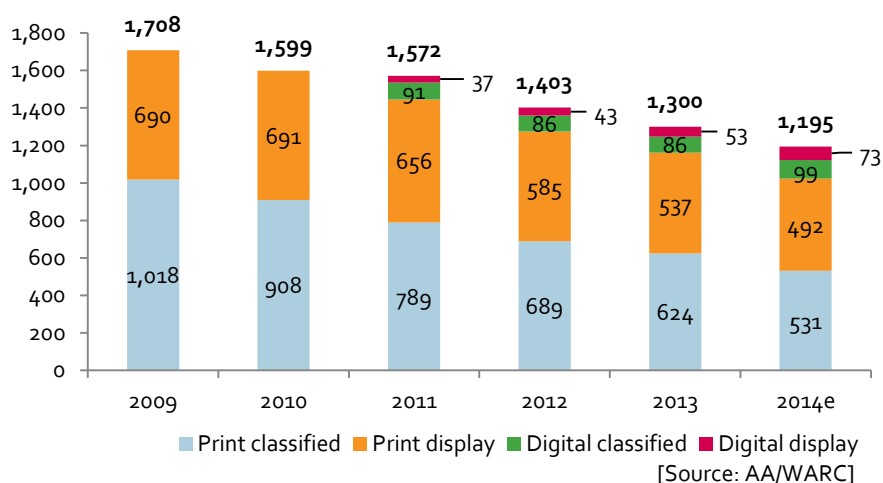


[Source JICREG]

Print advertising – revenue decline slows in improving economy

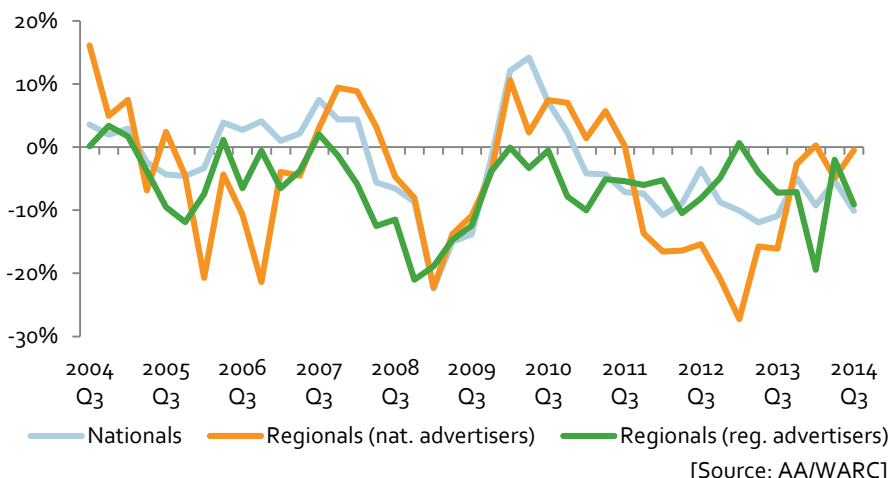
In line with circulation, print advertising revenue decline has moderately slowed, down -8.8% in 2013 and -7.4% last year compared to -11.9% in 2012, according to our estimates. We view this as primarily driven by cyclical factors; most notably a buoyant labour market which left recruitment classified revenues roughly flat in 2014 compared to a -13.2% decline the previous year. Other classified categories experienced a more minor reprieve with total print classified spend down roughly -7% for the year. The favourable market conditions in recruitment advertising enabled Johnston Press to report its first annual 'tipping point' in the company's results for FY 2014; total recruitment advertising revenue grew year-on-year with a print loss of -£0.3m outstripped by digital gains of £1m.

Figure 6: UK local newspaper ad spend (£m)



In print display, there has been a marked slowing of decline in national advertiser spend. After a -15.5% fall in 2013, spend fell -2% year-on-year in the first three quarters of 2014, outperforming the national newspaper advertising market as well as revenues from local advertisers (see (figure 7)).

Figure 7: Display ad spend y-o-y change (%)

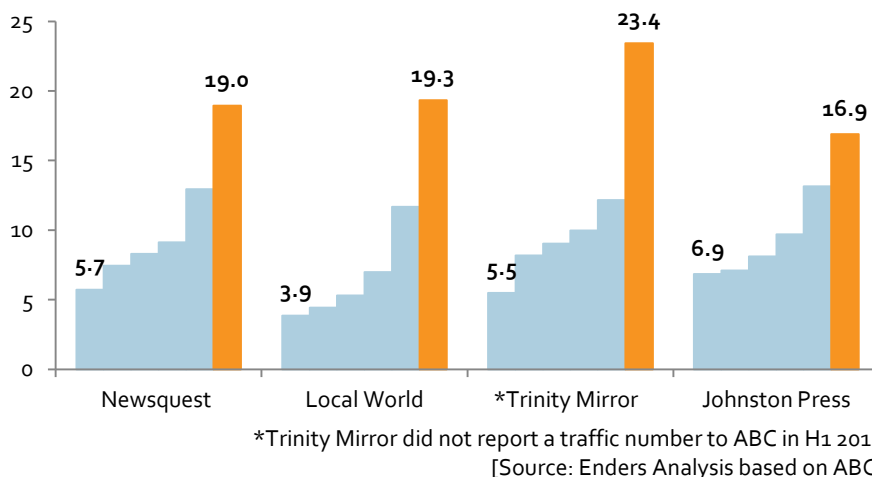


Our medium term outlook for print advertising is for the rate of decline to stay broadly constant at around -7% over the next 3-4 years in the context of a stable economy.

Digital

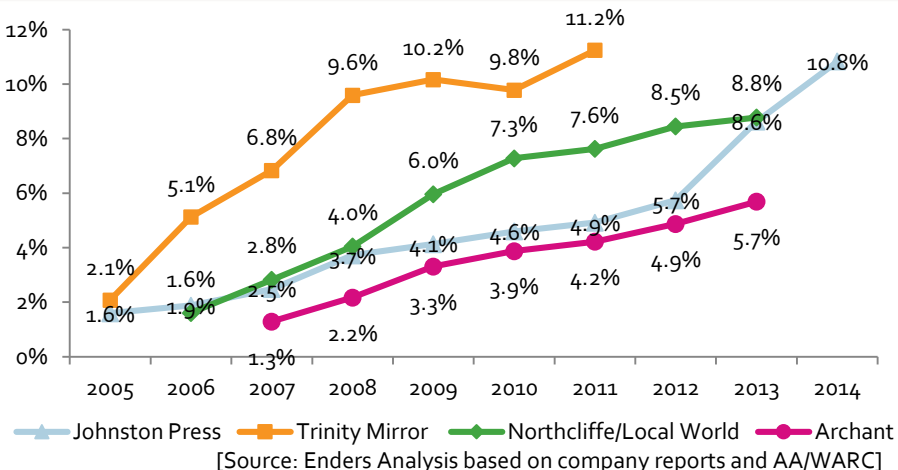
In 2014 the major publishers began to experience a significant uplift in digital traffic growth. Figures submitted to ABC show that Trinity Mirror and Local World monthly server traffic increased by 4.6x and 5.3x respectively between H1 2009 and H2 2014. Figure 15 illustrates all publishers will need to at least maintain this rate of growth in the next five years in order to provide a compelling alternative to Google and Facebook for local advertisers, but the recent growth patterns are promising signs that publishers' digital content strategies are beginning to take effect. In this report, we predominately focus on the 4 largest local news publishers by revenue, print circulation and online traffic: Trinity Mirror, Local World, Johnston Press and Newsquest.

Figure 8: Global traffic H1 2009-H2 2014 (m)



The second problem facing these companies, as outlined in figure 9, is that converting traffic growth into significant digital revenue growth has so far proved very difficult for regional publishers. Trinity Mirror's last reported digital advertising number for its regional news brands was artificially boosted by the inclusion of the company's pure play digital classified businesses. Of the other three market leaders only Johnston Press has broken the barrier of 10% digital revenue share in its 2014 results published earlier this month.

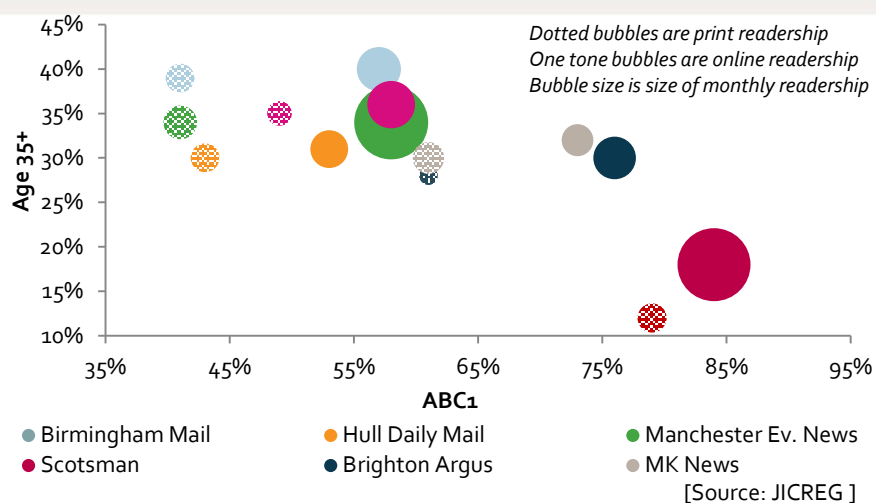
Figure 9: Digital revenue as share of total revenue



We do, however, see genuine signs of promise in the digital audience growth achieved by the four main publishers in the last 12 months and the acceleration in traffic growth is now beginning to feed into data supplied by WARC. We estimate that total digital display spend on national newsbrands increased 38% year-on-year in 2014, more than double the growth rate in 2012, and we believe that digital advertising will continue to grow at an annual rate of between 20-30% over the next three years (see advertising forecasts on p.23).

Studying a sample of regional titles in the latest JICREG readership data from October 2014 reveals that, as with free and paid print newspapers, the demographics of digital audiences are significantly more appealing to advertisers (see figure 10). Under 35s constituted 32% of digital readerships on average compared to 30% in print while ABC1s constituted 66% of online readerships compared to 54% in print.

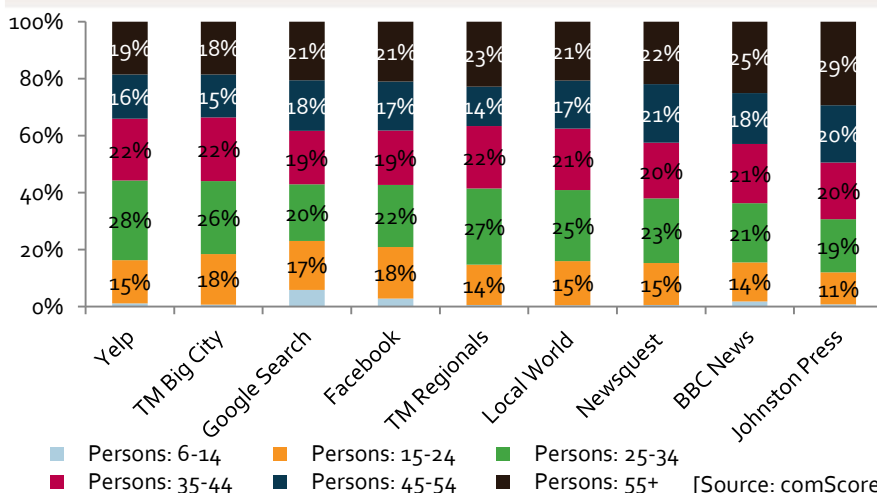
Figure 10: Online/print demographic readership share (%)



Regional newsbrands are also increasingly being consumed on smartphones and tablets although the share of page views by device varies significantly by publisher. comScore data for the UK in January 2015 shows that mobile devices accounted for 71% of page views on the Trinity Mirror city newsbrand websites while at Newsquest mobile share of page views was a comparatively meagre 33% - a telling reflection of the varying commitment of publishers' to mobile-first strategies.

When the online demographics of regional news brand audiences are compared with their main competitors for local advertising spend the numbers are also promising. comScore data from January shows the average share of traffic across the four main publishers in the 18-34 age group is 38% compared to 43% for both Google and Facebook suggesting that the lack of demand for local news in younger age groups is often overplayed.

Figure 11: UK traffic age group shares (Jan-14, %)



Market share and potential consolidation

In response to the rumoured acquisition of Local World by Trinity Mirror we have looked at company reports and industry numbers to try and piece together a rough sketch of market size and share across print and digital. The numbers in figure 12 are based on the published results of the top 4 local news publishers and include our estimates where data is incomplete or unavailable. The revenues at Trinity Mirror’s local news operations and Newsquest are particularly hard to gauge.

Trinity Mirror ceased reporting local numbers in 2012 after wrapping their national and local newspaper operations into a single publishing division. Newsquest is a subsidiary of the US media conglomerate Gannett, and broken out revenues have not been provided since Gannett’s 2012 annual report. In these cases we have relied on fairly broad assumptions to produce revenue estimates for the companies’ most recent reported financial years. For Trinity Mirror we have assumed a constant split between regional and national revenues since 2011 based on past results. For Newsquest, we have assumed total revenue growth in line with the total market for circulation and advertising revenue since 2012 and have split advertising into digital and print based on the split in the overall market and Newsquest’s share of digital traffic. Local World’s numbers are taken from the company’s reported results for the financial year ended December 2013 and are thus 12 months behind the numbers produced for Newsquest, Trinity Mirror and Johnston Press. Some top line estimates from our analysis of the Top 4 publishers’ market share:

- £820m in print consumer revenues (48% of total UK market)
- £1,614m in print advertising revenues (50% of total UK market)
- £172m in digital advertising revenues (54% of total UK market)
- Combined, Trinity Mirror’s local portfolio and Local World account for roughly £435m of regional newspaper brand revenues (25% of total UK market)

Figure 12: Regional publisher revenue estimates vs. total UK market (£m)

	Johnston Press	Trinity Mirror	Local World	Newsquest Media	Total market
Circulation revenue	78	59	61	67	555
Print advertising revenue	137	123	143	136	1,075
Digital advertising revenue	25	29	20	19	172

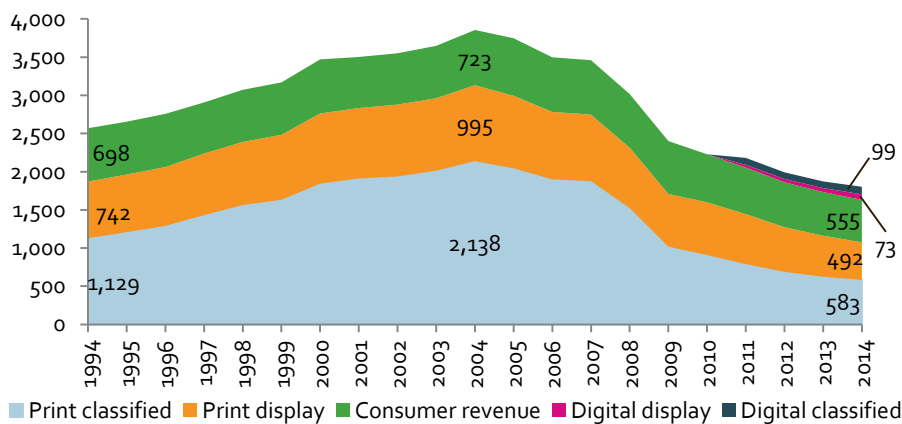
[Source: Enders Analysis based on company reports, ABC and AA/WARC]

Part two: the market challenge

Before we analyse strategic options available to publishers there is value in defining the market challenge that they face. Even today it is occasionally described as the migration of classifieds to digital—but this transition was merely an early (albeit impactful) manifestation of a much more profound structural shift.

To state it boldly: distribution rather than news has always been the local newspaper business model. Local newspapers were in effect local media monopolies, all value residing in the costly physical creation and transportation of the printed product. Circulations peaked in the mid 1950s when ITV launched, loosening the first bolts of that colossal barrier to market entry. But since the late 1990s, broadband, Google, smartphones, tablets and social media have systematically unscrewed the entire edifice, while two recessions and an increasingly urban, centralised and service based UK economy have given it a few violent shakes on the way down.

Figure 13: UK local newspaper brands revenue (£m)



[Source: Enders Analysis based on AA/WARC and ABC]

The collapse of the distribution monopoly leads to a myriad of challenges for publishers; as a result, they are fighting on many fronts simultaneously. For example, the loss of recruitment advertising to digital services was not just detrimental to revenues. There were many implications. For years local newspapers were receiving calls from SMEs and the public sector to place jobs adverts. These advertisers were typically offered a limited range of placement options and price points. This in turn determined the skills, scale and structure of the sales team, filled the newspapers with a depth of browsing content that motivated consumer demand, and created a weekly editorial and marketplace schedule. When recruitment advertising moved to digital every one of these operating assumptions was dismantled.

While recruitment is important in revenue terms, in the larger operation it is a relatively trivial example. The market challenges taken as a whole are much more complex and much deeper. Seemingly every digital trend negatively affects the local newspaper model. For example:

1. Mass “push” media is being replaced by personalised “pull” media, particularly now we have entered the mobile and social media era
2. There is a shift from generalist content provision, in bundles, to specialist services and aggregators (local is one of the few content categories that maps forward into the mobile, social era, but the execution has to be fundamentally different)
3. Platforms are to some degree replacing media: by platforms we mean a service that suppliers and users contribute to and develop
4. Effective business and service provision can be created, delivered and sustained on a much smaller cost base than ever before
5. In terms of demand, content bundles are less important for media consumption, with content increasingly atomised and consumed on a continuum, drawing from a myriad of publishers and services
6. All businesses now have many more marketing and sales channel options than in the pre-digital marketplace, replacing simplicity with complexity
7. Content and marketing (or more specifically, editorial and advertising) are either relentlessly converging (rise of native advertising and creative content solutions) or else they have been entirely separated (consumers search for properties on Rightmove)
8. Investment (from within the industry and from without) is increasingly allocated to the potential of the digital space rather than the existing revenues of legacy businesses, accelerating the supply-side trends

It is impossible in a short research paper to capture the scale and depth of strategic and operating challenges that these digital media trends throw at a local newspaper business. Almost everything such businesses were doing in 1995, and the way they were doing them, are fundamentally wrong in 2015. A manufacturing industry has moved into the service or retail sector in the blink of an eye. Furthermore, the local newspaper industry frequently talks about how the market functions today, with the unsaid assumption that today’s definitions and descriptions are somehow stable; that all publishers need to do is build an effective model for today’s technologies and consumption habits, and the job is done.

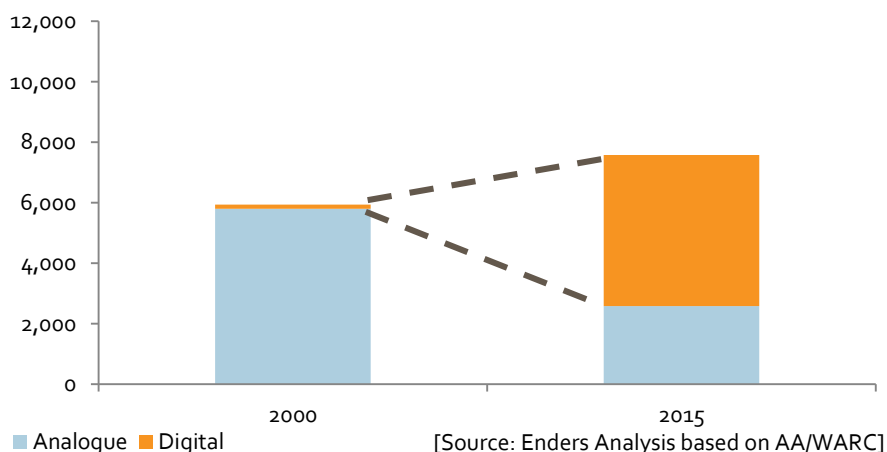
But this could hardly be further from the truth. Today’s marketplace is less stable than at any point in history precisely because the speed of service innovation and consumer expectations resulting from the development of digital technologies are accelerating, not decelerating. Print media was a fundamentally stable marketplace compared to the desktop internet. But the desktop internet was a fundamentally stable marketplace compared to the mobile one, and among the next waves of innovation will be apps and devices communicating with each other, doubtless generating new marketing, commerce, service and content business opportunities for local communities, and undermining existing businesses that do not adapt to changing circumstances quickly or effectively enough.

Next, has the competitive landscape for local media changed during this period of digital disruptive waves? The short answer to this is evidently yes; but it might also be reasonably argued that, overall, the competitive challenges thrown at local newspapers could have been even greater still. Based on experience of the last 15

years, new entrants are just as likely to fail as succeed, although some of the successes have been very big indeed.

We believe Google straddles both sides of the fence. On one side Google AdWords has generated more revenue from SMEs than many local newspaper businesses care to acknowledge. Some publishers believe local digital advertising has principally gone to Jobsite, Auto Trader and Rightmove. But we estimate that more than 200,000 SMEs are spending on average upwards of £7,000 per annum with Google, so in aggregate they are generating somewhere in the ballpark of £1.5 billion for the search giant, and potentially considerably more. And this effectively just covers the direct response or classified expenditure (see figure 14).

Figure 14: Classified ad expenditure (£m)



On the other side of the fence, over many years Google has launched and retreated from a wide variety of local initiatives, often in vertical marketplaces such as property and auto. Without local sales, knowledge, networks and authority, momentum for some types of service innovation is too slow even for a self-service and algorithm based solution as proficient and well implemented as Google.

Facebook has had considerable success with local communities and local commerce, and recent developments suggest they are increasing their interest not just in news content but in local content. We estimate more than 50% of Facebook's £510 million 2014 UK advertising income was generated from SMEs. Location but also precise consumer targeting are key to Facebook's success. Not so long ago the Exmouth Journal was the only way to target people in Exmouth. Online, this is not the case. The Exmouth Journal website has negligible traffic (according to Nielsen and comScore) and the publisher will have little data on these users beyond what they can backend from the IP address (no sign in is required). By comparison, in five minutes advertisers can place an advert targeting the 360,000 Facebook users who live within 25 miles of Exmouth, or, if they prefer, the 3,900 female Facebook users who live within 25 miles of Exmouth and have a birthday in the next seven days.

Of course publishers are developing targeting tools. For example, rather than just listing recruitment ads within their search facility (outsourced or otherwise), businesses can place recruitment ads on newspaper websites and using cookies target consumers by gender, age and income, but also by content/context. But this is not the same thing as Facebook's first party data approach (we will return to

this later). Facebook and other native businesses have deeper investment pockets and are moving much more rapidly.

Meanwhile, Facebook's initiative to host content directly on its site has started in discussions with the big national and global news brands, but will soon reach local media, providing a real dilemma for publishers. We have always considered the "local outrage" question a useful metonym for the local marketplace: if consumers go to Facebook when some local decision infuriates them, then local media have lost the battle. If consumers go to their local news website, then publishers have a chance of winning. Stories hosted on Facebook would blur the simplistic boundary we describe: share of advertising spend might be welcome, as would the audience reach, but at what long-term strategic cost?

We note that publisher backed hyperlocal and community sites have entered the marketplace with generally poor results. The Guardian pulled a local service initiative in 2011 which it had trialled in Edinburgh, Cardiff and Leeds, bargaining on the basis of these sites that a national network would be "unfeasible". Some local publishing groups have developed hyperlocal sites, and then retreated from them in waves. The challenges of building news led local advertising businesses are well demonstrated by Patch, the US hyperlocal news network. Founded in 2007 and acquired by AOL in 2009, Patch received \$300m in investment, creating more than 900 local markets, employing 1,000 journalists and soliciting contributions from 14,000 bloggers. AOL scaled it back to 600 sites, and then sold majority ownership last year, having incurred \$200m of losses over five years.

Nevertheless, thousands of startup sites have appeared in the UK, some of them are gathering considerable local traction. They tend to be small, independent businesses with limited commercial ambitions. Some of them are passionate champions of their local communities and local issues, while others are predominantly notice boards providing user reviews and/or ratings for local services. In terms of traffic, share of consumer time and share of SME expenditure, they are all competition for local publishers, albeit in a fragmented form.

TV broadcasters have also developed local media services, with both Sky and STV in the commercial sector notable for their active footprints in local news and community coverage. We consider these developments to be more of a threat to local newspaper publishers than the more formally organised Local TV initiative, which we have always strongly argued is destined to fail, at least on a sustainable, nationwide, commercial basis.

The BBC, however, is a different question, and its role in local news provision a report in its own right. At the same time the public service broadcaster is a critical player in a highly competitive and rapidly evolving landscape, and we did not want to ignore it here. Three separate developments have emerged in recent months.

1. James Harding, Director of BBC News and Current Affairs, made a speech at the February launch of a commissioned report, *The Future of News*: "In the UK, devolution and the decline of the regional press is creating a real need for local news coverage, a democratic deficit". The reports reasons: local journalism was "one of the biggest market failures in news in the last decade", and concludes the BBC should provide more local news
2. Separately, the BBC has started to pilot schemes to share stories with local newspapers and to link through to newspaper websites from BBC Local pages. The BBC has "promised to improve attribution of stories which originate in local papers and agreed to a formal audit of how many

BBC website stories originate in the local press. We have suggested other news organisations might consider covering such things as sport and courts for the BBC, we have hosted an industry event on data journalism and we are exploring joint ventures in local areas during the General Election campaign”

3. A recent Culture, Media and Sport Committee (CMS) report on the future of the BBC concluded, among other things: “the BBC should...support local media through extending the indie quota to include local news”

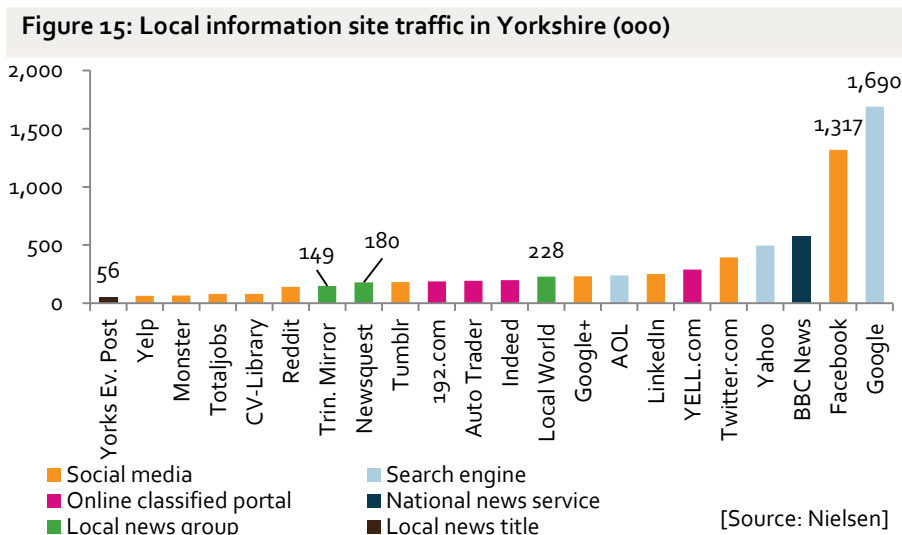
The implications of the first item above are that BBC developments could be *more* competitively threatening to local newspaper businesses, justified by the extent of newspaper closures (free titles), reduced frequency of titles (daily to weekly) and the 10 year loss of some 5,000 journalists, yet arguably ignoring or underrating publisher focus on digital investment, and in particular the rapid traffic growth of the last year or so. The BBC has long been criticised by local commercial media for filling its local radio, local online and local TV services with stories originated by newspapers. Tensions were particularly high when the BBC’s ambitions in local provision extended to a proposed local video initiative in 2008, before it was forcefully quashed by the BBC Trust.

However, both the second BBC item and CMS report suggest the BBC intends to support local media rather than more actively compete. This seems the more likely medium term outcome. Chancellor George Osborne announced in the Budget (18 March) that the Government should enter discussions with local newspaper publishers regarding tax breaks to help support the sector. The BBC’s role in local will certainly evolve in the next few years, and we consider it likely to become more entangled with local newspaper and native enterprises as it does so.

Finally on this point, while the decline in local journalists clearly has had an impact on local news provision, we do not believe publishers will reduce their content investment to the radical levels undertaken by commercial radio in recent years. Taken as a whole local commercial radio has increasingly filled schedules with syndicated, non-local content, massively reducing costs but at the expense of the breadth and depth of targeted, relevant local content. *Some* elements of non-local syndication are evidently worth exploring in the local press, but our sense is that publishers will not see this as an opportunity to save money in local journalism *per se* so much as one to reduce resources that have limited advantage being local.

In summary, publishers do not have a demand problem. Consumers still want to know what is going on locally and businesses still wish to reach consumers who are at least partly defined by location and a sense of shared community values. All the evidence suggests demand is robust. Indeed, after decades of rising disposable incomes, cheaper international travel, radically evolving lifestyles and neglected and declining town centres all of these socioeconomic trends have now moved into reverse. Local is relevant again: socially, we are becoming a *more* local nation.

But distribution has changed everything. The value of demand has been transformed. From a monopoly position newspaper publishers now compete to have a strong voice in the “noise” of available and overlapping services (see the example of competition for local traffic in Yorkshire in figure 15).



As we have previously opined, in order to move above this noise, local newspaper publishers need to try and grow their traffic 5x to 10x – and the substantial trend improvements in 2014 highlighted in Section 1 are very encouraging.

Part three: supplier options

Publisher responses to the structural challenges in the local media sector have largely been linear: publishers have reduced costs, and changed some reporting structures. There are many subtleties that this oversimplification misses. For example, some publishers have gone “digital first”, preparing content and marketing services for mobile devices, and “reverse engineering” daily and weekly print newspapers out of all that activity.

However, the majority of publishers have adapted their existing business into a digital business, and then created some reverse process elements. We consider this a subtle and sophisticated version of a *linear* response to the market challenge, rather than a deep rooted structural response.

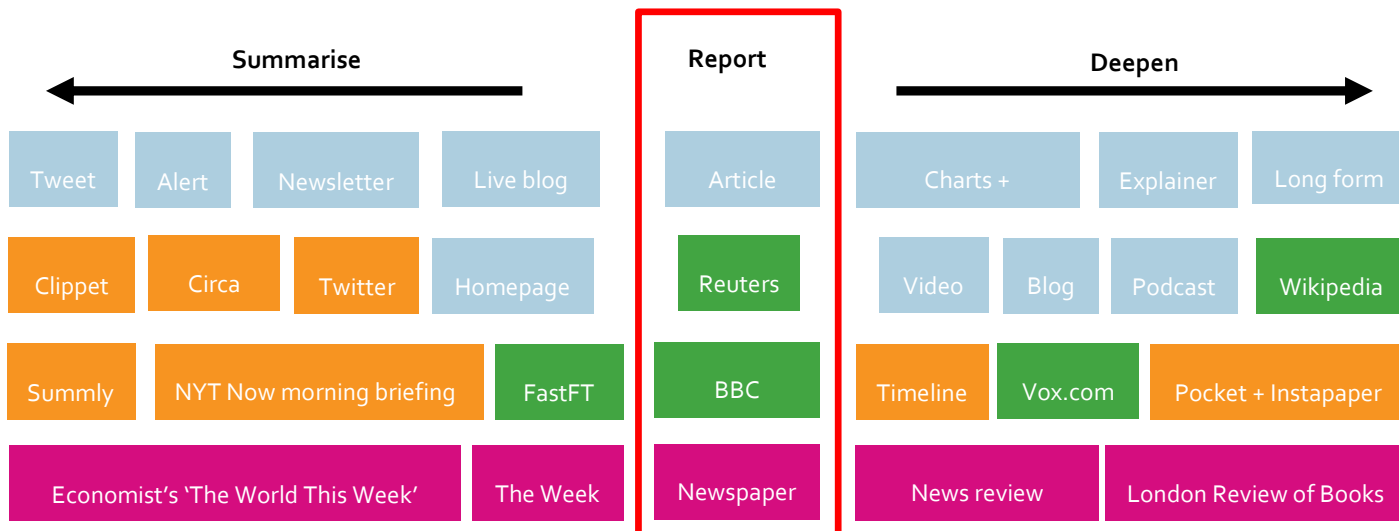
Linear responses are an optimal solution if the publisher is running the business to generate as much cash as possible in the medium term. Structural responses require more investment, damaging profit margins in the short and medium term, are a good deal more complex, are higher risk, and by their nature they are more disruptive of an existing business. (One way of thinking about a structural response is: if we wanted to destroy our current news brand tomorrow, what would we do?) For those organisations who wish to remain in the sector for the long-term, structural responses are necessary because their point is to build a sustainable service.

To put it in simple terms: local news brands have to evolve into local platforms, and build a communications, information, content and data service for local communities (citizens and businesses).

However, that is a good deal easier said than done. Distribution drives every aspect of the old model. For example: newspaper editorial content, including the length, design, tone and nature of all articles (see figure 16); how stories are treated and the timing of them; display and classified advertising, including the scale and execution of the adverts, and the range of SMEs interested in

advertising; the skills and experience of journalists; the employment infrastructure for journalists and commercial teams; the skills and experience of management; the management tools used for decision making; the very nature and frequency of management decision making.

Figure 16: Selling a news service to consumers



[Source: Enders Analysis]

David Broder, the former Washington Post commentator, defined a newspaper as “a partial, hasty, incomplete, inevitably somewhat flawed and inaccurate rendering of some of the things we heard about in the past 24 hours, distorted despite our best efforts to eliminate gross bias by the very process of compression that makes it possible for you to read it in about an hour”.

The magnitude of change from this publishing model to a retail or service model is immense and one of the critical questions is the degree to which a publisher can deliver this under its own steam, and the degree to which it needs to partner and outsource solutions. Our view is it is easy to underrate two things: the challenge of changing a highly established business culture and its focus on a 24 hour product provision; and the challenge of attracting the best technology talent so businesses can develop, and keep developing, the most relevant technological solutions.

Taking the latter point first, it is relatively easy to attract competent technology talent, but excellent developers are notoriously difficult to recruit outside of the technology sector. This is broadly understood. What is less frequently acknowledged is that the performance gap between competent and excellent technology people is a huge chasm, particularly when measured over years.

On the business culture point, changing culture from within is difficult precisely because existing management and staff are either resistant to change, or more usually can embrace only so much change: the pace is therefore almost always too slow compared to the speed of market developments.

Wholesale outsourcing of technology and transformation can enforce change to an agreed timetable and therefore create a new delivery and business culture in its wake. It is often reasoned such an approach cannot really carry the culture of a company: after all, these are just technology people writing code. But this description misses the point, even if you consider it accurate. A partnership of this nature is commonplace in many other industries including technology firms

themselves, and, when it is well handled by both sides, provides management with the tools to change company culture much more rapidly. Consider the following advantages, and it should become apparent how they effect change in the culture of the company itself:

- A service development roadmap is managed separately from company resources, in effect removing cultural issues that slow things down
- Expensive but relatively ineffective internal technology and process resources can be disposed, removing tensions between company functions and partially offsetting partnership costs
- Technology knowledge and implementation expertise is a much higher quality than publishers would be able to attract into their own organisations, even on a contractual basis
- Technology talent also keeps on top of developments in technology solutions; therefore, as the marketplace evolves so does the publisher's technology solutions
- Cost effectiveness - while major publishers (New York Times, Guardian, News UK) can afford massive tech teams, local publishers cannot
- Speed to market: rapid development deployment if/when required
- Technology solutions are not just about great code and architecture, they are also about developing efficiencies in process, automating activities where possible, creating timely and actionable data for all functional layers and management - and so on
- Technology resource can be scaled up and down as required much more efficiently than with in-house staff

Publishers have embraced substantially more outsourcing at a tactical level than they ever did in the past. They now routinely outsource a wide variety of activities, including printing, classified advertising search platforms, national advertising, advertising formats across devices, directory services and so on. But outsourcing - or partnering - at a more strategic level is still a big step for most publishers. Arguably it has taken the circumstances of Local World, a new organisation structured from traditional assets, to move from baby steps to such a transformational leap.

Northcliffe Media (DMGT's regional newspaper business) and Iliffe News and Media were sold into Local World in 2012, with shareholders including DMGT, Iliffe, Trinity Mirror, Odey Asset Management and Artefact Group. The company was valued at £100m. Launched with a paired back HQ and management team, Chairman David Montgomery described the spirit of Local World: "It will be unencumbered by the infrastructure of the industrial past such as property, printing presses and large scale distribution or any legacy issues such as high levels of debt." It therefore had opportunities to invest, and budgeted £10m for tech development from the outset.

Local World's vision to transform from a manufacturing to a service organisation generated two challenges. First, the company would have to access technical specialists to compete with global advertising giants like Facebook and Google. Second, Local World would have to run its IT function both more effectively and more efficiently. Management met with 10 consultancy firms and appointed Cognizant Technology Solutions. Cognizant provides IT, consulting and business process services and was selected essentially on the basis of one criterion: its high quality technology team. This team is tasked not just with delivery

of managed IT services, but creating all the tools and services that bring the new content and commercial strategies to life.

There is a world of difference between tactical outsourcing of discrete cost lines or revenue streams and collaborative outsourcing at a strategic level. Strategic partners work through the outsourcing options with companies and the configuration of the outsourcing. Strategic roles are always retained in the organisation.

Functions that local newspaper publishers would review cover both managed IT services and also those which would not be recognised as the key digital transformation elements. Our list here is not comprehensive, but is designed to demonstrate the breadth and depth of the collaborative process:

Managed IT services	Digital transformation
Service desk	Content
Data centre and networks	Advertising sales
Advertising system(s)	Commercial activities
Production	Digital projects
Editorial	Mobile
Finance	Web, social
Business applications	Analytics

Publishers and the industry have many options, but outsourcing on this scale can accelerate the cultural transformation necessary to run a very different business model. In the meantime, it provides a clear illustration of the breadth and depth of the change that management need to achieve, whatever implementation approach they favour.

Emerging content models

Put simply, a local platform hub is a publishing model that the news brand controls, but which any registered user can contribute to. The publisher has editorial authority. News is an important category of information because news is change, which in turn affects search and social media and can drive targeted alerts. But a database is also critical. So, a trivial example: the Horniman Museum in Forest Hill in South East London has been a family attraction for decades. Occasionally it makes the news, perhaps when a major exhibition opens or a famous donor provides funding. But for the vast majority of the time its activities are not newsworthy, they are merely process.

If a consumer types Horniman into Google the museum site will be returned, and, very occasionally, the news brand site will be returned. But the local content platform should *always* be returned, because it knows everything about the Horniman: it knows every exhibition it has ever run, every donor it has ever had, its opening times, its history, its management team, the number of visitors it gets per annum, its most famous exhibits. The local platform has to be the Wikipedia of its community, not just its news service, and just as a Google search for an actor invariably highlights the Wikipedia page, so the local platform should be returned whenever a local personality, business, landmark, school, hospital, train time, golf course, shop, councillor - and so on - are searched for. Therefore, the technology and data architecture of local platform hubs, and content taxonomy and tagging, are all critical skills in this new business environment.

Location is also critical. With more than half of usage coming from mobile devices, and the proportion certain to grow, relevant segmentation and use cases need to be rigorously developed. The whole service should be built around the user's primary location, and provide a degree of content personalisation. Perhaps one page is a map, with every user's home at the centre of it, and all relevant content highlighted geographically. That page could be a personal homepage that alerts consumers when they check their phone first thing in the morning. "Local" has a wide variety of meanings and related use cases, but we believe there are three broad ones: nearby; community; and front door (for deliveries). Every element of the content (and commercial service, which we look at in our next section) can be developed in relation to these top level use cases.

Mobile is crucial. We estimate 75% of traffic to local digital services will be on mobile devices in the next two to three years. Notifications and alerts are evidently tools that drive traffic very effectively, but using these to link to long articles may be missing the point. It may be important to link to very short summaries (and then to longer articles as desired) or even very short videos. Local platforms need to understand how users engage with media on mobile: the content flow has to be fast (brief) and it has to be eminently social. Even BBC1's flagship Ten O'Clock News recently featured iPhone footage of delays at Heathrow.

All publishers are using the community as content contributors to a greater degree than ever before, and some have set ambitious targets around the scale of such contributions. Platform models - such as eBay, Etsy and Wikipedia - are by definition open to multiple users, and local media hubs should adopt the same publishing logic. After its launch Local World's David Montgomery spoke of a "truly digital" future in which journalists become "harvesters of content" and much of the "human interface" involved in the current publishing model disappears.

Newsroom 3.1, a 2014 Trinity Mirror initiative at its North East office (Newcastle Evening Chronicle, Sunday Sun and The Journal and Teesside's Evening Gazette), is arguably a less radical version of this approach. New roles such as Social Media Editor and Newsroom Planning Analyst were implemented in an editorial structure designed for planning and process rather than reaction. Editorial authority remains important, but it is not solely applied in a broadcast mode; its influence is more decentralised. A single top-down editorial approach is no longer the correct - or only correct - operating model. Nevertheless, curation and judgement remain critical.

Montgomery hosts a conference call with Local World's editors every weekday morning, reviewing each print and digital business, its editorial decisions, and the traffic being achieved. The goal of this meeting is to spread best practice by encouraging teams to emulate the values of the most successful content, and to avoid some of the mistakes of the least successful content. Such discussions focus on a huge range of editorial criteria such as timing, tone, positioning, layout, use of photography and other qualitative judgements: anything that would appear to influence the relevance and appeal of content for local communities (and, in a number of circumstances, a much broader audience too).

Key to the future of local platform hubs is a shift in editorial and journalistic mindset. Over a period of three decades local newspapers have arguably delivered on a promise of editorial independence at the expense of other relevant missions. We realise our thinking here is controversial. We are absolutely not arguing that local newspapers should ignore local council corruption or that its journalists should be paid to write positive copy about companies. However, what we *are*

arguing is that local newspapers should unashamedly champion their community and their towns and cities. Too often we suspect a relentless focus on editorial independence has led to a negative, combative tone that is counterproductive for a local media platform.

Local media platforms will need to celebrate local businesses, local personalities, successes large and small. Since its relaunch as a free title under Lebedev Holdings the Evening Standard has become substantially more of a champion of London than in the years prior to its sale. It is a campaigning media brand on behalf of a wide range of causes including the capital itself, rather than a neutral bystander as likely to knock the city as support it. Similarly, Hull is to be the 2017 UK City of Culture, and the Hull Daily Mail was a forceful champion of that outcome and its Editor Neil Hodgkinson is on the board overseeing the city's 2017 activities.

Overall, local platforms will have a life of their own, and not everything can be precisely planned or controlled. Nevertheless, in terms of in-house skills, platforms will need good content managers who can aggregate blogs, video, user-generated content, social media. They will also need data analysts who can track usage and prioritise service developments. Human interest stories will become more important. There will be objectives to find and promote local celebrities. More syndicated content for everything that is non-local will be developed by the large publishers, and perhaps an industry-wide solution would be the most cost-effective. Editing will be less top-down, more decentralised, but essential for strategy, leadership, curation and judgements. Editors will be the public face of the business- arguably closer to their role 100 years ago than they have been in recent times. Journalists - of which there will be fewer - will be promoted as stand-alone brands within this complex network of activity.

Emerging commercial models

The new business model is predicated on a shift from anonymous to known consumers. To put this model in place publishers need to have an engagement funnel, from anonymous, occasional visitors through to registered, regular users. We remain doubtful that large volumes of registered users will pay for access to a local platform, but it is not impossible to envisage the long-term development of a range of benefits some of which can only be realised by paying members. Our point is that the funnel will not just have two options (non-registered and registered users) but many options, from entirely free usage, through registered-user only content and services through to paid membership services.

Gathering consumer data is critical so that the platform evolves into an effective marketplace for every SME, public sector office and business in the community. In discussions with various local and regional publishers over the last year we have established that local sales teams are typically reaching about 10-15% of the SMEs listed within a relevant area (based on Office of National Statistics data). The sales system built over many decades was for repeat customers and inbound calls (recruitment, for example) rather than an outbound operation. Furthermore, newspaper businesses have always been surprisingly inflexible in the marketing opportunities they have offered. Customers have had to fit into a limited template of options, rather than buying what they want.

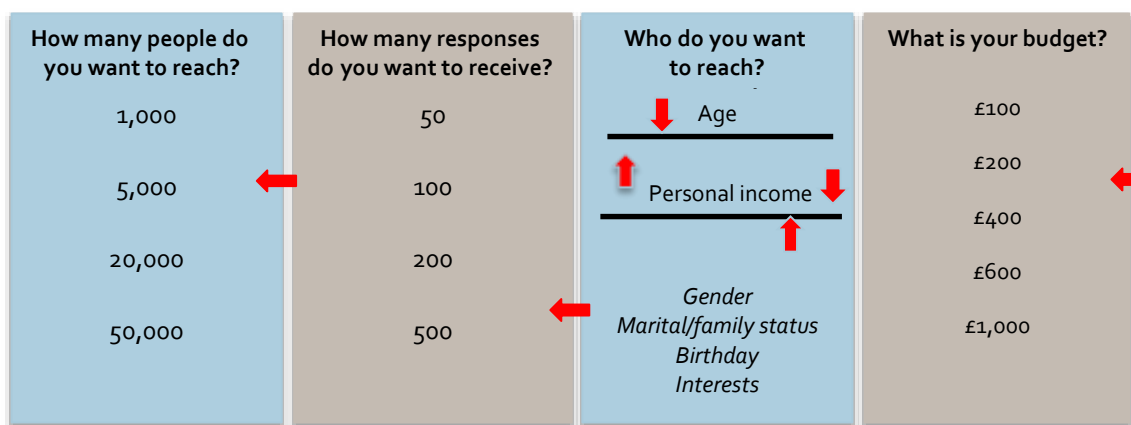
The local hairdresser does not necessarily want to take out a display advert in a local newspaper. S/he wants to fill his/her salon on Monday mornings when all too often it is empty. There may be a variety of ways to achieve that outcome: email

campaigns, discounting vouchers, targeted mobile and desktop display. There may be other marketing challenges and objectives that require SMEs to develop their search engine presence or social media strategy.

Therefore, the local platform solution has to be both entirely flexible, and also self-service. Some publishers have suggested to us that SMEs do not really want self-service but we estimate that in 2014 Google, Facebook, Auto Trader, Rightmove and Zoopla generated well over £2bn from SMEs. Local platforms need to have an integrated back-end administration system for SMEs that is based on key use cases and is as intuitive as the consumer front-end (see figure 17).

Figure 17: SME marketing administration (illustrative)

Illustrative SME marketing administration self-service on a newsbrand local platform hub



[Source: Enders Analysis]

Facebook, which generates nearly £300 million from SMEs by our estimates, has a huge advantage over traditional media because not only does it have access to good consumer data, but it is first party data. Some 34m UK adults access Facebook, and while the depth of data collected on consumers varies substantially, the density of usage, engagement (more than 20% of time online in the UK is on Facebook) and structured data is extraordinary compared to that collected by other media. Targeting data generally has become a sophisticated industry in recent years, but nothing is ever as valuable as rich first party data. This is why we are in no doubt that publishers need to consider the value of registrations and membership, even if they have decided they will never develop subscriptions.

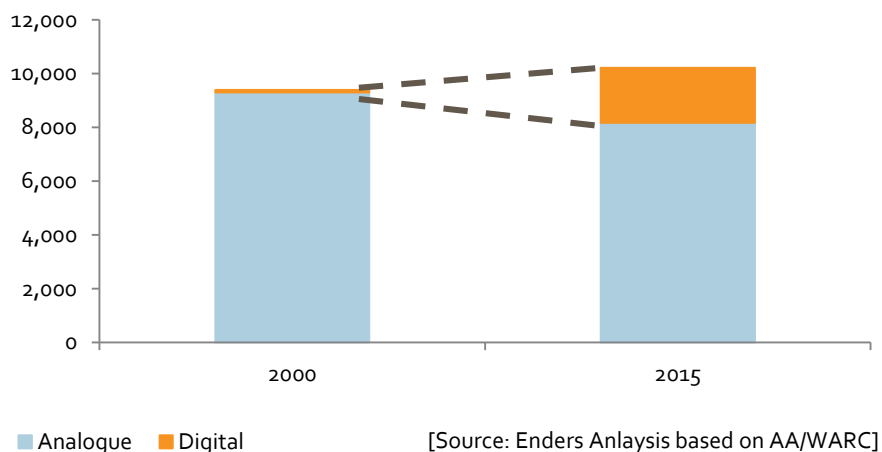
A fully evolved self-service infrastructure means sales teams have increasingly to be experts at upselling, targeting and educating new segments, in an effort to attract the missing 85% of SMEs that are not today using local publishing media.

In parallel, as physical newspapers retreat we believe a huge gap in the marketplace has opened up for local display marketing. Other traditional media options are relatively unchanged: outdoor and TV have marginally improved, with more digital inventory available and new options such as Sky Adsmart, sold locally by Johnston Press. Radio continues to be important for some objectives and organisations. But broadcast TV remains onerously expensive for many businesses and irrelevant for their marketing objectives.

However, digital has *not* replaced newspapers for display in the local media landscape. Digital display is still a relatively small part of the total display advertising marketplace (see figure 18), and Facebook clearly offers the most

effective option at present. But Facebook, and programmatic display advertising more generally, do not provide a solution for SMEs who want to market in an appealing and relevant quality local content environment (we touched on some of these issues in our advertising report, [Context is Queen, the value of media environment \[2015-019\]](#)). Businesses want to market themselves, they want to build their reputation, and local media platforms provide the best environment for them to achieve that. Not all communications are about direct response; and consumer ratings have not eliminated the need for businesses to deliver confident, controlled messages about themselves on a platform in which consumers are positively engaged by local content.

Figure 18: Display ad expenditure (£m)



We believe a local platform would stimulate SME display spend, provided it delivers six things:

1. Huge reach (penetration) of the local market
2. Density of usage- commensurate with Facebook usage
3. Ability to segment, and target relevant users according to a wide variety of criteria- deep data on users
4. A broad, highly flexible and easy-to-use range of marketing options
5. User-friendly self-service administration system that translates objectives into techniques, and measures marketing performance on simple dashboards
6. Editorially, the platform is a passionate local champion (though editorial independence remains core)

Commercial teams need the tools to segment and prioritise all plausible advertisers by business type; provide multiple and flexible marketing use cases to each segment; and to enable back-end performance optimisation tools to businesses. The platform needs to be effective – the sales teams have to be comfortable being measured on transparent performance metrics. And that is why it also needs to demonstrate that it is effective, and that through careful campaign manipulation that marketing solutions can always be further improved.

Arguably, the most optimal solution for the industry would be to develop a *nationwide* local platform. The biggest challenge to this innovation would probably be publishers themselves, who may still prefer to develop and own solutions rather than collaborate on a shared platform to compete with Google and Facebook.

However, effective national development in this way could make the local media attractive to national (and global) brands again. Mediaforce 1XL is a step in that direction, but it is a small step compared to an integrated local platform for the UK as a whole: that would be a very attractive option for national advertisers to reach audiences with exactly the right message at exactly the right time in exactly the right environment.

Many non-local publishers are positioning their digital services as trading platforms, and a nationwide local programmatic trading platform could be an astute, and strategically important long-term investment for the local press sector as a whole. Furthermore, it could help put local platforms on the front foot, by letting them focus on the key measures and attribution models preferred by SMEs and national brands, rather than those supplied by Facebook, Google and the agencies. Likewise, native and content marketing solutions for SMEs could arguably be better served through a centralised industry solution.

As mentioned above content syndication innovations - non-local features for print newspapers - may also work more effectively as an industry-wide solution, rather than as a series of individual publisher solutions. Consolidation in the marketplace could accelerate the industry towards such outcomes.

Publisher business models are shifting from two revenue streams to multiple revenue streams, though consumers, SMEs and the public sector remain the contributors. Many publishers already have myriad revenue streams, but the proportions of revenue will become materially much more mixed than they are today and than they have been historically. The advertising revenue bucket will dramatically change, with publishers increasingly providing marketing solutions for SMEs, only a small – and declining – proportion of which will be traditional advertising. In this outline, we are not limiting ourselves to service solutions such as Johnston Press's Digital Kitbag (for search ending marketing, website builds, and such like). Local platforms will be protean, learning from SME demand and marketing effectiveness, and continuously improving the services on offer.

Revenue streams will include:

- Audience targeted emails
- Location based alerts
- Sponsored editorial
- Creative content
- Search Engine Optimisation and Marketing
- Sponsored live events
- Membership access, offers, events
- Display advertising
- Mobile advertising
- Websites and mobile sites
- Direct response messages
- Video advertising

Sizing these various opportunities is difficult, but no different from forecasting the revenues of most native startups. However, traditional analysis of the local newspaper market tends to focus on the transition of audience expenditure and category advertising expenditure from print to digital. On this basis, it is hard to see how revenue can go anywhere but down. Johnston Press has recently highlighted that some advertising categories, aggregated across print and digital,

have now stabilised; this is encouraging, but the thinking undervalues the opportunities for local media platforms.

One of the reasons that recruitment advertising is stabilising for local newspaper publishers (aside from a fairly strong economy and a reasonably confident jobs market) is that their recruitment services are moving up the value chain, closer to the HR function of SMEs: they are evaluating CVs for businesses, and sending on a shortlist of the best candidates. A large proportion of the revenue opportunities listed above have historically been pursued on an ad hoc, rather than a systematic, basis. Some of the revenue streams were evidently impossible in a pre-digital world. Because as a rule of thumb commensurate digital advertising expenditure is discounted 80% compared to print, we think of digital platforms as being tiny businesses. But digital is also a far larger playground than print. Today, commercial teams are not only failing to reach 85% of SMEs in their regions, they are also failing to provide full service flexibility for 100% of them.

Local platform hubs should not be competing for the established few billion pounds of advertising spend by SMEs, but for a cut of the entire marketing, PR and even technology spend of all SMEs and a smaller cut from national brands. In total this is a huge pot, many times the magnitude of the UK's advertising spend. It has grown well beyond the level of inflation for the last decade, and should continue to do so for the foreseeable future.

Figure 19: UK local news brands advertising expenditure and forecasts

	2013	2014e	2015f	2016f	2017f
Local news brands advertising expenditure (£m)					
Print display	537	492	462	434	407
National display	165	161	154	148	141
Local display	372	331	308	286	266
Print classified	624	583	547	511	475
Recruitment class.	103	103	101	98	93
Non-recruitment class.	521	480	446	413	382
Digital display	53	73	95	118	142
Digital classified	86	99	111	120	131
Recruitment class.	55	67	77	84	93
Non-recruitment class.	32	33	34	36	38
Local news brands advertising expenditure (year-on-year % change)					
Print display	-8%	-8%	-6%	-6%	-6%
National display	-16%	-3%	-4%	-4%	-5%
Local display	-5%	-11%	-7%	-7%	-7%
Print classified	-9%	-7%	-6%	-7%	-7%
Recruitment class.	-13%	0%	-2%	-3%	-5%
Non-recruitment class.	-9%	-8%	-7%	-8%	-8%
Digital display	24%	38%	30%	25%	20%
Digital classified	0%	15%	11%	8%	9%
Recruitment class.	5%	22%	15%	10%	10%
Non-recruitment class.	-7%	3%	4%	5%	7%

[Source: Enders Analysis based on AA/WARC]

About Enders Analysis

Enders Analysis is a research and advisory firm based in London. We focus on the media, entertainment, mobile and fixed telecoms industries, with a special focus on new technologies and media, and we cover all sides of the market, from consumers and leading companies to regulation. For more information see www.endersanalysis.com. Contact us at info@endersanalysis.com.

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News brands: Rise of membership as advertising stalls

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Brief overview

Print

National quality newspaper print circulation decline has slowed on the back of an extraordinary newsflow in 2016, and because the structural transition to mobile has largely been absorbed

However, popular press decline has continued to be the main driver of total circulation falls as smartphone adoption for these demographics has been in full flow since 2013. This matters because it has helped accelerate the structural shift in newspaper advertising to digital advertising: advertiser and agency sentiment and trading have rapidly shifted (with quality titles suffering every bit as much as popular titles)

Saturday and luxury (magazine supplement) environments are substantially outperforming print media – a trend we believe will become more accentuated as time goes on

Print is still substantially the most attractive solution for immersing readers in news and features, a consequence of the disconnected device and inherent serendipity of its layout and package. As membership models develop publishers will invest more in designing and enhancing their tablet and mobile services

Digital

News brands are losing market share to the tech and distribution platforms – we estimate 90% of UK digital display growth in 2016 was on Google and Facebook. As with print, high end, luxury and well-differentiated media are best placed

Services that can track users across devices will be particularly well placed over the next few years, as brands shift their attention from reach to targeting and attribution, enhanced by immersive engagement

Rise of member and subscription services

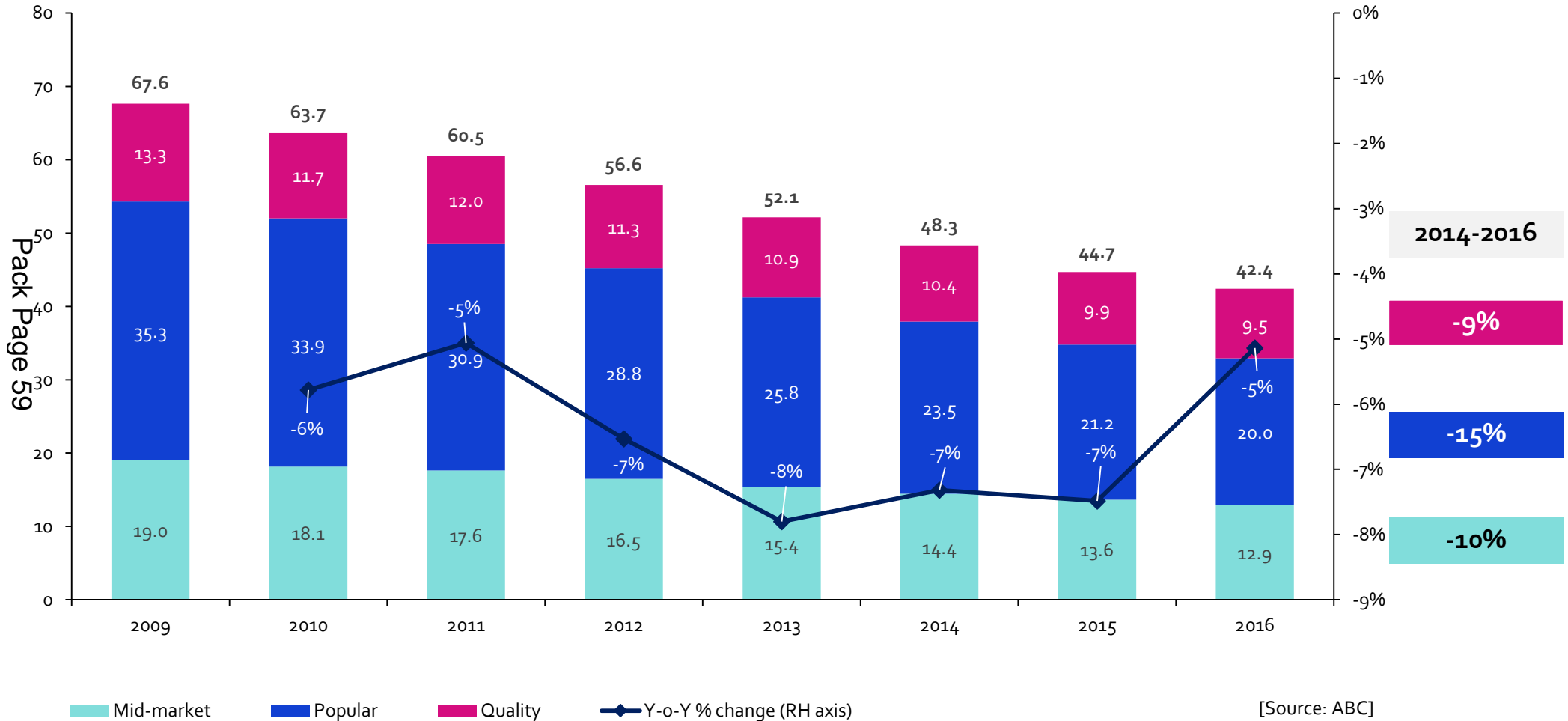
The rise of member and subscription services will diverge the marketplace: quality, immersive, partially closed experiences with membership fees; and open, scale services largely reliant on digital advertising

However, publishers are notoriously poor at *service*, undervaluing both the need to develop a holistic experience mindset (integrating data, design, tech and marketing) and the complexity and costs of deploying retailer skills effectively across the organisation

National newspaper circulation trends: qualities stabilise, as decline transfers to the popular press

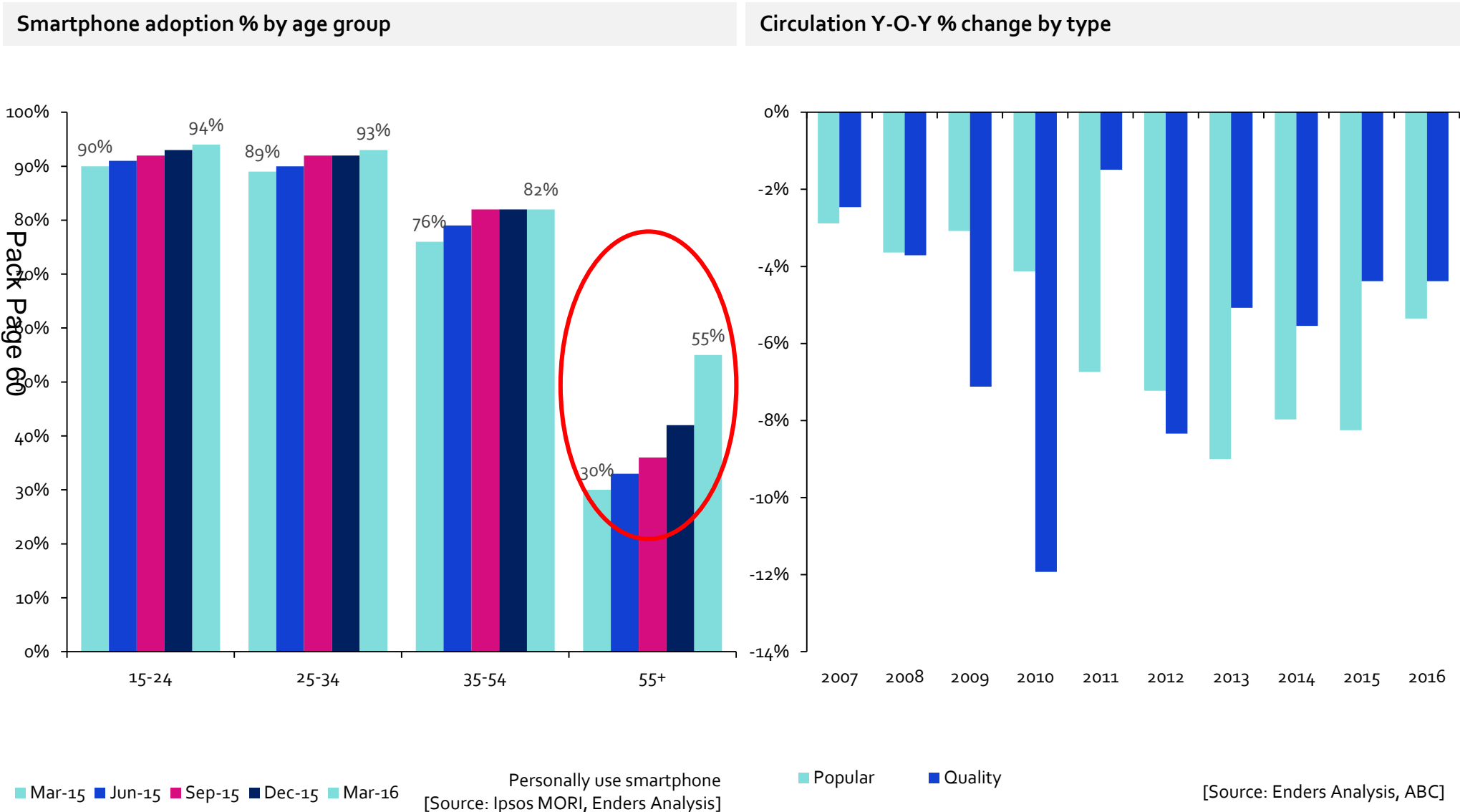
As decline in newspaper shifts from the high-end, low-volume quality press to the popular and mid-market press the aggregated decline in volumes has increased, producing inevitable challenges to the economics of physical wholesale and distribution

National newspapers circulation volumes per week (m)



Smartphones are a critical driver of circulation decline

Smartphone adoption among the over 55s has grown exponentially since Q1 2015, and has been the main driver of decline in demand for daily print

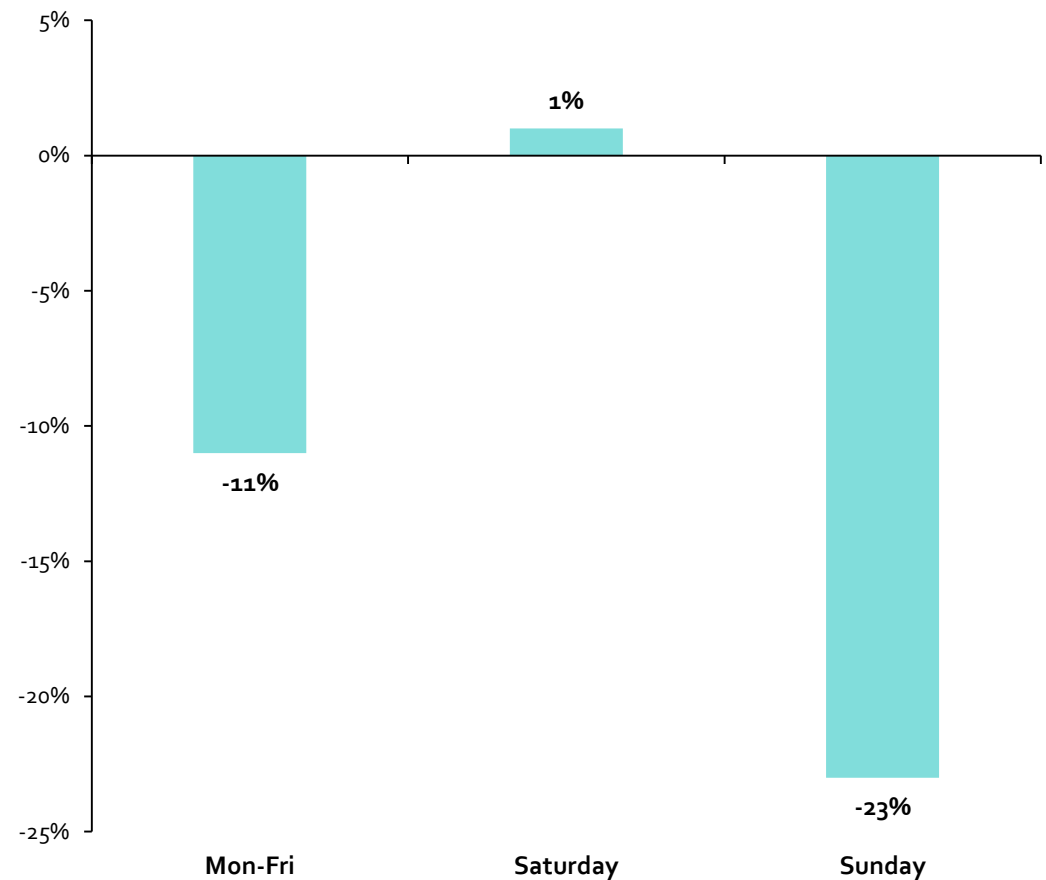


The clear weekly trend: Saturday wins

- Erosion in daily newspaper purchasing is well understood, but the weekend market is changing more dramatically. Quality Saturday titles are very steady, while Sunday titles have fallen substantially. Sundays are turning into “just another day”, and the weekly digest – a very successful format in print – sits more comfortably at the start of the weekend than the end
- Greatest resilience in print news media – such as The Economist, the Weekend edition of the FT, The Week – provide weekly digest/commentary in a trusted brand package, which is a highly relevant print product in a 24/7 news environment. Content that is not replicated anywhere online – Private Eye, for example – is relatively rare and also outperforms print media trends

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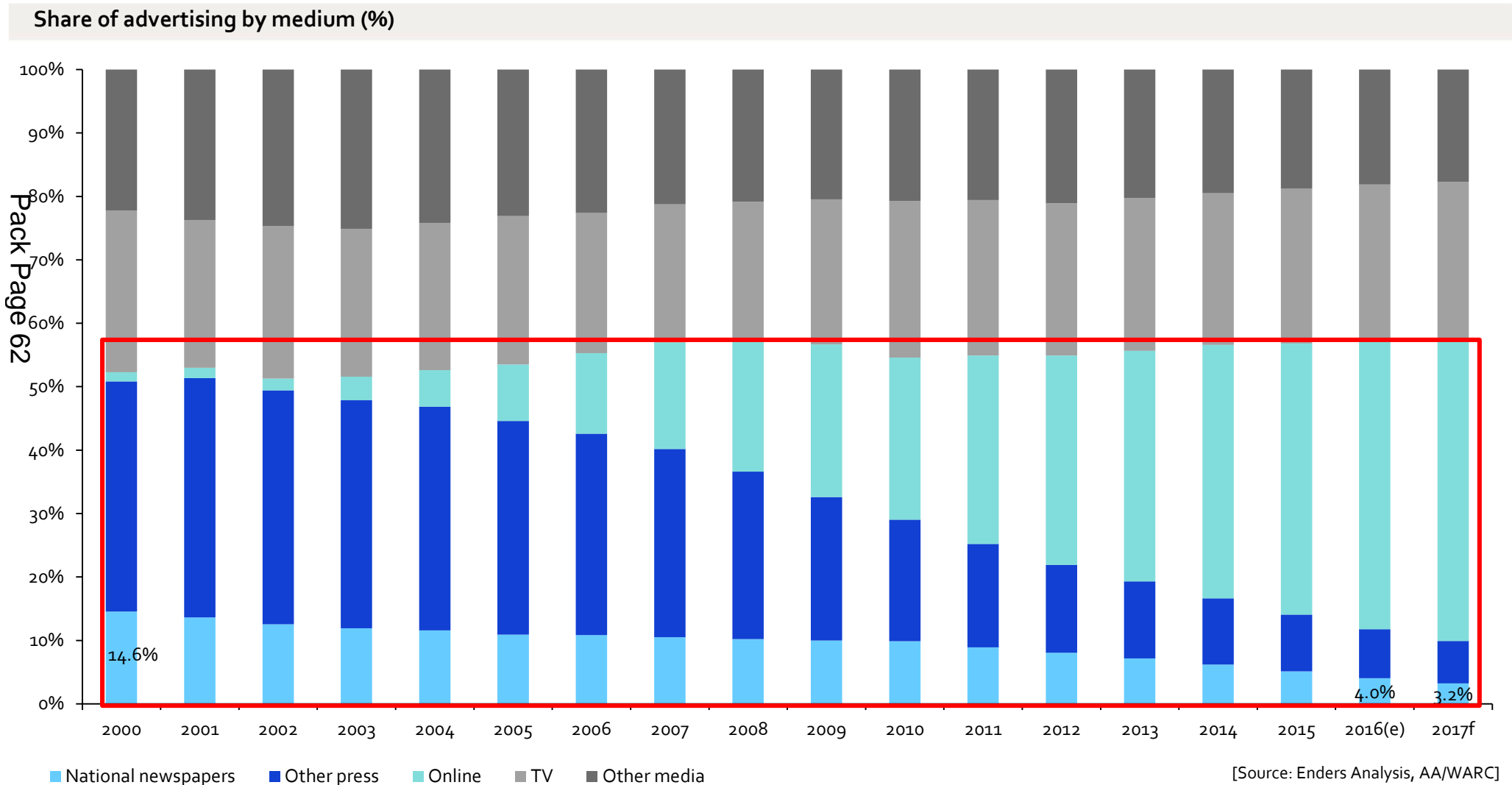
Sales volume growth, UK national quality press , 2012-2016



[Source: Enders Analysis]

Press to online advertising substitution is *very clear and accelerating*, with other media steady

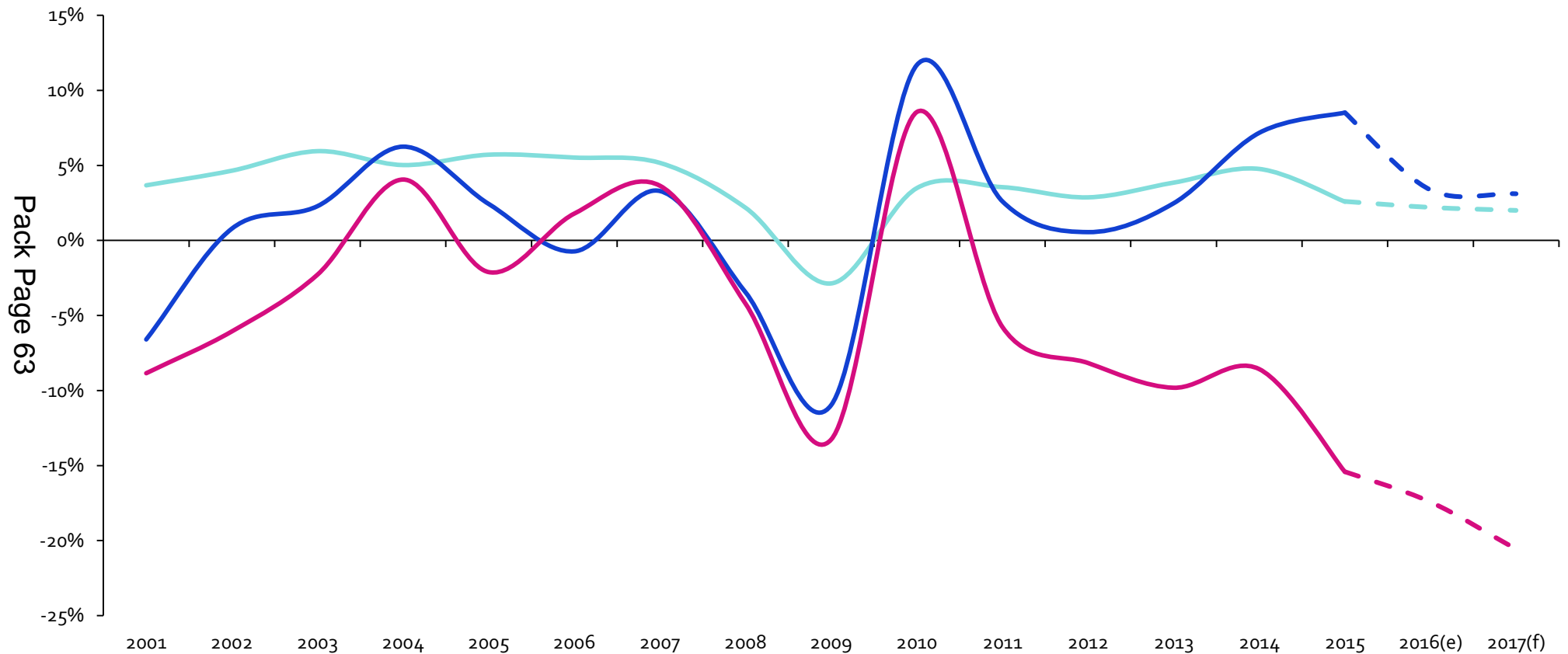
Substitution has been brutal: the growth of digital advertising has largely been at the expense of print media. For the first 10 to 15 years of this trend it was largely a story about print classifieds moving to general and specialist search (Google, Auto Trader). In the last two to three years, it has increasingly been a story about print *display* moving to digital platforms



Advertising trends in newspapers are equally challenging

Print display advertising decline accelerated substantially in 2015, then again in 2016: a structural decline which has been decoupled from steady growth of consumer demand, and counter to what has been a highly resilient advertising market generally, with TV, outdoor and most other media performing well

Nominal UK display advertising, national newspaper print display advertising and GDP (Y-O-Y % change)

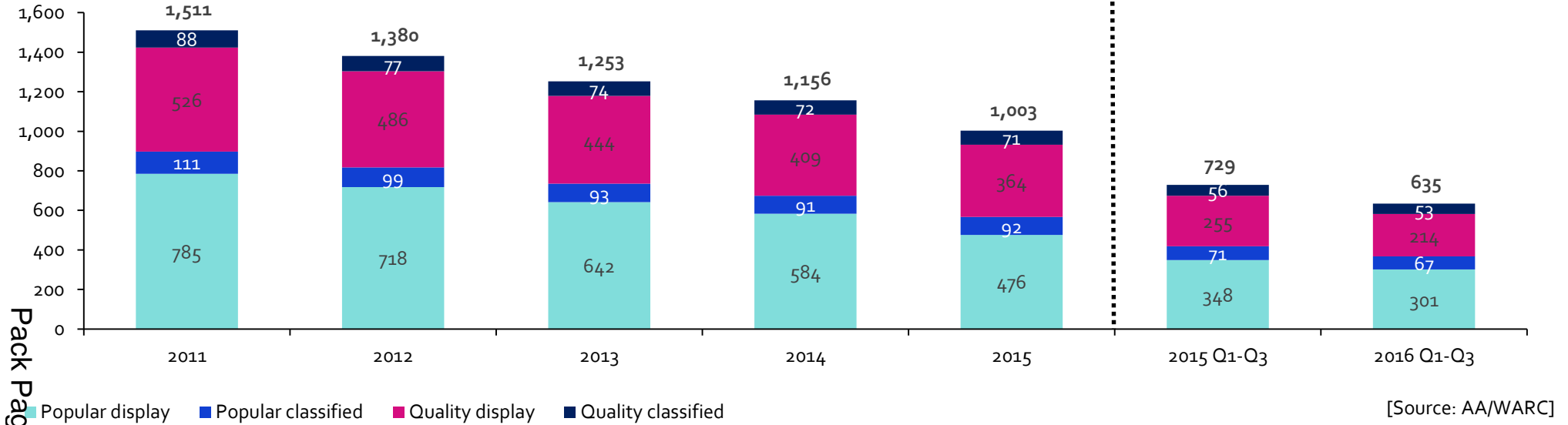


— GDP growth — Total UK advertising growth — Total UK national newspaper print advertising growth

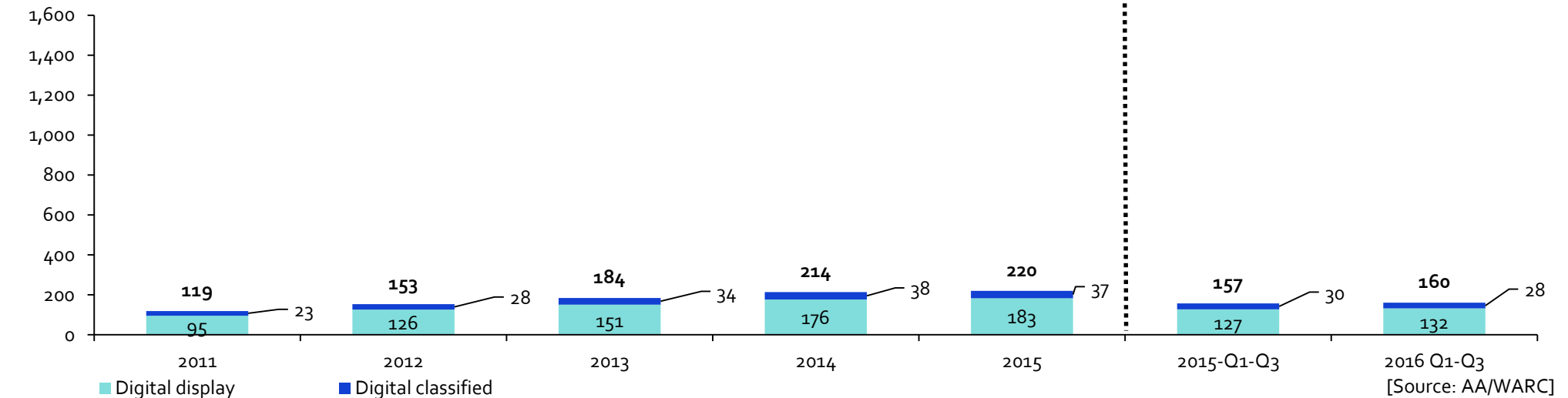
[Source: AA/WARC, ONS, BoE, Enders Analysis]

£5.80 print revenue lost for every £1 gain in digital (much of *that* revenue indirect from platforms)

National newspapers print advertising revenue (£m)



National newspapers digital advertising revenue (£m)

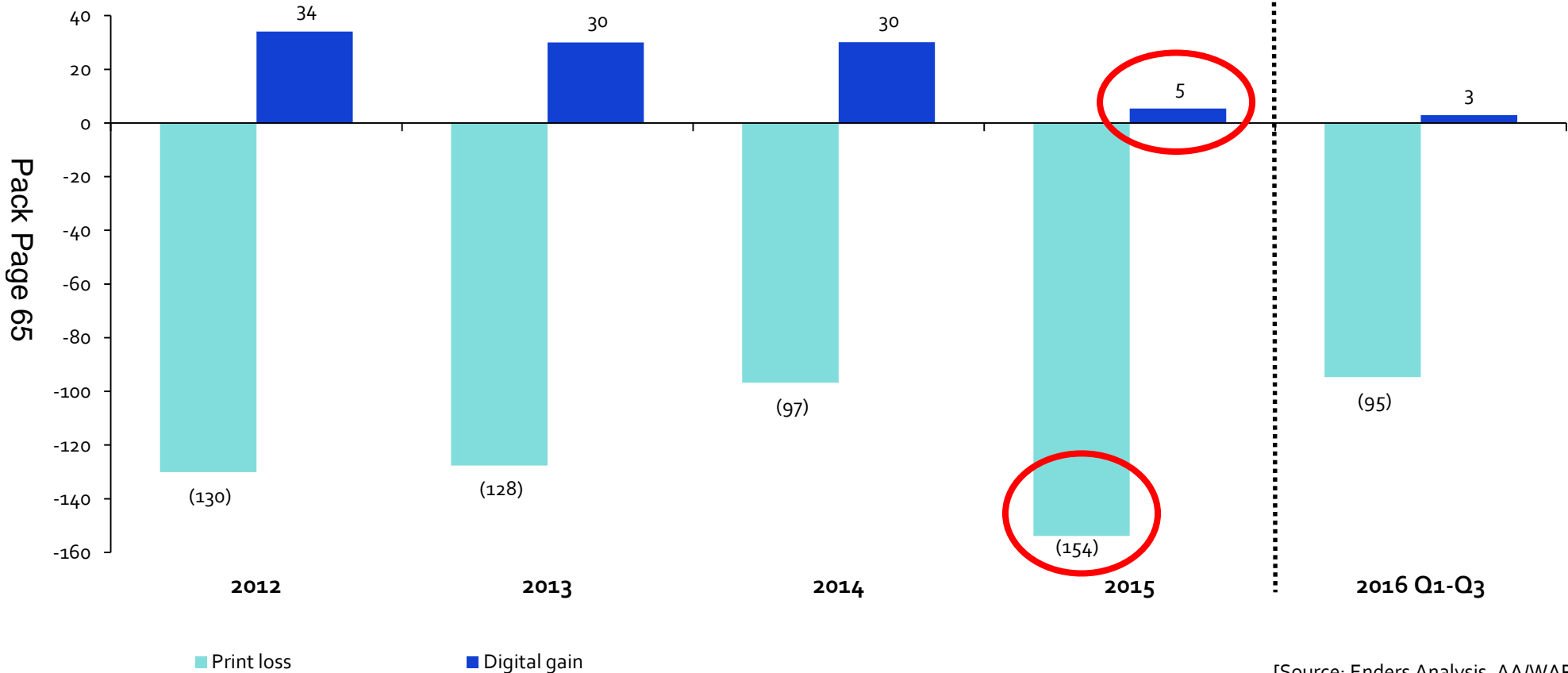


Trends were accentuated in 2015 – £31 in print lost for every £1 gained in digital

Digital growth almost stalled in 2015, and remained challenging in 2016 – this is the primary reason why some publishers have in the last year or two reviewed their membership, subscription or paywall options

New York Times switched its advert formats in part to thwart programmatic, and has accentuated the added-value *context* of its advertising model, now seen as a secondary revenue stream, not the joint core revenue stream

Digital gain versus print loss in national newspapers (£m)

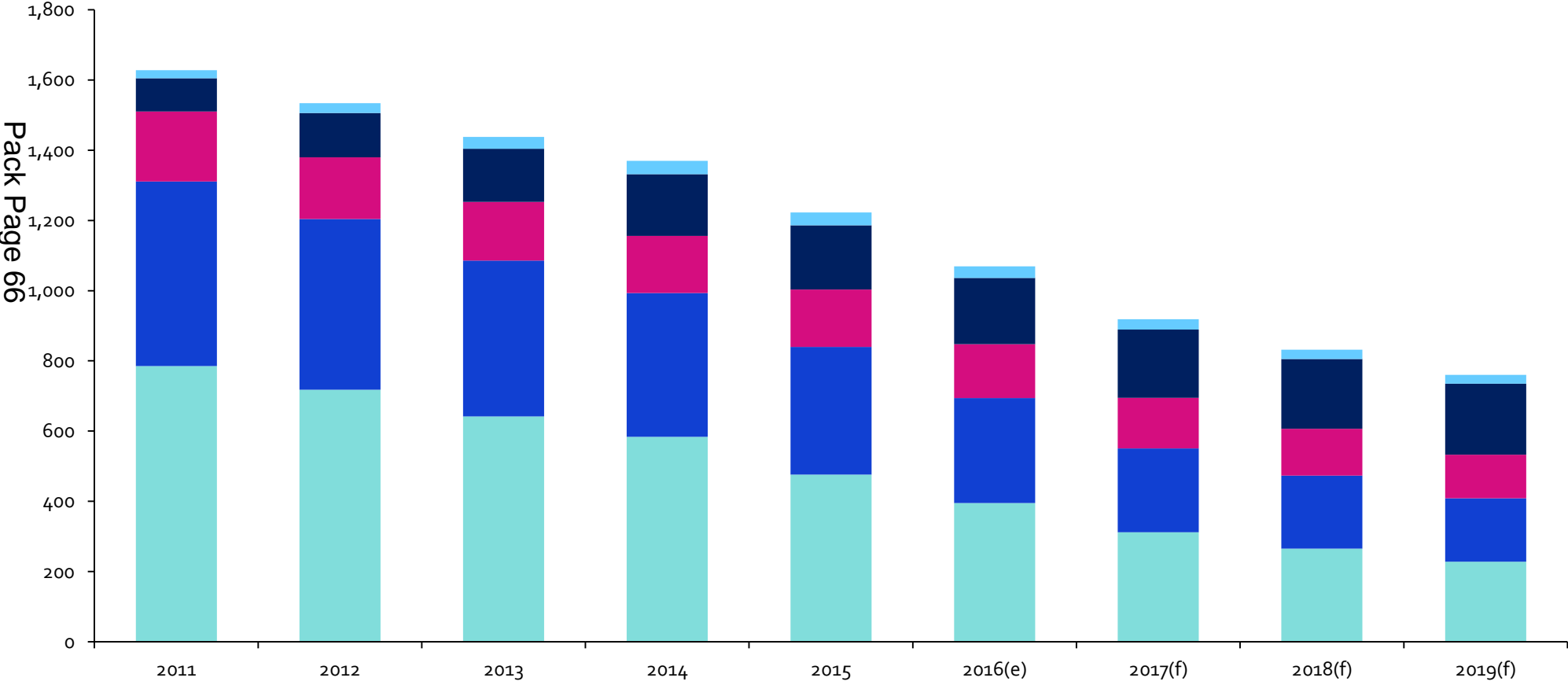


[Source: Enders Analysis, AA/WARC]

National press advertising outlook

Our forecasts assume recent trends continue. Discussions with a wide range of advertisers and media agencies in the last few months have provided us with no indications that the transition from print to digital is going to slow down this year or next year – and could *accelerate* before any slow down occurs further out

National newspaper advertising revenue (£m)



[Source: Enders Analysis, AA/WWARC]

National press advertising outlook

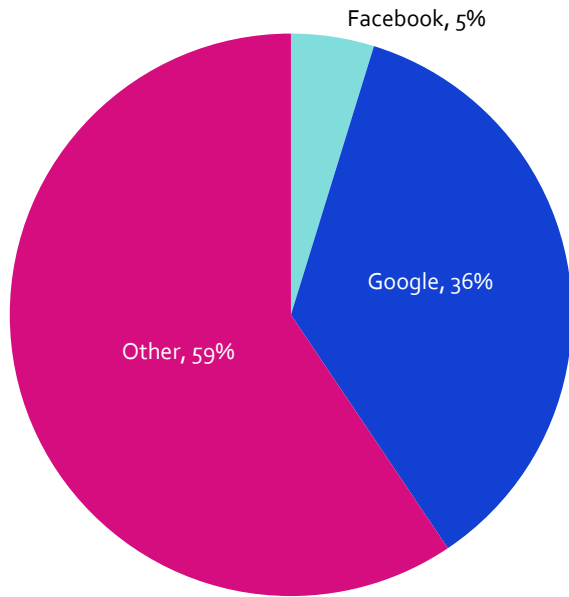
National press advertising outlook (£m)									
	2011	2012	2013	2014	2015	2016(e)	2017(f)	2018(f)	2019(f)
Print display - popular	785	718	642	584	476	395	312	265	228
Print display - quality	526	486	444	409	364	299	239	208	181
Print classified	199	176	167	163	163	154	144	134	124
Total print	1,510	1,380	1,253	1,156	1,003	848	695	607	533
Digital display	95	126	151	176	183	188	194	198	202
Digital classified	23	28	34	38	37	33	30	27	25
Total digital	117	151	181	213	219	222	224	225	227
Total print and digital	1,627	1,531	1,434	1,369	1,222	1,070	919	832	760

[Source: Enders Analysis estimates and forecasts based on AA/WARC]

Two thirds of national newspaper digital audiences come from Google and Facebook...

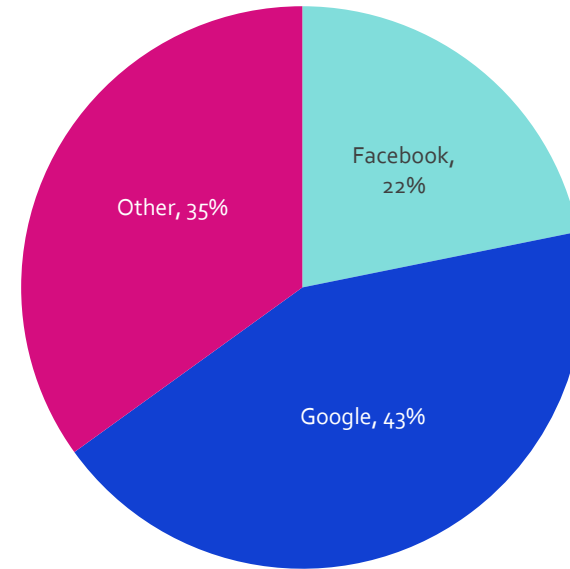
Google has grown in importance as a traffic source for news publishers over the last three years, but Facebook has grown between four and five times

National newspapers source traffic (July 2013)



[Source: Enders Analysis estimates based on comScore]

National newspapers source traffic (July 2016)



[Source: Enders Analysis estimates based on comScore]

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...but 90% of digital ad growth is Google and Facebook, with news losing share

- Google and Facebook have unmatched user understanding and valuable owned inventory in mobile search, native and video
- Google and Facebook are also expanding digital advertising among SMEs: their self-serve platforms are easy to use, billing options are flexible, no minimum fees
- Their strategies are *marketing*, not advertising – that’s a critical difference for a wide variety of businesses, from corporates seeking short term transaction growth to Small and Medium Enterprises seeking precise targeting or cost-effective brand exposure
- Only a fraction of the ad spend on either platform goes through agencies

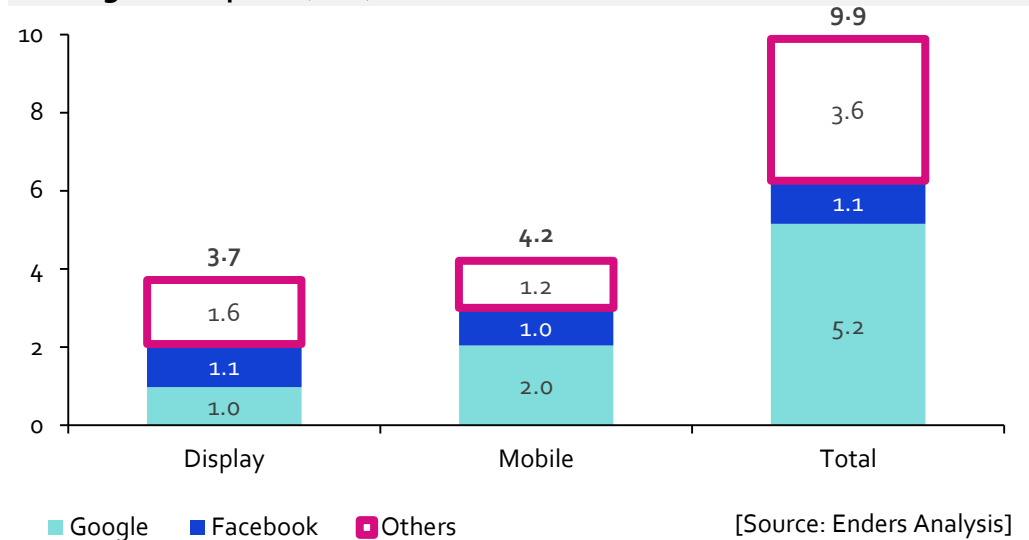
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Traffic acquisition costs apply (Google pays 20% of advertising revenue to publisher and distribution partners)

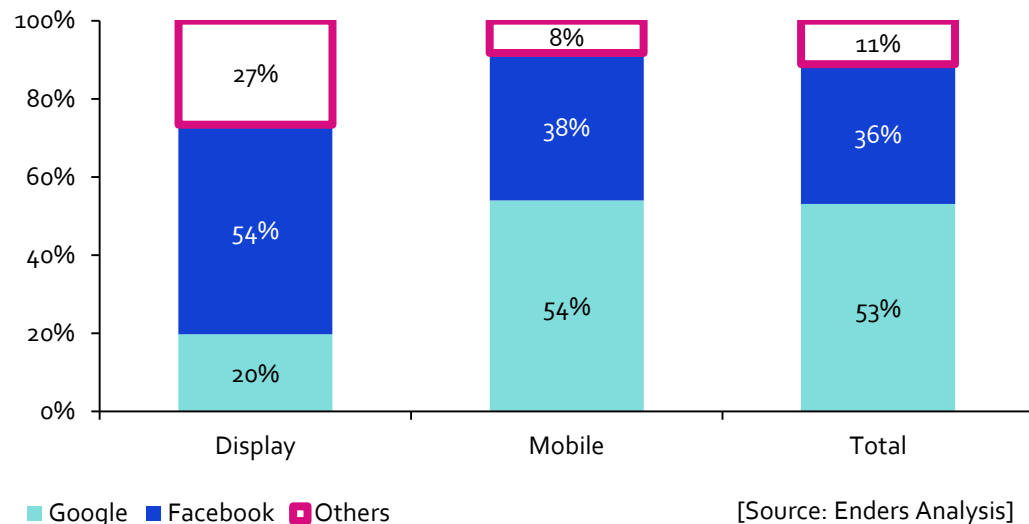
Amazon is coming: excellent identity layer, user understanding (purchasing not just intentions) and control of the most valuable opportunity: at the moment of purchase intent

- **Snap(chat) is coming:** unique, high-quality formats; highly engaged audience. Could be Twitter-scale in the UK this year, but much better performance metrics
- But of course overall traditional display advertising is being replaced by short term direct response marketing measurement (see next)

UK digital ad spend (£bn)



Google & Facebook shares of 2016 YoY growth, UK digital ad spend (%)

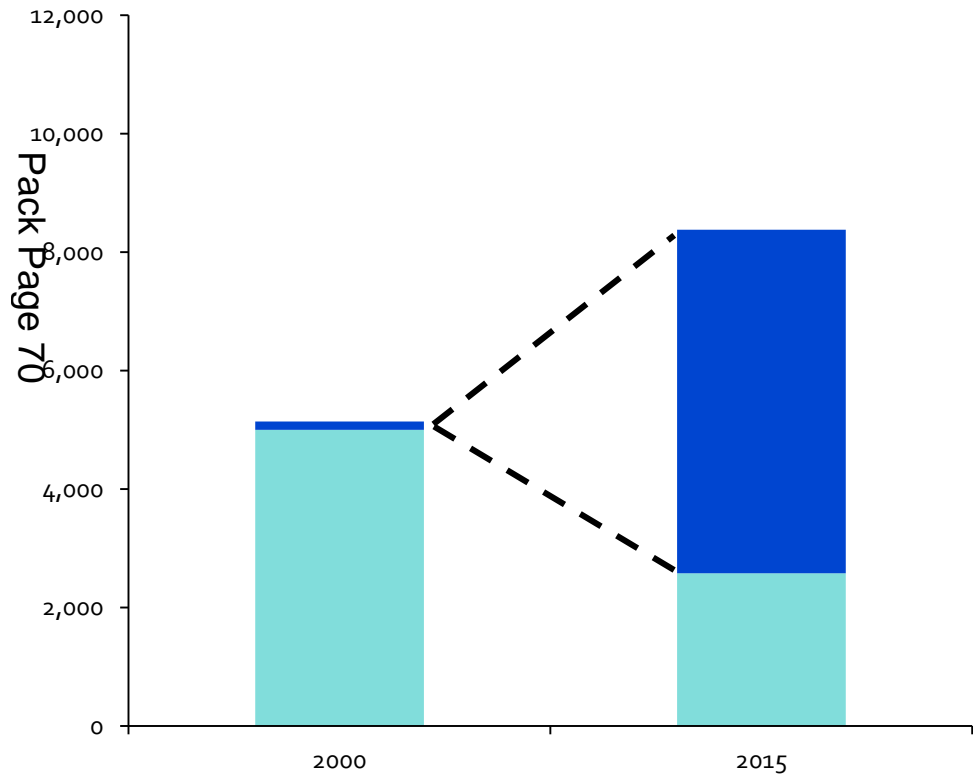


Marketing objectives in digital are overwhelmingly direct response rather than display

Much of the recent structural decline in print display advertising has been at the expense of digital, with this advertising largely measured on direct response or other short term activation measures, rather than longer term awareness, emotional brand connections and reputation measures

Print media, which has always felt to advertisers and agencies more *tactical* than TV, has lost out in this transition, and we have seen some marketing data which suggests print media is now being undervalued in the media mix compared to its effectiveness, particularly long term brand benefits

Direct response ad expenditure (£m)

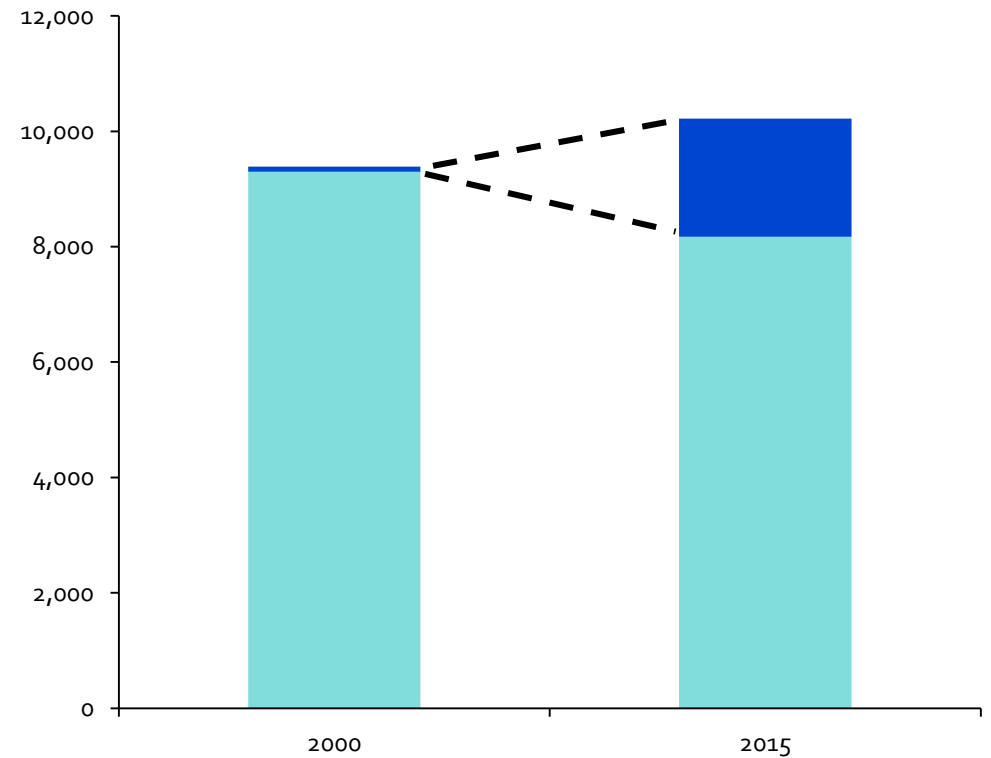


■ Analogue

■ Digital

[Source: AA/WARC]

Display ad expenditure (£m)



■ Analogue

■ Digital

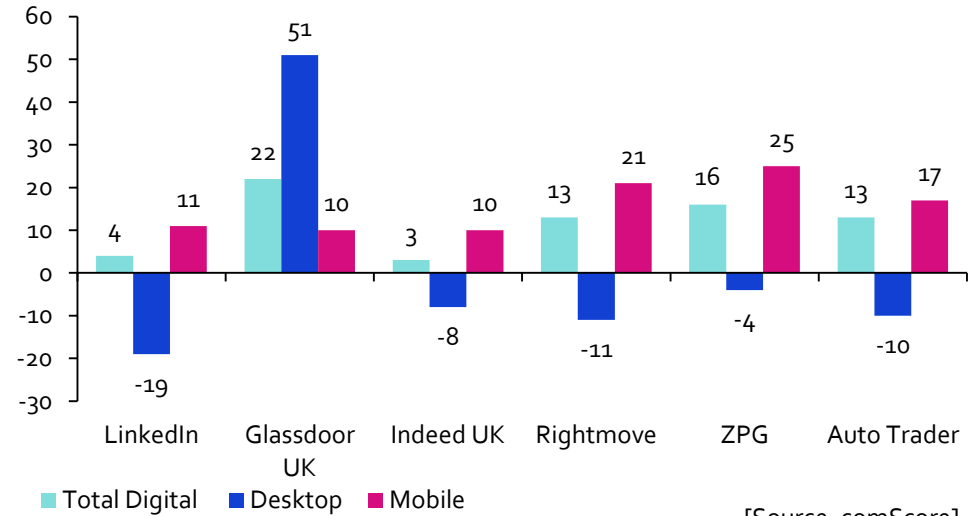
[Source: AA/WARC]

Among specialist services the rise of mobile is enabling market leaders to cement their position

- As with general content platforms, specialist services – for example classified markets – are becoming increasingly reliant on mobile
- Consumer research and interaction are growing and have transitioned from desktop to mobile devices
- We observe that the range of services achieving scale success is declining as the desktop retreats, because consumers only download one app for each interest
- As a result, brand awareness is critical, mobile deployment quality needs to be excellent, but with these factors assumed the market advantage of leading sites is cemented by mobile

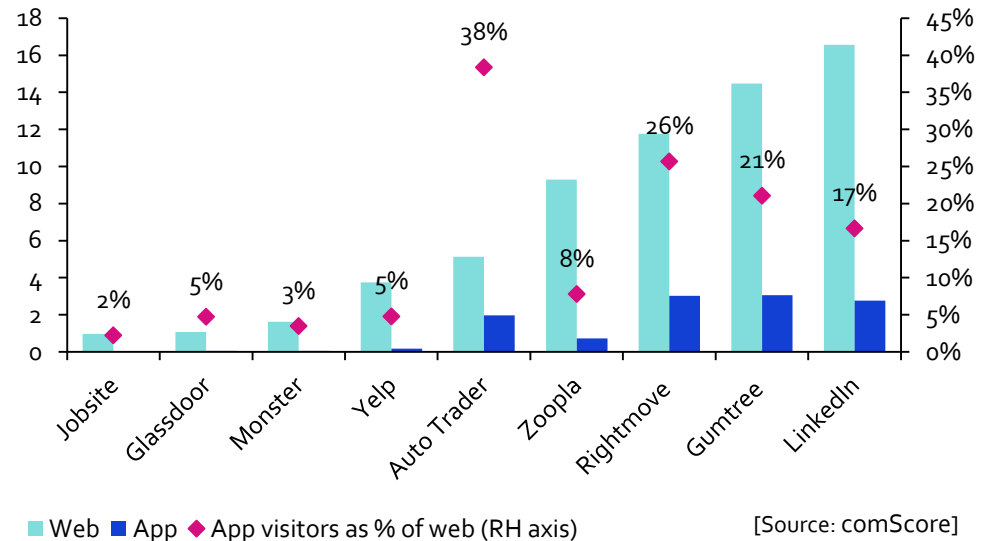
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Classified sites % change unique visitors Sep-15 to Sep-16



[Source: comScore]

Classified sites mobile unique visitors (m)



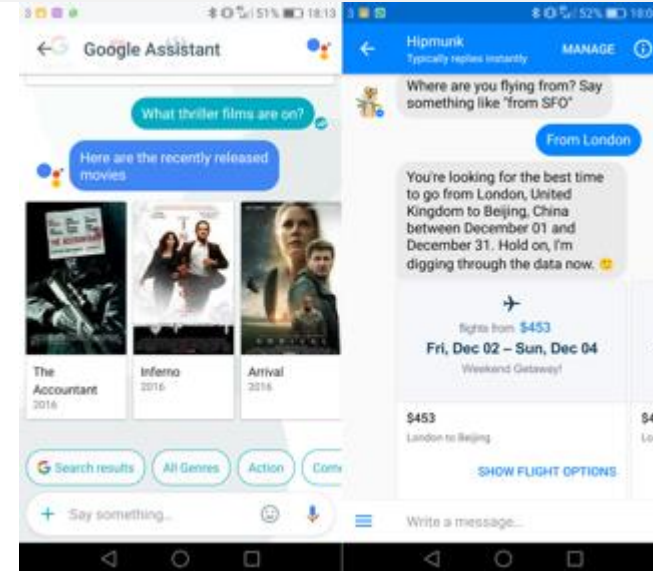
[Source: comScore]

The future: from media to context and audience

- Over the next few years, advertising and other marketing will converge. Paid media will become less well defined
- **Content marketing** is a good example of these trends. The majority of spend is on owned media – will premium paid media lose or gain share?
- The rise of **messaging** (at the expense of social)
 - Combination of automated (business) and human interactions
 - It will fulfil ad-like functions on top of customer relations and a sales channel
 - It will involve few, probably no display units – no advertising *per se*
 - The billing model will be flexible, including entirely earned and organic, paid-for prominence, and pay-per-interaction, as well as billing by performance
- Affiliate links are another, more prosaic form of overlap – not paid media, but a potential revenue source for publishers and marketing expenditure for retailers (although with its own potential for abuse)

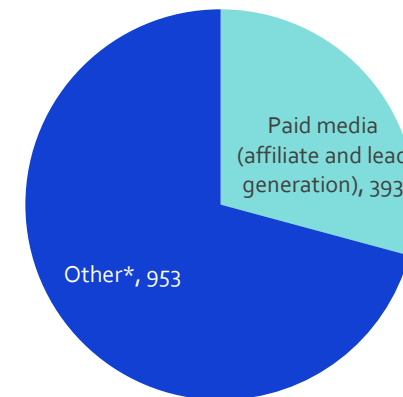
Pack Page 72

Google Assistant (l), flight search bot in Facebook Messenger (r)



[Source: Enders Analysis screenshots]

Est. 2015 UK affiliate and lead generation spend, online (£m)



*Price comparison and aggregator sites, gaming affiliate networks, B2B lead gen. etc.
[Source: PWC/IAB Online Performance Marketing Study 2015]

News brands: Rise of membership as advertising stalls [2017-011]

Future of marketing: B2B techniques shift to consumer markets, and rise of native services

Decline of paid media

- While we expect total digital marketing investment to continue to grow, options other than paid media are growing in importance
- Voice interfaces and AI assistants will provide new opportunities for sponsorships, affiliate models and customer acquisition marketing – outside current paid media and search advertising models
- Related to all this is the growing importance of data management platforms and “marketing clouds”, systems which help blend together customer relationship management, marketing and advertising
- These models are expanding from highly personalised B2B marketing to consumer marketing



[Source: Google, Amazon]

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Decline of traditional media

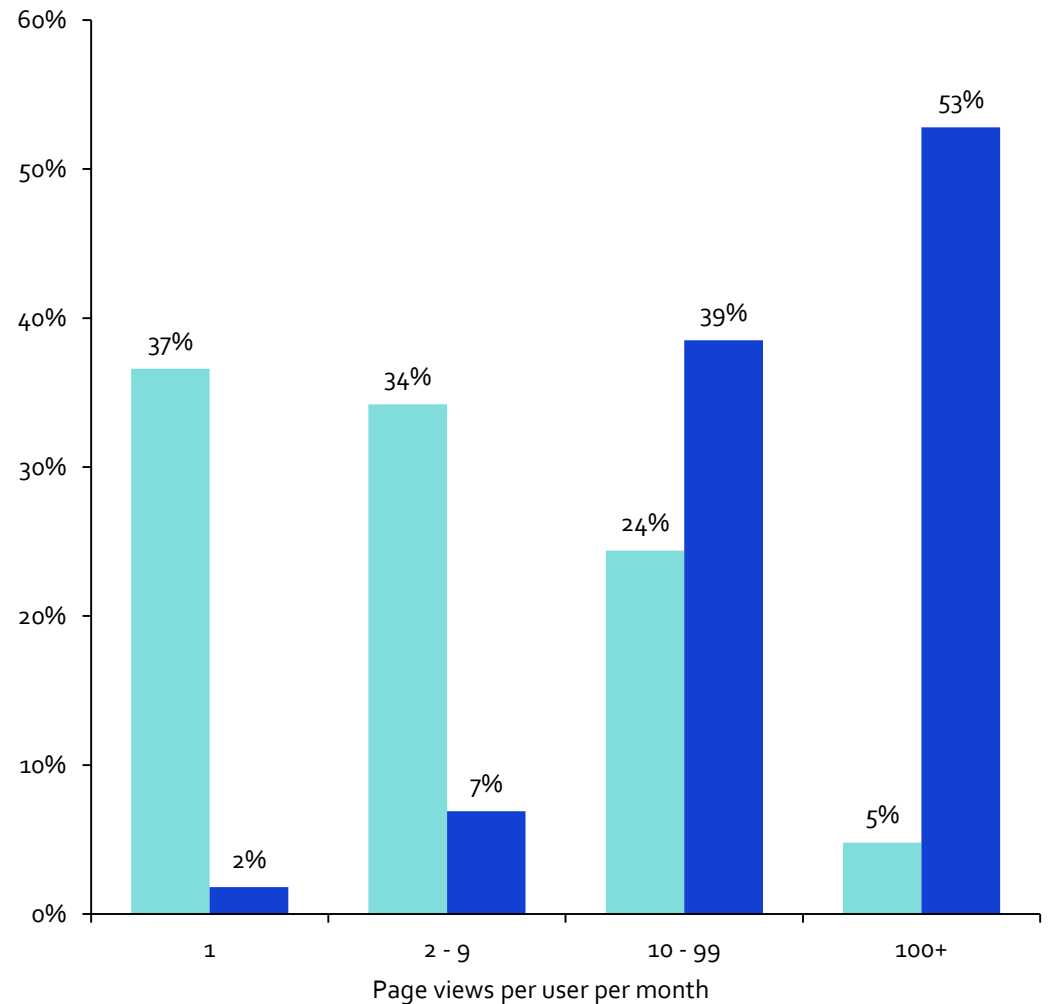
The attraction of high-traffic services with uncontentious editorial-native solutions – think of Tastemade which has sponsored food and travel short videos distributed across social and even broadcast media, or Vice – will grow substantially in the next few years, undermining spend with some traditional media

For news services a strategic shift (back) from reach to quality audiences and engagement

- Over the years Enders Analysis has assessed a large spread of content and access models, observing a *general failure to create closed, immersive and engaging user experiences*
- User engagement is key to
 - sustain news operations independent from platforms
 - build a critical reading volume, encouraging membership
 - create a quality advertising environment
- Most publishers to date have delivered a strategy that assumes brand strength, audience scale and user engagement grow together in a virtuous circle
- *Digital scale is a mirage*: digitalisation has increased “readership” by an order of magnitude...
 - generates advertising revenues – but fails to cover costs
 - weakens brand differentiation and positioning
- For a typical German online newspaper (see chart), less than 5% of users generate more than half of contacts – a ratio similar to that of 200,000 circulation against 10m unique users
- A focus on core users’ experience rather than on scale could grow subscriptions and a more valuable advertising space
 - The New York Times changed advertising formats, creating some programmatic friction, but emphasising the quality of its environment and the engagement of its attractive audience
- Will more curated tablet apps emerge, with rich (video?) brand advertising rather than direct response marketing?

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Newspaper online usage pattern



■ Share of users (%)
■ Share of page views (%)

Based on an anonymised newspaper, September 2014
[Source: Enders Analysis from AGOF/Zeitung 2014/15
Bonn: Bundesverband Deutscher Zeitungsverleger (p.170)]

Médiapart – a case study in paid native digital news provision

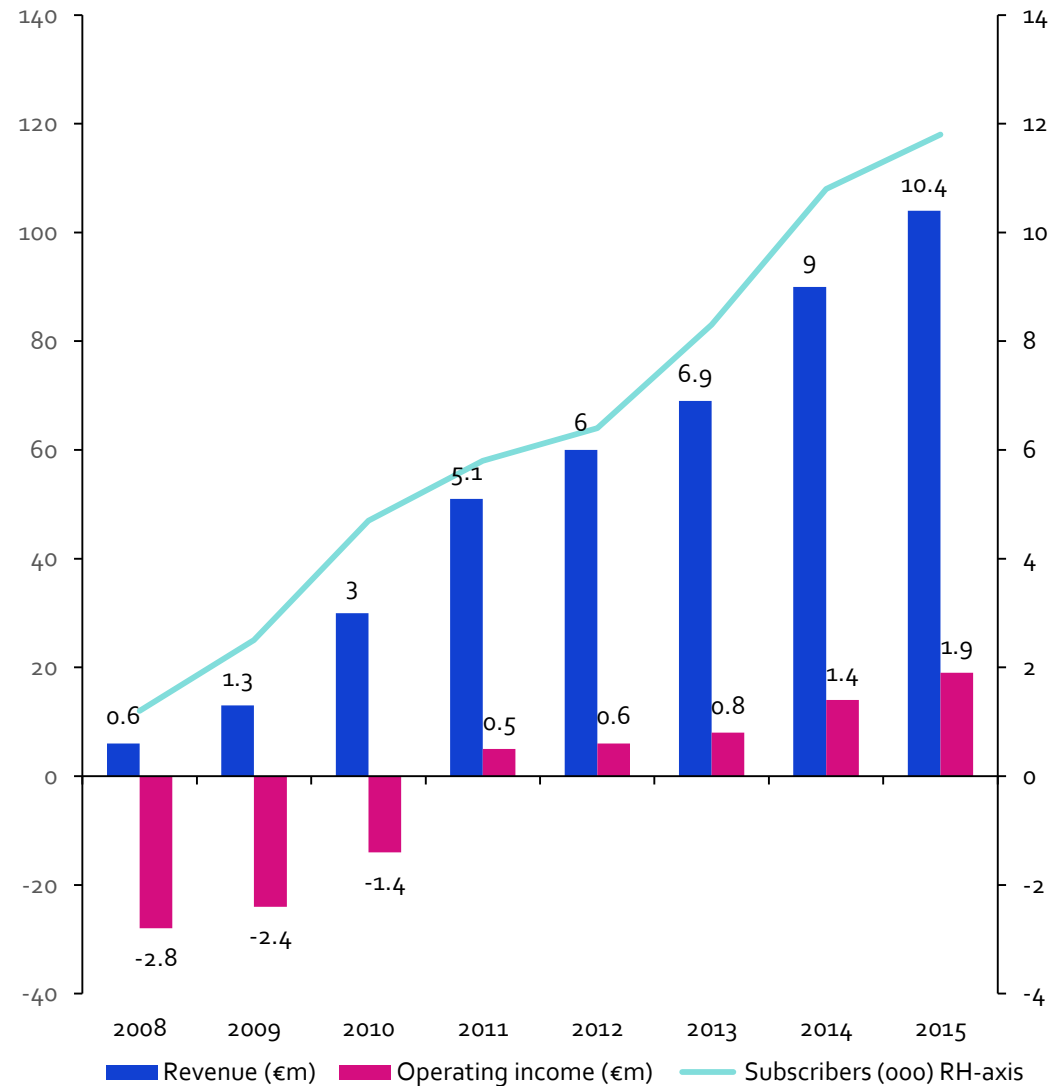
- Created in 2008 by former Le Monde journalists, Médiapart is a subscription-only news site without advertising (€11/month)
- The service focuses on investigative and opinionated journalism
- High profile journalistic scoops have greatly helped brand recognition and sampling by readers
- With 65 staff including 39 journalists, Médiapart generated a €10.3 million turnover and €1.9 million operating income
- The subscriber count has increased steadily to 118,000
- Médiapart strives to create a community around its brand through printed publications, forums, blogs and events

Pack Page 75 Médiapart has had notable impact on French politics – but its resources are thirty times smaller than Le Monde’s or Le Figaro’s

We believe three factors are essential for consumers to consider paying for content media services

- Perception that the content matters, and therefore has value, and the access price feels commensurate to the value
 - Perception that the content cannot be acquired any other way, at least not for free
 - Convenience and other customer service factors
- We note publishers have a poor track record at customer service, often undervaluing its importance, and underestimating the complexity and associated costs of deploying retail prowess across the business

Médiapart: subscribers (000), revenue (€m) and operational result (€m)



[Source: Enders Analysis from Médiapart]

Rise and rise of membership, and the challenge of micropayments

- The New York Times has added >500,000 digital subscriptions in the last year, and more than half of those in the weeks around the US presidential election
- In the UK digital models are changing
 - The Guardian has grown its members to some 200,000, while maintaining entirely free access
 - The Telegraph has adjusted its meter model to optimise usage and conversions
 - The FT introduced a free trial period to encourage *immersive* usage, again to encourage conversions
 - On the other hand, The Sun abandoned its paywall: this was always a very challenging solution for a content business that invented a hugely influential form of social media long before the internet
- Our thesis is that membership models will grow in the next few years
 - The dream of an advertising-funded free access solution for scale newsrooms looks increasingly dubious
 - As the branded package comes under threat we believe smaller-scale, more specialist (narrower editorial remit) services may gather traction – Mediapart, Politico
 - Large news brands may be able to have it both ways – Times Business, Telegraph Politics, Guardian Society, Sun Bingo, Mirror Football
- Micropayments remain a challenge, even if the consumer use-case may be gathering traction and there is no longer a technology hurdle. Two levels of friction remain – industry and consumer
 - Industry options include (1) shared industry wallet; (2) a supplier with everyone's cards on file to be a wallet provider (while taking a 0% cut to keep it profitable for publishers); (3) wait for every consumer to get bitcoin. The likelihood of these happening feels inversely proportionate to its chance of success if implemented
 - Certainly nothing will work for consumers unless publishers – newspaper, magazines and beyond – all use the same service. Jamatto and others are intuitive and pretty frictionless, easy to deploy and flexible in terms of variable publisher imperatives
 - But even successful solutions elsewhere – such as Blendle – will find the UK a difficult market. Publishers are fiercely competitive, there is no deep language moat and there is just too much free content

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Agenda Item 3

Document is Restricted

**Independent Review of Support for Publishing and Literature
in Wales.**

13 June 2017

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Foreword

This independent report offers an analysis of the Welsh Government's support for publishing and literature in Wales. It offers an evidence based approach for evaluating the current position inviting stakeholders to present detailed information regarding the current infrastructure and financial support available to further publishing in Wales.

Wales's literature and publishing ecosystem comprises a diverse range of activities which reaffirm the importance of appropriate funding and of establishing an infrastructure which will further celebrate the distinctive cultural identity of Wales. As noted within the report, the promotion of literature and publishing in Wales must be considered, along with other art forms, within a clear policy statement from the Welsh Government in delivering an inclusive society and a Wales that is much more confident, bilingual, more equal, better skilled and more resilient. Publishing and literature promotion has a key role to play in enhancing our nation's bilingual cultural identity.

The review provided the opportunity to reconsider the nature of the current infrastructure support and the ever changing dynamics within publishing. Such changes ranged from the creative ways in which writers practice and engage in their craft, the digital developments for publishing and the ever expanding opportunities for readers to engage with literature, be that through live events or other formats.

Literature in Wales has a rich tradition and a contemporary vibrancy which should be celebrated and supported. With regards to the promotion of the Welsh language and the development of a bilingual nation, the importance of literature creation and publishing is key for the government to reach its strategic targets. The time is right however for the Welsh Government to consider whether any additional structural changes are required to further the impact of such activity. The economic and social value of this activity should not be underestimated. Writers in Wales need to be supported and the current funding offered to support infrastructure development should be appropriate and fit for purpose, in order that further investment can be made in talent development and publishing, so as to build resilience into this creative sector.

Within the current context of significant changes in a post Brexit environment, it will be imperative for the Welsh Government to consider and, where appropriate, further coordinate its cultural policy, so that it will be possible to celebrate 'creative Wales' on an international stage. Literature has such an important role to play in this regard.

I am grateful to the Panel members for their professionalism and hard work. Given the significant amount of evidence that was presented it became apparent that additional time was required to allow for the secretariat and the Panel members to consider in detail the evidence. The discussions with stakeholders were passionate and clearly demonstrated the level of professional interest in the subject. I would also want to place on record the Panel's gratitude to the officers of the Welsh Government who supported this review. I would particularly note the hard work and constructive input of Paul Kindred, Hywel Owen, Rachel Whitfield-Pierce and Lea Beckerleg.

The recommendations within the report offer the Welsh Government an opportunity to reflect upon the strategic opportunities available to enhance the current ecosystem for the production of literature and publishing in Wales. With any public investment, due consideration must be given to the importance of value for money, accountability and good governance. An effective ecosystem which supports literature and publishing must be able to demonstrate that it delivers on clear strategic objectives, be they associated with economic, social or cultural capital.

At the core of this review is the opportunity to celebrate Wales – the creative power of literature to describe, interpret and celebrate our identity. That creative power is of great value, both on a national and international stage. We should continue to build upon the current infrastructure, enhance the creative talents of our writers and support a dynamic publishing infrastructure for our country.

Professor Medwin Hughes DL



1. Overview

This is the first independent report which considers the Welsh Government's overall support for publishing and literature in Wales. It is worth emphasising that no other independent panel has previously been commissioned by the Welsh Government (or the Welsh Office, prior to 1999) to consider this area in its entirety.

During 2014 an independent review of the Welsh Government's support for books from Wales was commissioned. That review assessed:

- The rationale for Welsh Government support for books from Wales.
- Whether the Welsh Books Council continued to be the most appropriate vehicle for delivering that support.
- The evidence for the value for money of the current approach.

The report produced by that review is available on the Welsh Government website¹

The aim of this review has been to carry out a wider analysis of the Welsh Government's support for publishing and literature. In doing so we have been mindful of the Welsh Government's broader strategic priorities and its legal duties to the people of Wales, including those set out in the Well-Being of Future Generations (Wales) Act 2015.

We are also aware, as are most interested in this field, that there have been huge changes in the way in which both written and audio-visual material is published and consumed, including, but not limited to, the rise of digital platforms. There are likely to be further huge changes, many currently unpredictable, over the next 5-10 years. With this in mind we have focussed on the need for support structures that will not only be appropriate for 2017, but will be adaptable enough to respond to further evolution in the sector, remaining relevant and identifying new opportunities to support both publishing and literature across Wales.

The landscape of literature starts with the writer and ends with the reader (or vice versa). An overview of the publishing process, which explains the areas where financial support may be available, is provided at **Annex 1**.

In addition, **Annex 7** provides comparisons between the publishing and literature sectors in Wales and those of other European nations – both 'autonomous regions' or 'sub-state legislatures' and sovereign states.

In conducting this review we have read, listened to and considered the views of stakeholders from right across the publishing and literature ecosystem in Wales and we are grateful to everyone who has contributed their thoughts and provided evidence to the Review Panel.

This report brings the work of the Review Panel to a conclusion. It presents the Panel's analysis and key findings and, in accordance with our remit, proposes a series of recommendations for the future support of publishing and literature in Wales.

¹ <http://gov.wales/docs/drah/publications/170609-review-of-support-for-books-from-wales-en.pdf>

2. Remit and priorities

2.1. In May 2015, the then Deputy Minister for Culture, Sport and Tourism announced the terms of reference and priorities for this Review²

2.2. In broad terms the scope of the review is to assess:

- i. The main aims of the Welsh Government in supporting the publishing industry and literature in Wales, in both languages; i.e., what are we seeking to achieve, culturally, socially and economically? Are these aims still fit for purpose in the 21st Century?
- ii. The scale and remit of the support currently given to deliver these aims, including the relationship between the bodies responsible for delivering this support.
- iii. Digital developments within the publishing industry in Wales.
- iv. The administrative arrangements for the Welsh Government support for a Welsh-language daily online news service, as well as papurau bro (*Welsh language community newspapers*).
- v. The support for publishing and literature in disadvantaged areas across Wales.

A specific review of academic publishing was not within the remit and responsibilities of this review of Publishing and Literature. This will be explained in further detail later in the report.

Panel Members

- **Professor Medwin Hughes (Chair)** - Vice-Chancellor of the University of Wales Trinity Saint David.
- **Professor Elin Haf Gruffydd Jones (Vice Chair)** - Director of Welsh Language and Culture and Professor of Media and Creative Industries, Aberystwyth University
- **John Williams** - Writer, novelist and Screen-writer. John Williams currently writes for the Mail on Sunday and the Independent and is co-organiser of the Laugharne Festival.
- **Philippa Davies** - Writer and business psychologist, with 12 non fiction and fiction books published, alongside web content for The Economist and Udemy.
- **Martin Rolph** - Consultant. Martin undertook an independent review of the Welsh Government's support for books from Wales 'The Review of Support For Books From Wales' during 2014.

² <http://gov.wales/newsroom/culture-tourism-sport/2016/160315-literature-review/?lang=en>

3. Approach

3.1. In order to assess the five main areas set out in the preceding Terms of Reference, the Review Panel pursued an evidence based approach in developing its analysis and conclusions, on which it then based its recommendations to Welsh Ministers. To ensure that the Panel had access to sufficient evidence and breadth of opinion to inform its deliberations, a comprehensive stakeholder engagement plan was implemented.

3.2. Engagement activities included:

- Review Panel membership: an expert Panel established which included individuals drawn from key organisations or expertise within the sector;
- Review Panel meetings;
- Literature review - of public domain material
- Evidence sessions - several Panel meetings were held to take evidence in the form of facts and opinions from a range of stakeholders in the field - a full list of those we met is at **Annex 2**;
- Review of additional written evidence - a number of the stakeholders with whom we had discussions provided supplementary written evidence, either volunteered or upon request. Some of this was pre-existing and in the public domain, some was not - a full list of the documents we received is at **Annex 3**;
- Online questionnaire - a very important part of the evidence we considered was the responses to our questionnaire. A copy of the questionnaire is at **Annex 4**, and a breakdown of the response received is at **Annex 5**.

4. Context

Welsh Government Priorities – Culture and Creative Industries

In evaluating the terms of reference set for this review, the Panel took note of the strategic priorities of the Welsh Government as outlined in Taking Wales Forward 2016-2021³.

The Panel noted the clear statement of intent within the policy document to celebrate and build upon the diverse cultural wealth of Wales. The stated intention of the Government to further support and nourish the arts in Wales was also reaffirmed within the Well-Being of Future Generations (Wales) Act 2015 which demonstrated the importance of a dynamic and vibrant cultural environment.

The promotion of literature and publishing in Wales must be considered along with all other ‘art’ forms within the clear policy statements of the Welsh Government in developing an inclusive society, a “Wales that is more confident, more equal, better skilled and more resilient”. The further development and investment in ‘cultural capital’ is key to promoting a nation’s cultural identity. The wealth and diversity of activity associated with publishing and literature in Wales reaffirms the fact that there is an extensive and dynamic Welsh literature and publishing ecosystem which makes an important contribution towards the Government’s stated priorities in supporting culture initiatives in Wales. The time is right, however, to reconsider the current infrastructure.

Based upon the significant evidence presented as part of this review, the Panel noted the diverse network of institutions, organisations and literary groups which all played a part within defining a publishing ecosystem for Wales. The review provided the opportunity to critically reflect upon the effectiveness of the current dynamics between the various key stakeholders.

In reviewing the current activities associated with publishing and literature Promotion, the Panel was very much aware of the importance of acknowledging the distinctive, differentiating factors associated with publishing and literature promotion in both the Welsh and English languages. It must be acknowledged that the business and intervention model varies between both languages. For the Government to achieve its stated target of working towards one million people speaking the Welsh language by 2050, it will be critical to further build upon the digital connectivity between publishing, education and literacy in Welsh.

Creative Industries – UK and Wales

Any meaningful consideration of a publishing ecosystem in Wales must consider the diverse activities currently offered within a context of the investment made within the wider creative industries. In the past, defining the creative industries has been a matter of contention. The Panel noted the definition offered by the Department for Culture Media and Sport (DCMS) of literature and publishing as ‘those industries which have their origin in individual creativity, skill and talent and have a potential for wealth and job creation though the generation and exploitation of intellectual property’⁴.

³ <http://gov.wales/about/programme-for-government/?lang=en>

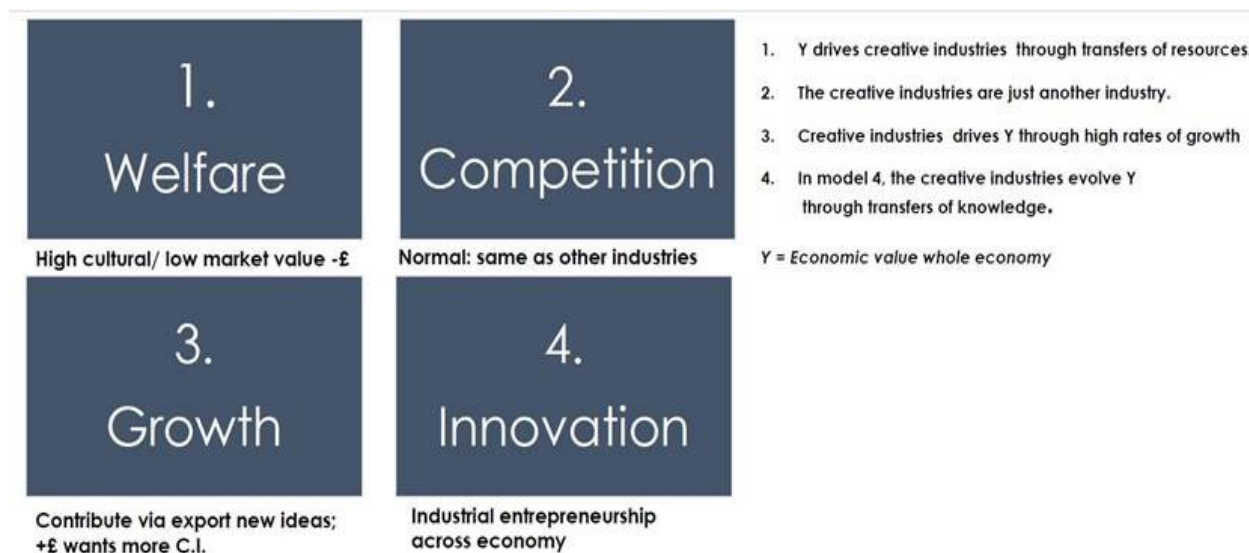
⁴ *Creative Industries Economic Estimates: Full Statistical Release*, Department for Culture, Media and Sport, 2011 p.6.

In the UK as a whole in 2015, there were 200,000 publishing jobs in the creative industries - a 3.7 per cent rise between 2014 and 2015. In addition, UK publishing's value to the economy continues to grow: the GVA of publishing in 2014 rose by 2.8 per cent year on year, and has increased by an average of 1.6 per cent a year between 2008 and 2013.

According to latest Welsh Government statistics, 84,000 people work in the 'creative economy' in Wales. Of these, nearly 53,000 work in the creative industries, and around 31,000 work in creative occupations outside the creative industries. More details about the creative industries in Wales in the context of Welsh Government priorities is available on the Welsh Government website⁵.

In evaluating the appropriateness of current investment by the Welsh Government in this context, the Panel considered the wider relationship between the creative industries and their value to the economy. Research indicates how different forms of these industries help economic growth.

In their paper 'Four Models of the Creative Industries' (2008)⁶ Potts and Cunningham analyse the relationship between the creative industries and their value to the economy as a whole. They describe four models:



1. Welfare: where subsidy is required and there is negative economic value
2. Competition: where the creative industries work like any other industry
3. Growth: where investment and growth are priorities
4. Innovation: where invention in the creative industries is supported to spread into different sectors, for example through software development or digital innovation.

⁵ <http://gov.wales/topics/businessandconomy/our-priority-sectors/creative-industries/?lang=en>

⁶ 'Four Models Of The Creative Industries' (2008)

This review has taken into account the four models in its evaluation of the publishing and literature sectors, focussing primarily on the Welfare model which makes up the bulk of activity in Wales.

In *Social Network Markets: A New Definition Of The Creative Industries* (2008)⁷, Potts, Cunningham, Hartley and Ormerod argue for a more useful market-based definition of the creative industries, where what is created and consumed relies far more on word of mouth, taste, culture, popularity and information feedback, than other industries.

'The CIs, then, are properly defined in terms of a class of economic choice theory in which the predominant fact is that, because of inherent novelty and uncertainty, decisions both to produce and to consume are determined by the choice of others in a social network. This class of social network choice is, we suggest, the proper definition of the creative industries.'

Implications for policy may be:

- Creative industries regarded less as social welfare and more as innovation systems
- A shift from top-down re-compensatory model to a bottom-up model of experimental facilitation and innovation
- Development of finer and better micro data on firms, jobs and patterns of activity, shedding light on economic growth mechanisms and interactions among cultural, social and economic actions and institutions.

Paul Ormerod, co-author of the above paper, discusses in his book *Positive Linking* how an emphasis on people as social creatures has implications for policy-making, with norms, peer pressure and influencers determining its successful implementation:

'A key point here is that when network effects are present, the most effective policies are unlikely to be generic, across-the-board changes to incentives. Careful prior analysis and thoughtful targeting become the order of the day. If we can get right, or even approximately right, less can be more. Fewer resources used more intelligently can potentially lead to much more effective strategies'.

Policy on literature and publishing may be regarded as key to growth in the creative industries, to help develop copywriters for the web, games writers, script writers for film, tv and animation, as well as fiction writers whose creations may be exploitable cross platform.

Economic Benefits

If government sponsored support for publishing in Wales is to have more significant economic benefits, it must be informed by a sufficient understanding of the contribution of the publishing industry and literature to economic development which hinges critically on the generation of Intellectual Property (IP) - original work which has copyright value. This also involves developing infrastructure for publishing businesses and talent development of writers in Wales.

There are two key questions to be considered regarding economic development benefits and literature and publishing in Wales:

- Is this funding helping grow publishing infrastructure?
- Is this funding contributing to talent pathways for writers?

⁷ [Social Network Markets: A New Definition Of The Creative Industries](#)

Sustainable Jobs

In 2015, 200,000 people were employed in publishing across the UK. There is no specific data available on employment status within the publishing industry in Wales - whether full time or part time. However, the Welsh Books Council (WBC) regularly refers that about a 1,000 people are employed within the publishing sector in Wales and that is the only source available. Wales is therefore clearly below the UK average “(i.e of the order of just 0.5% of the UK total against Wales’ workforce being about 5% of the UK’s). However, it is worth noting that Wales does not have large publishers such as those found in London, Edinburgh and Oxford. At the same time, the Welsh publishing industry is primarily based in areas where the percentage of Welsh speakers is higher than the average across Wales.

Digital opportunities to produce new media like audio books have not been taken up. New skills need to be developed for cross platform production of literature; online community building and management; video trailer creation and production’ and marketing across on-line platforms such as Amazon.

However, patterns of employment and sustainable jobs in literature and publishing are changing world-wide. Specializations like editing and design are increasingly outsourced to freelancers, and digital platforms offer opportunities for writers to be self-publishers, hybrids - who are both traditionally and self-published - and to easily access global as well as local markets. Digital expertise and understanding of online marketing matters greatly in these new distribution channels, as demonstrated by Book Swarm⁸, a digital agency just for book businesses and bookbridgr⁹, a blogging community set up by the publisher Hodder Headline.

Alternatives to being left on the ‘slush pile’ in a publisher’s office are appearing. Lisa Hall¹⁰ runs a popular book blog, and established communication with publishers made it easier for her to get her novel *Between You and Me*¹¹ traditionally published, while her considerable online presence helps reviews and sales.

In the way that journalists are now increasingly employed in PR roles and as technical writers, some creative writers, subsidise their literary experiments by writing white papers, copywriting online, newsletters and blog content for clients willing to pay. Sites like *Upwork*¹² act as online brokers for these writers to trade across the world.

While screenwriting is extraordinarily competitive, with Hollywood employing between an estimated 7- 8000 writers, growth in online video means there is often local work for script writers helping businesses get their message across.

There is often local work for scriptwriters helping businesses to get their message across. According to this white paper by Cisco¹³, 80% of the world’s internet traffic is forecast to be video by 2019.

⁸ <http://bookswarm.co.uk>

⁹ <http://www.bookbridgr.com/>

¹⁰ <http://www.lisahallauthor.co.uk/>

¹¹ <https://www.amazon.co.uk/Between-You-Me-bestselling-psychological-ebook/dp/B01B7RRNB8>

¹² <https://www.upwork.com/hire/business-writers/>

¹³ <http://www.cisco.com/c/en/us/solutions/collateral/service-provider/visual-networking-index-vni/complete-white-paper-c11-481360.html>

Around 140,000 people attended the 2016 National Eisteddfod in Abergavenny, and attendance figures show a fairly stable and predictable audience for Welsh language culture. As Google searches on language show, this audience would be a clearly defined niche for innovative cross platform content, online. Some support for this idea could be drawn from the growing popularity of Facebook Welsh Learners Groups like 'Dwi'n Dysgu Cymraeg' (4340 members) and 'Say Something In Welsh' (3452 members), showing enthusiasm and appetite for Welsh Language content in multiple formats, which could be consumed from a central hub website.

Print Media in Wales

It is worth considering briefly the current print media landscape in Wales.

Evidence received by the Panel including responses to the on-line survey, referred to the importance of the publishing and literature industry in Wales due to weakness of the print media in Wales – this will be discussed in further detail in the analysis of the survey at **Annex 5**. In addition, the papers that have the highest circulation in Wales such as *The Sun* and *The Daily Mail* do not give much attention to Wales generally let alone the publishing industry. During recent years, there has been a steady decline in the consumption of daily newspapers in Wales. The Audit Bureau of Circulation's (ABC) latest figures in February 2017 indicated that *The Daily Post* is now Wales' best-selling regional newspaper – selling an average of 22,251 copies in 2016 compared with 23,645 printed copies sold in 2015. The table below reflects the decline in circulation figures.

	1979	1997	2005	2015	2016
Daily Post	50,000	52,000	40,835	23,645	22,251
South Wales Evening Post	69,000	67,185	56,487	23,870	21,031
Western Mail	94,000	61,541	43,247	18,063	15,697
South Wales Echo	120,000	74,246	57,852	17,820	15,140
South Wales Argus	53,000	30,597	30,295	11,475	10,808

However, there was an increase in online visitors for most titles. Wales Online's audience grew 13.1% to reach an average of 292,824 daily unique browsers, according to the latest ABC figures in 2017. The Daily Post's website grew 5.1% to reach 81,125 daily unique browsers. While the online figures are encouraging they do not generate the kind of income which can replace the sales and lost advertising revenue of newspapers.

Coverage in the media to the publishing and literature sectors

The Panel noted the limited coverage to the industry in the press generally in newspapers and by the broadcasters in Wales. This included reviews for books as well as specific programmes. Although programmes such as *Heno* on S4C have regular items on the industry including book launches there is no similar provision in English on BBC Cymru Wales or ITV Cymru Wales. The Panel therefore suggested that links should be improved between the sector and the mainstream media in Wales. The broadcasters should do far more to discuss books from Wales and Welsh language books should be discussed by English language media, as well as vice versa, in order to cross the boundaries between the two literary scenes and traditions in the country.

How Literature and Publishing contribute to Welsh Government policies

The Panel was asked to assess whether the main aims of the Welsh Government in supporting the publishing industry and literature in Wales, in both languages, were appropriate and fit for purpose. Any expenditure by the Welsh Government is only justifiable if it clearly supports the agreed programme for Government. The Panel considered the Government's strategy document *Taking Wales Forward 2016-2022*¹⁴ as the overview policy statement and evaluated the current investment in line with the stated priorities.

It also considered the Welsh Government's vision for culture in Wales which was outlined in the document *Light Springs through the Dark: A Vision for Culture in Wales*¹⁵ which was launched in December 2016.

It is clear that supporting and enhancing a successful bilingual publishing industry in Wales not only makes a contribution to the economic growth strategy associated with the creative industries in Wales but also support the numerous micro business initiatives which have been established, in the main, in rural contexts and support the Welsh language and culture. Associated policy directives which focus upon the culture and heritage of Wales, the development of a new educational system and the requirement for the production and publication of bilingual materials also reaffirm the appropriateness of continued Government financial support for publishing in Wales.

In the same context the promotion of literature in Wales is at the core of a dynamic cultural and creative policy. A successful creative Wales will see the value of investment in furthering literary talent in both the Welsh and English languages. Acknowledging the fact that Wales has one of the longest literary and oral traditions in Europe, it is also imperative that continued support is given in both languages to further develop the creative literary talent of Wales. Presenting creative Wales on an international stage must include the wealth of modern literary talent which we have in both languages. Investment in translation and international marketing will be key for demonstrating a 'connected' Wales with a strong cultural policy.

The Panel also considered the legally binding obligations stated within the Well-being of Future Generations (Wales) Act 2015¹⁶ and considered that if the Government was to successfully demonstrate the important role that culture played in improving health and wellbeing, then the continuation of investment in the development, promotion and publication of literature was entirely appropriate.

¹⁴ <http://gov.wales/about/programme-for-government/?lang=en>

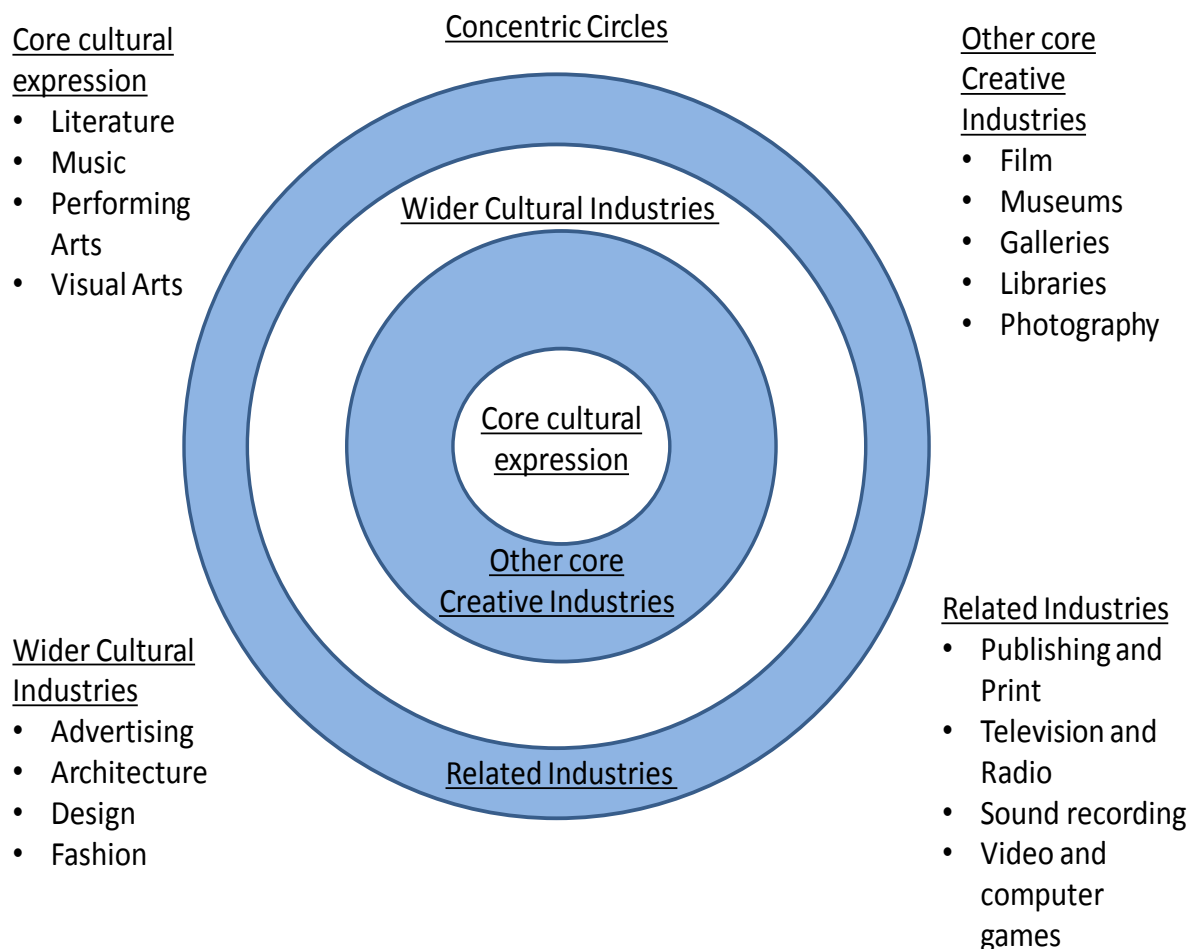
¹⁵ <http://gov.wales/topics/culture-tourism-sport/arts/a-vision-for-culture-in-wales/?lang=en>

¹⁶ <http://gov.wales/topics/people-and-communities/people/future-generations-act/?lang=en>

Welsh Government Support

The concentric circles model of the cultural industries

In considering where literature and publishing fit in the context of creative or cultural industries as a whole, the model below is very useful as a contribution to context setting¹⁷.



Welsh Books Council (WBC)

The Welsh Government supports the publishing industry in Wales through the WBC, which is a non-statutory body (and registered charity) providing specialist services to the book and magazine publishing trade in Wales. Its remit is to support and develop the publishing industry in Wales in both languages (English and Welsh).

The task and finish group on publishing in 2001 chaired by Delyth Evans recommended a number of changes to the funding arrangements for the WBC. Following this review, the Welsh Government decided that the funding the WBC received from the Welsh Language Board and local authorities should be delivered direct from the Welsh Government. Subsequently in 2003, it was decided that the funding for English-language publications provided by the Arts Council of Wales (ACW) English language books would be transferred to the Welsh Government and

¹⁷ Throsby, David. Cultural Trends Vol. 17, Issue 3, pages 147-164, Published online 26 Sep 2008)

administered by the WBC. Prior to 2003, the WBC was therefore only involved in Welsh language publishing.

Funding Position

Budget 2016-17

The WBC received £3.6m from the Welsh Government during the 2016-17 financial year, split as follows:

Main categories of WBC's expenditure in 2016-17	£'000
Specialist staff supporting publishers and others ¹⁸	748
Publishing Grants	2,299
Grant Administration	184
Capital	60
Core Running Costs	295
Total	£3,586

WBC Publishing Grant supports both English and Welsh language publications, with £1,632,550m allocated to Welsh language publications and £666,450 to English language publications.

Further breakdown of these sums is as follows:

Grants for Distribution 2016/17

Welsh-language Publications	£
Programme Publishers	360,800
Individual Publishing Grants	80,000
Performance Payments etc	14,600
Appointments and Training	209,375
Payments to Authors and Illustrators	322,775
Marketing	50,000
Booksellers	45,000
Electronic Publishing	15,000
Games	0
Magazines	345,000
Support for Welsh-language Press	190,000
Market Research	0
Total Welsh-language Grants	1,632,550

¹⁸ i.e. providing services such as editing, design, bibliographical services and marketing to publishers

English-language Publications	£
Revenue Magazines	175,000
Revenue Books	228,154
Individual Publishing Grants	60,000
Small Grants and Training	8,500
Author Advances	52,000
Supported Posts	64,240
Marketing	41,056
Classics	<u>37,500</u>
Total English-language Grants	<u>666,450</u>

WBC Grants

The WBC supports the publishing industry in Wales through three main interventions – by offering subsidised specialist services for a small fee to the publishers in the fields of editing, design, sales and marketing and also by grant-aiding around 300 titles annually (200 in Welsh and 100 in English). In addition, its Distribution Centre stocks titles of Welsh interest in both languages, distributing these to over 800 outlets.

WBC channel grants through publishers to support and develop a thriving and viable publishing industry. Authors can then obtain publishing skills provided by individual publishers including creative copy editing and marketing.

A significant portion of the grant goes to publishers as an annual block grant for publishing a programme of a specified number of titles (programme funding was a recommendation made in the Welsh Government commissioned report of the Task and Finish Group on Publishing in 2001). WBC also runs a title-by-title scheme for publishers who wish to apply.

Following recommendations from several reports and consultation with industry stakeholders, the WBC has extended its grant support to include a wider range of more commercial titles with a greater emphasis on popular fiction, biographies and sport in order to reach a higher number of readers from a wider range of backgrounds.

Summary of WBC budget since 2010-11

	2010-11 £	2011-12 £	2012-13 £	2013-14 £	2014-15 £	2015-16 £	2016-17 £
Running Costs*	1,305	1,258	1,207	1,153	1,103	1,043	1,043
Grants**	2,768	2,773	2,773	2,773	2,623	2,483	2,483
Capital	25	25	25	25	25	60	60
Total expenditure budgets	4,098	4,056	4,005	3,951	3,751*	3,586	3,586
Actual income: from Distribution Centre, other departments and DfES	3,511,758	3,567,611	3,510,200	3,533,475	3,327,779	2,943,806	N/A

*including cost of specialist services provided by WBC staff

** including grant administration (£184,000 in 2016-17)

Further details about the WBC are available on its website¹⁹; Annual Report 2015²⁰; Operational Plan 2016-17²¹ and Strategic Plan.²²

The WBC presented the following background information for the Panel's consideration when it gave oral evidence:

- Despite the nuance in the English language name of the organisation, the WBC operates and supports both Welsh and English language publishing and literature.
- Publishers in Wales work within a complex and precarious economy, competing with the commercial publishing industry mainly based in London.
- WBC aims to enable small businesses and authors to emerge and develop.
- WBC works across disadvantaged areas.

¹⁹ <http://www.clc.org.uk/>

²⁰ <http://www.clc.org.uk/5391.publicationFile.dld>

²¹ <http://www.clc.org.uk/6536.file.dld>

²² <http://www.clc.org.uk/1671.publicationFile.dld>

- WBC's core responsibility relates to the publishing industry and have grave concerns about any further reduction to the budget which would be detrimental to being able to deliver and develop their current service.

WBC – Strategy and Structure

- The WBC's strategic document *Looking Forward* (Edrych Ymlaen) which looks to the future, and details working more with universities and educational establishments, to include giving guidance to teachers to identify suitable reading material.
- The WBC emphasised that it was essential to have a clear structure to ensure development. The role of the various WBC Panels were explained which includes the Welsh Language Publishing Grants Panel, English Language Grants Panel and a Children's Books and Reading Promotion Panel
- WBC support to authors goes through publishers.
- The WBC encourages the formation of groups and bodies (e.g. Cwlwm Cyhoeddwyr) and that they are encouraging English language publishers to form a similar group.

WBC- Functions and Services

- The WBC's services includes the Distribution Centre which represents the commercial arm of the WBC and represents a major contribution to WBCs income with over 10,000 titles in stock and receiving approximately 1000 new titles per annum – with 55% of these being in English.
- A design and editing service which offers a support service to publishers, particularly smaller publishing companies, looking to develop and grow.
- A key aim of the WBC is to enable authors from Wales to compete with authors from England as well as encouraging Welsh authors back to Wales.
- Targeting disadvantaged areas and disadvantaged groups and taking books to support under-performing schools.
- The WBC is also involved in initiatives such as :
 - National Year of Reading
 - Stori Sydyn/Quick-Reads
 - Roald Dahl Celebration
 - Reading City Campaign – for which WBC developed an application for Swansea Reading City which is currently under consideration for funding.

How the funding the WBC receives from the Welsh Government contributes to delivering a number of Welsh Government priorities

WBC has defined its remit as to support and develop the publishing industry in Wales in both languages (English and Welsh). This broad remit allows a significant contribution to the Welsh Government's strategic agenda in a number of areas:

(a) Welsh Language

The WBC has a key mandate in promoting the Welsh language publishing industry. Welsh-language and bilingual books and publications underpin the Welsh Government's support for the wider-use of the Welsh language and contribute to delivering the Welsh Government's Welsh language strategy and contributing to the goal of reaching a million Welsh speakers by 2050.

For example, Golwg 360, the on-line Welsh language news service is funded by the Welsh Government through the WBC. Golwg 360 has contributed to the Welsh Government's aspiration of seeing plurality of news services in Wales as without it BBC Cymru Wales would be the only online Welsh language news service. The WBC's bibliographical and book-selling website, gwales.com, is a digital hub for the publishing industry in Wales, the primary source for Welsh-language e-publications and provides a fully bilingual service to its users.

Over 65% of funding received by the WBC from the Welsh Government is channelled towards Welsh-language publications. For example, during the 2016-17 financial year 1,632,550 was allocated to Welsh language publications while £666,450 is earmarked for English-publications. In addition, all the WBC's staff are bilingual. A number of publishers and booksellers based within areas of higher proportions of Welsh-language speakers exceeds what one might expect if they were distributed across Wales on a pro rata population basis and so enable professional and skilled workers to remain within local, often rural, communities.

Bookshops selling a large proportion of Welsh medium books and other materials serve as small focal points for the language, its literature and sign-posting of Welsh-language activities for both fluent speakers and learners.

(b) Economic Development and Sustainability

Publishers, printers and booksellers offer a range of highly-skilled and semi-skilled employment opportunities.

It is estimated that around 1,000 people are employed directly within the industry excluding writers - more if other book-related employees such as librarians are included. Many offering design and editing services do so as freelancers. Many of these companies and individuals are based in rural Wales and contribute to the local economy.

Some publishing houses and bookshops are located in rural and post-industrial disadvantaged areas. They make a positive contribution to the fragile economy of these areas. This is reflected at **Annex 6** with maps showing the location of publishers and bookshops across Wales.

WBC runs a self-financing Distribution Centre (in effect a wholesaler) on the outskirts of Aberystwyth. This has a turnover of circa £5million gross and is the bedrock of sales for most publishers based in Wales.

(c) Books for Children and Young Readers

The Welsh-language book scene has seen significant developments with more balance of original titles and adaptations published across the age ranges. New publishers such as Firefly Press have also enriched the variety of English-language children's books available during recent years.

Suitable reading material is central to developing a child's ability and motivation to read which in turn underpins both writing and oral skills. Research indicates that reading for pleasure improves attainment across all areas of the curriculum.

For over forty years, the WBC has organised the annual Tir Na n-Og prize which celebrates the best children's books in Welsh and English.

(d) Literacy and Reading

WBC supports activities which help the Welsh Government to meet its Programme for Government commitment to improve numeracy and literacy and developing Welsh Medium Education. The broad range of books published caters for, and engages with, readers from different backgrounds. Literacy projects, such as the successful Quick Reads scheme have been developed to make books accessible to those who are less confident in their reading skills. More generally, recent years have seen the development of an extensive range of attractive and popular reading material that engages with the public.

The WBC supports development of digital publications by publishers in both Welsh and English, and the development of other platforms such as apps for magazines in both languages. Its website, gwales.com, provides a means for readers to access e-books in English and Welsh.

(e) Tackling poverty and working in deprived areas

The WBC Child Poverty Strategy is a live document contributing to the work of the Welsh Government in this field and supporting the recommendations of Baroness Kay Andrews' report on Culture and Poverty²³.

The WBC's work contributes in the field of mitigating the effects of poverty. This will be achieved through promoting and supporting activity in these areas in connection with the WBC's plans for promoting reading, and through funding activity in collaboration with education and library authorities. The activities will underpin the WBC's contribution to tackling poverty, especially amongst children.

The WBC co-ordinates the Summer Reading Challenge and works closely with libraries and schools to ensure that children benefit from these projects. The activities will underpin the WBC's contribution to tackling poverty, especially amongst children.

The WBC Child Poverty Strategy informs its publication strategy and includes activities to promote reading as a skill to tackle poverty among families, especially children and young people. For example, events organised in conjunction with World Book Day promote inclusion and collaboration across the sectors involved with literacy development.

WBC coordinates the publication of Quick Reads/Stori Sydyn titles for those who are less confident in their reading skills and promote reading as a necessary skill to alleviate poverty. The Welsh Government's Department for Education and Public Services funds WBC for this separately.

(f) Cultural Diversity

The publishing industry reflects to a considerable, but not full, extent the cultural diversity of Wales through a mix of classic, literary and contemporary writing in various genres. The WBC has made a conscious decision in the last three years to place an emphasis on extending the range of titles in both languages. This has contributed to promoting equality amongst readers as well as offering each reader a range of reading experiences

In its Strategic Plan, the WBC lists how it contributes to delivering the Welsh Government's strategic priorities in a number of areas:

²³ <http://gov.wales/docs/drah/publications/140313-culture-and-poverty-en.pdf>

- Presenting the Welsh culture and heritage by means of a wide range of varied reading material that presents the history of Wales and its people
- Promoting and supporting the Welsh language by presenting it as a living, relevant language
- Promoting literacy and reading as essential life skills
- Contributing to a programme to tackle poverty and deprivation through ensuring a supply of reading material which is both varied and inclusive
- Promote the health of the people of Wales and emphasising the advantages of reading for the individual's well-being
- Contributing to the Welsh economy by supporting an indigenous industry which reaches all parts of Wales
- Integrating the cultures of Wales by providing support and services for both languages
- Supporting the education sector by providing reading material which complements the educational resources supported by the Welsh Government
- Promoting Wales overseas by means of our rich literature and our prestigious authors
- Contributing to the national discourse by supporting current affairs and literary magazines and academic material
- Supporting digital material and promoting innovation in the field.

Arts Council of Wales (ACW)

ACW operates with a combination of Welsh Government grant aid and lottery funding. During 2016/17, ACW received £30.6m from the Welsh Government and £16m in lottery funding. ACW has national organisations, of which Literature Wales (LW) is currently one. ACW aims to make the arts as central as possible to the lives and well-being of the nation and to support, nurture and give a platform to the arts. ACW encourages more people to participate in the arts and to nurture young talent. Digital is increasingly becoming part of ACW delivery mechanism.

Wales Arts International is the branch of ACW which initiates and supports international engagement and international partnerships. WAI seeks to give Welsh art forms an international stage and to raise the profile of Wales' internationally. In the field of international literature and publishing, Wales Literature Exchange is also supported by ACW.

As noted previously, following the task and finish group's report on publishing, funding for English-language publications provided by the ACW for English language books was transferred in 2003 to the Welsh Government in 2003 and administered by the WBC. ACW retained responsibility for supporting the development of writers and promoting literature from Wales in both languages. In 2011, ACW transferred its remaining responsibilities for activities related to literature to the newly created LW. Summaries of the support for literature delivered on the Welsh Government's behalf through ACW between 2012-2016 and the strategic support from Wales Arts International are reflected in the tables at **Annex 10** and **Annex 11** respectively.

Further details about the activities of ACW is included on its website²⁴; Annual Report 2015-16²⁵; Remit Letter 2016-17²⁶; and its Operational Plan 2016-17²⁷

ACW - delivery against Welsh Government priorities

The Welsh Government's priorities are set out in the annual Remit Letter. Information is provided below on how ACW has delivered against Welsh Government priorities outlined in its Remit Letter.

Well-being of Future Generations (Wales) Act 2015

ACW is one of the public bodies in Wales that falls within the Act's remit. ACW's activities are guided and monitored by a Future Generations Monitoring Group, and it has developed and published a Sustainable Development Strategy and Action Plan. It has also invested in 'flagship' projects such as *Ideas: People: Places* that promote well-being and sustainable development.

²⁴ <http://www.arts.wales/>

²⁵ <http://www.arts.wales/104582.file.dld>

²⁶ <http://gov.wales/docs/drah/publications/170307-acw-remit-letter-en.pdf>

²⁷ <http://www.arts.wales/3113.file.dld>

Being Creatively Active

A key priority is encouraging more people to enjoy and take part in the arts. ACW measures progress against this goal by using a variety of data and research. The main sources of information are:

Arts Portfolio Wales Survey: The Arts Portfolio Wales (APW) is ACW's nation-wide network of 67 key organisations that receive revenue funding on an annual basis. The headline figures for attendance at portfolio events in 2015/16 were: (a) total attendances of 3,740,833 (down 3.9% on previous year) and (b) a total of 18,336 events (down 7.7%). Participation figures have increased however. The 2015/16 figures were 1,141,730 (2.1% up on 2014/15) and a total of 71,728 participatory events (up 4.2%).

Children's Omnibus Survey: ACW commission an annual survey of attendance and participation amongst children and young people. Headline figures for 2016 include: (a) 82.9% of children and young people in Wales attended an arts event once a year or more (5.8% down from 2015), (b) 86.3% of children and young people took part in arts activities once a year or more (down 2.2% since 2015).

Arts attendance by disabled people: ACW has created the *Hynt* scheme, an initiative designed to make it easier for disabled people and their companions/carers to attend the arts. Recent research has revealed that 26 venues are taking part in this project and at least a third of circa 8000 Hynt card holders have used their cards in the last 18 months.

Overall, although participation is up, continuing economic austerity is undoubtedly having an impact. ACW is considering what new initiatives it will need to take to tackle ongoing disparities in engagement across Wales.

Education and Skills

The *Creative Learning through the Arts* (CLTA) programme is the primary activity in this area. CLTA is a £20 million, five year programme, jointly funded by ACW and the Welsh Government. The programme was devised to deliver the recommendations from the "Arts in Education in the Schools of Wales" report by Prof Dai Smith (2013)²⁸ The programme has three main aims: (i) to increase and improve arts experiences and opportunities in schools, (ii) to improve attainment through creativity, and (iii) to support teachers and arts practitioners in developing their skills. There are two strands to the programme – the *Lead Creative Schools Scheme* and the *All-Wales Arts and Education offer*.

The Lead Creative Schools Scheme brings pupils, teachers, creative agents and arts practitioners together to explore and develop creative approaches to teaching and learning. There are currently 279 schools actively engaged in the scheme. In 2017-2018, this will increase to over 530 schools. The Arts and Education offer focuses on increasing and improving arts experiences and opportunities for schools. Under this strand ACW has established four *Regional Arts and Education Networks*, with a remit is to: (a) create and establish networking opportunities for teachers, artists and arts organisations, (b) provide training and Continuing Professional Development (CPD) for teachers and arts professionals, (c) provide a brokerage service between artists, arts organisations and schools, and (d) manage and co-ordinate a programme of identifying arts specialists in schools and supporting them to share the expertise with other schools.

An *Experiencing the Arts Fund* provides grants to schools, through a "Go and See" scheme to

²⁸ <http://gov.wales/topics/educationandskills/publications/wagreviews/arts-in-education-review/?lang=en>

attend arts and cultural events. Funding is also available through “Creative Collaborations”, a scheme to encourage schools to devise innovative arts projects in collaboration with arts organisations.

National Youth Arts Wales (NYAW): represents a partnership between Tŷ Cerdd (whose remit includes the National Youth Brass Band of Wales, National Youth Symphonic Brass Wales, National Youth Choir of Wales, National Youth Training Choir of Wales, National Youth Jazz Wales and the National Youth Wind Orchestra of Wales) and the Welsh Joint Education Committee (which has responsibility for the National Youth Orchestra of Wales, National Youth Theatre of Wales and National Youth Dance Wales). ACW is currently driving forward changes to the organisational structure for NYAW, aimed at helping it to develop a more sustainable business model.

National Endowment for Music: In February 2017, the Cabinet Secretaries for Education and for Economy and Infrastructure gave the go-ahead for the creation of a National Endowment for Music. The aim is to enhance the existing forms of funding available to help young people to participate in and to develop their talents in music.

Tackling Poverty

The Fusion Programme is entering a new phase following the ending of the Communities First funding mechanism. Following a successful first year, the number of Pioneer Areas has increased from six to ten areas. ACW is involved in all of these and continues to play a proactive role on the Operations Group which is helping to shape the new *Fusion* programme.

Sustainability and maximising return on investment

Portfolio funding: Following the Welsh Government’s announcement of a 3.5 % increase in grant in aid funding for 2017-18, ACW passed on the same level of increase to its portfolio organisations.

Resilience: a key part of ACW’s approach is its new “Resilience” programme for its portfolio organisations. This includes expert diagnostic advice, and capital investment (if justified) to enable change and capacity building. ACW received 53 submissions from portfolio organisations in response to its call for expressions of interest. Alongside this, ACW also developed a series of master classes and leadership workshops, covering issues such as change management, fundraising, IP, and partnership building.

Safeguarding the Arts Infrastructure

Supporting the work of funding partners: ACW’s Local Authority Project Group has been targeting the Public Service Boards across Wales as they seek to develop their local needs assessments. They will be putting together a strategy and action plan to illustrate how they will deliver against the Well-Being of Future Generations (Wales) Act 2015.

To support this work, ACW has developed an *Advocacy Booklet* which is being distributed to all Public Service Board chairs, local authority Chief Executives and Leaders, Health Board Chief Executives and Welsh Government Cabinet Secretaries. This aims to highlight the potential of the arts, and the sector’s role in supporting local delivery of the Act. All of the local authorities are producing local needs assessments by the end of March 2017 as part of their obligation to the Well-being legislation. As an official consultee, ACW will be contacted for its views.

Brand Wales

International activities: During 2016-17 – and particularly since the EU referendum – ACW has worked with an increased emphasis on international working, as part of the Welsh Government's developing narrative in this area. ACW has been working with British Council on a combined grant project fund programme for *India Wales*, which the Cabinet Secretary for Economy and Infrastructure launched in February. The 70th anniversary of Indian independence in 2017 is providing an important opportunity for Wales and India to refresh and strengthen existing relationships, and to develop new opportunities for creative collaboration.

ACW has also helped the Welsh Government to respond to its *cultural Memorandum of Understanding with China*. It played a pivotal role in organising the cultural element in the Welsh Government Trade Mission to China in February 2017. ACW is also involved in preparing Wales' presence at the 2017 *Venice Biennale* will focus on the work of artist James Richards.

Digital Technology

Digital R&D: ACW has a close relationship with NESTA, which has led to the establishment of a Digital Innovation Fund. Five projects have been taken through to full R&D. Both are in discussions about the next phase. The current thinking is to broaden the scope to include more organisations at a lower project cost.

The Space: The Space, along with ACW and the BBC Academy held a digital arts day in November 2016. Over 90 delegates attended the event, which included panel discussions, interactive demos' and workshops on themes ranging from capturing the arts for the screen to creating interactive audience experiences with technology.

Arts and Health

Policy development: Work has begun to develop a joined-up approach to future strategy, between ACW and Welsh Government.

A Cross Party Group on Arts and Health, chaired by Eluned Morgan AM is considering the 'idea of co-commissioning and funding a study into the Arts and Health in Wales', with the ACW charged with taking forward the research study. Meanwhile, Arts and health networks continue to grow organically. The visual arts organisation ENGAGE is coordinating an all-Wales network, and is holding meetings in the South and the North.

Betsi Cadwaladr University Health Board has revived its Steering Group meetings across North Wales.

A symposium held in November 2016 by Aneurin Bevan University Health Board led to interest in establishing a 'Community of Interest' around Arts and Health under the banner of *1000 Lives* (the national improvement service for NHS Wales delivered by Public Health Wales). This has exciting potential to bring together interested colleagues from both health and arts sectors in a network that is linked to improvement within the NHS system.

Throughout October and November 2016, a series of events took place across Wales as part of *Walls: Muriau*, the second Arts and Mental Health Festival organised by Disability Arts Cymru, Ynys Môn and Gwynedd Mind, and Making Minds. The festival aims to break down the stigma attached to mental health, and to increase access to the arts for those experiencing mental ill-health as well as provide a platform for artists living with mental illness.

Literature Wales (LW)

ACW has designated LW as the National Company for the development of literature in Wales. It was established in April 2011 following the merger of Academi, the National Literature Promotion Agency and administrator of The Welsh Academy (the national Society of Writers in Wales) and the Tŷ Newydd Writers' Centre set in a house with historic associations with David Lloyd George.

LW's role is to facilitate and stimulate literature programmes and events throughout Wales, and promote the best of our literatures internationally. It also develops and supports the writers of Wales at every stage of their literary journey.

As reflected on the LW website, since 2011, the organisation has:

- engaged over 700,000 participants, including 255,000 young people in literature activities across Wales
- awarded 140 Writers' Bursaries, 57 of these to new writers. Many of these recipients have gone on to achieve success and to win major prizes for work written with the support of the bursaries, including Jonathan Edwards (Costa Poetry Award Winner 2014), and Kate Hamer (shortlisted for the Costa First Novel Award 2015). Total Bursaries awarded to date: £481,000
- expanded its work with children and young people, by creating the new Young People's Laureate role and strengthening links with other projects in Wales, such as Bardd Plant Cymru, as well as bringing the popular American Poetry Slam model to Wales
- broadened the reach of the South Wales Literature Development Initiative, working with various partners including Mind, Gwent Arts in Health, National Literacy Trust, Swansea Bay Asylum Seeker Support Group, as well as Local Authorities
- led on major centenary celebrations, for instance, Dylan Thomas 100 Festival, R S Thomas and Roald Dahl 100 Wales, delivering major literary tourism, engagement and education projects on behalf of Welsh Government and with the support of the ACW .
- redeveloped Tŷ Newydd Writing Centre, with support from ACW , Ashley Family Foundation and The Welsh Academy
- created new digital project, Her 100 Cerdd, to celebrate National Poetry Day. The online challenge for four poets to write 100 poems in 24 hours, annually attracts 10,000 views and over 2,500 individual readers

LW is governed by unpaid non executive directors. LW is a Company Limited by Guarantee and registered Charity. It is managed by a Board of eleven Directors, who are also Trustees.

ACW funds LW and has been part of its portfolio of Revenue Funded organisations (RFOs) for some years. ACW treats LW as a national company responsible for developing and promoting literature. Following ACW's 2015 'Investment Review', ACW continues to define LW as an RFO. ACW supports other literary activity (eg events such as the Hay Festival).

In 2016-17, ACW provided LW with £717,163 of core revenue funding from ACW's grant-in-aid. ACW also allotted £151,000 in project funding to LW from its National Lottery budget

LW represents the interests of Welsh writers both inside Wales and internationally and encourages people to enjoy others' writing and to write themselves, through a programme of workshops, courses, festivals and competitions. LW services include mentoring, writers' bursaries, information and advice, and independent manuscript assessment. LW aims to place literature at the heart of the well-being, literacy, employment and skills agendas and strives for literature to be seen as a vital part of a balanced, engaged and healthy life. It does this through:

- Improving opportunities to participate in literature:
 - Writers on Tour
 - Wales Book of the Year
 - Regional Development Initiatives
 - Lit Lounge pop-ups at festivals
 - Literary Tourism
- Providing platforms for children and young people of all ages, abilities and backgrounds to create and enjoy the literary world around them:
 - Young People's Laureate
 - Bardd Plant Cymru
 - Creative writing workshops in schools – Dylanwad & Writers on Tour
 - Schools residencies at Tŷ Newydd
 - Young People's Writing Squads
 - Slam Cymru
 - Cardiff Children's Literature Festival
- Developing and supporting writers at every stage of their writing journey to achieve their full potential:
 - Writers Bursaries
 - Mentoring & Critical Services
 - Writing courses and Masterclasses at Tŷ Newydd
 - Information and training
- Working in partnership in order to raise the international profile of the writers and writing of Wales:
 - Funding for translation grants through Wales Literature Exchange
 - Ambassadorial role of the National Poet of Wales
 - Working on major events and centenaries e.g. Dylan Thomas 100 and Roald Dahl 100
- Increasing engagement with literature through digital platforms:

- Her 100 Cerdd
- Y Neuadd
- Dylan’s Great Poem
- Online launch of Wales Book of the Year shortlist.

Further details about the activities of LW is included on its website;²⁹ Business Plan³⁰, and report of the LW Trustees and Financial Statements for 2015-16 ³¹. LW officials and a Board member presented the following background information for the Panel’s consideration when they gave oral evidence to the Panel:

- The definition of literature is all-important in relation to the review’s terms of reference and that literature does not only belong to the published book but can be spoken, performed, as well as published and that literature belongs to everyone.
- Since being established through uniting Academi and Tŷ Newydd , LW has expanded and is an organisation that welcomes change.
- LW encompasses all forms of writing to include digital platforms, and the focus is on readers as well as writers, children as well as adults, communities of all nationalities and the underprivileged.
- LW’s five key strategies are:
 - Participation
 - Supporting Writers
 - Children and Young People
 - International
 - Digital activity
- LW’s Business Plan is the second since LW was established, and sets out the aims and values of the organisation.
- Over recent years, LW has developed a relationship with the Welsh Government, and works with other organisations including The National Trust, Museum Wales and the British Council.
- LW seeks to align itself with the Themes of The Welsh Government; The Year of Adventure, The Year of Legend and the Year of the Sea, and weave these into their programme of activity.
- LW’s plans for the Year of Legend in 2017 include developing a literary tourism strategy as well as working with the Football Association of Wales on a poetry project to celebrate the UEFA Champions League Final in Cardiff, as this will attract international attention

²⁹ <http://www.literaturewales.org/>

³⁰ https://issuu.com/lencymru-litwales/docs/literature_wales_business_plan_2016/1

³¹ https://issuu.com/lencymru-litwales/docs/literature_wales_signed_accounts_20

- The poet Llion Jones received funding from LW to write poetry during the European Football Championships in France in the Summer of 2016.
- LW has a good relationship with the press in Wales and beyond, to include regular meetings with BBC, and firm links with *Radio 4* and *The Guardian*.
- LW is one of seven strands supported by ACW and that they meet regularly to discuss joint strategies.
- LW is also currently working with the National Theatre of Wales and often works with the Welsh National Opera.
- LW is developing a new strategy on defeating poverty in culture and is aligning its priorities with the aims of the Well-being of Future Generations (Wales) Act 2015. LW has a planned programme of events to include working outside of the literary field with sports, homelessness and the tourism industry.
- LW's vision is that literature belongs to all.
- LW was currently working on a monitoring and evaluation strategy.

Participation

LW aims to increase variety of literary activities, work with disadvantaged people (e.g. those not in education or training) and work with sustainable community partners.

LW had recently worked with the following:

- Slam Wrexham
- The Young People's author Sophie McFinne who works with communities to encourage the participants to write a piece of work to perform on stage.
- Roald Dahl's centenary year
- Refugees
- Cardiff City Football Club

Supporting Writers

- Support writers to excel at all stages of their career
- Invests in bursaries for authors (300 in the last two years, since taking over from Academy)
- Supported Writers At Work at the Hay Festival

Children and Young People

LW works with:

- The Costa Prize,
- The Prose Medal
- Awards scholarships to new writers.

International Strategy

- LW works to promote Welsh writers on an international stage, and participated in the International British literature showcase, working with the British Council and WAI.
- At the Hay Festival, LW Wales works with writers to further promote themselves, both in Welsh and English.

Finance Strategy

- LW receives £1.2million with £717k coming from the Welsh Government via ACW, with lottery funding and specific direct grants (including from the Welsh Government) with charity income topping this up.
- Of the expenditure, 80% of this is spent on people (staff, supporting writers) with millions reaching individuals and contributing to the economy.
- Also, 80% of all purchasing spend is with Welsh suppliers.
- LW has worked to establish new income streams through sponsorship and to increase business contacts. This work has included increasing membership and undertaking fund raising activity. LW has already been successful with applications (to include The Barbican) and is hopeful that 10% of all of its income will come from sponsorship and from commercial money by 2019.

Tŷ Newydd

- Tŷ Newydd became part of LW -it had not sought to take it on but had been given it and the building had been in decay. LW now work in partnership with the National Trust and Portmeirion.
- Tŷ Newydd delivers courses, workshops and has developed a relationship with local people and the local museum. The venue is now also licensed for weddings and will be available for corporate events seeking to bring in income.

Other Comments

- Ecology was a strong consideration, and that listening to poetry has as strong a place in ecology as a gig or reading a book.
- As part of LW's support for festivals the focus will shift more to facilitating other people rather than event managing.
- LW queried the Panel's Terms of Reference. and suggested that the Panel should consider recommending to Ministers that a comprehensive mapping of what is happening now in reading, writing and digital is needed, to inform the development of a 'future facing' strategy (with LW and WBC involvement).

Wales Literature Exchange

Wales Literature Exchange, based at the Mercator Institute at Aberystwyth University, is funded by ACW and connects writers, translators, publishers and other agencies involved in facilitating literary exchange between Wales and the world. Its Translation Grants Fund (£20k per annum) is available to publishers to support the translation costs of publishing both Welsh and English literature (from Wales). Wales Literature Exchange was established in 1998 as Wales Literature Abroad and subsequently rebranded in order to acknowledge the reciprocal nature of its work. It works closely with Literature Across Frontiers (European Platform for Literary Exchange and

Policy Debate), WAI, LW, British Council, universities, translators, publishers, authors, similar literature exchange agencies and key stakeholders across the world.

Research into international working in the literature sector in Wales

During 2016, Arad, the independent research company, completed its research study into international working in the literature sector in Wales : *Research into international working in the literature sector in Wales*³². The Executive Summary has been published but not the full report (it is currently only available on request to Wales Arts International).

The recommendations were:

1. An overarching, inclusive and ambitious international engagement strategy that focuses on the artistic and commercial support needs of the literature sector should be developed;
2. Individual organisations' roles should be better defined and linked to delivering the strategy in a coherent partnership structure. This process should be linked to proportionate funding of organisations according to their roles and expertise;
3. Writer residencies, translation grants and support for travel are all integral to supporting artists to engage internationally and should be funded sustainably. This funding should be linked to the overall goals of the strategy and the monitoring of impact;
4. Current levels of support should be reviewed in line with envisaged organisational roles and expertise to ensure greater access and quality. This should be linked to greater promotion across the sector as to the types of support available and which organisation can most effectively deliver it;
5. Wales Literature Exchange should be provided with additional support through the strategy to allow it to build on its expertise in translation and developing international networks;
6. Marketing grants should be reintroduced to support the Welsh Books Council's commercial engagement activities at international book fairs and other relevant events. These activities should be linked to the marketing plan outlined below in recommendation 7;
7. A targeted and realistic plan to identify international markets should be developed. This should link to wider Welsh Government and Arts Council of Wales strategies and build on previous international engagement work where relevant;
8. Systems should be put in place to monitor and share data across organisations regarding the impact of international engagement;
9. Sustainable funding should be targeted towards attracting international writers and publishers to Wales as part of a drive to support and develop grassroots festivals and touring networks;

³² <http://www.wai.org.uk/news/6883>

10. National and international activity should be connected by ensuring links between writers and organisations who work internationally with literature programmes and cultural tourism activities in Wales.

ACW responded to the ARAD report by acknowledging its role in delivering against the report's recommendations and commits to specific actions to ensure that organisations come together as needed to do so.

Activities funded by the Welsh Government's Department for Education and Public Services

The total amount of funding from this Department of the Welsh Government during 2016-17 for interventions to support raising of literacy and numeracy standards is **£860,475**. This is in addition to the funding given to Regional Education Consortia via the Education Improvement Grant to provide support on literacy and numeracy

Book Trust Cymru provision - Book Trust is a UK-wide charity which runs programmes to promote books and reading. Book Trust Cymru, as a separate organisation, manages four programmes operating in Wales, funded by the Department (total grant for 2016-17 - **£700,000**):

Bookstart - to encourage all parents/carers to share books, stories and rhymes with their children from a young age and on a regular basis in order to support their cognitive, socio-emotional and pre-literacy development, including the development of speech language and communication skills through gifting of bilingual book bags and resources by Health Visitors in the first year of life and again at 18-27 months. (grant - **£348,475**)

Pori Drwy Stori: Literacy - to raise standards of Reception aged children in Literacy and the three core areas of learning in the Foundation Phase through providing high quality resources and training to support schools to engage parents/carers in their child's learning and build a positive home-school link. (grant - **£124,902**).

Pori Drwy Stori: Numeracy - resources support the understanding and use of basic numeracy skills through engaging children and parents/carers in enjoyable maths games and activities at home and in school, and encouraging play and conversation about number. The resources encourage parents/ carers to engage their children in numeracy activities in their everyday lives. (grant - **£93,628**)

Letterbox Club - to improve the educational outlook for children in foster care through engaging children with reading for pleasure and numeracy at home. Letterbox Club is available for children in Years 1 to 8, with parcels available for children every other year. (grant - **£132,995**)

Reading Promotion Programme

The Department for Education and Public Services provides annual grant funding to WBC to support the Reading Promotion Programme. The focus is to promote, encourage and increase the appreciation and interest in reading and literature among children and young people.

The total Welsh Government grant for WBC Reading Promotion Programme for 2016-17 is **£160,475**. The programme incorporates the following four strands.

Quick Reads – a primarily adults-focused resource to promote reading; funding support covers the commissioning of 4 titles (2 Welsh and 2 English), together with promotional materials and distribution costs (grant - **£55,100**) The *Quick Reads* books have introduced hundreds of

thousands of new people to read , and have encouraged existing readers to read more. They have reached some of the most economically deprived people, helping to improve access to reading. The Welsh language titles are also used extensively by Welsh learners or those who are under-confident in their Welsh language skills.

World Book Day – a UK-wide campaign, celebrating books and reading. WBC prepares teacher packs linked to the event, working with education and library services across local authorities to deliver various local activities. (grant - **£58,500**)

Summer Reading Challenge – programme operated in partnership with the Reading Agency, focused on encouraging children to continue with reading throughout the school summer break (grant - **£26,400**)

Creative Writing Competition – delivery and management of a Roald Dahl inspired creative writing competition and the publication of an anthology of winning entries in both English and Welsh. This activity will run alongside and complement the array of official activities organised by the Roald Dahl 100 Wales - Steering Group partners. (grant - **£20,475**)

Welsh Government's Welsh in Education Resources Branch (WERB)

The branch focuses on Welsh language and bilingual educational resources. The branch commissions resources which are not produced commercially to maintain and improve the provision for 3-19 year olds. The branch produces Welsh-medium resources (both print and digital) for all subjects, ages and abilities, from the Foundation Phase to 14-19 subjects, as well as resources to support the learning of Welsh as a first and second language. Resources are also produced bilingually if they support the delivery of Wales-specific aspects of the National Curriculum. Less than 5% of the titles supported by the Branch were purely literature.

WERB has a budget of £2.65 million to improve the provision of materials to support the teaching and learning of the national curriculum including numeracy and literacy
WERB has commissioned Welsh apps after identifying a lack of digital resources.

The Welsh Government funds Welsh versions of assessment and qualification resources produced commercially by publishers in England to ensure Welsh language versions exist.

For print resources Welsh Government funds the difference between the production cost and the potential income to suppliers from sales of materials. Welsh Government provides full funding for digital resources.

The commissioning process begins with identifying gaps in resources available through holding panel meetings of teachers from across Wales for each curriculum subject. The needs identified feed into the commissioning programme. There are currently approximately 100 new titles per annum.

Resources are commissioned mainly via a framework of approved suppliers. There are 23 providers on the framework of providers. Some projects are commissioned outside of the Framework via single tenders where a supplier is in a unique position to produce the resource, eg copyright reasons. Tenders are judged on a number of criteria which includes cost, educational content and expertise. The current ratio of digital resources to printed material is 60:40. RNIB has been awarded a contract to produce the commissioned titles in formats suitable for blind and partially sighted learners.

The Welsh in Education Resources Branch liaises with the WBC as part of its work of commissioning learner resources in order to identify possible synergies in commissioning.

It is a contractual requirement for all print resources commissioned by the branch to be distributed by WBC's Distribution Centre. This means that the resources can be ordered and purchased from bookshops throughout Wales. Bibliographic information about all of the commissioned titles is available from the WBC's website ³³www.gwales.com. Digital resources commissioned by the branch are available free of charge on Hwb.

The level of original Welsh Language work was increasing, and the ratio is approximately 70:30 between original work and adaptations. The Welsh Government does not supply schools directly and schools buy directly from the WBC or from bookshops.

WBC's Schools Officers make regular visits to both primary and secondary schools to enable practitioners to look closely at the resources before purchasing. To ensure that they have the latest information, the WERB meets with the WBC Schools Officers on an annual basis to share information about the resources due for publication and the resources that have been recently commissioned. The WBC Schools Officers also inform the branch of suggestions for new resources that they have gathered from practitioners.

Educational practitioners' advice is central to the process of identifying and prioritising the resources to be commissioned, and ideas gathered by WBC are included in the advisory panel discussions held by the branch. The advisory panels are made up of practitioners from the primary, secondary and further education sectors and are led by Welsh Government appointed subject experts. Resources that are prioritised for commissioning are subject to a tender exercise within a European Framework Agreement. The resulting resources are quality-assured by a group of practitioners led by a Welsh Government subject expert to ensure that the final product meets the requirements of the curriculum and the original specification. The branch also currently provides grant funding to the WJEC to produce Welsh-language versions of resources written specifically to support WJEC examination specifications.

The BBC used to attend the annual panels. However, the relationship between the Branch and the BBC was now more on an ad hoc basis, e.g they had liaised about resources for Welsh for adults, and that BBC had contacted the department in connection to Bitesize and Jam to ensure that it would not negatively impact on the publishers. The Branch also met with S4C recently to investigate possibilities of working together.

On 26 April 2017, the Welsh Government arranged a summit in Cardiff to address concerns about the supply and creation of Welsh-medium and English-medium resources for the new Wales qualifications and the new curriculum that is currently being developed. The summit brought together representatives from the Welsh Government, WJEC, Qualifications Wales, Coleg Cymraeg Cenedlaethol, educational consortia, CYDAG and others to look at the issue of providing the right materials for Wales' education system.

The summit considered the following:

- The current situation for Welsh-medium resources.
- Identified the challenges and issues for the future for both Welsh and English resources to meet the needs of reformed curriculum and qualifications.
- An opportunity to propose ideas for the way forward.

³³ www.gwales.com

The Cabinet Secretary for Education is committed to ensuring that resources are available in both languages at the same time and that an all Wales infrastructure which will enable the production of bilingual resources to meet the needs of our new curriculum needs to be established.

New Curriculum for Wales

A new curriculum for Wales is being developed by the Welsh Government, in conjunction with education professionals across Wales. The ambition is that it could be made available to settings and schools as early as 2018 and used to underpin learning and teaching for children and young people aged 3-16 from September 2021.

Professor Graham Donaldson's independent review of curriculum and assessment arrangements in Wales³⁴, *Successful Futures* was published in February 2015 which provided the foundations for a twenty-first century curriculum shaped by the very latest national and international thinking.

The new curriculum will have more emphasis on equipping young people for life. It will build their ability to learn new skills and apply their subject knowledge more positively and creatively. As the world changes, they will be more able to adapt positively.

They will also get a deep understanding of how to thrive in an increasingly digital world. A new digital competence framework has been made available which introduces digital skills across the curriculum, preparing young people for the opportunities and risks that an online world presents. Teachers will have more freedom to teach in ways they feel will have the best outcomes for their learners.

The central focus of assessment arrangements will be to ensure learners understand how they are performing and what they need to do next. There will be a renewed emphasis on assessment for learning as an essential and integral feature of learning and teaching.

A network of Pioneer Schools is playing a central role in the development of the new curriculum for Wales. These pioneers are working in partnership with organisations such as Estyn, the regional consortia, employers and other stakeholders including Welsh and international experts to design the new curriculum framework. They have been focusing on designing the curriculum structure and considering the strategic design and core principles of the new curriculum framework. They have been developing the following aspects:

- Assessment and Progression
- Cross-Curriculum Responsibilities
- Enrichment and Experiences
- Welsh dimension, international perspectives and wider skills

The working groups have now been established to begin the high level Areas of Learning and Experience (AoLE) design before working on the more detailed development for each of the six AoLEs outlined in *Successful Futures*, Professor Donaldson's independent review of curriculum and assessment arrangements in Wales. They are:

- Expressive arts
- Health and well-being
- Humanities

³⁴ <http://gov.wales/docs/dcells/publications/150317-successful-futures-en.pdf>

- Languages, literacy and communication
- Mathematics and numeracy
- Science and technology

It will also include three cross-curricular responsibilities: literacy, numeracy and digital competence.

The creation of the new curriculum may necessitate the need for more distinct Welsh resources. The WBC could possibly play a supporting role in the development of the new curriculum. Discussions have taken place between Welsh Government Ministers and officials and the WBC about the role which the WBC can play in the production of Welsh and Welsh medium classroom materials for the new curriculum.

The *Diamond* Review of Higher Education Funding and Student Finance Arrangements in Wales³⁵

The Panel commenced its work in January 2016, a few weeks after the interim Diamond Report³⁶ was published following a review of higher education funding and student finance arrangements in Wales. The interim Diamond Report made several references to academic publishing, including academic publishing in the Welsh language, publishing research on Wales, as well as specific mention of the University of Wales Press. [see extracts at **Annex 8**]. Academic publishing in both languages is an important part of publishing in Wales, as recognised by the respondents to the Panel's public questionnaire [**Annex 5**]. However, given that academic publishing was evidently being considered by the Diamond Review, and also taking into consideration the composition of the Panel [5 members, 2 academics, appointed Chair of Panel is VC of UoW], it was clear that a specific review of academic publishing was not within the remit and responsibilities of this review of publishing and literature.

The Final Diamond Report was published in September 2016 and, without consultation with the Panel, made reference to the Review on Publishing and Literature as well as to the University of Wales Press and academic publishing in Welsh and in Wales [see extracts at **Annex 8**]. In its meeting held on 11 October 2016, the Panel discussed these aspects of the Diamond Report. This discussion was held in the absence of the Chair and was chaired by the Vice-Chair of the Panel. The Panel adhered to its view that a specific review of academic publishing was not within its remit.

A large number of respondents to the Call for Evidence used this opportunity to highlight the need for Welsh HE institutions to have a responsibility for the teaching of Welsh culture and history and/or supporting the funding of the University of Wales Press. The Review Panel was informed that Welsh universities are not currently required or expected to make the study of Wales, past and present, an integral part of their programmes of teaching, research or publication; this makes the subject, across a wide spectrum of disciplines, precarious'. Respondents included HE sector representatives, both corporate and individuals, as well as private individuals.

It was suggested that a clear and explicit commitment is needed, from both the Welsh Government and universities, to support and promote teaching, research and publication in this area of scholarship, in order to secure its long-term future. The Review Panel was also informed

³⁵ <http://gov.wales/topics/educationandskills/highereducation/reviews/review-of-he-funding-and-student-finance-arrangements/?lang=en>

³⁶ <http://gov.wales/docs/dcells/publications/160927-he-review-final-report-en.pdf>

that a relatively small sum of money is needed to support the University of Wales Press (UWP) in order to secure substantial benefits. It was highlighted that UWP receives an annual subsidy from its parent institution, the University of Wales, in order to operate and that in future, it might not be possible to publish some research on Wales because of the lack of additional funding from other sources. The University of Wales Dictionary for the Welsh Language also made a submission in support of its continued funding. The Final Diamond Report does not tackle the issue any further and relevant extracts from the Executive Summary and the body of the report are included at **Annex 8**.

Wales Union Learning Fund

Where literature plays a part in developing essential literacy skills of union members, projects funded by the Wales Union Learning Fund (WULF) may also have a part to play. The specific objectives of the current Welsh Government/Wales TUC prospectus include:

“Widen participation...” [in learning of people in work] “...supporting interventions which focus on equality of opportunity, reducing social exclusion, and encouraging non-traditional learners.”

“...encourage more people to engage in learning.”³⁷

Welsh Government’s Major Events Unit

The Welsh Government’s Major Events Unit provides support to a number of organisations and festivals with a link to literature and publishing. A breakdown of the funding provided during 2016-17 is attached at **Annex 9**.

Welsh Government’s Welsh Language Division

In addition, support for other festivals is channelled through other Welsh Government divisions. For example, support for the National Eisteddfod for Wales (£603,000 in 2016-17) and the Urdd Eisteddfod (£287,280 in 2016-17 – Urdd Gobaith Cymru’s overall funding is £852,184) is channelled through the Welsh Language Division.

Papurau Bro

During 2016-17, the Welsh Government allocated £87,810 to 52 *papurau bro* (Welsh-language community newspapers). The Welsh Government through its Grant Scheme to promote and facilitate use of the Welsh Language, supports *papurau bro* throughout Wales.

The *papurau bro* have a wide circulation with over 45,000 papers being published every month. Local volunteers are responsible for publishing the papers and they are an integral part of the fabric of Welsh-language communities across Wales. The circulation of *papurau bro* have been incredibly stable during recent years despite a number of challenges. As the way people share and consume news change due to technological developments, there are examples of *papurau bro* moving gradually to new platforms on the internet.

³⁷ Wales Union Learning Fund Prospectus 2016-18 Skills and Employment: Wales/TUC Wales November 2015
Digital ISBN 978 1 4734 5146 9

Welsh Government support for Libraries ³⁸

The provision of public libraries is a statutory duty for local authorities, as set out in the Public Libraries and Museums Act 1964. The same Act places a duty on Welsh Ministers to superintend and promote the use of Welsh public libraries. The Welsh Government invests in libraries through revenue and capital programmes led by its Museums, Archives and Libraries Division. There have been three previous strategies for Welsh libraries and the Welsh Government is currently working with the library sector and key stakeholders to finalise a future delivery plan for libraries in Wales. The plan will retain a strong focus on partnership working, continuing to implement innovative projects such as the shared library management system for public libraries and the national digital library service, as well as supporting the workforce and ensuring that the library sector is sustainable and resilient.

Books are the reason many customers use libraries, in paper and increasingly also in electronic formats. Welsh public libraries have worked with the WBC to ensure that Welsh language e-books are available within the all-Wales e-book service, which is supported by the Welsh Government. Libraries work closely with authors, publishers and relevant stakeholders such as LW and the WBC, in order to provide access to the creative output from publishers and writers in Wales and this will continue in the future.

Creative Wales

The creative sector is the fastest growing priority economic sector in Wales, expanding faster than anywhere else in the UK, outside London. The creative industries in Wales have given the world Dr Who, Sherlock and a plethora of other high quality drama productions. However, continued growth of the sector requires a nimble approach in order to compete with Hollywood, London and the rest of the best. Following a commitment in the Labour Party manifesto, for the Welsh Assembly Elections in 2016, the Welsh Government announced that it would:

- Set up a wholly owned subsidiary of the Welsh Government, Creative Wales, to support the sector in Wales. In doing so, the Welsh Government will aim to sustain at least 850 jobs and £40 million a year in production expenditure.
- Ensure closer collaboration with the education sector to ensure a constant pipeline of skills to support the sector's growth.
- Exploit the unparalleled success of the Creative Industries in Wales to promote the country across the UK and the world.

The core aim of Creative Wales will be to support the economic growth of the sector, helping businesses that create and exploit creative content respond to the opportunities of the global creative economy.

While it is true that attracting film and TV productions, and developing the screen industry in Wales can create a huge boost to the local economy, the historical emphasis on film and TV support has meant less attention has focused on other upcoming subsectors of the creative industries which also offer potential growth and economic impact. It is clear that the economic landscape has changed as the creative industries have developed. This is something which needs to be considered in the set up of Creative Wales. Support services need to reflect current and future priorities, rather than a historical set up, and the format and strategy of the support

³⁸ <http://gov.wales/topics/culture-tourism-sport/museums-archives-libraries/libraries/?lang=en>

organisation needs to align with the current needs of the industry in order to deliver effective services.

Creative Wales will need to continue to invest both in securing inward investment and ensuring appropriate support is available to help Welsh creative businesses exploit the opportunities created by our recent successes. We want to ensure the continued growth of the creative industries sector in Wales and ensure that a long term sustainable sector is created. To do this more joined up support is needed encompassing:

- a) Nurturing talent pathways & industry led skills support
- b) Access to capital (private & public)
- c) Infrastructure, networks and partnership working

Contrast between English and Welsh Language publishing in Wales

Before going any further it is important to differentiate between publishing in the English language in Wales and publishing in the Welsh language. English language publishing exists in the context of a massive international industry and, in particular, in the context of the London publishing industry just up the road. English language publishing in the UK is generally a commercial initiative. English language publishers, whether 'commercial' or 'literary', are typically set up as regular commercial businesses.

Welsh language publishing, on the other hand, will always struggle to be commercially viable in the current market. It can only realistically exist in its diversity with Government support. However, given that the Welsh Government is committed to supporting the Welsh language, the only remaining question for us is whether that support is being delivered efficiently. In the case of English language publishing in Wales there is also the fundamental question as to whether provision could – or indeed should - be left to the market.

It should be noted that there is one area in which English language and Welsh language publishing converge and that is in the matter of distribution - as the WBC distributes books in both languages around Wales.

English and Welsh language publishing in Wales are therefore in completely different marketplaces, scale-wise, competitiveness, opportunities for collaboration, agglomeration and convergence.

While literature and publishing in Welsh may always require support and link to Welsh Government policy towards Welsh Language growth, this should not mean that it is unable to analyse and account for how it offers value for money. In the case of publishing and literature in either English or Welsh, issues such as 'double funding' where both publisher and author get supported for instance, need scrutiny.

New Developments

Amazon

It is difficult to overestimate the disruptive power of Amazon on book publishing and other industries, and it remains controversial with regard to monopoly, working practices and difficult questions for regulation arising from digital markets. Alongside its visible presence online, vast

internet businesses like Netflix and Airbnb are powered by Amazon Web Services³⁹ in the background.

From the perspective of this review, it should be noted that:

- Amazon enables writers to self-publish and distribute their work globally. There are other platforms available but they are tiny in comparison.
- This means that niche subject books can have a wide reach across the world, with UK e book sales for 2015 being around £381.5 million
- Amazon has funded successful self-publishers in Wales producing audio book versions of their books, based on demand and volume of sales
- According to Author Earnings, the UK is the world's second largest market for e books, next to Amazon.com in the United States
- 66% of print book buyers in UK shop at Amazon.co.uk (Mintel)
- Amazon.com now rents textbooks to students in the US, undercutting traditional educational publishers like Pearson. John Fallon, CEO said ““What rental has done is eat into new book sales and that has had bigger impact than we thought’ following a £2 billion drop in company value, in January 2017
- Amazon has opened shops in the US, and applied to register its shop trademark in the UK. The Amazon app is required to shop and collection of consumer data is a priority.
- Although Amazon does act as an enabler it should be noted that it is also a dominant force in the on-line marketplace

E-Books and e-Readers represent both a risk and an opportunity. If publishers accept change, transform their processes, train employees, and offer their content in multiple formats – in digital or printed form, bound or on demand, as a PDF or ePUB – and on all platforms, they will have a good chance of developing a viable digital business model. Publishers that resist change, consider the digitizing process to be merely an additional cost, and attempt to defend their existing content and business models, will face the greatest risks.’⁴⁰

The Growth of Self-Publishing

A recent estimate says that there are over 1000 self-published writers currently earning over \$50,000 a year from Amazon alone but the average earnings of a writer in the UK currently is estimated to be around £7000⁴¹

Online following can be helpful to a writer in getting a traditional publisher. Hazel Cushion of Accent Books spotted the potential of best-selling author Jodi Taylor, when she saw her 400+ reviews on Amazon.

The most successful self-publishers are adept at marketing their own work, often using facebook groups to organize reciprocal promotions. Amazon will often approach high sellers for their own imprints (which published over 2000 titles last year) or offer support to create audio versions of

³⁹ <https://www.theatlantic.com/technology/archive/2015/04/the-unbelievable-power-of-amazon-web-services/391281/>

⁴⁰ <https://www.pwc.co.uk/assets/pdf/ebooks-trends-and-developments.pdf>

⁴⁰ <http://authorearnings.com/report/may-2016-report/>

⁴¹ <https://janefriedman.com/9-statistics-writers-know-amazon/>

their titles for their audio book division, Audible, which had two billion hours of audience listening in 2016⁴².

Important influences:

The Growth of Digital

The internet has dramatically altered how consumers receive, read and digest content. The once simple equation of 'publishing equals print' has rapidly evolved into the more complex equation of 'publishing equals print, online, e-reader and mobile'. With a range of new formats available to consumers and subsequently more tools at the disposal of publishers - enabling them reach their target markets and audiences like never before - the possibilities that this digital wave brings to the industry are immense. One good example of this is The Bookseller⁴³. Amazon's dominance makes it most difficult to compete with:

More than 50% of all traditionally published book sales of any format in the US now happen on Amazon.com.

That's just the traditionally published books, though.

In addition, roughly **85% of all non-traditionally published book sales of any format** in the US also happen on **Amazon.com**.

The Growth in Writer-Initiated Events, which the Web helps

During 2016 a number of festivals were held including Laugharne Festival, Penfro Festival, Writers' Fairs and Literature Festivals in Tenby, Solva, Abergavenny, Llandeilo, Llangwm, Rhondda, and Carmarthen

These events involved well-known authors like Ian Rankin (Laugharne) and Griff Rhys Jones (Llangwmlitfest), competitions, workshops and community engagement with local business, volunteer stewards and accommodation. To varying degrees there was also online community engagement.

⁴³ <https://www.thebookseller.com/futurebook/digital-crossroads>

5. Themes and messages from the evidence base

This section of the report explores some common themes and messages which have emerged during the wider stakeholder engagement and evidence gathering phase of the Review. They have also informed and shaped the Review Panel's thinking and recommendations. The themes and messages conveyed here have informed the Review Panel's thinking. They should not, however, be treated as a reflection of the collective opinion of Panel members. No judgements have been made, nor can any guarantees be given, as to the validity, accuracy, significance, or otherwise of the views and information gathered from others.

A summary of responses to the specific questions raised in the call for evidence questionnaire has been prepared and is to be published alongside this report at **Annex 5**.

These views have been grouped together in some cases for the purpose of the report, but no particular order of priority is intended.

The themes and messages are analysed below under the second to fifth headings in the terms of reference for this Review (the first heading deals with how support could be improved; our conclusions on this are set out in the recommendations chapter which follows).

For ease of reference these headings are listed below:

- The main aims of the Welsh Government in supporting the publishing industry and literature in Wales, in both languages; i.e., what are we seeking to achieve, culturally, socially and economically? Are these aims still fit for purpose in the 21st Century? (See Chapter 6 'Recommendations')
- The scale and remit of the support currently given to deliver these aims, including the relationship between the bodies responsible for delivering this support.
- Digital developments within the publishing industry in Wales.
- The administrative arrangements for the Welsh Government support for a Welsh-language daily online news service, as well as *papurau bro* (*Welsh language community newspapers*).
- The support for publishing and literature in disadvantaged areas across Wales.

The scale and remit of the support currently given to deliver these aims, including the relationship between the bodies responsible for delivering this support.

Publishers – Welsh and English

During meetings with representatives from the publishers in Wales, the Review Panel asked publishers to share their views on what they saw as the major challenges and opportunities facing the publishing industry. Some of the key themes that emerged are outlined below.

It is important to note that the comments shown below were given in evidence to the Review Panel – they are not the comments of the Panel Members themselves.

Digital

- Publishers agreed that Wales is generally slow overall in moving towards digital, although there has been more progress with e-books.
- Generally not many audio books are published. One publisher noted that there is a need to address the lack of Welsh language audio books, despite it being costly.
- Ideally the price of e-books should be kept as close to the price of print copies as possible, to avoid additional pressure on bookshops.

WBC Support for Publishers

- While editorial marketing support from the WBC is very useful, the budget for this has seen recent cuts.
- Some of the publishers that appeared before the Panel benefitted from the WBC proof-reading service.
- Some publishers also use the subsidised editorial, design and marketing services offered by WBC, which were perceived as being very useful.
- Cwllwm Cyhoeddwr emphasised how valuable and supportive the WBC is to its members.

Funding and Grant System

- The publishers felt that the current system is generally working well but that the grant system can be difficult to grasp. However, most thought that the distribution support provided through the WBC is invaluable.
- The grant funding system is working at the moment although this may not be sustainable in the longer term unless the level of funding is reviewed
- The application process for WBC funding is better and less time-consuming than it used to be.

- The WBC's innovative Author Advance system has been successful in attracting bigger-name authors to Wales.
- The publishers that appeared before the Panel, apart from Accent Press, were generally dependent on WBC funding – only a small minority of books were published without WBC support.
- Publishers suggested that putting more funding into marketing would be greatly beneficial; WBC had organised television adverts pre Christmas but these need to be run throughout the year. One publisher said that an Advertising Fund would benefit authors, book-sellers and publishers.
- One publisher noted that the WBC is the best vehicle to serve the publishing industry in Wales, although there are ways in which it could improve.
- Despite the WBC headquarters being in Aberystwyth, one publisher based in south-east Wales noted that this did not present any issues.

Distribution and Sales

- The services provided for publishing and distribution by the WBC are unique and fit for purpose within Wales, but extending distribution beyond Wales is difficult.
- It would be beneficial for the WBC to use freelance reps in order to maximise sales for books which have UK-wide potential. While WBC can distribute outside Wales there are no reps based outside Wales to maximise sales potential.
- WBC supported publishers said that making accurate estimates of sales (as required by WBC) is becoming more difficult. Publishers use WBC to distribute within Wales (as they must for grant aided titles) while other distributors are used for worldwide distribution.
- There was a regular informal dialogue between publishers about business growth and business stagnation. It was noted that the WBC has market research resources, although limited, which can be accessed through the Distribution Centre. Support provided by WBC was positive. One publisher noted that the WBC will give a certain level of feedback on what is selling well but individual publishers are responsible for their own marketing. The number of officials focused on marketing varied between publishers. The lack of a marketing budget generally makes it difficult for smaller publishers, as larger companies are able to invest more in websites and web content.
- As part of the agreement with the WBC, publishers cannot sell directly to large Welsh book sellers, but publishing companies can make individual deals with small book shops and schools.
- It is restrictive that sales are channelled through the WBC's Distribution Centre and it would be of great benefit if the WBC could conclude deals with supermarkets, although the difficulties in dealing with them were recognised.
- WBC needs to be able to offer greater discounts to make selling books more attractive to big book sellers, and to ensure that the books are promoted in larger outlets.

- The current data system used by the WBC distribution centre needs to be updated and there is a need for the latest edition of VISTA Sales system which would provide accurate and up-to-date sales information to publishers; this would be both time and labour-saving.
- The WBC has sales reps that visit schools and nurseries promoting the books, but there is reduced book-buying from schools in Wales.
- In light of the discount that other wholesalers offer, consideration should be given to how the WBC could increase the discount it is able to offer to publishers, to be more competitive.
- It is getting more difficult to get books distributed for a variety of reasons, including competing against London publishers for distribution, but also as a result of the closure of a number of book shops across Wales, which had previously been 'shop windows' for literature.
- WBC does not have a sufficient level of staff with commercial knowledge.

International

- Money would be better spent in facilitating companies to have their own stands at book fairs and to build their own brands. The Department for International Trade has provided 50% support to publishers at overseas book fairs.
- The International Guild of Publishers has a stand at the London Book Fair with separate cubicles, which enables companies to have their own identity and to promote their individual material without the expense of taking a whole stand.
- One publisher noted that Wales was the only nation from Europe not to have a stand at London or at Frankfurt and that having a presence does illustrate a clear national identity.
- The WBC presence in Frankfurt in the past was a missed opportunity and lacked focus, as attendees were unclear of the opportunities.
- One publisher said that the London Book Fair is the 'shop window to the world', reaching an international audience, and suggested that a co-ordinated Welsh mission would help to raise sales and distribution for Welsh publishers.
- Trade Missions are valuable, but there is a need for briefing sessions to ensure that participants are equipped with the knowledge to maximise opportunities.

General

- Generally the publishers noted that they had infrequent contact with LW and considered it to be a writers' organisation.
- Standards have risen since devolution and the biggest challenge facing Welsh publishers is competing against the large London publishers.
- There are not enough book shops in Wales which stock and promote Welsh language books.

- It is now more difficult than ever to get books in front of potential readers and this issue has heightened as there are now several 'black spots' across Wales where there are no longer book shops.
- The cost for translating literary materials is prohibitive and there is limited support available; Welsh Literature Exchange does support this but the budget was £10k [increased to £20k in 2016].
- Publishers stressed the positive effect that promoting books can have on sales, but that it is increasingly more difficult to get books selected for promotion.
- Consideration should be given to the potential of supporting Facebook marketing for publishing companies.
- Waterstones has a regional policy for both Scotland and Ireland but there is no regional policy for Wales. It would be of great benefit to the Welsh publishing industry for a Welsh policy to be developed which would ensure greater visibility for literature from Wales within Waterstones' outlets.
- Marketing and PR are key to success.
- Publishers said that the main benefits of using a publisher rather than self-publishing were being associated with a brand and having access to professional marketing and the books trade.
- The general consensus amongst publishers was that it is not realistic for publishers to be self-sustaining, mainly to the competition from outside Wales. There was a responsibility to select books that are not purely commercial but also cultural.
- In response to a discussion on whether Welsh publishing companies believe they should be subsidised when they are selling a commercial product, one publisher noted that in terms of Welsh language titles, it was more difficult on a commercial basis and that his company was also a printing company which sustains the publishing part of the business. Without subsidy it would not be possible for his company to continue publishing.
- One publisher noted that a lack of resources leads to being risk averse, and if his company had adequate resources they would be able to take the risk of failure. Reference was made to the Amazon 'daily deal' and how Penguin has developed the relationship with Amazon and Waterstones through market engineering, making it difficult for smaller companies to get their titles on the daily deal.
- Publishers noted that they do attempt to develop new, young and developing writers who are looking to get better publishing deals with London publishers.
- The increase in the numbers of young people receiving Welsh language education is not reflected in recent Welsh language book sales.
- The standard of books in Welsh has risen.
- For the industry to grow it is necessary to either double the amount of available funding, or to reduce the expectation of the number of books published to allow individual books more time and space on the shelves in bookshops.

- Government support for Welsh language publishing is essential to facilitate publishing which would otherwise not be commercially viable and would not happen.
- Many Welsh publishing companies grew out of printing, now a rather old fashioned model beyond Wales. Their financial focus is on printing rather than publishing (which is then, in effect, cross subsidised by the printing income).
- There are currently too many children's books being published and too many being funded, which limits the opportunity for them to be displayed on shelves in book shops.
- It would be prudent to re-balance the funding so as to publish fewer (better) books and use the remainder to enable publishers to offer increased discounts and be better placed to compete within the market - to get more books into the supermarkets and book shops.
- There is an economic challenge as supermarkets are able to sell, for example, Julia Donaldson books at greatly reduced retail prices - making it difficult for publishing houses to compete and for books to be sold at the recommended retail price.
- There are now very few independent Welsh book shops - and none in the centre of Cardiff.

Following the discussion with the Publishers, the Panel came to the following conclusions:

The Panel acknowledged the significant knowledge which was evident within the publishing sector and the clear commitment and passion to build on the current infrastructure and activities. The Panel however felt that there was a need for more business acumen within the industry. The Panel recognised the commercial success achieved by Accent Press. There was a need for an industry training course which would include business skills as well as specific training in areas such as rights sales, editorial and negotiating contracts. Publishers are surviving but not getting rich; and that financial constraint leads to risk aversity.

Marketing and PR are obviously areas that should be improved. Publishers need to be innovative and a more strategic approach should be taken to include further investment. The Panel felt that there was a general level of satisfaction among publishers with the WBC . The level of monitoring and due diligence expected by the WBC is high. From the evidence received, engagement between publishers and LW was limited and publishers perceive LW to be a writers' organisation and not directly relevant to their activities. The Panel suggested that there was a need to put long-term strategies in place to support the industry, as simple injections of money alone will not necessarily benefit the individual companies.

The Panel suggested that consideration should be given to support mechanisms for start-up companies in specific sections of the publishing industry. There was a need to identify new opportunities to sell. The Panel recommended that measures should be put in place to encourage all Welsh publishers to operate internationally as well as encouraging international publishers to come to Wales. The WBC should support the development of missions to key international book trade fairs in the UK and overseas, to establish trading links and build capacity in the publishing sector in Wales. The costs and benefits of these should be reviewed each year and, more fully, after three years.

Support mechanisms such as Overseas Business Development Visit Support (OBDV), which enable businesses to undertake business development visits relevant to overseas markets, should be amended so as to allow consideration of applications from publishers to attend and have a formal presence at international book trade fairs, especially London (which is focussed on overseas markets despite being held in the UK) and Frankfurt.

In addition, Waterstones should consider developing a regional policy for Wales similar to Scotland and Ireland. The Panel was encouraged to hear, during the spring of 2017 as this report was being completed, that Waterstones had decided to introduce a regional policy for Wales.

Magazines and Periodicals

During meetings with representatives from various magazines which receive funding from the Welsh Government through the WBC, the Review Panel asked them to share their views on a number of issues including what they saw as the major challenges and opportunities facing magazines as well as digital developments

It is important to note that the comments shown below were given in evidence to the Review Panel – they are not the comments of the Panel Members themselves.

The following themes emerged from the discussion with the magazines

Relationship between print and digital content

- There was a need to be cautious on putting too great an emphasis on digital too quickly. A combination of print and digital was the way forward.
- There was an assumption that anybody receiving public funding should offer its service for free. That should not be the expectation and there is a need to develop and grow businesses. Moving to digital, results in an increase in the cost of printed material and that there is an assumption that the creation of digital content is free - which is not the case in terms of people's time and technical costs. Promoting and advertising on the internet is difficult to market and that in the modern day so much content is available free (e.g. BBC) and this makes it very difficult to compete.
- One of the magazines had discovered that it had engaged too quickly with digital and was giving too much away for nothing; and emphasised that the Digital Guardian with its vast circulation is also struggling to survive.
- Magazines are now, and should be, multi-platform but there is perhaps too much of an expectation that the 'younger generation' are entirely digital and 'older generations' are entirely print and that this is not always the case. There will always be a place for printed material which offers the reader an immersive experience.
- Physical copies are vital and of cultural importance and serve as an archive in a way that is not possible with digital content. There is a place for in-depth articles in print, as long-form digital articles often disappear over time.
- Multi-platform was the best way for the future. Readers still have a desire to read physical and detailed printed articles
- The digital app (*Magazines of Wales App*) established by the WBC for magazines had not been a great success.
- The magazines were working to attract new readers and new demographics and now operate different subscription rates, to include full subscription of both print and digital with a reduced rate for those who subscribe only to digital.
- Digital fields create a specific challenge and there is a need to see a relationship between physical copies and digital versions. There is a need to develop a strategy to establish the way forward

Advertising

- The magazines agreed that it was difficult for small publishers to raise advertising revenue and that digital advertisements do not result in significant income, and that there is a need to obtain detail of readers and to target the adverts specifically.

Development of sales and subscriptions during the last ten years, and whether there are any restrictions (geographic and social) stopping them reaching their readership

- There are now fewer shops to stock publications and therefore subscriptions have become a bigger, more important element.
- There are geographic black-spots with few retail outlets.
- The WBC Distribution Centre has limited availability to reach new shops.
- Attendance at targeted events and markets would be beneficial to promote magazines and increase readership.
- Magazines should look to engage more with schools, further education colleges and exam boards through the WBC representatives.
- It is not practical to increase sales levels in supermarkets
- The magazines use social media (Twitter and Facebook) to reach new audiences.
- Digital fields create a specific challenge and there is a need to see a relationship between physical copies and digital versions. There is a need to develop a strategy to establish the way forward
- There was concern about how magazines have been affected in recent years following changes to the state aid regulations.

Funding

- Raising money and funding through advertisements takes many man-hours and being able to pay authors fees is crucial.
- One of the magazines had received sponsorship from an university which was linked to work placement schemes and actively looks at additional funding, but that this time could be being spent on promoting the magazine.
- One magazine noted that the only way of guaranteed income was to regularly raise the price of magazine and this does not seem to have an effect on the number of readers.
- Private investors could jeopardise editorial independence which is crucial to publishing magazines, and raise conflict of interest.
- Some magazines had been successful with private funding for awards but not for magazines.

Dialogue with WBC and other organisations?

- The magazine publishers training day organised by the WBC during 2016 had been beneficial to share experiences. Further support with marketing would be a significant help to the magazines. Magazines play a large part in the culture of Wales, and in the overall context of funding allocated to the publishing industry magazines do not receive a great amount.
- There was scope for more dialogue but it is important that nothing is centralised as it is healthy to have two separate organisations – WBC and LW.
- WBC was not good at self-promoting, whereas LW puts a great deal of emphasis on publicity .
- It was noted that the WBC and LW have separate stands at the National Eisteddfod and it might be more cost-effective, to have one stand.
- There had been delays with promoting the Welsh Book of the Year [2016] as the books had been embargoed.
- The magazines agreed that WBC has personnel with a broad knowledge of culture and literature and the funding is distributed for the public good, and that while the WBC is arms-length there is a healthy level of scrutiny.
- There was very limited interaction with LW – one magazine liaised with LW to market and promote competitions.

How could the current system be improved?

- One of the magazines suggested looking at merging bursaries with publishing commissions, support writers rather than events and support publishers to design and edit their own publications.
- WBC could broker relationships with educational establishments and exam boards and libraries.
- WBC does the best that it can with limited resources. It would be beneficial to have guidance and advice on issues such as copyright and archiving and to receive marketing expertise offering advice on pricing and commercial services.

Importance of magazines beyond Wales

- This varied among the magazines but it was agreed that it was important and offered a potentially bigger market but more competition. Targeting Welsh speakers abroad was vital.

The role of English language magazines in Wales and whether they need to be treated differently to Welsh language literature

- The magazines are crucial due to the weakness of the print media in Wales and are undertaking the role of newspapers.

Summary of other issues the magazine representatives wanted the Review Panel to consider

- A central point to provide advice on commercial aspects to include copyright, pricing and moving-forward digitally.
- One magazine suggested support should be provided directly to writers and publishers rather than being channelled through WBC.
- Facilitating relationship with schools and libraries would be of great benefit to increase the readership.
- More pride needed in writing (as is the case with opera) when considering how many people are reached by writing, and there is a need to inspire new activity.

Following the discussion with the magazines the Panel came to the following conclusions:

The Panel recognised the appetite for change amongst the magazine publishers. It was apparent that the magazine publishers had a much clearer sense of the role of WBC compared to that of LW. The Panel discussed the suggestion that grants should go directly to writers and publishers, and agreed that while this could work for the more experienced publisher, WBC support is valuable for the less-experienced publishers.

Education and Literacy

The Panel made the following observations following evidence from the Welsh Government's Welsh in Education Resources Branch

It was reassuring for the Panel to see that the process is demand led and gaps in materials and resources are well researched. There are two elements to the Branch's work, to include establishing and defining the needs of schools and to forecast future requirements.

The breakdown of the materials and who produced them was very useful, and illustrated that producing and publishing educational content assisted in sustaining some of the Welsh publishers.

Some of the providers were new companies and included television and digital companies, rather than the more traditional publishing companies, and that traditional publishing companies did not have the resources to meet the digital specification.

New Welsh Curriculum

The Panel noted the shortage of English language books about Wales and the WJEC school syllabus does not include many books about Welsh culture and history through the English language. WJEC should ensure that Welsh writing in English is appropriately represented on the education curriculum

The Panel came to the view that over the next five year planning period far more integrated work is required between the funding and strategic priorities for developing and implementing the new Welsh Curriculum and the significant opportunities for developing an inclusive all Wales digital educational strategy. The WBC could play a key co-ordinating role in this context. Investment will be required in supporting teachers to deliver the new curriculum – this could include the production of new materials to support the learning outcomes set within the identified areas of learning. Consideration needs to be given how to best maximize the value of digital multi-content platforms and how the publishing industries can play a key role in such a development.

Professional and Skills Development (*including training for Publishers*)

As with other art forms and creative sectors in Wales, professional support for writers and publishers is paramount for further developing the sector. The Panel noted that far more could be done to support professional training. Whilst acknowledging that several institutions did offer a number of training courses, the overall sector could be serviced in a more systematic manner.

The Panel noted the significant courses available for supporting creative writing in Wales. These covered a range of organisations from universities to private providers. Noting the ever changing dynamics within the publishing sector, it was clear that so many small and medium-sized publishers in Wales will need to adapt. This is also true for the writers. The business model of self publishing marketing calls for a very different support infrastructure. In order to take full benefit of a far more complex network of distribution channels for writers - online, e-books, in addition to the traditional booksellers, it is suggested that further consideration be given for a professional training hub which could be accessed on line. This could be serviced and co-ordinated through one of the key national organisations. In addition to the areas noted above, the Panel recognised the numerous comments received with interest in the following professional areas: business skills, illustration, editing skills, use of social media and analytics. More could also be offered to bridge between creative writing courses for publication and also screen writing teaching. More partnership work between film and literature interests could be encouraged.

Noting the importance of artistic expression and the power of narrative, the Panel also considered the important role literature and publishing had to play in supporting inclusion and social equality in Wales. There is a clear need for literature to play a part in health, justice and education. This calls for professional support and training to allow writers to engage with vulnerable audiences in the area of participatory arts.

The Panel noted the advisability of reviewing all current professional training and coordinating the current offer and further develop an integrated programme of skills development tailored to the needs of writers, publishers and other key artistic stakeholders.

The current professional training landscape in Wales is patchy and could be enhanced through greater communication, coordination and amplification of the offer which currently exists and then adding new training opportunities.

Organisations

Welsh Books Council (WBC)

The Panel met with WBC officials including the Chair and the then Chief Executive. The background information presented to the Panel by the WBC has already been included.

It is important to note that the comments shown below were given in evidence to the Review Panel – they are not the comments of the Panel Members themselves.

The following themes emerged from the discussion:

Monitoring

- Quality assurance was vital for the WBC and it continually monitors the publishers that receive funding to ensure a variety of books and literary material as well as marketing materials which will create an income.
- A number of award-winning books have received support from the WBC and raised the profile of literature from Wales on a worldwide stage.

Digital Materials

- Though digital materials are available, the WBC recognised the take-up of Welsh-language e-books by consumers was taking longer than anticipated, but acknowledged that there was a need to have both English and Welsh language books available digitally.
- The sales of e-books had slowed down recently.
- Gwales, the digital sales and marketing portal for WBC had developed considerably during recent years.
- Papurau bro needed to increase its digital presence without undermining the content. The WBC referred to Golwg 360's ambition to work closely with papurau bro to increase their digital presence.

Relationship with key stakeholders

- The WBC emphasised that while it works with LW on specific projects and events, their functions are different and that LW works with authors whereas WBC role is to develop the industry.
- The WBC works closely with the Welsh Government's Department for Education and Public Services and the WBC schools officers regularly meet with officials from the Department.

The role of WBC in generating dynamic publishing in Wales and ensure that subsidised publishing doesn't encourage complacency

- The WBC grant structure looks to develop entrepreneurship and encourage competition and referred to new publishers such as Cinnamon Press and Firefly Press, which illustrate the vibrancy of publishing in Wales. The grants system encourages commercial development and the move towards greater sustainability in its emphasis on producing a commercially balanced publishing list and in supporting marketing and publicity initiatives.

Magazines

- WBC agreed that the readership of print magazines is decreasing as part of a wider global trend and consideration should be given to more digital content. However, the magazines are a forum for coverage of Welsh politics, literature and culture and to stimulate conversation especially considering the weakness of the newspaper industry in Wales.
- WBC said that magazines are now trying to secure funding from elsewhere to diversify, and while subscription remains the primary source of print sales, digital platforms provided the potential for greater reach and included open access models.

Views on whether there should be one body to offer an all-encompassing provision to the publishing industry in Wales

- The WBC agreed that, while it was satisfied it was already able to provide the growing publishing industry in Wales with a comprehensive service, it would be prepared (given appropriate additional funding) to consider greater future involvement in related areas outside its current remit in order to further develop the whole industry.

Following the meeting with the WBC and after consideration of the written evidence received, the Panel came to the following conclusions:

General

In considering the evidence presented by the WBC and also noting the additional evidence provided by other stakeholders, the Panel felt that the WBC displayed a high-level of maturity with regard to its core functions. It was felt that the WBC delivered upon Welsh Government priorities for the publishing industry in Wales. The Panel noted that the WBC was considered and acknowledged as a key national institution which had demonstrated over a long period of time, a clear commitment to the production and enhancement of publishing in Wales. In considering the evidence presented, the Panel came to the view that the time was right to consider additional responsibilities for the WBC. This could strengthen the publishing eco-system in Wales. Should additional responsibilities be developed then due consideration would need to be given to a number of structural and governance developments to support such additional functions.

Funding

WBC actively seeks best value for money from book publishers and magazines. It has a balanced approach to publishing grants (slate and individual projects) and a strong grip on administration and running costs.

There was a good micro management of funds and grants but it could be argued that that the WBC needed more industry professionals in some aspects of its work.

Governance

The Panel did not identify any major issues but some aspects could be improved as with any effective organisation. Generally the WBC was regarded as a transparent organisation ensuring stability, fairness, respect within the sector across Wales including publishers, booksellers and teachers.

Support for Publishers

The WBC governance of the support it provides to publishers was considered to be satisfactory. Its design and marketing services have helped to ensure that virtually all Welsh publishers are now capable of producing good-looking commercial products – which certainly was not true a decade or so ago. The WBC provides a focus for booksellers and Welsh publishers but naturally could do more.

Welsh Language Publishing

The Panel considered that the WBC played a key significant role in Welsh language publishing. They acknowledged the WBC's key role on behalf of the Government to support and enhance the Welsh language and ensuring that Wales has a vibrant Welsh language publishing eco-system. The Panel noted however that some publishers had suggested that there were too many titles and not enough clear guidance given to bookshops as to what they should or should not stock. WBC historically comes from Welsh language publishing background and its culture may not always be adept at supporting entrepreneurial publishers.

English language Publishing

Some of the evidence received by the Panel indicated that the WBC's real strength and interest is in Welsh language publishing. The Panel noted the views presented that as far as English-language publishing goes the WBC offers competent support but not the same level of strategic leadership as demonstrated for Welsh-medium publishing– and its location in Aberystwyth makes it feel a very long way from London's vibrant commercial publishing industry. There was some discussion among Panel members and some evidence received, whether the English-language service was best managed from Aberystwyth and whether the support for both languages should be split with English language publishing located elsewhere. However, the Panel on the whole felt that splitting the role of the WBC would not strengthen the publishing industry in Wales. The WBC is not a large organisation and the English budget is much smaller than the Welsh one.

As long as Welsh Government supports publishing in both languages (and WBC support for English-language publishing is less than 15 years old), there are benefits to the links between the two sides. The market does far more for quality in the English language (among some less impressive offerings), so the public funding interventions will be different. A good example is design. The quality of design of Welsh medium books, especially fiction has greatly improved in the last few years, narrowing the gap to better examples of English language design.

The Panel recognised that some of the small publishers supported by the WBC have had a sprinkling of prize-winning or prize listed books over the years, but have never looked remotely like becoming self-supporting operations. This is not to blame them. It seems that, as long as funding is only available specifically to publish new Welsh writing, then that is what they will continue to do, as a grant is far more reliable than simply relying on sales. If these publishers, or indeed anyone wishing to set up as a literary publisher in Wales, wanted to be self-supporting, it is highly unlikely that they would build their business model exclusively on publishing new writing from Wales.

The one big British publishing success to come from outside of London is Canongate books from Edinburgh. Canongate had the advantage of being bought by a very wealthy individual who was able to support the company through some tricky stages - and it's important to note that its great successes have not been necessarily Scottish in origin – e.g. their Booker prize winner 'The Life of Pi' or, indeed, Barack Obama's memoir.

The Panel felt that the Welsh Government should consider whether they want to continue, as now, funding publishers of Welsh literature or – and this would be more expensive in the short

term, but potentially only in the short term – helping to set up publishers based in Wales to publish internationally, both in terms of the authors they publish and the markets into which they seek to sell.

If, however, the real aim is – as it traditionally has been – to make sure that Welsh writers get a fair opportunity - that talented novelists from Wales will indeed find a publisher, then we need to consider whether that really needs market intervention. That is to say are talented Welsh writers really likely to be ignored by the London publishing establishment or not?

The Panel noted that it seems quite telling that the three books shortlisted for the English language section of the Welsh Book of the Year in 2016 were all published in London, by Faber & Faber. It is possible to identify Welsh writers who have been talent spotted by Welsh publishers – e.g. Cynan Jones and Rachel Trezise – and have gone on to be published in London. Would they have found a London publisher without getting their start in Wales? Probably but not necessarily. What is clear is that publishers in Wales are unable to fully support a publishing career – no author who hopes to make a living from their work is likely to stay with a Welsh publisher as things stand.

The Panel felt that the danger for grant funded Welsh publishing is that it becomes a cosy and complacent small-scale industry which has a minimal influence on the culture of Wales as a whole. However, it needs to be said that - given the current level of funding – and given the wider context of publishing in the UK – that is probably all one can reasonably expect.

One example of the contribution that can be made is the Library of Wales initiative, edited by Dai Smith and published by Parthian. This has been a popular and valuable rediscovery of the largely forgotten Anglo Welsh literature of the past century. This series of books seem to be grant funding at its best – stepping in where the market wouldn't and giving Welsh people today a much needed reminder that there is more to our history than Dylan Thomas.

Distribution

The Panel noted that the WBC Distribution Centre operates commercially, without direct subsidy. WBC distribution is mostly a success story with an effective distribution network. The WBC seem to do a very good job of getting books distributed around Wales, to a whole range of outlets that extend well beyond conventional bookstores.

Clearly the Welsh book buying market alone is not large enough to generate real commercial hits. There is the option of also using a UK wide distributor, but there seem to be some conflicts of interest here, and it's hard to point to examples of books from Welsh publishers that have really sold well into the UK market. Again this points to the question as to whether small Welsh literary publishers can ever be commercially viable. Distribution through the WBC seem to generate fairly consistent sales in the high hundreds per title – which doesn't compare badly pro rata to sales of literary fiction as published by UK wide publishers – but is a long way from commercial viability. New technology has led to an over-production of titles with the consequence that WBC is possibly trying to sell too many titles in a shrinking market.

WBC - Excessively Risk Averse in Some Areas

There seems to be evidence that WBC grant support, in its current form and at current levels, on the one hand enables some books to be published for which there are low levels of demand from readers and on the other hand does not encourage risk-taking and testing of the market.

There was a feeling that the WBC was generally risk-averse and hard funding decisions at times have been avoided. For example, should the in-house design capacity at WBC be totally cut?

Should fewer periodicals possibly be supported by WBC? The Panel agreed that a willingness by WBC to take calculated risks would enable publishers to move forward and to grow the industry. In addition, it would enable WBC and its stakeholders to evaluate better what works and what does not to ensure even unsuccessful risks inform development.

The Panel acknowledged that the WBC block grant is simpler than having to apply title-by title, but meeting the targets associated with the block grant (in terms of number of titles) may be one of the aspects that drives some publishers to publish titles that are less commercial.

Marketing

The Panel felt that more attention was needed to marketing generally by the WBC but at the same time recognising that this was an area where the WBC had to implement efficiency savings during recent years.

As the WBC has completed its business transactions once a book is produced, it does not need to focus on marketing. However, digital publishing involves new marketing skills and different analysis from traditional book marketing. To keep up, publishers need continuing professional development and updated knowledge and the extent to which the WBC contributes to this needs considering and needs to be reflected in how they serve their sector.

WBC Panels and Committees

The Panel agreed that the various WBC Panels and Committees were a success story. They support and help embody the values of WBC, and connect it to parts of Wales well beyond Aberystwyth where the staff are almost all based. They make WBC an organisation which is not just the fiefdom of its chief executive or senior staff. The Panel recognised the distinctive volunteering culture within WBC with Council and Panel members unpaid. In addition, the friends of WBC funds prizes.

Literature Wales (LW)

The Panel met on 17 June 2016 with LW officials including the Chief Executive and a Board Member – the Chair of LW was unavailable. LW representatives were originally due to meet the Panel in May 2016 but LW requested an alternative date as the Chair was unable to attend. During the next six months, numerous attempts were made to arrange a date for the Chair to appear before the Panel but this proved to be unsuccessful. Panel members were extremely disappointed that the Chair of LW, an organisation whose activities and staff are mainly funded by the public sector, was unable to make arrangements to meet with the Panel

The background information presented to the Panel by LW has already been included

It is important to note that the comments shown below were given in evidence to the Review Panel – they are not the comments of the Panel Members themselves.

The following themes emerged from the discussion with LW:

LW's relationship with WBC

- LW confirmed that they specifically work on two projects together, to include Wales Book of the Year and Bardd Plant Cymru. LW confirmed it does not meet with WBC formally but that they do meet as there is a cross-over between reading initiatives and literary incentives such as the Summer Reading Challenge.
- LW also work with other bodies including the National Eisteddfod, S4C and the Welsh Government.

Difference between LW bursaries and WBC bursaries

- LW said that this was where WBC and LW are most closely linked, and that LW bursaries are primarily aimed at allowing writers to take time-out to focus on writing. LW does not require books as evidence of outputs, but look to facilitate writing and life-changing opportunities, whereas WBC provide grants to publish books.

The role of the LW's Board and Management team following Arad's Review which quoted a 'lack of cohesive framework' and had not demonstrated 'strategic leadership'

- LW had been shocked to read the last paragraph of the report, and that they had had a number of follow-up meetings with ACW, and that ACW had acknowledged that the report held a number of contradictions.
- While LW did not agree with the conclusion, it acknowledged that if this is the public perception that it needed to be acted upon. LW's new business plan is about being 'more holistic' and a 'fleet of foot enabler' allowing projects to develop strategically, and that they are keen to adopt a 'link rather than lead' approach.

Relationship between LW and Academi

- LW said that the two organisations have a close relationship but that LW is a national organisation and believe that a group of writers such as Academi needs to be independent.

- LW said there was no fence between LW and Yr Academi, more a hedge and that Yr Academi is key to feeding into LW strategies and focus groups.

Governance Issues

- LW representatives noted that the Chair of LW was very active and holds meetings that are effective and responsible, LW said that it was currently recruiting board members and that a corporate background will be key criterion to who is appointed. LW said that the board was now a cohesive board of individuals with different backgrounds.

Other Observations

- The price of LW courses was competitive
- LW was delivering Welsh Government targets and requirements which include the level of attendance and new opportunities
- People were cited as being LW's top priority. Writers and audiences were of equal importance. Supporting authors and audience development had equal weight and could not be differentiated.
- LW said that there is now a focus group looking at writer support strategies and that it has run public meetings and questionnaires to feed into this. Following the results of the questionnaire it has become apparent that there is more scope to work together and it has been speaking to WBC to explore this.
- The funding for Roald Dahl events had come from the Welsh Government's Major Events Unit to ensure that literature was part of the Year of Adventure.
- LW discussed opportunities in self-publishing (e.g., via Amazon) and also noted some specific Welsh successes in the crime and young adult genres

Following the meeting with LW and after consideration of the written evidence received including their Business Plan and Risk Register, the Panel came to the following conclusions:

Based on the evidence received from LW and the diverse comments on the organisation, the Panel recognised the significant work LW has undertaken with regard to writers' bursaries scheme; writing squads; the National Poet; and Bardd Plant Cymru/Young People's Laureate.

Governance

The Panel received numerous responses regarding issues associated with the governance of LW. The Panel felt that there was no evidence within the LW Business Plan of systemic, strong governance and there was no reference to governance in the LW Risk Register.

The Panel was not clear how active a role the LW Board plays in the running and decision-making of the organisation and it was not very visible. There was concern that the LW Board only meets quarterly. The composition of the Board presented some concerns. The overall profile of membership of the LW board in its first six years does not seem to have had sufficient experience and skill in corporate governance, audit and financial management. That may change as new appointments are made, but it was not clear to the Panel when and how effectively they would be made. The interests of commercial writers and publishers are also not represented on the LW Board and there was also a need for constructive critics on the Board.

The Panel questioned the appropriateness of the executive/governance structure of LW. This led to questions being asked about the general culture of the organisation. The Panel was

disappointed that the LW Chair was not minded to meet to discuss the activities of LW. The Panel also noted the views of respondents to the on-line survey which referred to a sense of entitlement and self-reverence from LW. This led to the Panel questioning whether that was appropriate in the context of offering a cultural service linked to public money in Wales. The Panel therefore felt that the LW did not contain the right composition of skills and experience to run a body spending public money.

Tŷ Newydd

The Panel came to the conclusion that Tŷ Newydd is clearly underperforming but LW is still receiving a grant of over £110,000 per annum in order to make Tŷ Newydd's operations in its current role financially sustainable. After this grant is taken into account it broadly then operates with a relatively small surplus or deficit. From 2006/7 to 2013/14, the ACW grant was just under £100,000 per year and in some years additional grants were made on top of this (eg over £48,000 in 2011/12).

Tŷ Newydd seems to be mainly aimed at 'retired hobbyists' but it was unclear who Tŷ Newydd caters for and why it is receiving public subsidy. It was also unclear how many individuals, who have attended a course at Tŷ Newydd, have gone on to publish a book. This kind of residential literary course is viewed by many to be outdated in the current creative writing boom in the digital age. Tŷ Newydd offers little for professional writers or disadvantaged areas. [despite being located in a convergence area where GDP is low which should provide opportunities for it to do so] This is in contrast to the Irish Writers Centre and NUJ in Wales, who engage with their members to find out what they need. Despite this, the Panel noted the refusal of LW to acknowledge concerns about Tŷ Newydd courses. If Tŷ Newydd is to survive, it needs dynamic new leadership and a clear path to increased financial independence in the shorter, rather than longer term.

The Grade II* listed status and historical associations of Tŷ Newydd (ie with David Lloyd George) was mentioned during discussions and documents relating to the case for the support of Tŷ Newydd. However, these are not literary reasons for funding Tŷ Newydd's losses, they relate to the architecture and historic associations of the property. To that extent, if it is considered a worthy case for Welsh Government subsidy, perhaps it should come from Welsh Government funding allocated to the historic environment of Wales or tourism, rather than literature.

Wales Book of the Year

The Panel agreed that Wales Book of the Year was a good concept in principle and of benefit to writers, publishers and booksellers. Its recent sub-division into separate categories for fiction, poetry and non-fiction is sensible. However, there are significant deficiencies with how it is promoted and a significant question mark as to whether LW is the appropriate organisation to be co-ordinating. There is a sense that it is increasingly underfunded and a palpable lack of enthusiasm for it from LW itself. Recent awards have received very little press coverage and promotional material in bookshops have been scant. These are opportunities missed. The Panel questioned the value of the award if it did not lead to further promotion, prominence, sales and readership.

On 12 January 2017, LW announced that it was undertaking a review of Wales Book of the Year to be completed by April 2017. This announcement was made without any notification to the Welsh Government or to this Review Panel whose work was ongoing. The Review Panel was extremely disappointed with the timing of this review and the lack of consultation

Support for Writers

The Panel recognised that direct support for writers consists of two main strands. These are the writers bursaries administered by LW – which go directly to writers to enable them to work on a book – without necessarily having a publisher involved. Then there are the grants given to Welsh publishers by the WBC, which are paid to writers, effectively as advances for their books. The first of these schemes seems to work very well indeed – it's long established, has an open judging process, and has helped a whole number of writers to move forward with their careers. The second of them, however, is rather more opaque. There seems no obvious reason for the two funding streams to be separate – it's one of the clearest examples of the chronic lack of collaboration between the WBC and LW.

Writers' bursaries seem to be the main element of LW's work but do not account for the organisation's main expenditure. It was unclear to the Panel whether LW's main role was to offer bursaries or to put on events? LW does not seem to have a clear enough focus on developing writers. The Panel came to the conclusion that there was a lack of forward-thinking in terms of searching for and recognising new talent, and that while the bursaries were an effective element of LW, these required minimal administration, and there appeared to be little follow-up dialogue following receipt of the bursary or of propelling writers to the right opportunities.

The world of creative writing is changing rapidly and there is no evidence of LW adapting to this. There seems to be a corporate approach from LW and a disengagement with writers and no meaningful conversation to develop writers. There are global markets for publishing and commercial writing market such as comedy on television (ITV, Netflix etc; ITV delivers a comedy workshop in Wales in partnership with Boom), that illustrate commercial writing in action - whereas it does not appear that LW encourages writing or writers to become commercial.

The Panel was of the view that LW should focus on developing enabling, promoting, encouraging, supporting strategies rather than delivery mechanisms, placing writer and talent development at the core of its activities. Its courses do little to prepare writers to enter a commercial industry, and its relationship with creative writing courses offered at Welsh HE is not clear.

Live Literary Events

The Panel recognised that historically support for live literary events has been the responsibility of LW (and Academi before that). These are a mix of one-off literary events, programmes of literary events that run over a few weeks or months, and literary festivals. Literary festivals are an increasingly popular part of the literary landscape. They vary from large outdoor events taking place over a weekend to series of small events taking place over a week or two in the same town. It would appear that in recent years LW has moved its focus from supporting outside promoters to becoming a literary promoter itself, most notably with the Dinefwr festival. Overall literary festival funding is a little confused – some of it goes through LW and some through the ACW's Festival funding programme, which funds for example the Hay Festival.

The Panel felt that it would be more appropriate for LW to facilitate the running of events rather than to lead on them in accordance with an 'enabling' approach. LW's previous arrangements in relation to live literary events seemed to be more effective. LW's new role as a promoter seems to take up far too much of its resources. It is hard not to see a major conflict of interest when LW has its own commercial stake in the festival market. There was an over emphasis of attendance at events.

Confusion about Role – is LW an Enabler or Deliverer?

The Panel felt that LW seemed uncertain as to its proper purpose. Is it a supporter and enabler for writers and literary promoters, or is it an equivalent to Theatr Genedlaethol Cymru and National Theatre Wales – a national literary company? It seems to be leaning towards the latter, but this is not really a role that makes sense in its art form. While many aspects of literature can be performed, it is not primarily a performing art.. LW's new incarnation as a festival promoter seems to be ineffective, expensive and distorts the market place which operates in some parts without significant public sector subsidy.

The Panel suggested that LW should act as an enabling body rather than being inward looking and aiming to do everything itself. Responses to the Panel's work suggest that very few people in the Welsh literary world seem to be clear about what its purpose currently is and who it serves.

Financial

The Panel was surprised to identify that 75% of LW's budget was spent on its own staffs' salary costs. Having analysed LW spend, the spend on bursaries and literary events does not represent a large proportion of the total spend. The Panel was disappointed with LW's overall record in attracting, by its own efforts, funding from other sources (ie excluding the Lottery funds it administers).

Educational

LW runs a number of educational initiatives. However, it seems that they use a very small number of regular writers.

General

The Panel felt that LW's Business Plan includes very little detail in terms of output, and is more an activity plan than a business plan. There is no evidence of programme evaluation or detail of financial monitoring.

The Panel felt that LW was not engaged with digital developments and there was a need to develop digital audiences. The panel noted that the role of Academi and the relationship with LW was unclear. It was not clear to the Panel what measures were taken by LW following the Arad Report. The LW initiatives that seem to work well – the writers bursaries in particular and, to some extent, the Wales Book of the Year – are long-standing ones in which LW now shows little interest. They seem to survive on sufferance, and, in the case of the bursaries, thanks to their direct lottery funding.

Overall the Panel felt that the missions and goals of the organisation were unclear – and to 'serve people, to serve everyone' is unrealistic and vague. LW is very much an inward looking organization and does not have a strong enough focus on outcomes. LW can no longer be considered a young organisation but the Panel considered that in its evidence it demonstrated a lack of maturity and strategic planning in a number of key areas.

Arts Council of Wales (ACW)

The Panel met with the ACW Chair and officials including the Chief Executive.

The background information presented to the Panel by LW has already been included.

It is important to note that the comments shown below were given in evidence to the Review Panel – they are not the comments of the Panel Members themselves.

The following themes emerged from the discussion with the ACW Chair and officials

General

- Literature is a key element of the arts and a key concern is that some art forms benefit more than others. Support for literature is strong and is made in the knowledge that there is a market failure, but that it is of value to Welsh culture and needs to be preserved. Literature and publishing need to be joined-up and ACW welcomes the Review, which is looking to make the sectors stronger and more strategic.
- In 2011/2012, 3% (£1,247,247) of the total level of ACW grants awarded went to literature, and, despite diminishing overall ACW funding, grants to literature had increased to 5% (£2,197,906) in 2015/2016.
- One of the conditions that shapes ACW's strategy for literature is that there are different levels of people and organisations engaged in this area – from libraries to social engagement - and that is it a complex landscape in terms of a strategic approach. There have been significant in-roads made and that participation of young people is an upward trend.
- There is not a distinct spend allocated to literature, or to any other art form, to allow for a more flexible approach.
- here is no statement in the ACW strategic documents specific to literature or any other individual arts form as this enables the ACW to prioritise and recognise key projects.
- ACW noted that there are very well-established managed processes within ACW for monitoring organisations and make necessary improvements, to reduce the excessive risk and to ensure value for money.
- When organisations are at red risk, ACW will work with the board and the Chair to establish markers and targets with specific outcomes attached, and will also give in-depth focus and new steers.
- ACW has separate measures for economic and cultural value. The level of employment and amount of money that culture contributes in terms of tax is significant and far outweighs the level of public funding being given to support arts organisations.
- ACW noted that there was no data available on all Wales book consumption (online and 'non-WBC' titles, e.g. supermarkets etc)
- ACW confirmed it would be meeting key stakeholders imminently to take the recommendations forward from the Arad Report

ACW's views on its relationship with LW

- Establishing LW was a challenge but from ACW's perspective, there was a need for all partners to be more engaged with each other.
- ACW consider LW as an enabler creating an environment for others to thrive rather than a deliverer of specific functions
- ACW noted that the chief executives of other arts organisations have high profiles within their specific fields, in the same way as is the case at LW.
- ACW recognised that LW needed to address digital developments and digital integration.
- LW focuses on engaging across socially disadvantaged areas, which stretches across all art forms, and that it has recently been working with Somali poets with a focus on the oral tradition. LW undertook a considerable amount of work in Communities First areas.
- ACW disagreed with the Panel's suggestion that LW considers audience participation to be a key measure and noted that this was not a specific objective placed upon them by ACW.
- ACW stated that there could be merit in having more consistency in that ACW receives a remit letter and WBC and LW receive award letters.
- ACW encourages LW to source other funding. In recent years, LW has secured funding from other sources in addition to that from ACW and has become more entrepreneurial. ACW noted that the latest LW business plan is refreshing and there is now a clear focus on what they aim to achieve.
- In the past ACW has questioned the projects that LW has supported and the level of staffing but that they have moved forward and the priorities to which they work are positive
- Support for applications from writers has remained constant despite funding cuts.

ACW's views on LW governance

- According to ACW, LW is under no illusion regarding accountability, as demonstrated by the fact that ACW has identified LW as an organisation at red risk. ACW therefore has influence over LW.
- There have been issues with LW in the past but the Business Plan for 2016-2019 has now evolved and is a far stronger document with a clear vision. ACW emphasised that if an organisation had poor leadership and was not being run properly ACW would react and take action but LW was not in that position.
- ACW confirmed that it had considered whether special measures should be taken, but LW was not in that category, and clarified that if goals and achievements were not met then special measures could be taken. ACW was not legally responsible for boards of bodies it distributed funding but that they do hold them accountable for the funding they receive.
- ACW emphasised that there are some areas of concern in LW's risk register and that the language of the risk register is stark as they do not want issues to be white-washed.

- In response to the Panel's enquiry that the LW Board do not have sufficient background in terms of business and finance, ACW acknowledge that could be strengthened and that governance is constantly evolving. ACW recognised that the LW board was not yet providing sufficient challenges and that the board is aware that it needs a wider range of skillsets.
- The Panel questioned why LW was still referring to itself as a young organisations despite being formed six years ago. ACW explained that LW had always been considered at red risk because it had to move from a membership basis to a national organisation and that this takes time. ACW recognised that work was needed in this respect.
- LW's weakness was governance but its strengths lie in its engagement with the community across different sectors and with its engagement with writers.
- Moving from the Academi set-up to the current set-up had been a success as it has moved from supporting one set of writers (its membership) to serving a broader range of stakeholders.
- ACW suggested that it would make sense for WBC to be governed by ACW. Although the ACW would like the Welsh Government to mandate for a single body with a strategic lead in the policy area, ACW did not want a "command and control" approach, and respected independent responsibilities.
- ACW did not agree that the role of LW should be exclusively, author development and talent development. It should also promote through festivals and literature should be considered a performed art-form. It was important to recognise the whole spectrum of literature. LW had engaged with the creative learning programme which was concerned with raising standards of literacy.
- Although LW was on the right track it needed to engage more with young people. The writers' squads are a huge success and LW engages with schools.
- LW had been successful in terms of measuring impacts from a quantitative perspective but that qualitative evaluation takes longer to assess.
- From an international perspective, ACW recognised that there was a long way to go when considering LW's strategic engagement and connectivity. However, there was a need for dialogues and an analysis of the market to get things moving forward in this specific area.
- ACW was abundantly clear that LW does not have an entitlement to public funding and take seriously the prospect that ACW ultimately hold the budgetary "nuclear button" and could use it, if needed.

Relationship between LW and WBC

- ACW emphasised that LW and WBC are separate organisations and therefore there was no need for ACW to monitor if LW's strategy was aligned to WBC.
- ACW agreed that there was an overlap between the various organisations and work together on some initiatives such as Wales Book of the Year.
- However, there was no formal relationship between both organisations but that they do have meetings. ACW suggested that the formal relationship should be between WBC and LW and there should be more of an operational overlap.
- ACW did not believe that LW and WBC should merge. Both organisations have specific areas of expertise and knowledge but that they should do more together.

Wales Book of the Year

- In response to why Wales Book of the Year only having had 10 Amazon reviews, ACW said that it expected publishers to drive that and to increase sales. Promotion was something that needed to be considered.

Tŷ Newydd

- ACW informed the Panel that Tŷ Newydd had a £110k deficit which is continuing into the future. In response the Panel asked why Tŷ Newydd was being funded indefinitely.
- ACW emphasised that it was never a question of 'neat tying of ends' but it is a property which has now become a space to provide focussed opportunities for writers. ACW acknowledged that it should give consideration to the option of LW ceasing to run or support Ty Newydd.
- ACW noted that five years ago Tŷ Newydd was lurching from crisis to crisis; now it seems to have a more strategic function as part of LW and has a better basis for the future. The strategic focus of Tŷ Newydd was to offer high level access to high quality tutors.
- LW interact with writers. There is a market for the courses offered at Tŷ Newydd although the range of courses need to be scrutinised. It was important to consider the totality of LW's offering including engaging with writers and young people

Following the meeting with ACW and after consideration of the written evidence received, the Panel came to the following conclusions:

ACW role in relation to literature

From ACW's Operational Plan, it appeared that ACW was interested in supporting events with some 5% of ACW's budget going to festivals and events. ACW funds book festivals and reading events in the same way as LW therefore there was an implication that there could be double funding in some areas. The Panel was surprised by the apparent focus of ACW (and LW) on live literary events – this is not the main way in which literature is consumed ACW's data considers literature as a live art-form whereas, in reality, the majority of literature is consumed through the reader experience.

Relationship between ACW and LW

ACW consider LW as the delivery mechanism for literature despite there being very little reference to LW in ACW documents.

The Panel strongly felt that LW should not sit alongside Welsh National Opera, Theatr Genedlaethol Cymru and National Theatre Wales, in the way they are conceived by ACW, as their function is different as production companies. Literature's primary function is not to reach audiences through performance. LW is the only ACW sponsored national organisation at *red risk*, and has always been since it was established. There were currently four organisations in *special measures* and the Panel did not understand why LW was not in that category.

Although ACW accepts that there are issues with LW, as demonstrated by the *red rating* and the fact that they had considered special measures, the Panel was concerned with the insufficient challenge from ACW in dealing with LW as it needs to be accountable for the outputs and outcomes achieved with public funds.

The Panel was concerned that ACW seemed content with LW at 80% towards being on-track and noted that it had taken over six years to get to this current position and that LW was still at *red risk*. While ACW referred to its power to use the option which is ultimately available to it of withdrawing funding, the Panel doubted that ACW would do so and that under ACW's sponsorship, LW's rate of improvement would continue to be slow.

The Panel came to the conclusion that ACW was having difficulty in getting LW to improve its shortcomings and its governance. ACW should be more pro-active, in ensuring that LW's Business Plan and Risk Register are fit for purpose and deliver against required outputs. The distorting effect of the weight ACW puts on attendance at literary events should be modified in its oversight of LW. The Panel identified a need to consider what is the added value of LW, and whether it was the vehicle to enable ACW to support literature without needing to be directly involved.

The Panel suggest that there is a need for ACW to better articulate the role of LW. Based on the evidence received, LW was not achieving as would be expected. Government intervention should only be available to assist where activity would not otherwise be able to happen - and therefore the question should be asked as to whether LW and ACW are acting simply as funding agencies, rather than incentivising others to do things better.

Future Arrangements

The Panel did not agree with ACW's suggestion that LW and WBC might work more productively alongside each other to achieve desired outcomes if the funding of WBC was transferred so that ACW funded both WBC and LW. Given the Panel's views on where ACW and LW currently are in terms of governance issues relating to LW, this option would have unacceptably high risks, and be unlikely to bring benefits. Now is not the time to consider merging ACW and WBC but there should a better interface and co-ordination between the organisations. Consideration should be given to moving some of the activities currently funded by LW to the WBC

Tŷ Newydd

In the last ten or more years, there does not seem to have been any open consideration of whether it makes sense for ACW (and LW since 2010) to continue supporting the revenue deficits and some capital costs of Tŷ Newydd.

The Panel does not feel able to definitively recommend that LW should divest itself of Tŷ Newydd at this stage. However, the evidence received has raised some serious concerns about its viability and its use.

With this in mind, the Panel strongly recommends that LW and ACW should undertake an urgent review of the role of Tŷ Newydd and the value of its continued, long-term, heavily subsidised existence as part of LW. Should this continue, or could the funding that currently goes to Tŷ Newydd be more effectively used to support relevant training and skills initiatives elsewhere? The resulting evidence and conclusions of this review should be put in the public domain.

Digital developments within the publishing industry in Wales.

The following themes emerged from the evidence provided to the Panel by various digital experts listed at **Annex 2**.

It is important to note that the comments shown below were given in evidence to the Review Panel – they are not the comments of the Panel Members themselves.

Digital

- Wales has a lot of potential, but this is constrained by lack of access to the right information.
- Digital marketing of Welsh content needs to be much more co-ordinated. Lolfa are pro-active in getting books published digitally and their books can now be read on Kindle and are available through Amazon.
- Amazon were not engaging with Welsh publishers and that Amazon did not recognise Welsh. An app was developed with the WBC which could make Welsh language books downloadable (as opposed to using Amazon) but, despite the app being built, it is not maintained or promoted. There was no above the line marketing of the app and there was a feeling that the publishers were not fully on board.
- Amazon is a global market and can take up to 80% whereas YouDo was offering an alternative which would only take 10-20%.
- There is a need for publishers to work together coherently and to move forward, and to share best practice to grow as an industry.
- While Lolfa has made its books available digitally, gwales (and other publishers' books) cannot be read on Kindle.
- WBC does not take managed risks; and while there is not a closed-door to the app it was not marketed.
- Public funding currently supports the status quo and not innovation.
- Some publishers do not want to access digital options for fear of jeopardising paper copy sales but are losing out on sales
- Audio books have grown in popularity, and there are great benefits to re-purposing content, with more and more publishers looking to do this.
- E-books are accessible, cheaper and available globally.
- Amazon changed the landscape of publishing completely and gives everyone access to being published
- More people now buy books from Amazon than from bookshops.

Self-Publishing

- There are a number of different platforms for self-published authors.
- Self-publishing bypasses publishers and distributors and enables the author to take complete control with regard to content and price.
- Amazon now quality-assures all self –published material and would not accept anything sub-standard or inappropriate.
- The downside is that there are more books to compete with as the market has increased.
- If a book is good, whether self-published or not, it will get sold, if it is not good then it won't.
- Good design and edit is vital to attract readers
- Making free downloads of the book available will have significant sales-benefits and assist in being able to market the book as a 'best seller'.
- There are different definitions of 'best-sellers' to include by specific category. Book shops now accept self-published books.
- There is an exchange programme through Amazon which facilitates publishers to share skills (e.g. to 'swap' cover design for editing).
- Once a book has been written, there is a need to find an audience. This can be done through blogging and connecting with reader groups and forums.

Observations from Panel following oral and written evidence received

The specific terms of reference for the Review asked the Panel to consider digital developments. It is well documented that the publishing industry has seen dramatic changes over the last decade with significant changes to the publishing business model as a result of the digitalization of reading. The Panel noted the extensive range of views on this subject. The advance of e-books and multi digital platforms calls upon the publishing industry to radically review the opportunities for maximizing market growth.

Publishing in Wales in the future will need to invest far more creative time and energy to link text, audio, video and images to create meaningful publishing opportunities to capture the value of a story. Success in digital publishing will depend upon what future readers will want out of the reading and book experience and whether they wish to have control of the reading experience or be taken along by the author in a more traditional manner. Interactive engagement and self management of narrative will be at the heart of publishing innovation. There is significant opportunities for innovation in this area. Those publishing companies who can leverage digital technology and consumer data for their own publishing ecosystem will see strategic benefits. This is also true for developing multi agency initiatives in the cultural and linguistic domains.

Maximizing digital connectivity allows organisations as S4C, Yr Urdd, WBC and educational providers to create exciting new creative digital clusters which could enhance opportunities for publishing in Wales. The Panel clearly identified that a significant pillar for future investment in

Welsh publishing requires moving text from static to interactive platforms. Digital technology can engage readers with compelling interactivity.

Technology over the last twenty years has fundamentally changed everything. Anything it hasn't changed already will soon. Technology makes it easier to do everything all the time - from distribution to translation – as compared to how it was. The issue is that technology can make things too easy – it makes publishing easy, at the expense of proper editing, and the currency of being a writer is devalued. The arrival of technology in a country like Wales, with poor communications, appears to be the fix all – but underneath there are a number of complexities.

WBC, LW, and the majority of Welsh publishers have been slow to engage with digital opportunities - with notable exceptions of Y Lolfa coming to an agreement with Amazon, and Accent Books, both in signing up talent online and marketing that talent online.

The size of participation for Welsh Language culture, based on Eisteddfod and S4C figures – between 140,000 and 160,000 – would make an ideal size audience to pilot a multimedia Welsh Language online hub, featuring books, films, music, games, apps, magazines and audiobooks.

The Panel found no audiobook output in Welsh publishing, despite the growing market in the UK being valued at between £75 and £91 million. However, the Panel received evidence that some of Wales's successful self-publishers have been approached and funded by Amazon to create audiobook versions of their work.

WBC, LW are not making use of low cost software to create online professional development opportunities for publishers and writers, with communities and forums online to facilitate discussion and learning between these organizations and the people they are meant to support.

Successful digital production in publishing depends on an appetite for experiment, and rapid adjustment in the face of negative feedback, then further experiment. It requires ongoing resourcefulness in problem solving and an understanding of how traditional and digital publishing meld together. The dynamics of such enterprise, built around loosely connected and distributed teams of specialists, often project-based with taste as an arbiter of success, indicate nifty responsiveness as priority. Nifty responsiveness requires funding organisations to be open, non-defensive and proactive about what they don't know. Again, the Panel has little evidence of this, significantly so in the case of LW. Investment in training for digital skills in the publishing sector in Wales was also crucial.

Supporting appropriate digital development within the industry should be a priority with far more opportunities for cross-platform content - creative and distribution. More digital advances are needed – both for writers and publishers.

Self-Publishing

Groups of self-publishers in Wales make heavy use of social media to organise and market their writer-led, grassroots book fairs. This year, Rhondda, Tenby, Llandeilo, Carmarthen, Llangwm, Abergavenny and Crickhowell have hosted such events.

The Panel believes that it would be beneficial to make workshops available on self-publishing and digital publishing. Publishers need to understand about digital publishing and the different markets available to them and training in these areas would facilitate publishing companies to grow.

The administrative arrangements for the Welsh Government support for a Welsh-language daily online news service, as well as *papurau bro* (Welsh language community newspapers).

The Panel was asked to consider the administrative arrangements for supporting the Welsh Language daily on-line news service.

Following Panel consideration of this issue, the Panel advised the Welsh Government in April 2016 that the administrative arrangements for this news service should remain as they are for the time being with the Welsh Government funding continuing to be channelled via the WBC

The then Deputy Minister for Culture, Sport and Tourism agreed with the Panel's advice and the WBC subsequently conducted a tendering exercise to run the Welsh-language digital news service.

In October 2016 the WBC announced that Golwg Newydd Ltd had won the tender to provide the Welsh-language digital news service for the next three years .⁴⁴

Golwg Newydd Ltd have run Golwg 360 their online and digital service, since it was established in 2008⁴⁵

Papurau Bro

As the Panel were only asked to consider the administrative arrangements for funding *papurau bro*, the Panel did not receive evidence from *papurau bro*. However, the Panel concluded that *papurau bro* was a success story and vital in providing opportunities for Welsh-speakers to read about activities in their local communities. Indeed it is widely acknowledged that *papurau bro* are the only Welsh language material read by a number of Welsh speakers. *Papurau Bro* are currently administered by the Welsh Government's Welsh Language Division. Support for magazines as well as Golwg 360 (who work closely with *papurau bro* on a number of initiatives) are funded through the WBC. The WBC therefore could see the advantages of also being responsible for administering *papurau bro* but also stating that the organisation was not pressing for this additional responsibility. The Panel secretariat also discussed this issue with the Welsh Government's Welsh Language Division who were not pressing for any changes.

Although the Panel could see the advantages of the administration of *papurau bro* being moved from the Welsh Government to the WBC they concluded that the current administrative arrangements seemed to be working and there was no reason to change. However, the Welsh Government should keep this issue under review and closer working relationships should be developed between the *papurau bro* and a number of organisations. For example *papurau bro* had already worked closely with Golwg 360 and this should be developed further.

⁴⁴ <http://golwg360.cymru/>

⁴⁵ <http://www.cllic.org.uk/newyddion-news/news-detail?diablo.lang=eng&id=13094>

The support for publishing and literature in disadvantaged areas across Wales

Social Inclusion

Access to culture can have a dramatic influence on social inclusion and equity. Ensuring effective opportunities and participation in a wide range of artistic activities has an important role to play in promoting a more just and equitable Wales. Allowing communities to create narrative which articulates their own stories and values can have a significant effect in helping communities to overcome social exclusion.

The creation, promotion and publication of literature which relates to the specific social and cultural issues of identified groups or communities is central to support inclusion. Encouraging participation in literary events, artistic groups builds resilience and self-confidence. It enhances the opportunities to build individual and group confidence and fosters key generic transferable skills. This of course also bridges the training needs of individuals disaffected by formal education and training and allows them to consider not only new opportunities or self development but also leads to greater self-confidence and higher self-esteem leading to an increased participation in society. This has the potential to instill a far more positive sense of identity for groups who are at risk of exclusion.

Professor Sandy Pentland of MIT has shown how patterns of social ties predict social outcomes⁴⁶ and how sources of health and wealth depend on engagement and exploration. He says: 'the propagation of ideas from person to person is a type of collective intelligence we call culture'. He demonstrates how social networks which focus on collective incentives⁴⁷ can improve idea flow. He and his team can predict from patterns of information exchange between people in a network, how productive and effective that town or organization will be. This has implications for policy and literacy inclusion and might suggest that existing networks like libraries, housing associations and schools could effectively combine their strengths to build stronger community networks, which focus on engagement and exploration. Housing associations in Wales are already training tenants to become classroom assistants and the Film Agency of Wales collaborates with housing associations in areas of deprivation to include local young people in film making.

The Panel noted the immense richness and diversity of cultural activity at local community level across Wales. Indeed, some of the national bodies associated with literature and publishing demonstrated examples of innovative practice. However more can be achieved through seeking greater integration between public bodies such as local authorities, libraries and community groups,

More work needs to be undertaken to understand the constraints within our communities to further support adult literacy and how the promotion of literature can play a role. Whilst the Panel received evidence of how Welsh institutions supported adult literacy it felt that a more coordinated approach was required.

The Panel was particularly interested in the potential of further developing the vast library networks across Wales as key development hubs which could support greater inclusion initiatives and further support adult and digital literacy. There are clearly significant synergies between the current development plans of the library services across Wales and the literature and publishing sector. It should be possible to craft an all Wales programme which would address key

⁴⁶ <https://www.youtube.com/watch?v=HMBl0ttu-Ow>

⁴⁷ <https://www.amazon.co.uk/Social-Physics-Networks-Make-Smarter/dp/0143126334>

Government policy areas such as: digital inclusion, literacy, social wellbeing, culture and creativity and economic wellbeing. The Panel identified the opportunity for sharing best practice on how to create effective and accessible community hubs which could support and enhance literature awareness and also further inclusion strategies. Increased partnerships with libraries across Wales could help to re-energize engagement to develop more community engagement and support inclusivity.

The Panel came to the following conclusions:

The Panel recognised that the majority of publishers are located in convergence areas Ensuring proximity of bookshops to all high schools in Wales was vital. In areas where there are no physical bookshops, pop-up book shops festivals, and book fairs should be encouraged.

It would be money well-spent to provide pre-market guidance and training to publishers. There should be more support for more locally led literary (or largely literary) events in disadvantaged areas. There should also be targeted intervention to develop talent banks linked to literature.

The Panel suggested that there was scope for a bottom up approach to literacy, inclusion and deprivation through housing association staff collaborating with librarians in local areas and working out of local libraries. Housing associations like Taff Housing⁴⁸ are already running training for tenants interested in becoming classroom assistants. Housing associations also have community workers in place in all areas where inclusion and deprivation are issues.

⁴⁸ <https://www.taffhousing.co.uk/events/2016/11/04/classroom-assistant/>.

6. Conclusions and Recommendations

The Terms of reference for this Review instruct the Panel to consider the following:

- The main aims of the Welsh Government in supporting the publishing industry and literature in Wales, in both languages; i.e., what are we seeking to achieve, culturally, socially and economically? Are these aims still fit for purpose in the 21st Century?

After careful consideration of the evidence received, the Review Panel makes the following recommendations. They are designed to build upon current support arrangements where possible, but making changes where needed to ensure that the offer overall is fit for the 21st Century and will maximize the cultural, social and economic benefits of a strong publishing sector and a rich literary culture in Wales, in both Welsh and English.

Main recommendations to the Welsh Ministers

General

- The Welsh Government should continue to provide financial support to the industry in both the Welsh and English languages.
- Support should continue to be provided for both print and digital materials, but digital provision and strategy needs to be significantly improved.
- The importance of appropriate funding from the Welsh Government should be reaffirmed, to promote and encourage innovative opportunities for both literary development and publishing in Wales.
- These are key areas of investment which align fully with the Welsh Government's commitment to the Well-being of Future Generations (Wales) Act 2015 and directly support the strategic priorities set out in its Programme for Government (PfG) Taking Wales Forward 2016-2021:
 - Valuing our renowned bi-lingual literary tradition, enabling it to thrive in the 21st century, ensuring its global reach and supporting access and participation across Wales will contribute significantly towards the following well-being goals – *A healthier Wales; A more equal Wales; A Wales of cohesive communities; A Wales of vibrant culture and thriving Welsh Language; A globally responsible Wales.*
 - In doing so this will support PfG goals for a Wales which is - *healthy and active; ambitious and learning; united and connected.*
 - A strong, innovative publishing industry that provides high-quality jobs, competes internationally and allows professional writers of all backgrounds (in Welsh and English) to develop career pathways in Wales will contribute significantly towards the following well-being goals – *A prosperous Wales, A more equal Wales, A Wales of vibrant culture and thriving Welsh Language, A globally responsible Wales.*
 - In doing so this will support PfG goals for a Wales which is - *prosperous and secure; ambitious and learning; united and connected.*

Changes to the way support is administered

- The Welsh Government should seek agreement from the Welsh Books Council (WBC) that it will take on some of Literature Wales' (LW) current functions, including:
 - Book of the Year (with the aim of increasing its commercial impact, including consideration of the marketing approach required)
 - Bursaries
 - Literary Events / Writers on Tour
 - Provision for children and young people
- This would require additional funding from the Welsh Government, which should be offset by a corresponding reduction in the funding provided to the Arts Council of Wales (ACW) for these purposes (which it currently passes on to Literature Wales).
- Where the above functions rely on third party funding (e.g.; National Lottery funding currently awarded for the delivery of bursaries), agreement should be sought with the Arts Council of Wales, Literature Wales and the Welsh Books Council that ACW and LW will not reapply for this funding at the end of the current award, and will instead support an application from the WBC for the funding needed for delivery of this function in future.
- If the Welsh Books Council's purposes are expanded on this basis, the following would then need to be considered (by the WBC):
 - A change of title to reflect additional responsibilities
 - Appropriate presence at a regional level across Wales
 - A clear and focused digital strategy
 - A clear strategy to promote inclusion across Wales, building on its existing child poverty strategy
 - A talent development strategy
- Once agreed, the Welsh Government would need to reflect the above changes in a revised grant award letter to WBC and a correspondingly revised remit letter to ACW (removing the duties and funding being transferred to WBC).
- With these structural changes, the following would remain with ACW / LW:
 - Ty Newydd Writing Centre⁴⁹
 - Other cultural events and festivals delivered by ACW

Recommendations for stakeholder organisations:

The Publishing Industry in Wales

- The sector as a whole, from micro-enterprises right through to larger companies, needs to develop a more comprehensive focus on innovation, entrepreneurship and connecting with new audiences and readers:

⁴⁹ <http://www.tynewydd.wales/>

- *The sector in Wales should take full opportunity of new initiatives which further enterprise and innovation in digital technology, marketing and publishing.*
- *Opportunities should be actively sought for cross-arts collaboration with artists and entrepreneurs in other creative industry sectors - particularly in local and regional hubs, to further support an inclusive agenda.*
- *The publishing industry in Wales should also look for collaboration opportunities with businesses in other sectors of the digital economy in Wales (e.g.; e-commerce, insurance etc.).*

The Welsh Books Council

- The Welsh Books Council should develop a refreshed, wide-ranging mission to identify and deliver the right support needed for books from Wales in either language, in all regions of Wales - acknowledging that the interventions needed will often be different for Welsh and for English and also for different contexts (e.g.; geography, demographics, stakeholders, audiences etc.).
- With this comes a need for the WBC to review the nature and capacity of the Executive and the governance arrangements, to ensure that both are appropriate to allow the WBC to take its new, expanded mission forward.
- The WBC needs to develop different levels of risk appetite across different functions, to allow for greater managed risk taking and innovation where appropriate. For example, this approach could improve the effectiveness of marketing within and outside Wales; it would also allow the WBC to do more to incentivise publishers to find hits.
- Develop a robust digital strategy and increase digital engagement, including but not limited to:
 - *Supporting the sector as a whole to take full opportunity of new initiatives which further enterprise and innovation in digital technology, marketing and publishing.*
 - *Enabling the sector to find and exploit collaboration opportunities with businesses in other sectors of the digital economy in Wales (e.g.; e-commerce, insurance etc.).*
 - *Engagement with relevant industry bodies in these other sectors in Wales, to consider whether further development of existing skills and expertise is needed to facilitate collaboration with the publishing industry.*
- Set out and implement steps to improve marketing and increase the commercial reach of publishers
- Develop and implement a clear strategy to encourage and develop talent across Wales, including (but not limited to) identifying and advising on possible career paths for writers/authors in Wales, addressing barriers to entry where they exist and ensuring access to appropriate and effective professional development.
- Enhance quality assurance processes even further and embed best practice in this area across its new, expanded range of activities.

- Consider and implement plans to support more innovative / entrepreneurial publishers and writers.
- Consider whether specific, tailored support may be required to meet the needs of micro-enterprises.
- Consider and implement plans to enable and encourage cross-arts collaboration with artists and entrepreneurs in other creative industry sectors - particularly in local and regional hubs, to further support an inclusive agenda.
- Increased presence at a regional level across Wales, including north-east Wales and south-east Wales.
- Develop and implement a clear strategy on inclusion, building on the existing child poverty strategy; this should set out how the WBC will support and enable activities across Wales that promote inclusion, including working with libraries and other delivery mechanisms.
- Investigate the impact of the arrangements in wholesaling within the publishing sector in Wales and other parts of the UK (most notably in England) and develop proposals to address the negative impacts of this.
- WBC support for book fairs should not be limited to Wales, although in-Wales activity is important and should continue.
- The WBC should support the development of missions to key international book trade fairs in the UK and overseas, to establish trading links and build capacity in the publishing sector in Wales. The costs and benefits of these should be reviewed each year and, more fully, after 3 years.
- Develop and increase the training provision for publishers (in areas such as business management, protecting and exploiting IP, marketing etc.)
- Encourage publishers in Wales to establish an umbrella organisation for English-language publishers (similar to Cwlwm Cyhoeddwy'r Cymru for Welsh Language publishers), and / or investigate the benefits of joining one of the existing, UK level representative organisations
- Seek to improve the links between the sector and the mainstream media in Wales. The strengthened organisation should have stronger relationship with the Public Service Broadcasters across both languages.

(For example, opportunities could be considered for books to coincide with television series/reviews etc.; there is currently disparity between Welsh and English coverage - e.g.; S4C's Heno has a regular item on current authors from Wales, there is no BBC Cymru Wales English language TV equivalent).
- Review the in house services currently provided by the Welsh Books Council to publishers (e.g.; editing, design). Consider on an individual basis whether these services should continue
 - at the current level or at all?
 - *Should more use be made of grants to publishers to enable them to engage such services from commercial providers?*

- *Explore new alternative means to grow the economic value of the Welsh publishing sector.*

(We note that well over half of WBC's staff costs relate to these services provided to publishers, rather than to core running costs.)

- Develop and implement proposals to increase the level of funding from both private and third sector sources (in consultation / partnership with LW or others, where appropriate).

(The level of funding obtained by both WBC and LW from private and third sector sources seems low. Both bodies are overwhelmingly funded by Welsh Government grants, either direct (WBC - which has also succeeded with occasional Lottery applications itself) or via ACW (LW - to which ACW also delegates the distribution of a limited amount of National Lottery funding). Both have made and continue with efforts in this area, but with limited success in terms of overall sums (excluding funding from the National Lottery, which itself is public money, albeit not Welsh Government grant). There are, of course, also some non-financial benefits to funding raised from non-public sector sources.)

- The Welsh Books Council should continue to administer the tender to provide the Welsh-language daily online news service
- Identify gaps in existing data on the publishing sector in Wales and take steps to address these data gaps, developing a complete and regularly updated baseline of data to inform future policy considerations (e.g.; across Wales and by region: total number of employees in full-time / part-time / freelance employment; total numbers of books published; total numbers of sales).

The Arts Council of Wales

- A clearer focus on engagement with literature is needed (having mandated LW to deal with it, ACW itself does not seem to consider it in depth or as a priority).
- ACW should review the scope, scale and delivery of the support for literature that it funds, in consultation with LW, WBC and other stakeholders. This should include the following:
 - *Defining a new, more focussed core literary 'mission'; one takes account of the transfer of key functions from LW to WBC and sets goals that place a much greater emphasis on outcomes.*
 - *Revisiting LW's relationship with authors and writers in Wales. This should include issues of representation, providing accessible resources and how best to support the professional development of authors and writers, on an adaptable, 'needs led' basis, in an environment where the world of creative writing is changing rapidly.*
 - *Can LW become an 'enabling' organisation, as intended?*
 - *Reconsidering the roles of both ACW and LW in supporting literary festivals. LW especially is meant to be an enabling body, but this is a good example of it acting more as a deliverer of events than an enabler of others to do so. In part this seems driven by an undue focus within LW on attendance numbers at literary events as a benchmark for success in supporting literature. This is misguided. These events are important tools for literature, audiences and writers, but they are not the primary means of mass literary*

consumption; success in increasing engagement with Welsh literature should not principally be measured in this way.

- *Reconsidering whether 'national company' status is appropriate for LW, following the transfer of key responsibilities to the WBC.*

(LW is much too inward looking, with not enough focus on outcomes.)

- Better communication is required between ACW and WBC – a Memorandum of Understanding should be developed to help underpin and achieve this.
- Strengthen oversight of LW's governance and accountability and improve monitoring of what is being achieved with the funding ACW gives to LW / literature.
- ACW should put its grant award letter to LW into the public domain in the interests of transparency.
- The 2016 ARAD report 'Research into international working in the literature sector in Wales'⁵⁰, should be published in full (it is currently only available on request to Wales Arts International; only the Executive Summary is in the public domain).
- We welcome the recommendations of the ARAD report, which should be kept under review to ensure they are delivered upon.
- We welcome ACW's response to the ARAD report, in which it acknowledges its role in delivering against the report's recommendations and commits to specific actions to ensure that organisations come together as needed to do so. These commitments should also be kept under review:
 - *The Arts Council proposes to bring together the key stakeholder organisations in Wales to workshop a new shared and ambitious international engagement strategy, one based on a greater clarity and complementarity of roles. This will be followed by an event to build on the findings and recommendations of the report and initiate some next steps.*
 - *To carry on the engagement working with the wider literature and publishing community which the report engendered.*

Literature Wales

- Funding for previously core functions including Book of the Year, Bursaries, Literary Events / Writers on Tour and provision for children and young people to be moved to the WBC (via the provision of additional funding to the WBC from the Welsh Government for that purpose, offset by a corresponding reduction in the funding provided to the Arts Council of Wales (which it currently passes on to Literature Wales for these purposes).
- Where the above functions rely on third party funding (e.g.; National Lottery funding currently awarded for the delivery of bursaries), Literature Wales and the Arts Council of Wales should not seek an extension of this funding at the end of the current award. They should instead

⁵⁰ <http://www.wai.org.uk/news/6883>

actively support an application from the WBC for the funding needed for delivery of this function in future.

- Improve governance and accountability

(There is a clear need to redress the balance between the Board and the management team, which is currently too dominant.)

- Strategic planning needs to be refined
- Detailed analysis should be undertaken of how LW's budget is currently distributed

(75% of LW's budget is spent on own staff salary costs.)

- Consider how to support more innovative / entrepreneurial writers.
- As necessary, develop and implement proposals to increase the level of funding from both private and third sector sources (in consultation / partnership with WBC where appropriate).

Working with ACW, critically re-consider the role of Ty Newydd – funding that currently goes to Ty Newydd could go to more effective and relevant training and skills initiatives elsewhere.

(It appears that ACW and LW have never considered whether the ACW's ongoing annual subsidy to LW for Ty Newydd - of well over £100,000 - is valid in terms of outcomes achieved. Nor have they considered alternatives - e.g.; whether they should divest themselves of Ty Newydd. LW and ACW both seemed unwilling to acknowledge the panel's concerns about the relevance and accessibility of Ty Newydd courses.)

- Working with ACW, critically reconsider the status of The Welsh Academy.

The Welsh Government – other recommendations

- Support mechanisms such as Overseas Business Development Visit Support (OBDV), which enable businesses to undertake business development visits relevant to overseas markets, should be amended so as to allow consideration of applications from publishers to attend and have a formal presence at international book trade fairs, especially London (which is focussed on overseas markets despite being held in the UK) and Frankfurt.
- This will require appropriate value for money considerations for the sector (i.e.; lower than current Welsh Government guidelines for other industries), acknowledging that the potential arising from initial attendance will usually have a payback over the longer rather than the immediate term.
- Amend the grant award letter to WBC to reflect the recommendations set out in this report; correspondingly, amend the remit letter issued to ACW, removing the duties and related funding being transferred to WBC.
- It is vital that publishing and literature are considered in the development of the new curriculum.
- Strengthen opportunities for Welsh publishers on procurement framework.

- Papurau Bro should continue to be administered by the Welsh Government's Welsh Language Division
- Building on the recommendations of the ARAD report, support is needed for the translation of Welsh language literature into English - as a bridge language as well as a target audience – and also for the translation of literature from Wales into other, international languages. This could have cultural as well as economic benefits and add value to the development of the new curriculum. The Welsh Government should consider options for providing or facilitating this support.
- Approx. five years from now the Welsh Government should commission another exercise broadly similar to this one to look widely across the field again, in light of the experience of the next five years and the ever-developing prospects for the future.

Annex 1 : Overall Landscape of Publishing and Literature

The landscape of literature starts with the writer and ends with the reader (or vice versa). An overview of the publishing process is provided here, to better understand the role of funding in this particular ecosystem.

The Writer

The writer creates a novel or short story or poem; this will ultimately be the Intellectual Property (IP) on which the publishing ecosystem is based. There are various stages within this writing process, some of which may receive public funding:

Creative Writing

In order to improve their craft, writers may take advantage of creative writing teaching. This is offered by Universities, adult education and by commercial providers. There are also a number of residential courses available. In Wales there is Tŷ Newydd⁵¹, the National Writing Centre of Wales. This is a residential creative writing centre in Llanystumdwy, which receives significant, ongoing funding from LW.

Writing Bursaries

Once a book is at least partly written - and if they have a reputation or an impressive sample of work - writers may apply for a grant to help with the writing process. This could be a literary bursary from LW or an author grant administered by the Welsh Books Council (WBC). The literary bursaries, in particular, have a strong track record of helping new authors into print.

What Next?

Once the book is written, the author then has to find a publisher. If they are already established, their book may already be contracted to a publisher either in Wales or outside (usually London). If they have ambitions to be published outside Wales, they will probably send their work to a literary agent in the first instance.

The Literary Agent

A literary agent will take on a writer if they see them as commercially viable – they typically charge 15% commission on whatever deal they can make for a writer. The agent will normally attempt to sell to a London publisher - as Welsh publishers typically don't pay enough to make it worth an agent's while. They will also usually be in charge of finding screen and translation deals for their clients. Wales does not have literary agents of its own: this is a wholly commercial sector of the business. There are several Welsh agents working for London companies, who may pay particular attention to Welsh writers, but that's as good as it gets.

The Publishers

London Publishers. London is one of the world's great publishing centres and offers extraordinary opportunities for a writer. As things stand, any writer in Wales who wants to make a living simply from their books will only achieve this by going to a London publisher. Welsh publishing is a cottage industry by comparison and lacks the marketing power to create bestsellers. It is also, of course, exclusively Anglophone. The London publishing business is very rarely subsidised – though there are some smaller presses, particularly poetry publishers, who do receive public funding.

⁵¹ <http://www.tynewydd.wales/>

Welsh Publishers. There are a dozen or so significant Welsh publishers. Almost all of them are to some extent subsidised (a notable exception is the avowedly commercial Accent Press). In return for their subsidy they are expected to focus on publishing books of Welsh interest. Therefore some Welsh authors will feel that their work is best suited to a Welsh publisher. This will certainly be the case if they write in Welsh. Writers who live in Wales may also feel – with some justification – that Wales-based publishers are more likely to pay attention to them.

Other parts of the UK outside of London have significant publishing enterprises such as Edinburgh and Oxford – these are cities on a more “Welsh scale” than London. As part of its deliberations the Panel noted a similar report for the publishing and literature sectors in Scotland which was published in 2015.⁵²

Self-Publishing A further option that is becoming more and more popular is for writers to publish themselves, either digitally or in print or both. For some, this is a positive choice: they relish the control that self-publishing offers. For others, of course, it’s the last option when they’ve been turned down by conventional publishers.

The Publishing Process

Editing. This is the process whereby a publishing editor works with the author to tighten and improve their manuscript. Editing standards within Welsh publishing are distinctly variable: there are some very good editors and some very poor ones. Arguably there has been too little focus on editorial work in publishing in favour of a focus on the more obviously visible areas like design.

Design. The WBC has presided over something of a renaissance in design and production values for Welsh publishers. By offering in-house expertise the WBC has helped to raise standards across the board so that almost all Welsh publishers are producing books to a professional standard (which was certainly not the case a decade or so back).

Marketing. This is the process of getting books from the publishers into bookshops and onto the internet. One unwelcome effect of a subsidised publishing industry is that very little marketing is done. Books are not expected to make money and consequently they very rarely do. As a result the visibility of Welsh publishers in the shops and on the internet is generally very poor. There is the odd exception, but they largely prove the rule.

Publicity. The process of getting press and media attention for books. Again, as with marketing, this is an area that suffers in the subsidised economy. In addition, and perhaps more importantly, – it suffers because of the lack of a developed Welsh cultural media. There is simply no real popular forum for Welsh books to be reviewed. Greater collaboration between publishers and forums such as Wales Arts Review should be considered

Distribution

Once the books have been edited, designed and printed, it is over to the distributors to get them into the shops and on Amazon et cetera. For distribution within Wales the big player is the WBC, that has built a successful business distributing the works produced by Welsh publishers around Wales. The WBC does a good job of reaching both bookshops and other outlets – arts and crafts centres, museums etc – that other distributors do not reach. The WBC does not distribute outside Wales, so in order for Welsh publishers to have a Britain-wide hit they would need to use one of

⁵² <http://www.creativescotland.com/resources/our-publications/sector-reviews/literature-and-publishing-sector-review>

the several large commercial distributors who service the whole of the UK. There can be issues of exclusivity when a publisher wants to deal with both the WBC and a UK-wide distributor.

Sales

a) **Bookshops.** There are a number of good, small, independent bookshops spread around Wales, often specialising in Welsh language and Welsh published books. There are a handful of chain stores in the larger towns – Waterstones mostly – that generally have no more than a token offering of Welsh language and Welsh published material

b) **The Internet.** The big player here is obviously Amazon. Some Welsh publishers have had success promoting their books via Amazon – both physical additions and digital ones – but for the most part they are outmuscled by the marketing departments of the big London publishers. Significantly some of the self-publishers appear to have done better with selling e-books via Amazon than the established Welsh publishers. There has been an effort made to establish a retail platform for books from Wales - gwales.com. Although use of the service is growing there are limitations and there is room for improvement – for example, gwales digital editions are currently delivered in a non-standard format which may be hampering sales.

c) **Bookfairs.** These are a burgeoning phenomenon – regional events often specialising in small press and self-published work. While hardly a major sales driver, these do point to the health of the reading culture generally. They rarely receive much in the way of funding.

Live Events

Once a book has been published, another area of the literary landscape to be explored is that of live events. These range from poetry readings in the back room of a pub – sometimes subsidised by Literature Wales 'writers on tour programme – to established literary festivals like Hay and the Laugharne Weekend, both of which receive subsidies from the Arts Council of Wales (ACW)

Translation

Finally, once a book has been published, Welsh publishers, perhaps aided by the grant funded Wales Literature Exchange, will attempt to find foreign publishers who will pay for the rights to translate and publish a book. Such deals will often be made at international publishing trade fairs – e.g. the London book fair and the Frankfurt book fair. Welsh publishers have attended both of these from time to time, sometimes supported by grant funding, and with varying degrees of success. For the most part it's the more commercially successful books that are picked up for translation and as noted earlier Welsh publishers rarely have such titles, though there are notable exceptions.

Readers

Readers can access books from libraries, bookshops and the internet. Most readers in Wales read much the same books as people do across the UK – mostly from popular genres like crime, romance, cookery, self-help etc. Most readers in Wales have limited exposure to the books published by Welsh publishers. As noted above they don't receive the same level of marketing and publicity support as London-published blockbusters. However, libraries, book fairs and festivals – not to mention the educational sector – do their best to give Welsh writing some kind of platform at least. As have initiatives like the Welsh Book of the Year. And, of course, those looking for literature in Welsh will inevitably have a different relationship to the marketplace.

Annex 2. List of those with whom discussions were held

Welsh Books Council

Professor M. Wynn Thomas – Chair, Welsh Books Council
Elwyn Jones – Chief Executive, Welsh Books Council
Lucy Thomas - Head of Grants, Welsh Books Council

Arts Council of Wales

Phil George – Chair, Arts Council of Wales
Nick Capaldi – Chief Executive, Arts Council of Wales
David Alston – Arts Director – second time

Literature Wales

Lleucu Siencyn – Chief Executive, Literature Wales
Elinor Robson– Deputy Chief Executive, Literature Wales
William Ayot - Director of Management Board, Literature Wales

Wales Arts International

Nicola Morgan - Co-Head of Wales Arts International

Publishers

Garmon Gruffudd – Y Lolfa
Caroline Oakley -Honno
Richard Davies– Parthian
Mike Felton - Seren
Jonathan Lewis - Gwasg Gomer
Gwilym Boore - Gwasg y Dref Wen
Hazel Cushion – Accent Press
Elwyn Williams – Cwlwm Cyhoeddwy
Elena Gruffudd – Cwlwm Cyhoeddwy

Magazines

Gwen Davies – New Welsh Review
Emily Trahair – Planet
Dylan Iorwerth – Golwg
Robert Rhys – Barn

Digital

Marc Webber, Digital Entrepreneur
Iain Tweedale – Head of Interactive and Learning, BBC Digital
Nia Davies (ND) – Executive Producer – Bitesize, BBC Digital
Christoph Fischer – Self Publisher and Festival organiser

Welsh Government officials

Ann Evans - Head of Branch - Welsh in Education Resources, Department for Education & Public Services, Welsh Government
Peter Owen, Head of Arts Branch
Iwan Evans, Senior Policy Officer, Welsh Language Division

Others [Interviewed by individual Panel Members, then reported in writing and verbally to the rest of the panel]

Jon Gower
Gwyneth Lewis
Peter Finch
Judith Barrow and Thorne Moore – Honno Authors

Annex 3 : Evidence Received

Written Evidence from Stakeholders

Myrddin ap Dafydd - Gwasg Carreg Gwalch
Garmon Gruffydd – Y Lolfa
Gwilym Boore – Gwasg y Dref Wen
Elwyn Williams - Cwlwm Cyhoeddwy'r Cymru
Karl Drinkwater – Publisher
Emily Trahair – Planet
Dylan Iorwerth – Golwg

Other Written evidence analysed by the Panel

The Review of Higher Education Funding and Student Finance Arrangements in Wales (Diamond Review) September 2016
Arad Report - Research into international working in the literature sector in Wales
Potts and Cunningham Welfare Model
Mintel Report - Books and E-Books – and Executive Summary – May 2016
Concentric Circles
Welsh Books Council Annual Report 2015
Welsh Books Council Operational Plan 2016-17
Welsh Books Council Strategic Plan
Welsh Books Council – detailed breakdown of grant recipients and level of grants 2014/2015 & 2015/2016
Welsh Books Council – Clawback process for Grants payments
Welsh Books Council- Sale figures of the bestsellers in children and adults (Welsh and English) during the period 2005/06 - 2014/15.
Welsh Books Council – detailed breakdown of grant recipients and level of grants 2014/2015 & 2015/2016
Arts Council of Wales Annual Report 2015-16
Arts Council of Wales Remit Letter 2016-17
Arts Council of Wales Operational Plan 2016-17
Arts Council of Wales – Radar Report and Risk Ratings– Literature Wales
Arts Council of Wales – statistics of lottery funding of literary festivals and events
Arts Council of Wales - Review of Welsh Government's support for Publishing and Literature: a submission from the Arts Council of Wales
Literature Wales – Annual Review 2014-2015
Literature Wales – concluding comments
Literature Wales Business Plan 2016-2019
Tŷ Newydd Business Development Plan 2016 – 2019
Literature Wales Activity Plan 2016-2019
Literature Wales Risk Register 2016
Literature Wales Governance, Structure & Management
Literature Wales Fundraising strategy 2016
Tŷ Newydd Business Development Plan
Literature Wales – Community Participation Project
Literature Wales Monitoring and Evaluation Strategy 2016
Literature Wales – Budget 2016-2017 & 2018-2019
Literature Wales Communities First Programmes
Literature Wales – Management Board minutes – July 2015- April 2016
Literature Wales activity attendance – 2015-2016
Literature Wales Writers; Bursaries 2011-2016
Literature Wales Writers' Bursaries statistical snapshot

Literature Wales – South Wales Literature Development Initiative - three case studies
Writers participating in Literature Wales activity – statistics
Literature Wales – International update
Literature Wales response to Arad report into international working
Literature Wales Directors biogs
Literature Wales - Tackling Poverty through Culture Projects April 2015 – October 2016
Literature Wales -Roald Dahl 100 Wales: Invent Your Event Wales-wide engagement
Literature Wales - Roald Dahl 100 Wales: Invent Your Event – update on Welsh Government
Targets September 2016
Literature Wales - Her 100 Cerdd 2016 Audience Reach
Literature Wales Two Culture Hive Case Studies on participation projects
Literature Wales -Writer Support Consultation – Summary of comments and suggestions 2016
Literature Wales - Ideas for Writer Support remodelling – October 2016
Literature Wales – Chief Executive’s statement
Literature Wales – response to Panel questions – September 2017**
Personal letter about Tŷ Newydd from James Rice
Literature Wales Writers’ support – background information
Radio Wales – ‘Writing the future’ programme on Literature Wales’ outreach programme
The Bargoed Miracle (provided by LW as supporting evidence)

Publishing and literature in Wales

About you

Os yw'n well gennych i gwblhau'r arolwg yn Gymraegewch i'r dudalen hon.

An independent panel has been established to review the Welsh Government's support for publishing and literature in Wales. This is not simply a review of funding provided. The review will look at the Welsh Government's current cultural, social and economic aims in supporting the publishing industry and literature in Wales and whether these are being achieved. It will also look at:

- **digital developments within the publishing industry and whether the current system of support is fit for the modern industry**
- **support for publishing and literature in disadvantaged areas across Wales.**

Further information about the review, the members of the Panel and the full terms of reference can be found here: [Support for publishing and literature review](#)

The review was launched earlier this year, with the intention of reporting to ministers in the autumn. The Panel has met with a number of organisations and stakeholders, but is keen to hear from anyone who has an interest in publishing and literature in Wales. This short questionnaire has been launched to allow you to write to the panel directly. This survey will be available until 31 August 2016, please feel free to make others aware of it. After this date the Panel will consider the responses received and this will feed into the final report to ministers later in the autumn.

Questions 1, 2 and 3 are required. Please answer as many of the other questions as you wish, but it would be extremely helpful if you could choose answers for questions 5 to 9. Answers up to 10,000 characters are possible for questions 11 through 14, but please be as concise as possible.

* 1. Please tell us where you live:

* 2. Please indicate your age group, as of 31, August 2016:

* 3. Which of the following describes you? Some roles may overlap; please tick all that apply.

- Reader
- Author
- Journalist
- Publisher
- Distributor
- Retailer
- Student
- Educator (if so, please indicate which sectors you work in below)
- Other (please specify)

Publishing and literature in Wales

Educator sectors

* 4. What sectors do you work in (tick ALL that apply)

- Primary
- Secondary
- Further Education
- Higher Education
- Private sector training provider
- Other (please specify)

Publishing and literature in Wales

Language and format

5. Please indicate which languages you are interested (tick ALL that apply)

- Welsh language literature and publishing
- English language literature and publishing
- Literature and publishing in other languages (please specify)

6. Which publishing formats are you interested in? (Please tick ALL that apply)

- physical publishing (for example - printed books and magazines, in hard copy)
- digital publishing (for example - e-books and other written content available for electronic devices online)
- Other (please specify)

Publishing and literature in Wales

Genres

In very broad terms, which genres are you interested in?

Separate categories are shown below for material aimed at “Children and young people” and “Adults” (please tick ALL that apply, in one or both of the lists):

7. Children and young people

- News and current affairs
- Topical interest (e.g.; sport, music, TV, film, gaming, technology)
- Educational
- Fiction
- Non-fiction
- Poetry
- Other (please specify)

8. Adults

- News and current affairs
- Topical interest (e.g.; sport, music, TV, film, gaming, technology)
- Educational
- Fiction
- Non-fiction
- Poetry
- Other (please specify)

Publishing and literature in Wales

Activities

9. How often do you do the following? (Please pick one option for each)

	Never	Occasionally	Regularly
Buy hardback or paperback books	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Buy daily newspapers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Buy other magazines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use library services to read or borrow books	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use library services to read newspapers or magazines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Buy electronic books	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Buy electronic magazines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Read free online news and current affair services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Read other free online content on subjects of interest (e.g. blogs)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Subscribe to online book services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Subscribe to online magazines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Subscribe to fee based online news and current affairs services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attend a free literary event or festival	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attend a paid for literary event or festival	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Publishing and literature in Wales

Support for publishing and literature in Wales

The main aspects of support for publishing and literature in Wales are summarised [here*](#) ([summary of support - opens in new window](#)), including links to more detailed information.

* The support for publishing provided by the Welsh Books Council includes the administration of additional grant funding provided by the Welsh Government to support the Welsh-language press. A Welsh language online news and current affairs service was established with this funding. This is currently run by Golwg Newydd Cyf. and is called Golwg360. The current franchise runs from 2014 to March 2017.

Please review the summary of support before continuing.

* 10. Please tick here to confirm that you have read the summary of support

Yes

No

Answers up to 10,000 characters are possible for questions 11 through 14, but please be as concise as possible.

11. In your view, what are the main challenges faced by the publishing industry and literature in Wales? These could be cultural, social, economic or of another kind.

In the next 2 questions, please comment on as many aspects of the support provided (or needed) for publishing and literature as you feel necessary.

12. Which aspects of the support currently provided for publishing and literature are working well (and why)?

13. Is there anything that should be done differently (and, if so, why)? Please explain what the outcomes would be of making the changes you describe.

14. Is there anything else you would like the Panel to consider?

On behalf of the review Panel, thank you for taking the time to complete this questionnaire.

Annex 5 : Quantitative and Qualitative Analyses of responses to Questionnaire

Section 1 : Introduction and Overview

As part of gathering evidence the Panel decided to issue an on-line bilingual survey which ran during July and August 2016. It invited written responses to 14 specific questions, set out in a questionnaire that provided background to the Review and its remit. Respondents were also invited to provide additional supporting information.

Responses to the Call for Evidence have been detailed, informative and thought provoking. They are a valuable addition to the evidence base. As outlined below the questionnaire attracted a remarkable response and was therefore a crucial part of the review process. A copy of the bilingual questionnaire is attached at **Annex 4**.

The statistical analysis includes separate information for the Welsh-language and English language questionnaires. Comments received from respondents are currently presented in the language in which they were provided. *[These will be translated in due course]*

Section 2 : Statistical analysis of responses and responses to call for evidence questions

Overall there were 829 responses received, 498 responses in English and 331 responses in Welsh.

Question 1: Please tell us where you live.

English language responses showed highest response rates from Cardiff (20%), Ceredigion (12.2%) and Outside Wales (11.6%) and Welsh language responses showed highest response rates from Gwynedd (30.5%), Ceredigion (23%) and Cardiff (15.4%). Table 1 and 1a and Figure 1 and 1a provide the statistical breakdown of responses by local authority area. No respondents skipped the question.

Table 1: Statistical analysis of call for evidence responses by local authority area (English Language responses)

Please tell us where you live:		
Answer Options	Response Percent	Response Count
Blaenau Gwent County Borough Council	1.2%	6
Bridgend County Borough Council	2.4%	12
Caerphilly County Borough Council	2.0%	10
The City of Cardiff Council	20.7%	103
Carmarthenshire County Council	4.4%	22
Ceredigion County Council	12.2%	61
Conwy County Borough Council	1.6%	8
Denbighshire County Council	1.8%	9
Flintshire County Council	2.6%	13
Gwynedd Council	4.0%	20
Isle of Anglesey County Council	1.0%	5
Merthyr Tydfil County Borough Council	0.4%	2
Monmouthshire County Council	2.0%	10
Neath Port Talbot County Borough Council	1.2%	6
Newport City Council	2.4%	12
Pembrokeshire County Council	4.0%	20
Powys County Council	6.2%	31
Rhondda Cynon Taf County Borough Council	3.0%	15
City and County of Swansea	6.0%	30
Torfaen County Borough Council	1.0%	5
Vale of Glamorgan Council	7.0%	35
Wrexham County Borough Council	1.0%	5
Outside Wales	11.6%	58
<i>answered question</i>		498
<i>skipped question</i>		0

Figure 1 Statistical analysis of call for evidence responses by local authority dddd (English Language responses)

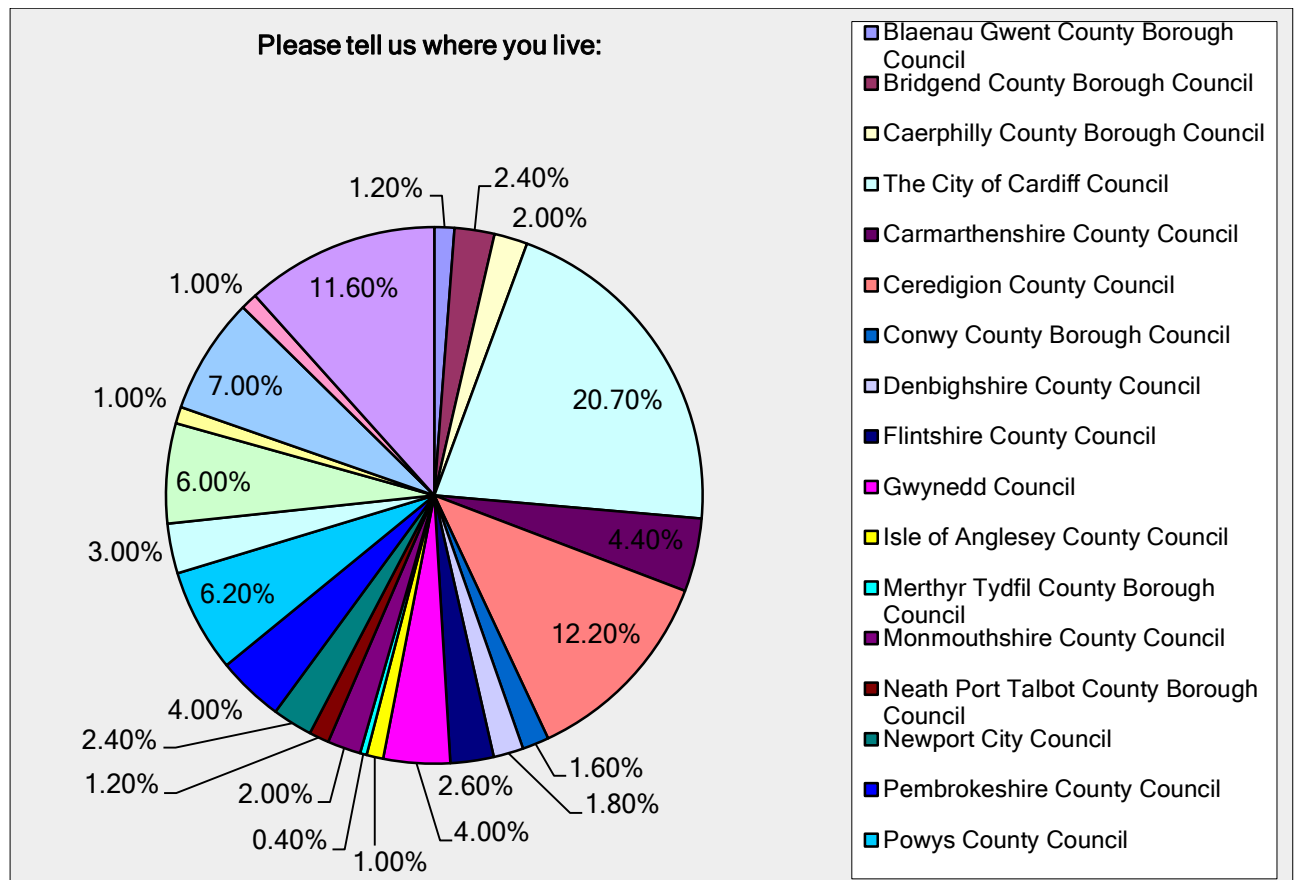
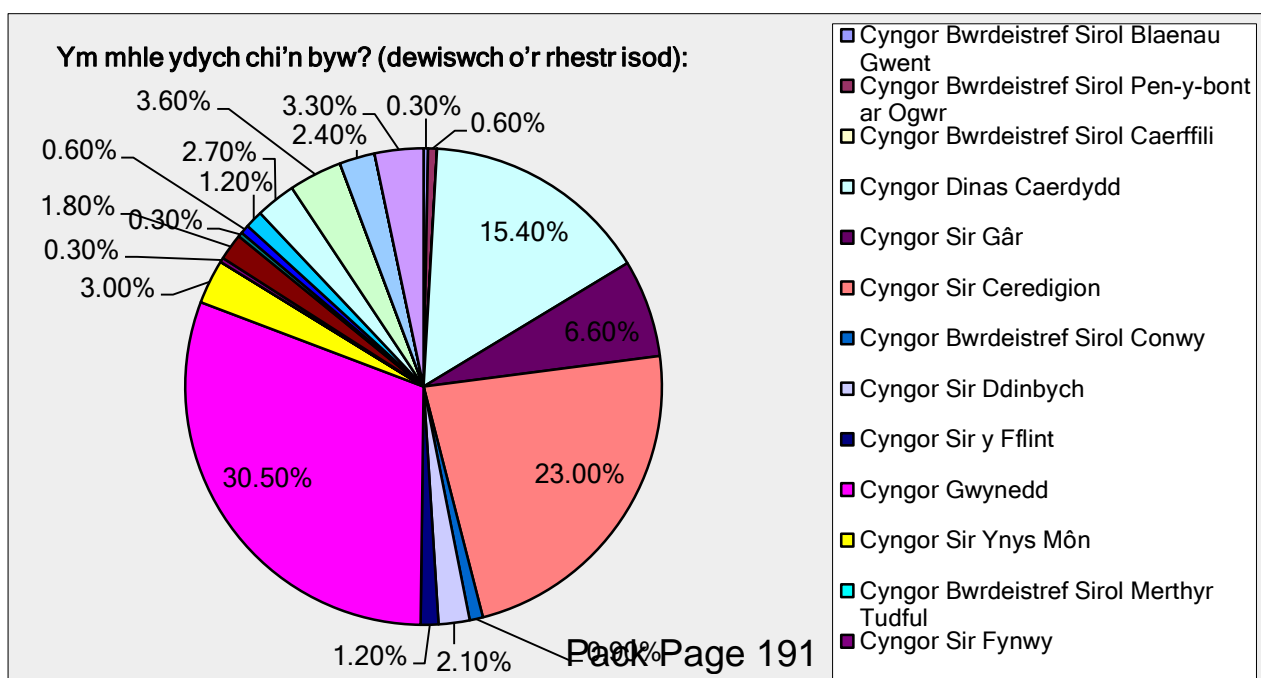


Table 1a : Statistical analysis of call for evidence responses by local authority area (Welsh-language responses)

Ym mhle ydych chi'n byw? (dewiswch o'r rhestr isod):		
Answer Options	Response Percent	Response Count
Cyngor Bwrdeistref Sirol Blaenau Gwent	0.3%	1
Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr	0.6%	2
Cyngor Bwrdeistref Sirol Caerffili	0.0%	0
Cyngor Dinas Caerdydd	15.4%	51
Cyngor Sir Gâr	6.6%	22
Cyngor Sir Ceredigion	23.0%	76
Cyngor Bwrdeistref Sirol Conwy	0.9%	3
Cyngor Sir Ddinbych	2.1%	7
Cyngor Sir y Fflint	1.2%	4
Cyngor Gwynedd	30.5%	101
Cyngor Sir Ynys Môn	3.0%	10
Cyngor Bwrdeistref Sirol Merthyr Tudful	0.0%	0
Cyngor Sir Fynwy	0.3%	1
Cyngor Bwrdeistref Sirol Castell-nedd Port Talbot	1.8%	6
Cyngor Dinas Casnewydd	0.3%	1
Cyngor Sir Penfro	0.6%	2
Cyngor Sir Powys	1.2%	4
Cyngor Bwrdeistref Sirol Rhondda Cynon Taf	2.7%	9
Cyngor a Dinas Abertawe	3.6%	12
Cyngor Bwrdeistref Sirol Torfaen	0.0%	0
Cyngor Bro Morgannwg	2.4%	8
Cyngor Bwrdeistref Sirol Wrecsam	0.0%	0
Y tu allan i Gymru	3.3%	11
answered question		331
skipped question		0

Figure 1a : Statistical analysis of call for evidence responses by local authority area (Welsh Language responses)



Question 2: Please indicate your age group, as of 31, August 2016.

The distribution of responses to this question is indicated in Figure 2 and Figure 2a. No respondents skipped the question. Highest response rates in the English language came from the 45-54, 35-44 age groups, closely followed by the 25-34 group. Highest response rates in the Welsh language came from the 45-54, 35-44 age groups, making up more than 50% of all responses. Responses in 25-34 and 55-64 brackets were approximately equivalent.

Figure 2 : Call for evidence responses by age (English Language responses)

NB: Figures have been rounded to the nearest tenth of per cent. The sum of the constituents may not add up to 100%.

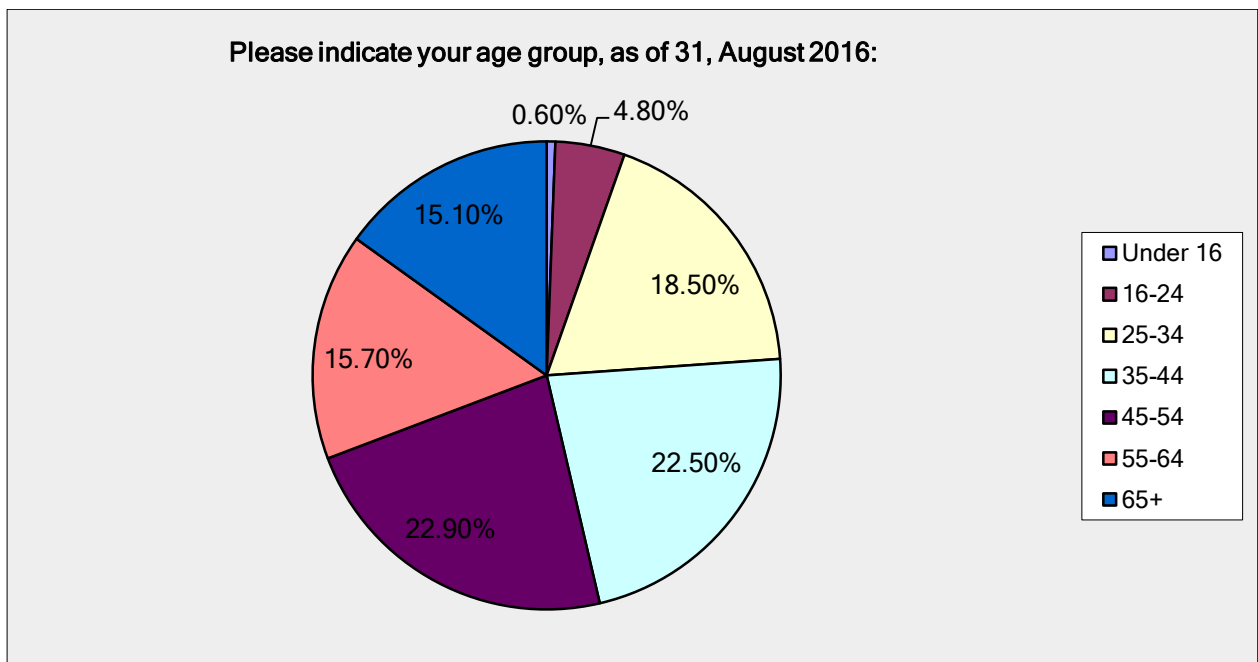
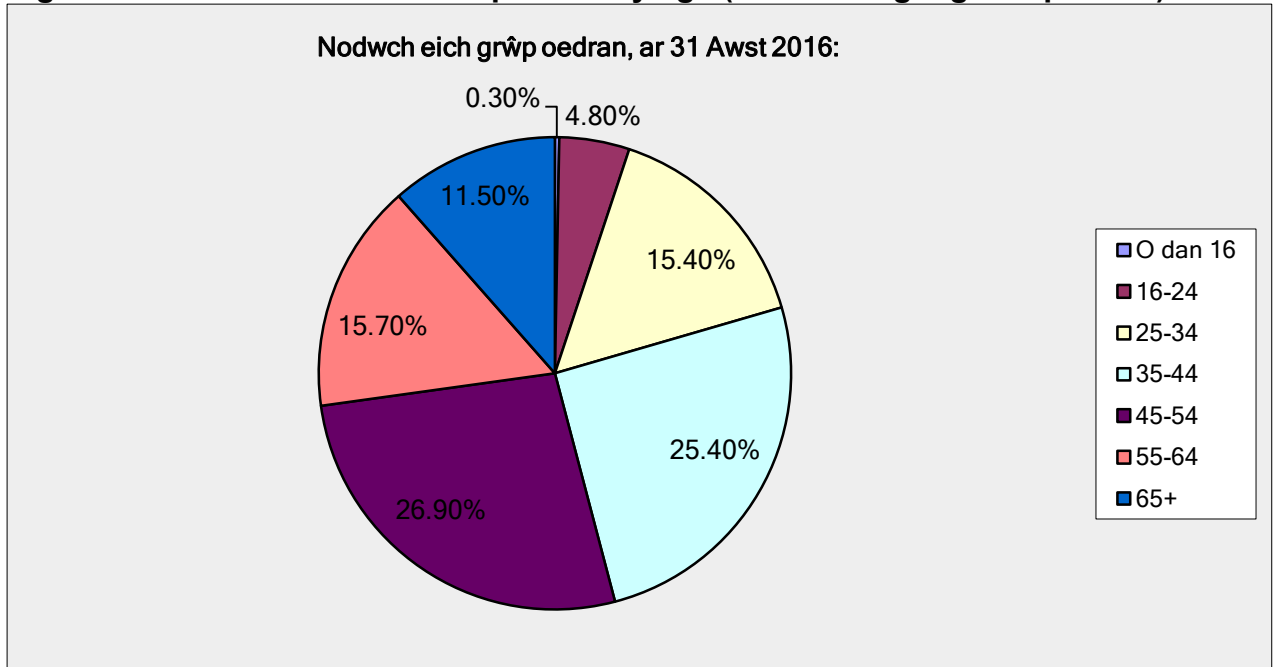


Figure 2a : Call for evidence responses by age (Welsh Language responses)



Question 3: Which of the following describes you? Some roles may overlap; please tick all that apply. Reader, Author, Journalist, Publisher, Distributor, Retailer, Educator (if so please indicate which sectors you work in), Other (please specify).

In both English and Welsh languages responses , the highest responses rate came from the Reader category, the category most likely to overlap with others. Authors make up the next largest group in both languages. See figures 3 and 3a.

Figure 3 : Call for evidence responses by category (English Language responses)

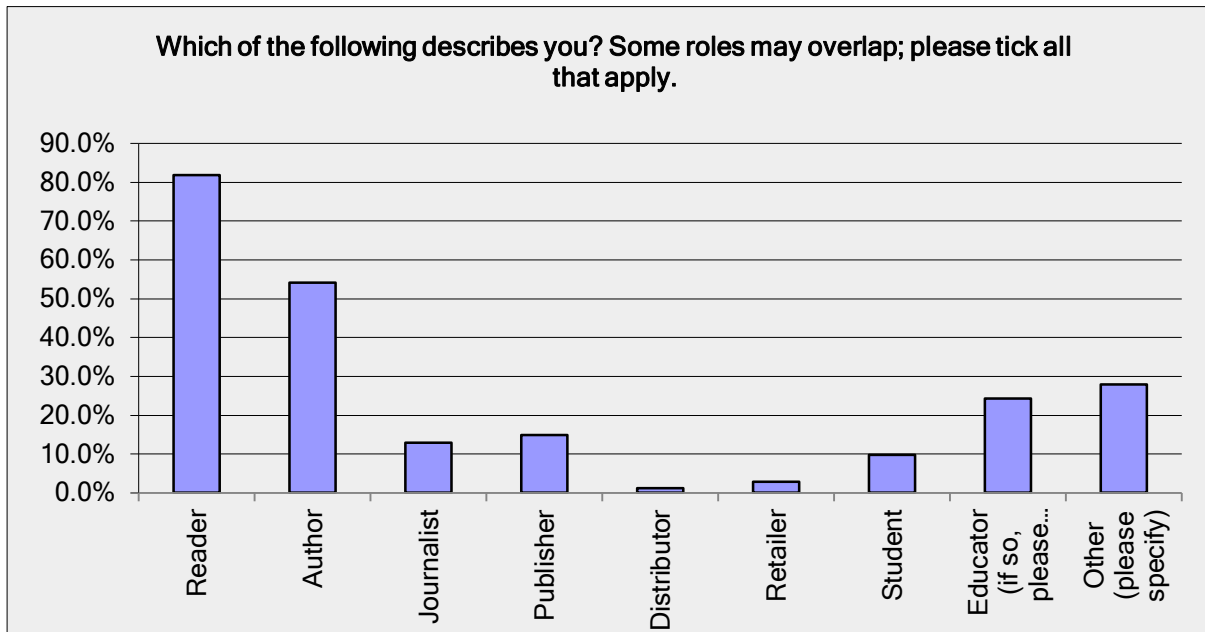
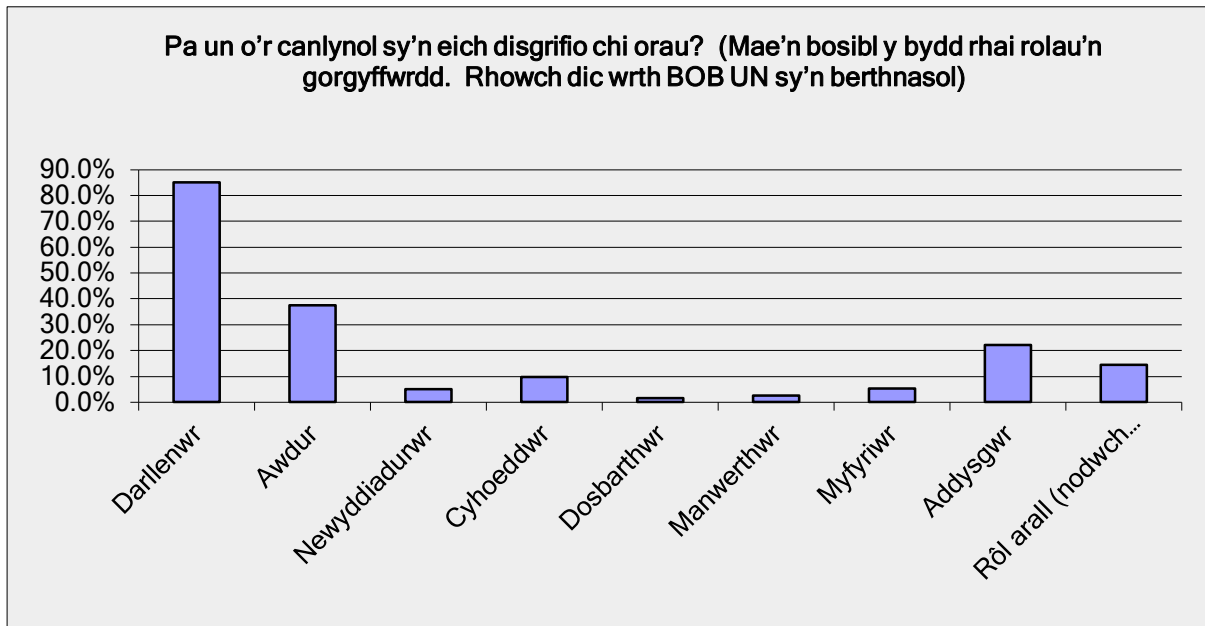


Figure 3a : Call for evidence responses by category (Welsh Language responses)



Question 4: What sectors do you work in? (tick ALL that apply)

Not all respondents chose to answer this question. There were 119 English language responses with a further 23 preferring to give a narrative response. There were 10 direct response in Welsh with one further narrative response. In both languages the highest number of respondents who replied directly to question worked in the Higher Education sector. See Figure 4 and 4a.

Figure 4 : Call for evidence responses by occupation (English Language responses)

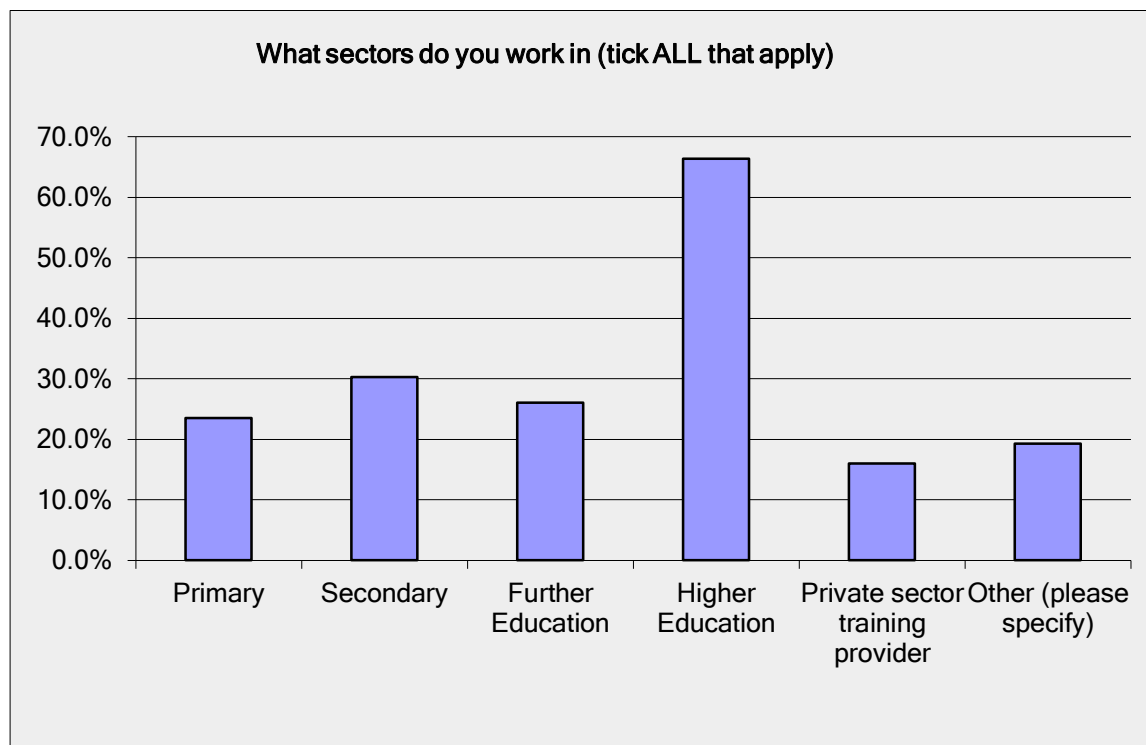
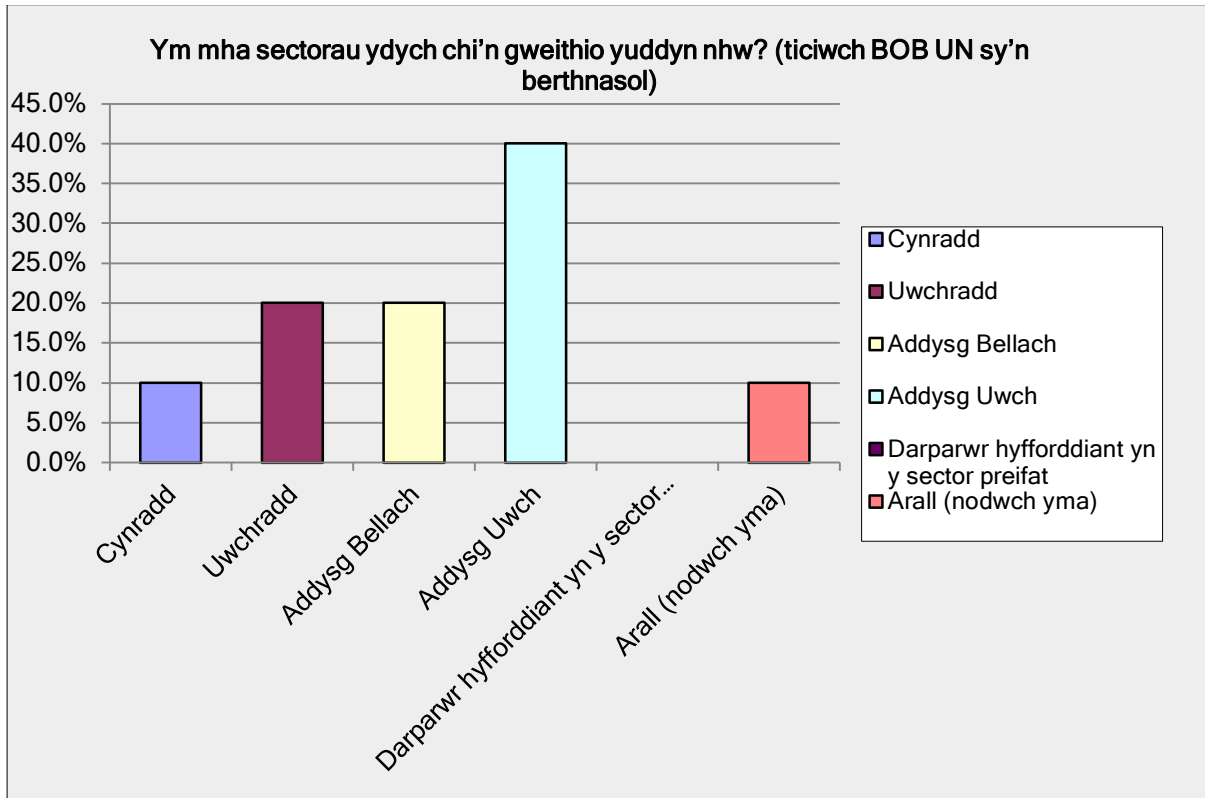


Figure 4a : Call for evidence responses by occupation (Welsh Language responses)



Question 5: Please indicate which languages you are interested in (tick ALL that apply).

Not all respondent answered this question. 488 English language respondents answered using the 'tick box' and 63 provided narrative information indicating an interest in literature in a range of languages including German and other European languages, Turkish, Russian and Chinese.

317 answered the Welsh questionnaire using the 'tick' box with a further 41 providing narrative information. See Figure 5 and 5a

Figure 5 : Call for evidence responses - languages of interest (English Language responses)

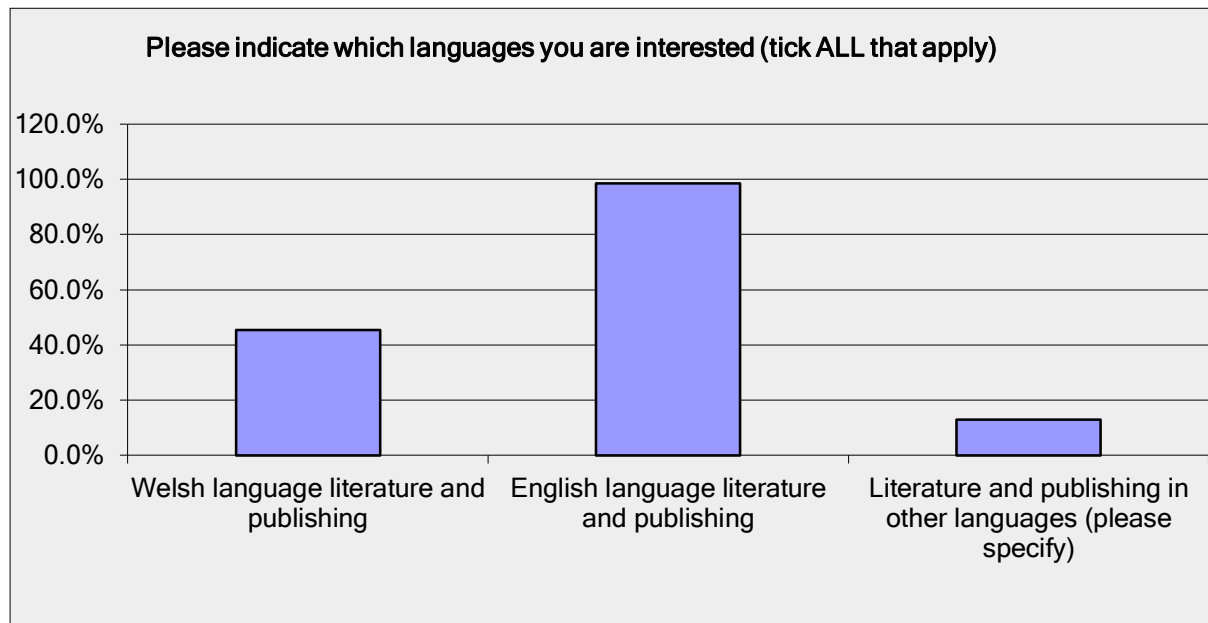
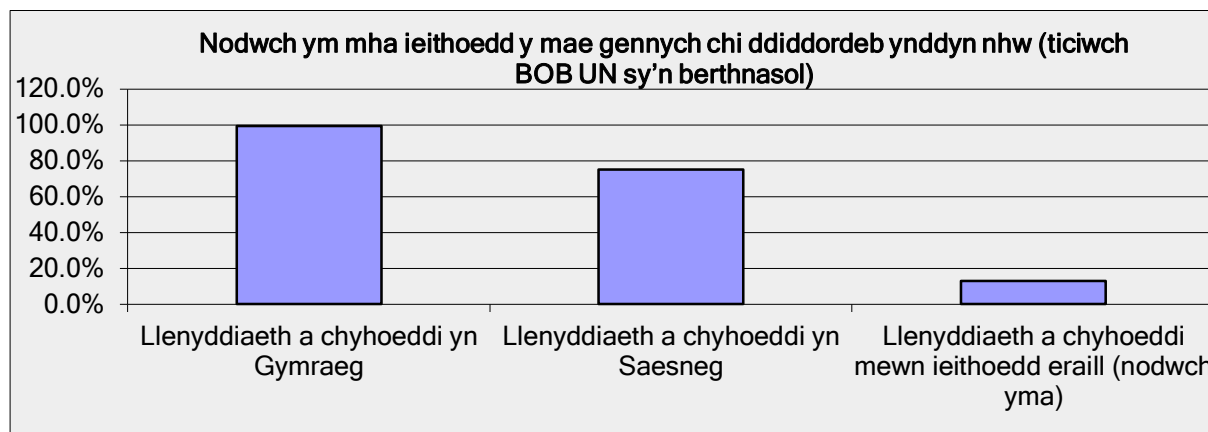


Figure 5a : Call for evidence responses - languages of interest (Welsh Language responses)



Question 6: Which publishing formats are you interested in?

Not all respondents answered this question. 473 English language respondents answered using the 'tick box' and 34 provided additional narrative information. 317 responded to this question in Welsh with 6 providing additional narrative information. See Figures 6 and 6a.

Figure 6 : Call for evidence responses - publishing formats (English Language responses)

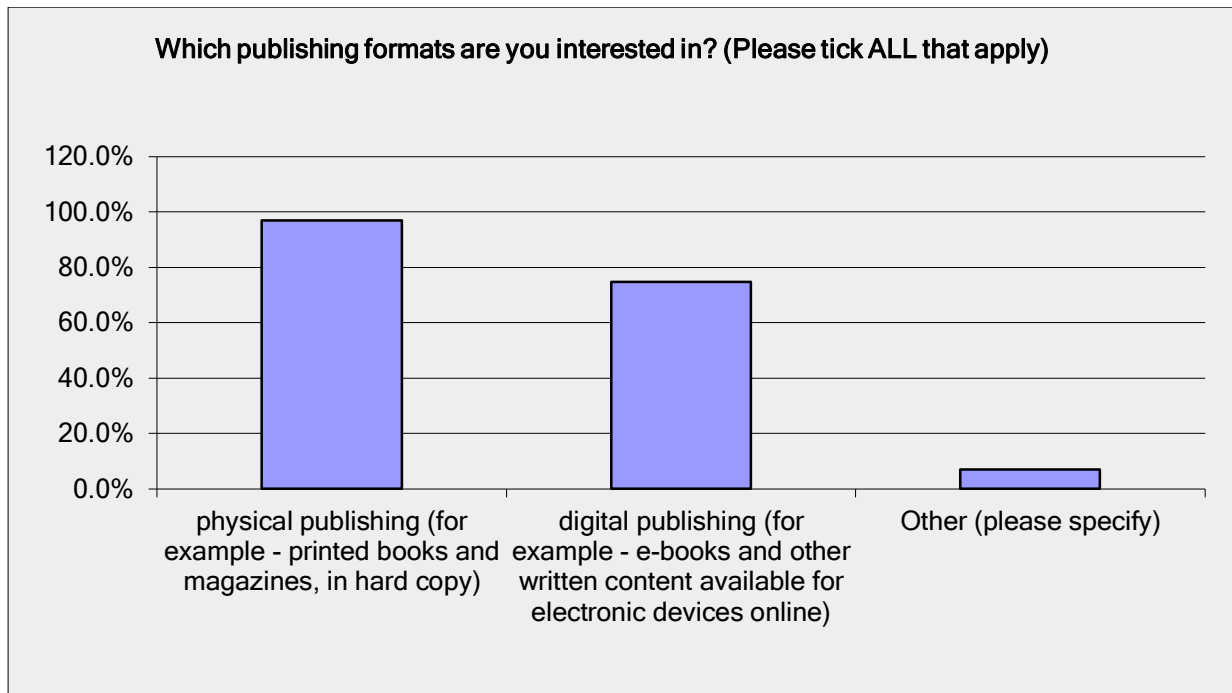
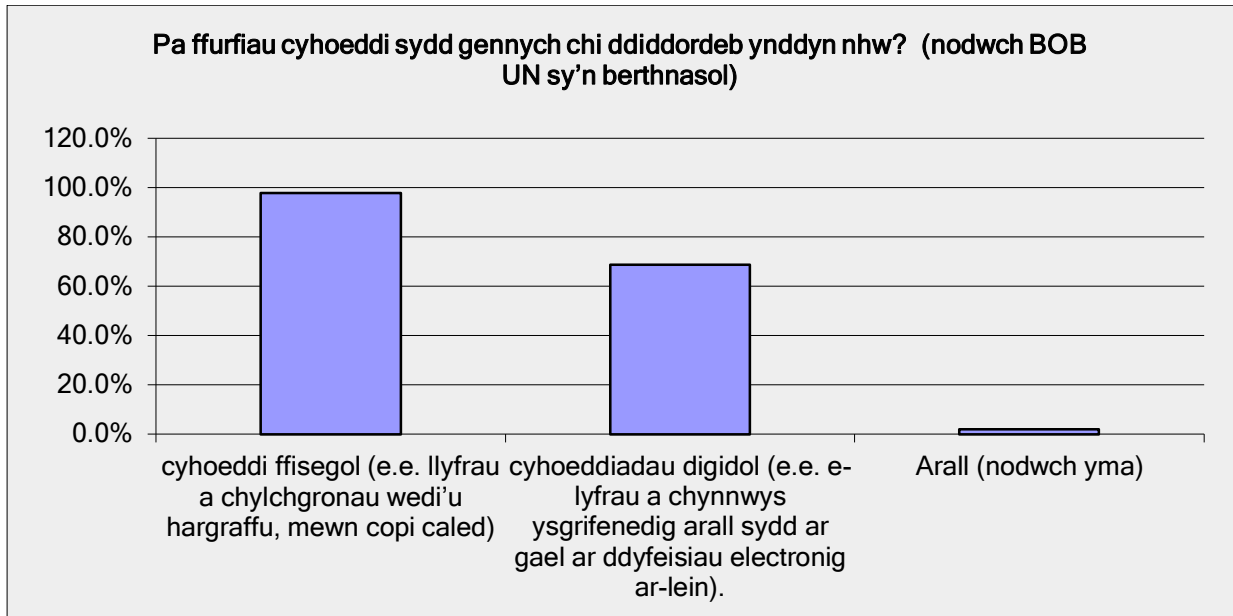


Figure 6a : Call for evidence responses - publishing formats (Welsh Language responses)



Question 7: Genres :Children and Young People

Less than 50% of respondents answered the English version of this question (240) with 6 providing additional narrative information.

Similarly, less than half answered this question in Welsh (146) with 8 providing narrative information. See Figures 7 and 7a.

Figure 7 : Call for evidence responses - children and young people - genres of interest (English Language responses)

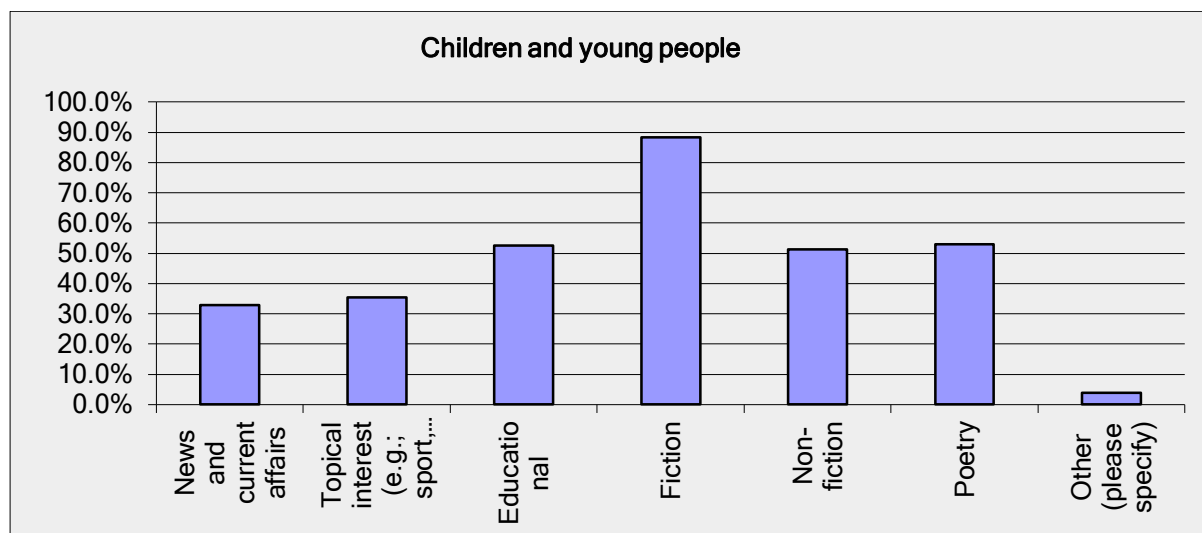
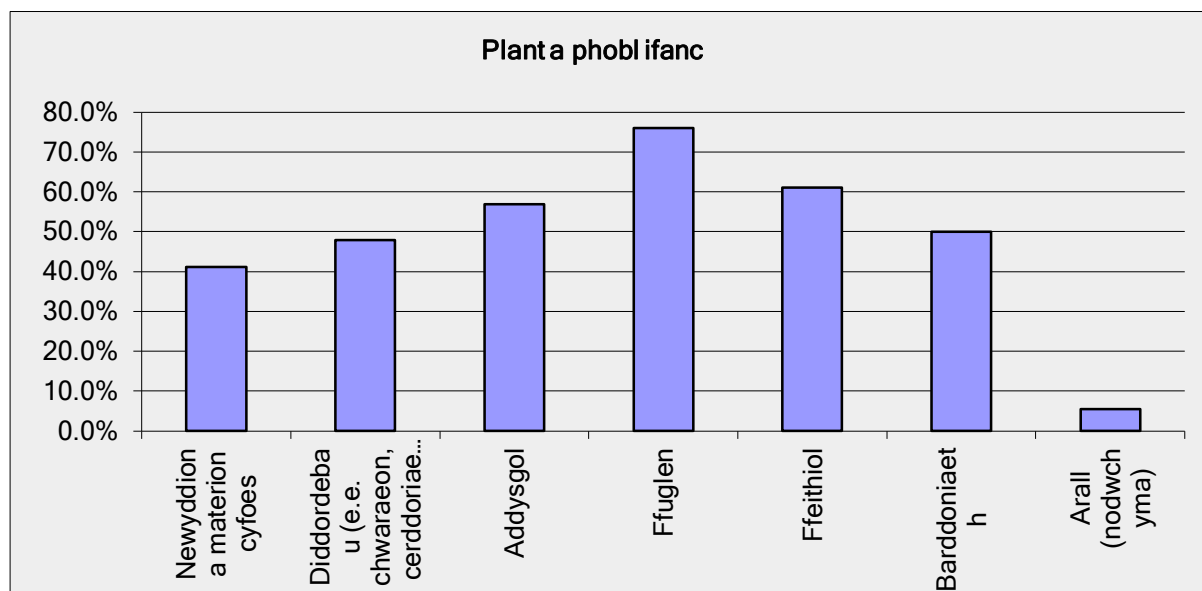


Figure 7a : Call for evidence responses - children and young people - genres of interest (Welsh Language responses)



Question 8: Adults

471 responded to this question in English, 51 providing additional narrative information regarding their reading preferences, outlining in more detail the broad categories provided by the 'tick boxes'.

311 responded in Welsh 26 provided additional information. See Figures 8 and 8a.

Figure 8 : Call for evidence responses - adults - genres of interest (English Language responses)

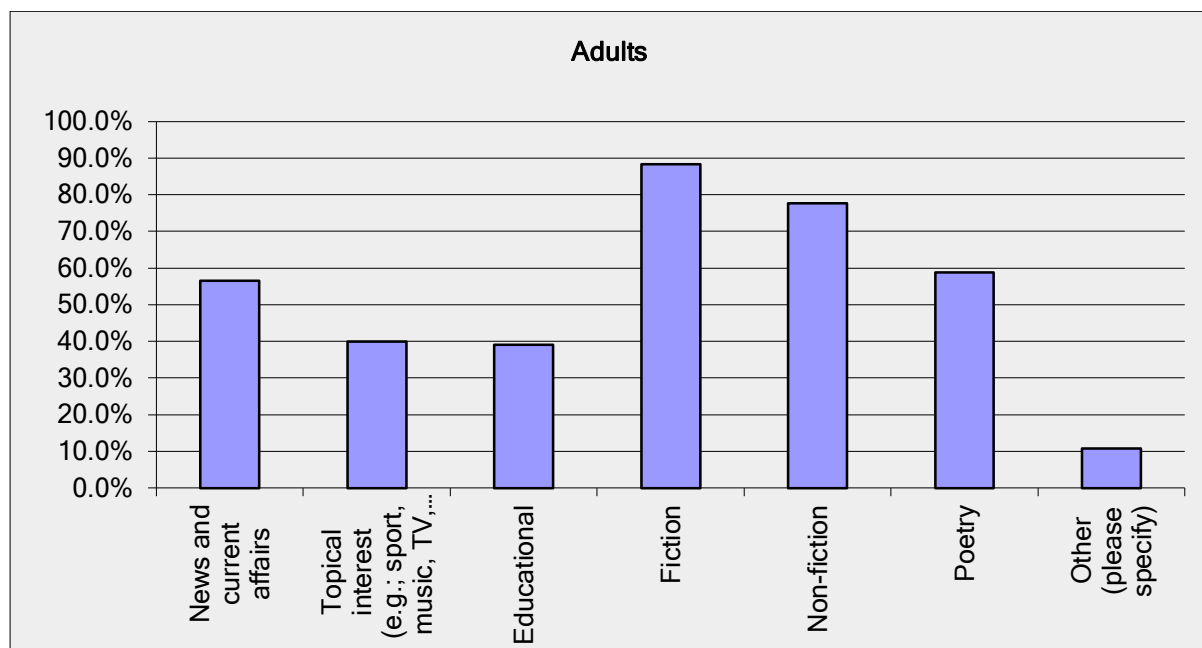
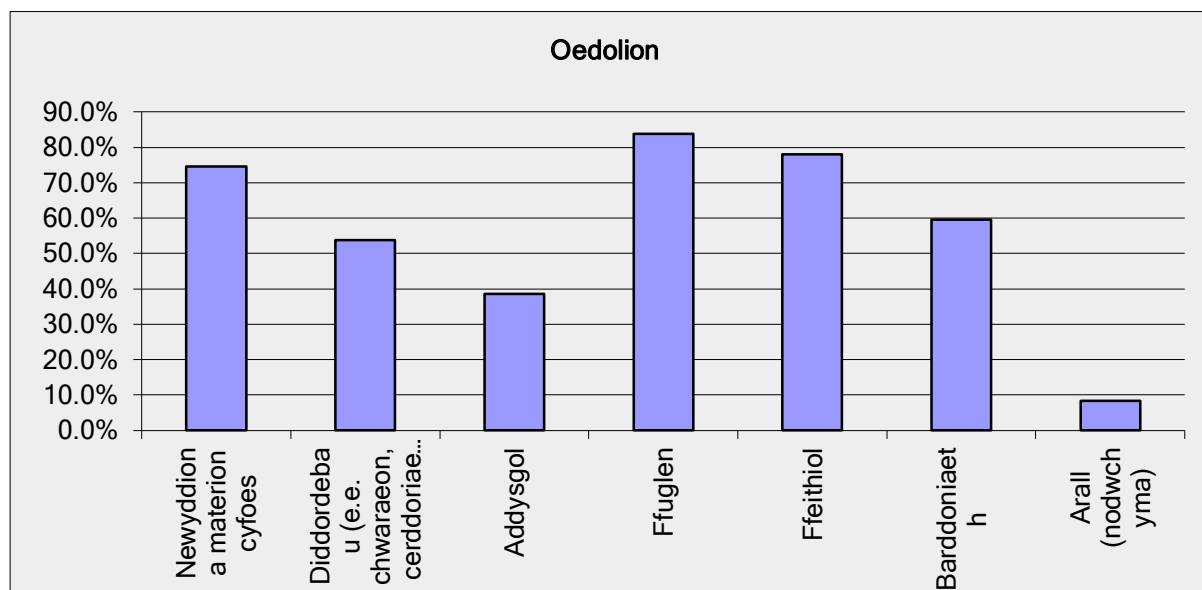


Figure 8a : Call for evidence responses - adults - genres of interest (Welsh Language responses)



Question 9: How often do you do the following? 470 responded to this question in English, 312 in Welsh. Statistical breakdown of responses are in Tables 2 and 2a and Figures 9 and 9a.

Table 2 : Call for evidence responses - reading habits (English Language responses)

How often do you do the following? (Please pick one option for each)				
Answer Options	Never	Occasionally	Regularly	Response Count
Buy hardback or paperback books	8	126	331	465
Buy daily newspapers	141	192	127	460
Buy other magazines	81	248	126	455
Use library services to read or borrow books	68	177	208	453
Use library services to read newspapers or	249	125	68	442
Buy electronic books	171	148	131	450
Buy electronic magazines	320	97	20	437
Read free online news and current affair services	6	73	380	459
Read other free online content on subjects of interest	21	99	339	459
Subscribe to online book services	287	110	49	446
Subscribe to online magazines	297	99	47	443
Subscribe to fee based online news and current affairs	367	45	34	446
Attend a free literary event or festival	45	240	177	462
Attend a paid for literary event or festival	79	232	147	458
			<i>answered question</i>	470
			<i>skipped question</i>	28

Figure 9 : Call for evidence responses - reading habits (English Language responses)

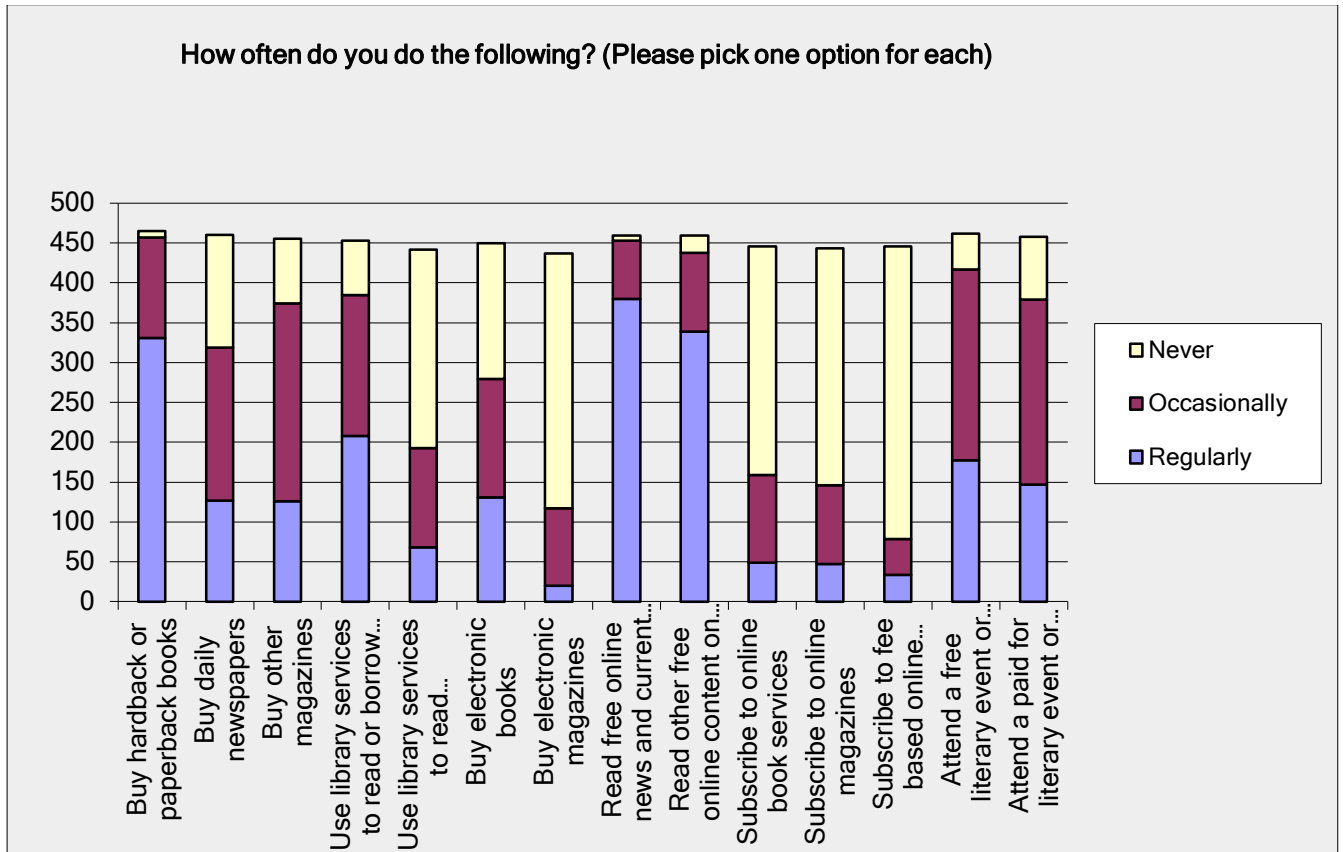
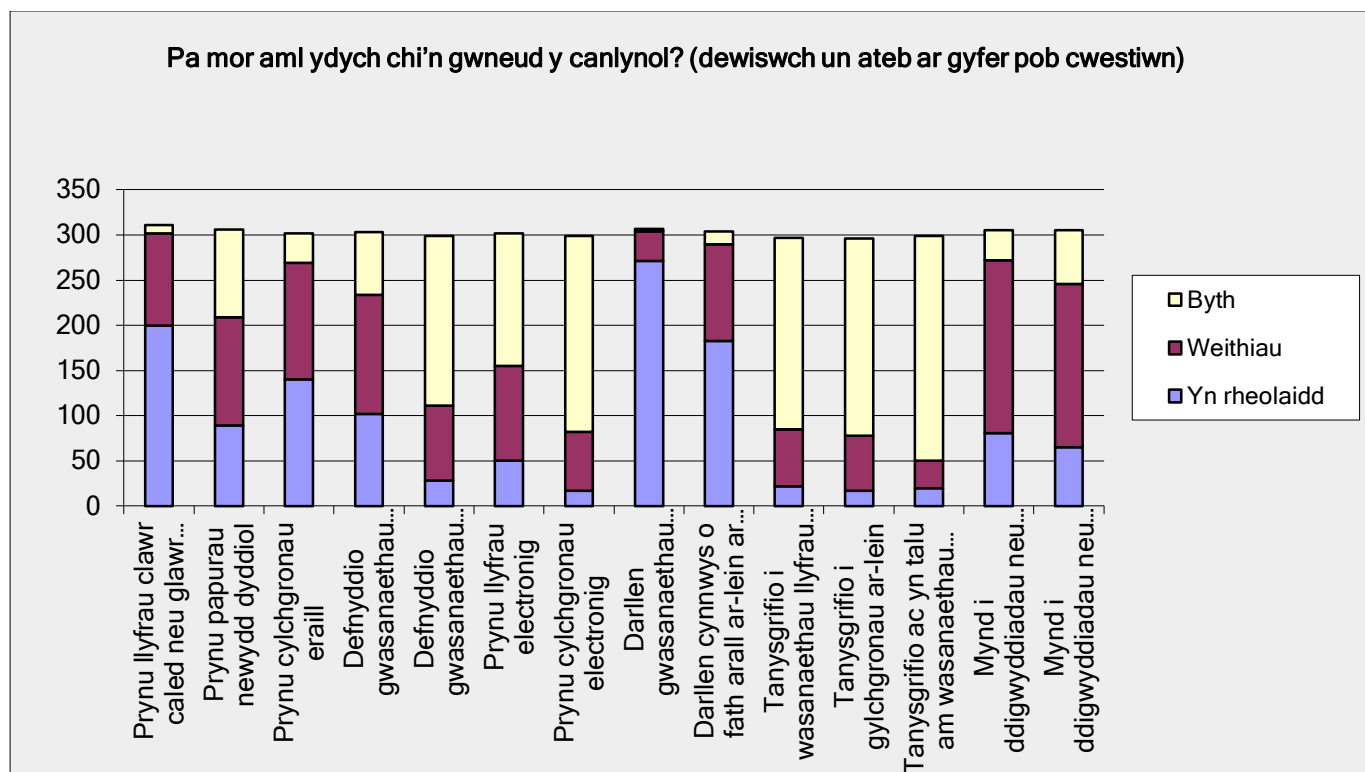


Table 2a : Call for evidence responses - reading habits(Welsh Language responses)

Pa mor aml ydych chi'n gwneud y canlynol? (dewiswch un ateb ar gyfer pob cwestiwn)				
Answer Options	Byth	Weithiau	Yn rheolaidd	Response Count
Prynu llyfrau clawr caled neu glawr meddal	9	102	200	311
Prynu papurau newydd dyddiol	97	120	89	306
Prynu cylchgronau eraill	33	129	140	302
Defnyddio gwasanaethau llyfrgelloedd i ddarllen neu	69	132	102	303
Defnyddio gwasanaethau llyfrgelloedd i ddarllen	188	83	28	299
Prynu llyfrau electronig	147	105	50	302
Prynu cylchgronau electronig	217	65	17	299
Darllen gwasanaethau newyddion neu faterion cyfhoes	3	33	271	307
Darllen cynnwys o fath arall ar-lein ar bynciau sydd o	14	107	183	304
Tanystrifio i wasanaethau llyfrau ar-lein	212	63	22	297
Tanystrifio i gylchgronau ar-lein	218	61	17	296
Tanystrifio ac yn talu am wasanaethau newyddion	249	30	20	299
Mynd i ddigwyddiadau neu wyliau llenyddiaeth am	33	191	81	305
Mynd i ddigwyddiadau neu wyliau llenyddiaeth ac yn	59	181	65	305
			<i>answered question</i>	312
			<i>skipped question</i>	19

Figure 9a : Call for evidence responses -reading habits (Welsh Language responses)



Question 10: Please tick here to confirm that you have read the summary of current support available.

325 answered the question in English and of those 98.2% (319) said they had read the summary of the support.

207 answered the question in Welsh, 95.2% (197) of those respondents indicating they had read the summary of support. See Figure 10 and 10a.

Figure 10 : Call for evidence responses - confirmation that respondents had read the summary of support (English Language responses)

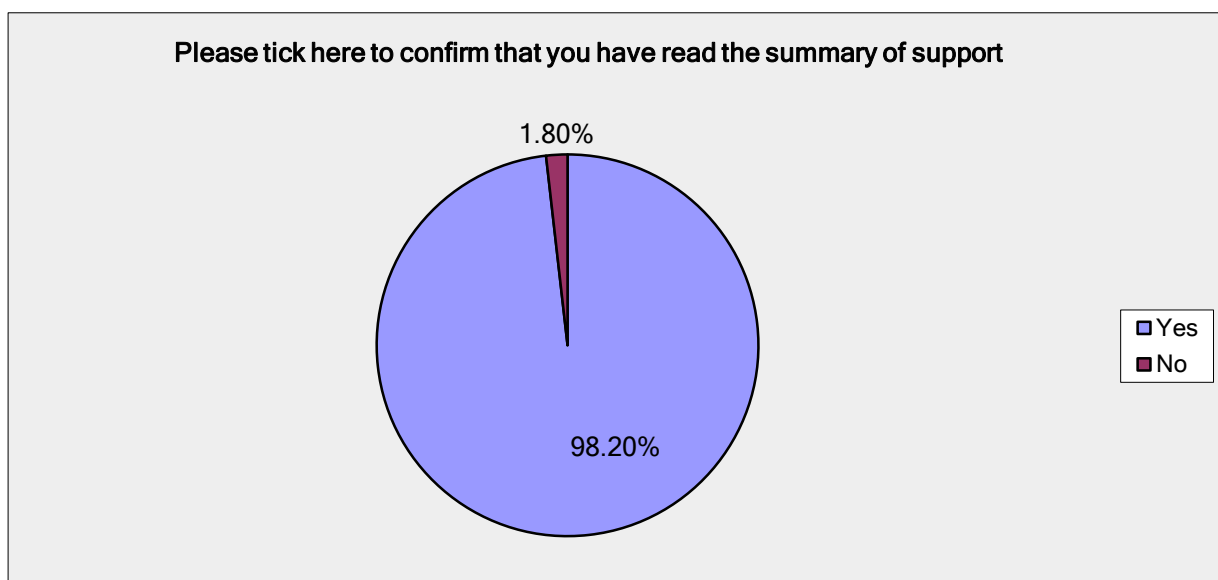
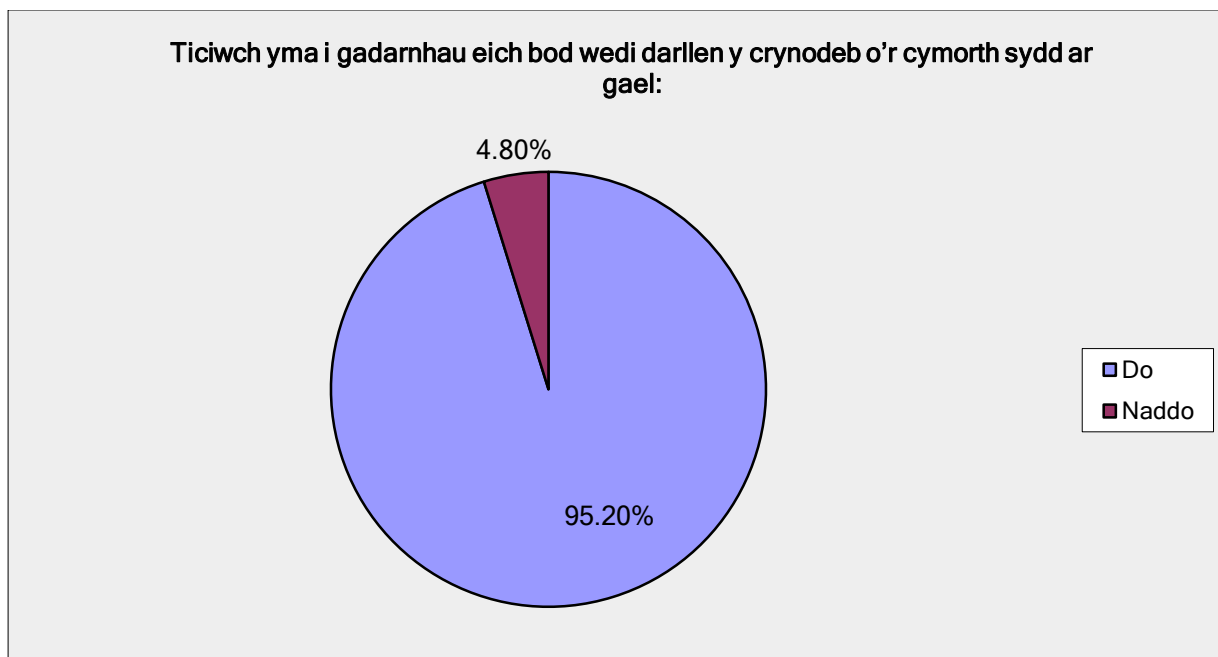


Figure 10a : Call for evidence responses - confirmation that respondents had read the summary of support (Welsh Language responses)



11. In your view, what are the main challenges faced by the publishing industry and literature in Wales? These could be cultural, social, economic or of another kind.

The following comments were received in response to this question and they are grouped under the following categories:

Economic/Funding

- Lack of funding generally in both languages
- Reduction in funding from Welsh Government
- Not enough money to fund development of new writers - may be even less with Brexit.
- External economic uncertainty - leaving EU as EU funding has helped the industry
- Brexit- impact on printing outside of UK such as Poland
- Need additional funding for books especially for teenagers
- Austerity – pressure to create work that is marketable and profitable
- No meaningful private sector publishing industry – more in one London press than whole of Wales
- Small client base
- Digital may overtake print in the long run leading to loss of jobs.
- There should be match-funding for grant aided publishers which would reduce the block grant given to each publisher (to cover overheads and literary titles) but then match fund overall book sales. This would encourage them to operate a commercial strand. It might be possible for them to build up revenue and their operations under their own steam and not have their very survival so reliant on grants.
- Uncertainty of global market
- Lack of funding for more high-brow publications
- Not enough jobs for the profession
- Reducing public spending on schools and libraries
- Higher unemployment leading to lower sales levels
- Funding for a specialised market
- Authors, despite e-books, are earning less than ever.
- Reduction in advertising spend
- Cashflow. Product development and expansion is always hampered by a lack of cashflow. Access to funds, even on a short-term credit basis, would be of immense value if the source of that funding had an in depth knowledge of the industry.
- Reduction in advertising spend which has been the main way of funding publishing.
- Difficulty in getting grants for publishing.
- People have less money to spend on attending events and buying books
- Rising postal costs
- Monopolisation of publishing by Amazon.
- People with no money to spend

- Market for conventional publishing is small, so cover prices high, making it necessary for new business models to develop. In addition, efficiency in supply - reprints take too long when content is required for university courses.
- Production costs
- The high discounts demanded by on-line and physical retailers - currently around 60% have a huge effect on the margins of small publishers such as those in Wales who necessarily do not have the same opportunities for economies of scale as the large multinationals
- Cost of producing books has increased because publishers/printing presses are charging more for publishing. More competition needed between publishers and printing presses to have more competitive prices.
- Need to invest more in the publishers to get them more self-sustaining.
- Deteriorating economic circumstances for many people especially impacting on the elderly and children/young people
- Extremely low wages and low numbers of staff compared to competitors in England (almost always London) sees Welsh publishers always fighting harder to compete, despite still being able to win excellent authors and books.

Digital/Technology

- Opportunities and challenges
- Important to have balance between print and digital
- Not enough emphasis on e-books and digital content in Welsh
- Reluctance of a number of platforms to allow Welsh publications – battle to get Amazon to allow Welsh-language e-books
- Amazon undermines sales through gwales and local bookshops
- Difficult to compete with Amazon
- Market dominance of Amazon in e-books has led to less diversified book consumption
- Developing digital provision is vital
- Digital challenge – vital to include Welsh
- Welsh needs to be on You Tube
- Need to grasp the opportunities provided by e-publishing immediately
- Need to compensate companies to make it viable for them to publish books on the internet for children and young people
- Moving to the digital world has impact on Welsh language. Everything available in English before they are available in Welsh
- Video content in Welsh vital
- Need to invest in Welsh-language reading app which has Vocab and synthetic voice for iPads etc to read Welsh-language e-books etc
- Gap between print and electronic – digital always considered secondary
- Everything now available electronically
- Too slow to embrace technology
- Lack of broadband a factor when considering digital provision
- Growth of vinyl
- Publishing industry competing with You Tube and Vimeo
- Use of electronic media in colleges and universities

- Low price for electronic formats
- E-books are fantastic in that they have enabled many to publish to the public but again the return per book is abysmal. This has also had the knock on effect of reducing demand for physical books, though they will never lose their appeal
- On-line – no promotion like bookshops and libraries
- E-publishing should be supported as an adjunct to, not a replacement of, print publishing.

Press/Newspapers

- Difficult to have discussion on literature and publishing due to the majority of people receiving news from England
- No coverage to books in the popular press
- Too much praising every Welsh content and not enough scrutiny in the press which is critical and fair
- Lack of national press in Wales as well as coverage in UK papers
- Psychological, cultural and economic barriers are obstacles to developing a 'national press'
- Television/Radio – no books on Y Gwyll etc. Need to improve links with S4C and Radio Cymru
- Need daily news service in English similar to Golwg 360
- Golwg 360 vital due to weakness of print media
- In an age when news moves quickly, better use is needed of translation technology to convert AP and Reuters reports to international Welsh-language on-line international stories before that news becomes dated

Welsh Language

- Need to attract Welsh speakers who read English-language books to also read Welsh-language books
- Less people speaking Welsh despite growth of Welsh-medium education
- Young Welsh speakers do not want to read Welsh as they link Welsh with the education sector
- Success of Welsh-language publishing industry dependent on success of Welsh-language education
- Shortage of Welsh-language text-books
- Absence of daily Welsh language newspaper
- Reaching audiences who can speak Welsh but are not used to visiting traditional places which sell books such as bookshops.
- Lack of confidence among Welsh speakers
- Not enough money by some people to regularly buy Welsh-language books and magazines
- Absence of promoting Welsh-speaking books and reviews
- A number of Welsh-language classics such as Daniel Owen out of print
- Not enough appealing novels comparable to adults in English
- So many Welsh-speakers choosing to read in English

- Reduction in the number buying books and reading generally especially in Welsh
- Cost of Welsh language books is too high compared to English language books.
- The resurgence of the Welsh language is growing so quickly that there are not enough resources available
- The lack of investigative journalism in Welsh which is beyond the capacity of present magazines and online services. And the fact that the grants system favours new titles over reprints so that valuable titles that go out of print stay out of print.
- Agree with the priority to publishing in the Welsh Government's Welsh Language Strategy Iaith Fyw: Iaith Byw (Strategic Area I6).
- The industry especially in the Welsh language is effective - "If it ain't broke..."

Different challenges between Welsh and English languages publishing

- Different challenges for both languages
- Impact of Anglo-American culture
- English present everywhere a big challenge
- Parity between both languages is vital
- Huge disparity between the Wales that Welsh speakers experience (a confident, bilingual nation that attempts to cater for all tastes) and those who do not speak Welsh (the odd poetry volume, picture book of landscapes, Welsh history or golden age of rugby books).
- Language divide – English-revenue grant has been frozen – real terms cut of 40 %
- Too much focus on Welsh Language and is waste of resources
- Welsh – small pool of readers available
- English – competing in a large pool mainly due to the lack of feeling of Welsh identity amongst readers
- More of a balance in the Welsh language sector – no representation in Anglo-Welsh publishing celebrating a vibrant, cosmopolitan, modern Wales

Libraries

- Pressure on local authorities – impact on libraries which are under pressure
- Libraries – cut-backs/reduction in opening hours
- Low level of support from libraries. Most libraries do not even have a section dedicated to writing from our own country
- The poor return for library lending is shocking
- Gradual decline of libraries within schools
- School libraries are filled with English-language books even in Welsh-medium schools.

Marketing

- Need more marketing materials

- Lack of promotion and marketing
- Lack of widespread awareness of Welsh writing in English by the public. This leads to impoverishment of sense of identity for English speakers in Wales.
- Publicity is amateurish and ineffective
- No promotion of excellent magazines
- Weak marketing and distribution infrastructure
- Poor marketing and distribution of books especially periodicals
- Exposure. With high street bookshops closing or using their space to display non-book product it is increasingly difficult to bring titles to the attention of a wide audience. It is also difficult to bring 'books from Wales' to an international market when the publishing industry in Wales has no body championing it collectively overseas.
- Importance of promoting Welsh books in the rest of the UK, which is sometimes lacking (due in part to London bias).
- Difficulties of promotion and marketing owing to the decline of bookshops.
- Lack of visibility within Wales to writers.
- Poor marketing support for Welsh publications in English language.
- Lack of visibility. Extra help to promote magazines in libraries, schools and bookshops (such as high street, chain bookshops) would be good.
- Small publishers have no marketing spend
- No attempt to market books outside Wales.
- Small publishers such as those in Wales lack the marketing spend to compete on a level playing field with their multinational competitors, even for Welsh readerships. This can lead to difficulties in visibility/discoverability in the marketplace.
- Lack of promotional opportunities outside Wales and viewed dismissively by the English
- Lack of UK wide representation
- Lack of knowledge and interest outside of Wales and awareness of writers from Wales. Irish and Scottish authors seem to fare much better and have international audiences.
Exposure outside Wales
- Domination by London/Too London centric
- Need to improve reach beyond Wales. Need to keep writers – just like Cannongate has done for Scotland
- Difficulty in getting heard outside of Wales – anti-Welsh prejudice
- Public apathy towards publications in Wales

Educational

- Emphasis on STEM subjects give the impression that there is no value in literature. More needed to spread the message that the publishing industry and its skills it fosters are crucial, valuable and central to our culture and society
- Need to increase literacy to increase the number of readers
- Access to digital educational resources vital

- Precarious state of the University of Wales Press (UWP) – financial support needed
- Concern about cuts to UWP and importance of UWP
- Illiteracy among young people
- Curriculum insufficient
- Lack of Welsh-language textbooks
- Current cuts to the funds made available in Welsh universities (particularly HEFCW) for publications and projects relating to Wales and Welsh culture; a diminution in financial support for scholarly journals relating to Wales and Welsh culture (for instance, the International Journal for Welsh Writing in English), something that threatens to cut off the life-blood of the scholarly communities who currently focus on the study of Wales and Welsh culture; difficulty of raising funds for the publication of non-fiction texts on Wales and Welsh culture in Wales, something that discourages scholars from studying Welsh culture
- Social and educational alienation in Wales's poorest communities, leading to people's disengagement from Welsh culture.
- Illiteracy - half of teenagers leaving schools are functionally illiterate
- Education linked resources need to be curriculum based and more emphasis should be on Welsh publishers being able to publish these resources more quickly and more cohesively
- Provision for children's books in Wales is minimal.
- Schools do not teach the work of English-language authors of Wales
- Reduction in school budgets for books and other related provision

Attracting Young People

- Attracting readers especially young people
- Young people expecting everything for free
- Vital to publish digitally to attract young people. Risk that traditional publishing could be out of reach of young people.
- Provision for teenagers especially boys very patchy
- Need to make reading fun especially for young people
- Need more support for parents for children to read for fun

Size of the Audience and Changing Habits

- Too many books. Need less and of higher standard
- Reduction in number of readers
- Reading competing with other leisure activities
- Need books which attract readers
- Size of the market small
- Problems in reaching people who do not read
- The publishing industry in Wales is very small and therefore the same people tend to work part-time for a number of publishers. The result of this is that a

number of them publish similar styles and genres. They should be more competitive with each other.

- Competition against UK/International publishing – problems of scale
- Publishers and small independent publishers have to compete with large English independents and publishing houses

Translation

- More translation of popular titles needed
- Need to translate more but not just from English
- Too many translations for children
- More translations needed – extend work of Wales Literature Exchange
- Need to have more non-English translations into Welsh

Bookshops

- The reduction in number of physical bookshops
- Lack of bookshops especially in disadvantaged areas

Distribution

- Pitiful book distribution beyond Wales
- Limited distribution of books in UK
- Poor Distribution for print in Wales

Some support structures not transparent//accessible enough

- Too cosy
- Audience too narrow – hear more from Bluemoose based in North of England than Welsh publishers
- Too Welsh – need to be like Scotland and Ireland
- Elitist trends within Welsh culture
- Need to have big ambition – not too niche
- Lack of accountability - old boys'/ womens' network
- Lack of ambition
- Parochialism
- Nepotism

International links

- More emphasis should be placed on making international links too in order to make a name for Welsh writing abroad through translation and author exchanges.

Magazines

- Magazines in Wales – no weight in Wales let alone across border

- Unfortunately the tiny readerships of Planet, New Welsh Review and Poetry Wales mean that they don't carry much weight within Wales, let alone beyond the borders.

Too Subsidised /Need to be more commercial

- Need to develop viable commercial model
- Sector apart from Accent is amateurish
- Too subsidised compared to England/Comfort zone. Need to be more commercial

Other Comments

- More enterprise and energy needed
- The world is changing quickly. Globalisation will likely lead to more people moving especially due to wars and climate change . This will likely lead to more pressure on small cultures.
- Too introvert – need to be more confident internationally and export content and authors
- Support with courses in places such as Tŷ Newydd – tend to be too expensive
- Challenge in English is to foster/nurture audiences within Wales
- Lack of satirical publications in both languages
- Need courses on printing – this would ensure people to stay in their local areas
- Most publishers and agents based outside of Wales
- Too much emphasis on adapting literature for children instead of publishing classics or producing original literature and original illustrations
- Better editing of novels needed
- English-language literature in Wales dependent a great deal on Welsh-speakers
- Political challenge – lack of opportunity to recognise and understand the importance of supporting publishing for minority language readers
- Cultural challenge – effective promotion of relevant contemporary books. Therefore, support of Welsh-language publishing vital.
- Supermarkets and chain-stores need to give due prominence to Welsh-language materials and small publishers.
- Cheap books in supermarkets a problem
- No network of small shops pushing Welsh culture in English
- Papurau Bro vital
- People want everything for free – very reluctant to pay
- Lack of choice and variety
- Better pay for authors for children and teenagers
- Link between history and contemporary vital
- Grow the audience
- Competition from international publishers
- More attractive covers needed – don't put children off reading

- Narrowness of literary organisations – graphics comics and virtual games are also literature
- Appropriate funding to allow authors to remain in Wales
- Apathy
- Low take-up of product
- Lack of excellence
- Book festivals need to be local, central and not large and also affordable
- Insularity v openness to the rest of the world
- Lack of networking among publishing companies. Not enough opportunities for people working in publishing in Wales at access training.
- Scarcity of accessible and affordable support and development initiatives for emerging writers, especially those from disadvantaged backgrounds
- The time and effort of voluntary editors and producers
- The sustainability and expansion of the audience
- Support for new writers
- No national reviews
- There is a lack of targeted book promotion and support for local rather than global
- Too old-fashioned
- Difficulty in attracting Welsh-language staff
- Staff hiring and training. Grant support for staff posts is limited to the ‘favoured few’ publishers who have been successful in the past – the fund is perhaps unduly pressured with the knowledge that any withdrawal of funding may result in the supported post being made redundant. Graffeg would benefit from assistance in this area
- Lack of support for micro-publishers
- Lack of understanding around how to publish in Wales is a massive challenge for individuals who have written some form of literature, who feel that maybe self-publishing could be an option but also if there is success how it can develop into a more official opportunity within the industry e.g. a publishing house picking it up.
- The option of becoming an author is still a relatively grey area for a career choice and while there are plenty of successful authors in the UK, there are only a few stand-out names from Wales who either have the right PR behind them or have the connections to be able to get their work out to the public. There's also not a lot of information about the financial aspect of being an author - what it costs, what you earn etc.
- No appreciation of books by young people
- Publishers in Wales need the freedom to publish experimental/subversive/idiosyncratic books and magazines to ensure that Welsh culture is not washed out, as often happens when Welsh writers take their work to bigger, London-based, publishers.
- Not enough variety
- Advances paid to ‘celebrities’.
- Opportunities for older writers (over the age of 40 years old - there seems to be a huge amount of support for younger writers).

- Lack of ambition, variety and cross-fertilisation which inevitably leads to cultural parochialism. Fundamentally the lack of creative and academic jobs coupled with inadequate public grants (the narrowing of artistic criteria on which these grants are awarded also ultimately renders the projects which receive funding quasi-propaganda) means that writers cannot afford to be writers in Wales.
- Lack of vision - not enough books on modern, universal subjects such as film, tv, food and travel - in both Welsh and English. Too many books geared towards the over 60s market (such as dreary autobiographies in the Welsh language), harking back to a long since past 'golden age', rather than creating space and product for younger audiences - the market of the future as older readers pass on. There should be more of a balance!
- Timing: There is an average wait of over a year to have a three chapter submission read. Sometimes, it's over a year and a half to get a yes or a no to a manuscript. That's way too long.
- Quality mixed – poor quality of fiction
- Need to be more honest and win back customer trust
- Limited readership, not enough variety of publishing particularly in Welsh.
- No critical mass of authors or publishers
- Attention span of people shortening
- Debasement of content due to reduction of editorial monitoring
- variety of books
- Too many publication – jam spread too widely
- Lack of agents in the industry
- Lack of networks – accessing training etc. Need a network for English-language publishers in the same way as *Cwlm Cyhoeddwr* for Welsh-language publishers
- Publishing and literature should be considered separately – different challenges
- Challenges in Wales no different to other countries
- Problem – small part of economic portfolio
- Structural and audience building
- Lack of free culture – e.g. in pubs in Ireland
- Lack of support from mainstream booksellers
- The lack of cultural or economic weight to gain orders from the remaining chains, such as Waterstones and supermarkets.
- Extending the commercial reach of the industry
- All the new books are always copies of English books converted into Welsh

12. Which aspects of the support currently provided for publishing and literature are working well (and why)?

The following comments were received in response to this question and they are grouped under the following categories:

Welsh Books Council (WBC) and Support for Publishers

- Golwg 360
- Professionalism of editors
- Gwales
- Magazines
- Bookshops
- WBC Editing Service
- Creative Editors in publishing houses
- Grants to Authors
- Support for publishing houses
- Marketing and Distribution
- Originals important – not just adaptations from English
- Promoting books such as *Gwledd y Nadolig/Llyfrau'r Haf*
- Library of Wales
- World Book Day
- WBC training for editing, design and production
- WBC Distribution Centre
- Block grants to major Welsh publishers - completely necessary economically, and the cultural benefit is immeasurably great.
- Covers improving
- WBC grant system works well in very straitened circumstances.
- Literary magazines
- Children's books – work of Firefly
- Publishing grants - publishers would not exist without these and they are bringing Welsh literature to the attention of mainstream audience.
- The Revenue Grant – although no increase in funding
- The author advance, marketing grants and ILBGs administered by the Welsh Books Council are crucial in allowing small but ambitious publishers in Wales the opportunity to compete with large English publishers for quality authors, and then to market their books effectively to the trade and readers across the UK.
- Success of publishers
- Support for bookshops
- Importance of WBC School officers
- WBC Panels
- WBC grants panels seem to work well. They are transparent and ably supported. It seems important to sustain separate panels for Welsh and English publications.

- The emphasis on the quality of writing, production and on sales targets in the current grant system is one of its strengths to ensure the competitiveness of books from Welsh publishers.
- The standard of design and editing is high. Support from WBC has clearly worked particularly well in these areas.
- WBC grants scheme to booksellers for events
- Good Networks
- WBC's support in terms of sales and marketing is largely restricted to financial support for marketing posts. This is excellent, but WBC could do a lot more with central support and shared marketing services.
- The WBC work very well to publicise the books they distribute
- WBC advice on sales, marketing and design is really helpful for any new authors as it means that you can decide on the best approach to promote your work. The chance to take part in workshops, courses and receive manuscript assessments also means that even if your work isn't ready to publish, there's the opportunity for experts to provide support so that you can get your work finished and hopefully published.
- WBC works well in partnership with Radio Cymru on a number of initiatives such as novel of the week.

Literature Wales (LW)

- Book of the Year
- Writing Squads
- Writers on Tour
- Tŷ Newydd
- LW website easy to navigate and informative.
- Literature Wales events and workshops have helped widen the participation of Welsh people in literary life. Grant support for authors and publishers is invaluable for the sustenance of culture and informed, considered cultural and political debate in this country.
- Support for creative writers, administered by LW, seems to work well.
- Bursaries for young writers
- Social Media such as LW's *Her Barddoniaeth*
- LW - exciting opportunities for young people.
- Gŵyl Dinefwr was very successful – a type of festival promoting Wales' two literatures - a Welsh Hay.

Other Comments

- UWP is doing sterling work, as are the smaller presses.
- Human Resources key
- Festivals thriving
- Bookshops
- Grants.
- Libraries.
- Residencies for writers
- Grants for publication - but to a very small elite.

- Support for publishers
- Reviews and magazines
- Wales Literature Exchange
- Advantage of not having to go through a literary agent
- HEFCW ring-fenced money for books on the study of Wales.
- Grants for authors, training for editors and translators. Programmes such as the Wales Literature Exchange.
- Literature is good for health
- Libraries and the service standards libraries subscribe to in Wales are excellent, providing a key role in supporting communities.
- Papurau Bro

13. Is there anything that should be done differently (and, if so, why)?

The following comments were received in response to this question and they are grouped under the following categories:

WBC and activities funded through the WBC including publishers and magazines

- Change the name of the WBC in a digital age
- Less financial support for WBC and more for the publishers
- More funding for Golwg 360
- Improve WBC marketing especially in English
- Gwales works quite well but it not widely known outside the trade. Gwales needs to be improved and easier to use. There needs to be more ways of buying Welsh books.
- WBC distribution – too much of a monopoly. Shops across Wales do not see reps from the Distribution Centre
- Grants for English-language publishers should be reconsidered although Welsh-language publishing grants should be preserved). An environment that encourages more risk-taking, that raises standards through competition (for example book covers are especially poor in comparison to publishing
- WBC should be far more proactive. The WBC does not actively promote English language publications to their retailers
- Change WBC distribution
- Current WBC periodicals franchise model creates dependency rather than an entrepreneurial business model.
- Apart from Planet other English magazines are not interesting and insular.
- Funding to O'r Pedwar Gwynt – too specialist
- State Aid – problem for English-language magazines
- Increase magazine subsidy to allow larger and better publications - outcome would be a healthier culture of criticism and investigation, crucial to the advancement of culture and public life in Wales.
- The current grant system of WBC disproportionately advantages so called programme publishers who are in receipt of an annual black grant but who also receive more money per title published than publishers who apply for individual grants.
- More central services within WBC e.e editing/design etc
- Review of magazines – lost opportunity
- Fewer books – better quality and Marketing
- The Library of Wales series needs reassessing.
- Importance of Magazines. There is some overlap between *Wales Arts Review*, *New Welsh Review* and *Poetry Wales*
- More financial support for Welsh popular and academic magazines in both languages.
- Some thought should be given to making the distribution centre a business independent of the grant-giving body of the WBC. As presently constituted, there is a clear conflict of interest.

- Several of the publishers in receipt of grant funding are printer-publishers and effectively benefit twice from government support, i.e. for content creation and production and it could be argued that this creates an unfair advantage.
Actual sales figures as recorded by the publisher and excluding returns should be published and available for scrutiny for all grant-aided titles. WBC sales are just a part of the picture.
- There are a small number of Welsh publishers which have a complete monopoly on the book scene in Wales - so many white, middle aged, middle class men dictating what is worth publishing/reading and what isn't.
- The WBC panels seem to make little difference.
- The WBC as a distributor has limited interest in English language titles.
- Not certain of the value of the Books Council design service.
- If there is not any more money the WBC should be more selective in making grants otherwise publishers will just go to the wall and decisions will be made for them.
- A firm and clear emphasis on digital media should be government policy and needs to be at the forefront of WBC policy.
- The WBC distribution service charges a very high percentage of cover price forcing up the cover price to consumers.
- WBC should commit to an annual review with each publisher in Wales (especially independents) to highlight opportunities and grow awareness and sales.
- The publishers in Wales should be encouraged to improve the standard of creative editors to raise standards. Currently editors only concentrate on language accuracy.

Literature Wales and activities funded through the organisation

- More investment in writing squads so that there is one in every Welsh county
- LW need to be fair to Welsh/English writers
- Less emphasis on Roald Dahl and Dylan Thomas and focus more on authors who are alive
- LW bursaries for writers scheme is not responsive to the needs of writers. The length of time between making an application for funding and getting a decision, is too long. A faster scheme for smaller projects - say 1 month - would be much more writer friendly
- Need redistribution of resources within LW
- The Wales Book of Year Awards appears to generate a little publicity but has little real impact on sales of nominated books or on the visibility of literature as a whole.
- The Wales Book of the Year needs to be better supported, with the prize money returned to its previous level
- A writers' organisation is needed that is either separate from LW, or a LW that supports and promotes living, working writers
- Need to reconsider LW bursary for writers and allocation between languages. It is wrong to judge Welsh and English language applications together because a) the issues around the Welsh language are radically different b) the

Welsh language will always come out a poor second against English. Need a strategy which ensures that financially - both languages are treated equally.

- More festivals/events that focus on new work and new to midscale writers - More connections to other small nations in literary events and projects
The writers on tour scheme is too cumbersome and poorly funded to achieve its aims. LW appears to focus on educational (school) initiatives and young writers rather than the writer community as a whole.
- Clarity needed on role of LW
- LW – promoting itself
- Pathway from LW bursaries to the Welsh publishers is not clear
- Remit of LW confusing
- Tŷ Newydd is welcome but not visible. Spectacular literature house in Cardiff is needed similar to the literature house in Oslo to hold events
- Dylan Thomas Prize should be focused more on writers who are Welsh or are from Wales

Marketing

- Funding to support advertising and production of books.
- Find ways to increase the incentives for publishers to promote books ambitiously - outcomes would be that Welsh books achieve greater commercial success.
- A more dynamic marketing Strategy to reach new audiences
- Funding should be targeted at reaching the widest possible readership within and outside Wales, ie by helping put books from Wales into shops, including chains and supermarkets, also into libraries, and reviews into national newspapers and online promotion agencies such as Lovereading or The Reading Agency, or Goodreads (run by Amazon) and by upholding quality standards so that trade and consumers want to stock and buy them.
- More publicity for current initiatives and involve more public events
- More to promote Welsh-writing and publishing outside Wales
- A more impactful presence on social media
- Marketing of Welsh books outside of Wales must be taken seriously. Too many Welsh books drop off the radar immediately after publication. This is largely due to the insular conservative nature of the Welsh publishing houses.
- Increase in marketing support promotes awareness and sales

Educational

- Worry for academic publishing after end of UWP grant
- Importance of UWP
- Increase education materials
- Funding for children's books from Wales should be reassessed and potentially increased in the light of the significantly lower levels of child literacy in Wales as compared to England, Scotland or Northern Ireland in the last available figures. Investment here in publishing books and in bringing authors into schools would reap rewards in terms of literacy and education.
- Important that HEFCW continue to fund academic titles relating to Wales.
- Asking schools and working with exam boards WJEC/CBAC on supporting material for courses would encourage pupils to use the Welsh language more

and more into their late teens and further, thus increasing the demand for resources which in turn would result in larger grants awarded to Welsh publishing.

- A more open minded attitude to children's literature would bring Welsh publishing into the modern world.
- Scholarly publishing is a key part of the publishing and literary sector.
- More resources needed for children
- Getting in to schools and championing Welsh books.
- Encourage education authorities to put more emphasis on reading for pleasure and promote contemporary literature
- Support non stem intellectual activity – this leads to thoughtful citizens.

Digital

- Less focus on digital – continue to support but not obsession
- Promote Welsh books on digital platforms
- More on-line publishing
- More self-publishing in Welsh especially electronic
- Moving to online publishing would also allow new digital formats to grow.
- Treat online spaces, literatures, and experiments as just as worthwhile as the printed form.

International

- Need presence abroad at book festivals
- Return to Frankfurt Book Fair

Press/Media

- Increase in coverage in the press/media
- Need English-language news service similar to Golwg 360
- Funding to support national newspaper (either expansion of Western Mail to Wales wide coverage or new publication)
- Literary programme on television
- Critical scrutiny in Welsh language publishing should be encouraged and supported in English language media.
- Ireland and Scotland have strong mainstream press compared with Wales

Funding Generally

- Wales should get rid of state publishing. None of the writers cannot even get an agent
- More grants to publish free on-line material
- More investment in both languages. Including more bursaries for talented authors
- Cancel all subsidy especially Welsh language
- Evidence that subsidising the book sector actually represents value for money.
- Publishers should sink or swim in the commercial world - if they fail then it is easy for writers to publish their own work and/or develop cooperative publishing models without subsidies. This would lead to the production of

some great contemporary work from Wales and the emergence of a true Welsh/literary/bardic voice that will ring through the ages

- More funding for local authorities to arrange more events such as promoting Book of the Year and televising the ceremony and making it a festival of national importance
- Remove funding from all publishers in Wales and possibly distribute all the funds directly to writers based on some criteria to be discussed, designed and developed.

Translation

- Funds to translate both English and Welsh literature into other languages should be increased both to broaden the reach of Welsh culture in the rest of the world and to help Welsh publishers win rights deals which could significantly boost their income and reduce dependence on government support. This would be in line with government funding to other small nations or cultures such as Latvia or the Basque country.
- Translate more popular books
- Wales Literature Exchange has been doing excellent work - more needs to be done to promote translation of literature from and into Welsh
- Of all the bodies funded Wales Literature Exchange is the most invisible

Papurau Bro

- Papurau Bro should not be formalised
- Material prepared centrally on matters of national interest should be available to be included in every papur bro
- Need to link papurau bro with Golwg 360.
- More support for papurau bro— at the local level papurau bro are vital to enable people to read Welsh. Some Welsh speakers only read papurau bro

Other Comments

- More books to be produced and ensure they are known about
- Increasing sales
- None of the small Welsh presses have expanded exponentially in the period since devolution.
- More support for cultural events generally.
- More sharing of ideas and resources. Neoliberalism encourages competition and this doesn't always work for the sector. On the other hand mergers and simplifying eradicates a diversity which is also essential.
- Create a better understanding of this economic order that is holding us back in order to come up with radical solutions. Look abroad for answers. Don't reinvent the wheel.
- Be careful when dealing with the language divide. Involve more monolingual English in Welsh language programmes (and visa versa) in order to aid understanding and lessen divisions. Hire leaders who are great at what they do and if they are not bilingual make sure they understand the needs of the Welsh language and are committed to learning it.
- Eliminate bureaucracy.

- Be open-minded and learn from others.
- Ticking boxes - such as deprived communities
- Less cronyism
- Risk should be taken more often. Without this literature will never progress.
- Raise Standards
- Better editing
- More popular titles
- Value for money
- More events in north-east Wales
- Appeal to young people
- Advertising
- More coverage to good books which please sophisticated readers.
- More emphasis on better drafts of novels/books. Some books appear with mistakes because publishes in too much of a hurry to get books to shops
- Promote discussion on books
- More opportunities to work in partnership
- More awards within the Welsh-Language magazine industry – awards in England lead to publicity and effective marketing to publishers
- Promote less Welsh-language books
- More material free on-line
- Platform for BME writers
- Supporting commercially viable, outward-looking projects to take them UK wide and beyond.
- Too cliquey
- Any possible imbalance in the levels of funding/staffing for literature promotion as compared to literature production should be addressed, as the former cannot exist without the latter.
- Welsh arts, trade and literature promotion agencies could talk to each other and join forces with the Welsh Government to present a cultural case to the Welsh and UK book trade to stock books from Wales across genres. A visionary long-term project to counter the inequality for both readers and writers.
- Welsh writing should also be more popular rather than high-brow
- More reading for pleasure
- Organisations too close
- More funding from Cardiff via ACW for small press publishers in Wales, leading to more opportunities for writers in both languages.
- More literature-related events in north Wales and in both languages, maybe some bilingual to encourage more non-Welsh speakers to both attend and to hopefully develop more of an interest in learning and using Welsh.
- Fewer publishers linked to universities would provide "journeyman" writers with better opportunities for publication and remove the incestuous nature of "creative writing" associated with those universities.
- Move to open access models of publishing, where subsidies are provided to cover the cost of online publication. There would still need to be a selection process - eg peer review of some kind, or publisher intervention - then content is made available using an open access licence free of charge. Removes any

barriers to access, promoting readership by the general public, researchers and students.

- Provide print on demand option for rapid delivery, on a cost recovery basis, or possibly with a small profit margin to act as an incentive for commercial publishers (or to replenish the subsidy fund). This should include back lists from all Welsh publishers. Libraries or other customers who still want print copies could purchase at a reasonable price to make available alongside the free print version.
- A bilingual literature festival in the north perhaps based on the Eisteddfod's Babell Lân or Hay-on-Wye but on a smaller scale
- Disappointment with Hay on Way Festival – need to make better use of Welsh big names based in England
- Facilitate distribution around the world - outcome would be that Welsh cultural impact would be spread more widely.
- Small festivals and targeted distribution of information on Welsh / local literature - covering all genres and publishers - would increase visibility and klout of local authors.
- Mailing lists for genres and all Welsh books.
- A selection service of reputable work from indie authors and books of Welsh interest would put weight behind some of the books published.
- Awards for multiple genres, more winners, not just one book that is high-brow. Broaden the spectrum
- Authors need a genuine voice. Currently they have none.
- Genre writing needs to be recognised in Wales - everything is geared towards worthy works which require financial support. Genre books seem to be seen as suitable to be taken on by mainstream publishers but Welsh writers want to be published in Wales and whilst the odd one or two a year get reviewed and recognised in their homeland most don't.
- Focus on producing commercially viable titles and overall reading schemes to appeal to the general public.
- The support of a new major independent publishing house in Wales that focused entirely on new and exciting voices in Wales, with a focus on global markets and digital experimentation would put Wales on the map.
- Funding for festivals should be more carefully co-ordinated - festivals often have low attendance, or are just attended by those already engaged in literature and publishing in some way, so some strategic thinking on location, theme etc. With better planning we could engage those who are interested but not yet involved. Also, several authors have been organising their own (seemingly successful) book fairs and we should look at why they feel the need to do this and work with them.
- Outreach and information about Welsh literature does not seem to be equally well distributed throughout Wales. Information about funding and initiatives is hard to come by in Mid Wales.
- Streamline funding application processes could be considered as publishers currently spend a long time filling in forms
- A website pathway could be devised, made up of questions that take authors/publishers, etc., to where they need to go for the guidance/support they need. Rather like a medical pathway page. This would enable people to

find the support they need quickly and save time-wasting within the groups trying to point people in the right direction. The same result would be partly achieved by a clear description of each body and what they seek to offer.

- Editorial work on fiction could be better, and the work especially in Welsh could go through another draft or so before publication
- Wales should rejoin the National Poetry Day initiative.
- Better integrated bilingual publications (Welsh and English in same doc for audience of both or either language)

14. Is there anything else you would like the Panel to consider?

- Audio books
- Lack of Welsh-language resources specifically for learners – existing provision is good quality but very limited.
- Website to review books in both languages and also to introduce poetry
- Hold Tŷ Newydd 1 day courses throughout Wales to enable people who live afar to attend.
- Extend mentoring scheme to include advice and leadership
- Encourage original books for children.
- Target new markets such as learners. Provision for them is very disappointing.
- Grants to shops to arrange events
- Work in partnership with festivals such as Gŵyl Arall Caernarfon and local initiatives.
- Use libraries to hold events.
- Better books for teenage boys
- Better novels
- Small number studying Welsh for A Levels – concern for future
- Festival similar to Hay but in the Welsh language
- More resources for children's books and local books.
- Money should be focused on supporting diverse/community focused literary activity
- Need to attend international book fairs
- Training for BME writers.
- Workshops for second language Welsh speakers wishing to get help with writing in Welsh. I have noticed the same names and types of ethnicities more or less appearing on Library shelves
- Open up the prizes and awards to everyone regardless of qualification, publishing record, age, method of publication and who they know. Find different ways of filtering and judging work that doesn't depend on some academic's arbitrary ideas of what constitutes literature
Lottery support – writers should receive the same lottery support as sport
- Using available resources, libraries, local not-for-profit radio, (e.g Radio Bronglais in Aberystwyth) and small events /festivals to promote the available content of Welsh publishing. There is Reinstatement of literature development officers working in the Welsh heartlands, both to promote English language Welsh writers and to promote the joys of the language to English incomers.
- Develop branding add value by enhancing your intellectual property.
- An incubator scheme to bring skilled and experienced literary agents to Wales would be a strong step forward for the industry. This is a key role that is completely missing and an agent will provide a service that a publisher does not.
- Establishing a single website where people can search for the help/organisations that they need. This should cover only those organisations

actually based in Wales, but would include writers groups, agents, publishers, editorial services, proofreading services, etc. Doesn't need to be fancy it just needs to be a list of where people can go for help, the disclaimer being that it is just a list and it is the responsibility of the user to ensure due diligence.

- Raise reimbursement for library lending. Include self published books in competitions/bursaries/festivals. The quality of the book should define its merit, not the way it was published.
- The importance of the role of independent bookshops to the economy and community as meeting places, business sustainability and local identity.
- A big national book fair, in Cardiff, in which Welsh authors can meet their readers and promote their own works.
- Some of the money being paid for writers' foreign trips (via WAI) seems an absolute disgrace - agreed there's a need to promote trips abroad but some of the funded seems v hard to justify.
- A linking of larger publishers with smaller welsh publishers. A system that would support and develop publishers range.
- Set up an annual, anonymised author feedback survey specifically reporting on publishers. This should be for published authors, feeding back only on their own publishers.
- Have a mechanism for acting on any concerns that result from this survey.
- Set up a sub-panel to establish a safeguarded minimum payments scale to authors publishing with subsidised publishers. This should not limit the negotiating of higher rates where appropriate.
- Diversity in publishing and literature in Wales.
- More publicity and support of welsh publishers and welsh authors on a national and international level for children
- The absolute importance of libraries as a community hub and resource for literature and it's promotion.
- Spend more money in promoting all Welsh writing not just our high profile writers.
- More poetry books with both English and Welsh translations/originals side by side. More translation workshops and residencies.
- The closure and reduced funding of library services is having a huge impact Arts centres should have bookshops
- There is a lack of clarity in the sector as to which strands of funding should be used to support spoken word and related activities, and as a result it is currently fragmentary and reliant on the efforts of a handful of individuals.

Section 3 : Comments and Information

Provided below is a sample of comments and information, broadly representative of the larger body of evidence collected by the on-line questionnaire.

Comments outlining support for the work of the Welsh Books Council and the funding it distributes to publishers

- Mae'r gwaith a wneir gan y Cyngor Llyfrau yn hanfodol wrth ddarparu grantiau ar gyfer cyhoeddi ond hefyd drwy ddarparu cymorth golygyddol a marchnadol. Mae'n hanfodol fod cyllido'r gwaith hwn yn parhau.
- Mae Cyngor Llyfrau Cymru yn sicrhau bod cyfrolau amrywiol a safonol yn gweld golau dydd yn y ddwy iaith yn gyson drwy'r flwyddyn.
- Un o brif fanteision y drefn bresennol yw fod y Cyngor Llyfrau yn delio â'r byd llyfrau a'r fasnach lyfrau yn ei gyfanrwydd - creu'r deunydd, ei argraffu, y cyhoeddu'rwydd a'r gwerthu. Felly mae'n ymwybodol o anghenion pob un sydd yn y gadwyn, o'r awdur i'r darlennydd a'r prynwr. Mae hwn yn gryfder mawr.
- Rwy'n credu bod y Cyngor Llyfrau yn gweithio'n dda ac wedi codi safon olygyddol, dylunio a marchnata llyfrau.
- Mae grantiau'r Cyngor Llyfrau yn bwysig iawn i helpu awduron
- Wedi ymweld â nifer o wledydd - mae Cyngor Llyfrau Cymru yn unigryw ac yn gwir haeddu pob cefnogaeth ariannol.
- Mae defnyddio'r arbenigedd a geir o fewn staff Cyngor Llyfrau Cymru yn greiddiol ac amhrisiadwy i barhad y diwydiant cyhoeddi yng Nghymru. Mae'r strwythur a ddefnyddir i wneud penderfyniadau parthed dosrannu grantiau i wahanol gyhoeddwr yn gwbl dryloyw ac o fudd mawr i'r diwydiant.
- Mae'r gwasanaeth newyddion a gynigir ar hyn o bryd gan Golwg 360 yn arbennig o dda. Mae'r wybodaeth a geir ar Gwales yn arbennig, a'r gwasanaeth a gynigir wrth ddsbarthu llyfrau trwy'r wefan heb ei ail.
- Mae'n wych bod cymorth ar gael i ryddhau awduron profiadol i ganolbwyntio ar ysgrifennu.
- Cryfder mawr yw'r ffaith bod corff fel y Cyngor Llyfrau ar gael i arolygu a hyrwyddo'r holl broses o greu - o'r egin syniad hyd at ddsbarthu'r cynnyrch gorffenedig.

- Mae'r modd y cynhelir y diwydiant cyhoeddi gan CLIC er mwyn sicrhau bod y fath ystod o deitlau'n ymddangos yn flynyddol yn destun diolch a gwerthfawrogiad. Mae'r gefnogaeth hon, yn arbennig i deitlau Cymraeg, yn allweddol os am gyflwyno'r iaith fel un sy'n gallu cynnig amrywiaeth o brofiadau cyfredol a pherthnasol. Cyflwynar CLIC waith ardderchog ar gyllideb gymedrol, a gwelir ei lwyddiant pan yw'n ymgymryd â digwyddiadau ac achlysuron fel Diwrnod T. Llew Jones a Gwobrau Tir na N'Og, e.e. y cydweithio eleni gyda'r Urdd a chwmni teledu Tinopolis.
- The revenue grant, although standstill funding has seen it decline sharply in real terms in the last ten plus years, is still an excellent and viable way to try to help level the playing field a little with the large competitors that Welsh publishers must take on even to publish successfully to a Welsh readership as well as hopefully beyond Wales, and also brings vital stability to forward planning and some absolutely vital support for staff costs.
- The WBC is excellent in supporting journals and book publishing in both languages.
- WBC is an excellent national institution doing invaluable work and should continue to receive high and preferably increased levels of support.
- Grants provided by the WBC offer essential support for publishers and authors whose output has a focus on Wales. The training it has offered to publishers has helped to drive up standards in the areas of editing, design and production. Through its distribution centre it provides a unique service, not only to independent booksellers and chain in Wales and elsewhere, but also to anyone with an interest in Wales via gwales.com The principle arrangement of awarding grant money works well due to the fact that WBC is well established with an experienced staff, robust procedures and a clear focus and deep commitment to the publishing industry in Wales.
- The Welsh Books Council is doing a good job with the small resources it has. But the tight budget means that it cannot function properly so that innovation and change becomes really difficult. This situation is also true for the publishers and project organisers - tight resources, short term project-based funding etc, means that we are limited in what we can do.
- Financial support and advisory services from the Welsh Books Council are fundamental in allowing publishers to maintain a Welsh literary canon, which is an essential component of our national identity.
- The Welsh Books Council manages to do a great deal on little funding. As a result, Welsh publishers stand a fighting chance in the wider world.
- Generally speaking the Welsh Books Council's services work well and have transformed design and editorial standards.

- Hoffwn ganmol y Cyngor Llyfrau: maent yn ardderchog. Noder hefyd fod pob un o dai cyhoeddi Cymraeg Cymru mewn ardal Gymraeg, wledig sy'n ddifreintiedig. Gyda'r holl ganoli i Gaerdydd mewn meysydd eraill, mae'n hollbwysig fod hyn yn parhau.
- The importance of what the Welsh Books Council does should stop being questioned - without its services Welsh culture would be less vibrant.
- Credaf fod Cyngor Llyfrau yn gweithio yn effeithiol iawn. Maent yn rhoi blaenoriaeth i anghenion y cwsmer (awduron / cyhoeddwr / darllenwyr). Mae rhai o sefydliadau llenyddol eraill Cymru yn rhoi mwy o flaenoriaeth (ac arian) i'w delwedd eu hunain. Credaf fod hyn yn broblem.
- Mae'r Cyngor Llyfrau'n gwneud gwaith rhagorol ac yn gwneud i bob ceiniog gyfri. Mae'r systemau trefnus a chlir sydd gan y Cyngor yn annog hyblygrwydd, annibyniaeth gweisg unigol a safonau uchel. Dylid rhoi mwy o arian iddyn nhw! Basai'n llawer gwell gen i weld mwy o arian hyrwyddo a marchnata llyfrau (a darllen)

Magazines

- I think magazines, although they may not have huge circulations, are vital for the creative and cultural life of a country. New Welsh Review, Planet and Taliesin are important centres of discussion, debate and new writing. These grants are administered by the WBC, with their marketing and design support, and I believe they are the reason that literature in Wales is blossoming.
- These magazines provide a critical voice to the cultures and literatures of Wales through diverse and vibrant contributions. The Welsh Government should be proud of its contribution in supporting Planet, NWR, Barn and the like, rather than seeing culture as some sort of encumbrance that needs to be cut.
- The demise of the journal Taliesin was lamentable and has never been fully explained. The new journal, O'r Pedwar Gwynt, seems excellent however. A vibrant and diverse periodical culture is important.

Library of Wales – Support and Criticism

- I do like the Library of Wales series but it has probably reached its peak now.
- What is the real value for money in the Library of Wales project? Since well over £1 million has been expended on this project, resulting in the republication of a long list of old titles, what are the actual sales figures for all the titles published thus far? These sales figures should be published. The titles are professionally produced and well promoted, but do people actually

WANT them?

- The Panel needs to consider whether sufficient cultural breadth has been achieved by the Library of Wales series: there has been a great deal to enjoy here, and the series as a whole is a key cultural achievement of the Welsh Government; however, whether there has been insufficient attention to (for example) writing by women is an area that certainly needs scrutiny.
- The obvious bias in the Library of Wales towards indifferent, male, south-Walian, Labour-friendly literature, which presents Wales as if it were a Celtic fringe dufffest.
- Only 3 female writers are represented amongst 42 titles. This is a shocking missed opportunity to promote historic female writers who received little support in their lifetime and remain undervalued.
- The Library of Wales series was largely a vanity project for the Series Editor and his then political masters. There is no good reason for it to continue
- A lot of money goes into the Library of Wales series. Honno press have been producing a very successful and respected classics series for 30 years, in both English and Welsh, with no formal acknowledgement from the Assembly. I would like to see more support of - in monetary terms would be appreciated, but mostly recognising it as on a par with the Library of Wales, and of great importance to Wales.

WBC Training for Publishers

- The chance to take part in workshops, courses and receive manuscript assessments also means that even if your work isn't ready to publish, there's the opportunity for experts to provide support so that you can get your work finished and hopefully published.

WBC School Officers

- Mae'r swyddogion a gyflogir gan y Cyngor Llyfrau i fynd o gwmpas ysgolion yn chwarae rhan bwysig. Trwyddynt hwy, a'r Catalog Llyfrau Plant a gyhoeddir yn flynyddol, mae'r ysgolion yn gallu cael gwybodaeth reolaidd am lyfrau newydd.

WBC - author advance grants

- These are the best way of encouraging bigger names to publish with Welsh indie presses and so help the publishers to compete in the UK-wide market. WBC - marketing grants. These can make the difference as to whether a title gets anywhere as events are crucial in selling books and helping word of mouth promotion. These grants can also help to pay authors for their travel and time. Too often writers are expected to travel to events and give their time

for free in order to promote the title, for which they will often have been paid very little for. For example the title, *Aubrey and the Terrible Yoot* by Horatio Clare, won the Branford Boase Award 2016 for Wales, against competition from Penguin Random House and Harper Collins amongst others, but this title by a Welsh author would definitely not have gone to a Welsh publisher without a significant author advance grant from WBC. The boost this has given to the reputation of Welsh publishing, not least, within the UK book trade, is considerable. In the last two years, however, it has been noticeable that authors, including talented up and coming Welsh authors have been offered author advance grants by Welsh publishers and have been turning them down in favour of larger advances from UK publishers, so this fund is only just keeping pace with what is needed, or has to be targeted at fewer books.

- Mae'r grantiau awduron yn angenrheidiol. Ond nid yw'n fater o "one size fits all." Efallai y gellid cynnig mwy ar gyfer nofelau hwy, sydd, wrth reswm, yn cymryd llawer mwy o waith ac amser i'w hysgrifennu. Bonws ar gyfer nofelau sydd wedi gwerthu'n arbennig o dda? Hefyd, mae llawer o sylw'n cael ei roi i lyfrau sy'n plesio'r beirniaid 'swyddogol' ond dim digon i'r rhai llai llenyddol - sydd gwir eu hangen yn y Gymraeg.

Changes to WBC funding arrangements

- Block-funded publishers are required to produce too many books into which they cannot put sufficient attention and resources. Fewer books that are more carefully selected, and are more carefully, thoroughly, consistently and persistently promoted over a longer period might be a better model, and would likely generate better returns. Support for publicists to work on getting individual titles broadsheet and broadcast coverage should be increased. So too should support for getting authors into high profile festivals and events (at present this is something that authors largely have to try to do alone). The Author Advance grant and Marketing grant system could use some adjustment. Funding for celebrity and ghost-written works undermines the literary and cultural value argument of support for publishing. It also does not seem to have generated the income in sales that originally justified these kinds of titles.

WBC Distribution of Grants

- The distribution of grants for publishers through the WBC is clearly a robust and helpful process. The grants are distributed intelligently across a range of stake-holder needs, and the WBC administers these grants in a manner that ensures that a wide range of individual publishers benefits from them. Moreover, refereeing processes used by the WBC ensure that quality control is transparent and that quality itself is assured. (I was for a number of years a member of the WBC's English-language grants panel and was impressed by the care, scrutiny and professionalism that the WBC achieved in their important work.)

Performer Related Payments

- I would continue with the grants to publishers for the time being at their present rate, but I would make more funds available that are performance related. For every book that sells more than say a thousand copies, the WBC could pay a 50% incentive fee to the publisher per book to grow their business (until there is greater self-sufficiency). The 'profits' from increased sales for the publishers should be used to publish books for kids and the young that are given away free at readings/events in places like Tesco's in the valleys and other deprived areas. Perhaps also 1-pound novels for the unemployed? Maybe we can create a greater reading culture in Wales beyond the couple of thousand that are presently interested

More in-house WBC Services needed

- Ar hyn o bryd dau olygydd copi canolog sy'n gweithio yn y Cyngor Llyfrau a hoffwn i weld mwy o swyddi canolog o'r natur yma (o safbwynt yr adran olygyddol a'r ddylunfa) er mwyn sicrhau bod y gwasanaeth sy'n cael ei gynnis i gyhoeddwr yn gyflawn - a bod y gwasanaeth hwn ar gael pan mae'r cyhoeddwr ei angen.
- The WBC is already as responsive to trends as it can be, but it (and the publishers) are caught in the straightjacket of funding periods - something the market doesn't respect. The WBC should receive longer term guarantees for funding, so that they can be even more responsive to trends as they already are.

Sufficient funding to the publishing industry is vital

- Mae'r arian ychwanegol a ddaeth i'r diwydiant cyhoeddi yn y ddwy iaith ers 2002 wedi gwneud gwahaniaeth sylweddol. Mae wedi golygu mwy o amrywiaeth o ddeunydd a gwell deunydd. Mae awduron, darlunwyr, ffotograffwyr a dylunwyr wedi cael gwell taliadau am eu gwaith. Dydi'r taliadau ddim yn or-hael, ond y maent yn llawer teilyngach nag oedden nhw cyn 2002.
- Mae angen mwy o gyllid ar y byd cyhoeddi - arian bach yw i'w gymharu â er engraifft y byd teledu. Gyda mwy o fuddsoddiad fe fyddai'r oblygiadau yn bell gyrhaeddiol. Mae arian bach i'r byd cyhoeddi yn mynd ymhell ac yn sicrhau mwy o llywodraeth yn cael gwerth eu harian allan o'r sector yma. Wrth godi proffeil y byd llyfrau fe ellir cyrraedd llawer mwy o bobl.
- One could consider ring-fencing this very modest public investment in literature to allow for confident forward planning among publishers and literary organisations, and to set out a statement of permanent values at government level.
- Welsh publishing and literature in general needs more funding from the Welsh Government. As well as the inherent value of culture for well-being, belonging, health and self-education, literature and culture are an inherent, and age-old part of political expression in Wales, and our 'democratic deficit' is only deepened by the underfunding of the sector.

- Not applying cuts to the Welsh Books Council at all, allowing it to recruit the best talent. Protecting it and championing it, so that they can get back to working on making Welsh literature a focus for excellence the world over - instead of constantly fending off cuts and challenges to their existence. The racism inherent in many of the arguments against funding it, similar to that levelled at S4C. The people who make these arguments know so little about the Welsh language - if we listen to them we would have no language left.
- Support for the Books Council should be maintained or increased, not cut year on year.
- Not enough investment by the Welsh Government, particularly in furnishing the WBC with good marketing budgets to offer publishers. Not enough remuneration for staff of publishing houses.
- With ever limited budgets, the literature organisations in Wales do their very best against quite difficult odds, including large numbers of incomers who don't appreciate the Welsh literary heritage, language and poetry
- The WBC is already as responsive to trends as it can be, but it (and the publishers) are caught in the straightjacket of funding periods - something the market doesn't respect. The WBC should receive longer term guarantees for funding, so that they can be even more responsive to trends as they already are.
- Commercially-led publishing has its place but does not fulfil the deeper cultural need for books and other publications that truly reflect Welsh life, and allow Welsh writers an unrestrained voice and an opportunity to contribute to the cultural dialogue within, and external to, Wales. Financial support and advisory services from the Welsh Books Council are fundamental in allowing publishers to maintain a Welsh literary canon, which is an essential component of our national identity. We need a range of authentic, original voices to be heard and remembered, and threats of funding cuts are threats to our collective voice.
- Welsh publishing has proved it can punch well above its weight in terms of quality - as evidenced by awards and prizes at UK level, with Costa, Booker and many other wins, longlistings and shortlistings. This despite an very low level of staff and wages which is becoming unsustainable. For Welsh publishing to compete profitably and flourish it needs strong, high quality books that are visible in shops to potential readers around the UK and hence to find a niche within the UK book trade that it barely has at present. This is in a time of: shrinking diversity in terms of outlets and what they stock swingeing cuts to margins - thanks largely to the enormous levels of discount demanded by the online trade

Criticism of WBC and the funding distributed to publishers

- Lack of delegation and leadership in the WBC means that they have not been able to flourish in recent years
- Government cuts have been 'absorbed' into people's salaries, rather than taken from operations, meaning that it's hard for them to recruit from the next, younger pool of talent - they can't offer the benefits provided by other jobs. It may have seemed like a good strategy in order to save on cuts to operation but it has damaged the WBC's ability to be a top class employer. There is a demand for the service, there is a huge pool of Welsh talent, the senior management at WBC aren't at all making the most of it.
- Are WBC advice services necessary or effective? Could money be focused more beneficially on grants?
- The panel should provide direction as to the cultural remit for publishing in Wales. Far too much ephemeral tosh (in both languages) is published with Books Council support.
- Mae'r Cyngor Llyfrau yn gorff hynod effeithlon ym mhob agwedd ond mae gweinyddu arian tuag at farchnata wedi bod yn fan gwan dros y blynyddoedd. Pe gallai gefnogi swyddi i swyddogion marchnata yn y gweisg ble nad oes rhai yn bodoli, a darparu hyfforddiant, gallai hynny fod yn fodd i dynnu llyfrau gwreiddiol at sylw darpar-brynwyr.
- Previous budget cuts to WBC have severely impacted its ability to do wider outreach work. Had this question come up a few years ago I would have praised the WBC for its role in projects such as Reading Communities. But sadly, for us this has dried up now.
- I would like to know how many grant-aided titles sell less than 500 copies, and how much waste there is in the system. But at present WBC does not release sales figures, and neither do publishers.
- I definitely don't agree with double-funding. This occurs when, for example, an author gets a grant to write a book, then a Welsh publisher gets a grant to publish it. It should be one or the other. Certainly the public seem to get annoyed when they realised double-funding is taking place in any sphere. Maybe grants for writing or editing services should include the condition that, if used, the book cannot receive a second grant to be traditionally published? Or ringfence figures for titles which aren't published by traditional publishers.
- WBC, though vital, deals only with publishers and distribution. Writers and their remuneration are not independently safeguarded or even properly considered in the present system. WBC have rules that funded publishers must give authors contracts and regular royalty statements, but no one checks independently if this is done. You need a mechanism by which authors

can give feedback to an independent body on publishers' reliability in providing suitable contracts, advances, regular statements and payments, as students can give feedback on lecturers' performance.

- For the author-publisher sector in Wales: the challenge is that there is no support at all. All the support goes to traditional publishing in terms of grants, WBC services and so on, even though in some cases the fact that the books can't be published without grants suggests that they are so unpopular they shouldn't be published at all. A fortune goes to the WBC, even though it only works as part of the traditional/legacy publishing scene. So a vast sector of the writing/literary scene in Wales is totally ignored. Why can't author-publishers apply for grants to publish work, for cover design, for editorial services?
- The WBC has a design department which offers subsidised work which again is really wonderful. However, if this was outsourced to publishers, like the editorial grants are, I believe it would be more cost effective.
- The WBC has always been good value, doing a difficult job but has always been old fashioned in its approach. It compromises when it should take risks.
- The WBC needs to distinguish more clearly between the strategies that are best suited to the Welsh language market, and the strategies that would support English language publications in that much more commercial marketplace. It needs to ask whether these distinct markets require different expertise, even a different mindset.
- Gwales.com may have a nice connection with the Mabinogion, but it is it the best name for an internationally accessible online sales site.
- I end up buying Welsh books from Book Depository because Gwales is a pain to use, do they accept PayPal yet, stupid not to
- Too much reliance on grants. Books Council's reluctance to break new ground. System of readers' reports needs overhauling. Officers need to be shaken out of their complacency. People whose livelihoods depend on the Welsh language hardly ever buy books in Welsh. Ditto for magazines. Old-fashioned image of the publishing industry.
- The inclusion of the Council within the Welsh Government's main economic department may require the Council to make its case with a harder economic edge. In this context its operational plan and sales targets need sharpening.
- Sales targets are expressed for one year only and do not distinguish between the languages. It is not clear, therefore, whether these targets represent a defensive strategy of holding the line or express any confidence in future growth in either language.

- The revenue grant to publishers works well but has not maintained its value.
- Author Advances were a good idea but frankly have not worked. The idea was to encourage Welsh publishers to commission high-profile writers. In practice it has simply been used to 'reward' 'well-known' (in Welsh terms) authors but has failed to attract top-selling authors. The 'well-known' Welsh authors would have written the books anyway, so the Author Advance does not add value.
- The WBC should not be receiving funding to offer services; or all their services should be available to anyone publishing in Wales, regardless of whether it is a small publisher or author-publisher. Or cut some of their funding and use it to support author-publishing in Wales via another body. The last option would be favoured, since the restrictions on working with the WBC (e.g. exclusivity for distribution) are onerous. The fact that any of this has to be spelled out, and seems to leave staff in the established system scratching their heads in confusion, shows how behind-the-times and discriminatory things currently are.
- There are a small number of Welsh publishers which have a complete monopoly on the book scene in Wales - so many white, middle aged, middle class men dictating what is worth publishing/reading and what isn't.
- None of the small Welsh presses have expanded exponentially in the period since devolution. The extra funding in the early 2000s and projects such as the Library of Wales seemed to suggest the potential for breakthrough and the creation of a 'Welsh Cannongate'. The reasons why this did not happen are probably multiple and complex.

Improve marketing including WBC marketing

- Dylai unrhyw nawdd cyhoeddus i wyliau neu ddiwyddiadau diwylliannol fod yn amodol ar hyrwyddo cyhoeddiadau Cymraeg a Saesneg Cymru. Dylai cylchgronau a llyfrau o Gymru fod yn y Maes Awyr yng Nghaerdydd, yng Nghaerdybi ac Abergwaun, ym mhob gorsaf trên ayb. Does yr un llyfr Cymraeg na Chymreig yn cael ei hysbysebu yn eang ac yn amlwg. Mae gwefan Gwales yn hen ffasiwn ei diwyg ac yn anodd i'w defnyddio ac mae angen ei gwella ar frys.
- The WBC is not so effective in promoting Welsh books outside Wales. It needs a more vibrant, outward-facing marketing department.
- My own experience of distribution through the WBC has not been impressive and I now work with London based distributors, who are for more efficient at servicing outlets in Wales (and the UK and internationally). I would suggest reviewing how this distribution model works. I would prefer to use a Wales-based distribution service to get my product around Wales a) to support jobs and b) to reduce the carbon footprint of my publication.

- Marketing of Welsh books outside of Wales must be taken seriously. Too many Welsh books drop off the radar immediately after publication. This is largely due to the insular conservative nature of the Welsh publishing houses.
- Byddai'n well, yn fy marn i, i gyfyngu ar nifer o'r teitlau a gwario mwy ar hyrwyddo. Canlyniad hynny fyddai cael mwy o ddarllenwyr yn y pen draw. Fyddwn i ddim am amharu ar yr amrywiaeth ond yn hytrach cyhoeddi llai o hunangofiannau er enghraifft - bod yn fwy dewisiol a chaboli mwy ar y rheiny yn ogystal a'u marchnata.
- The Welsh Books Council seem content with marketing inwardly, having stands at the National Eisteddfod and the Royal Welsh Show which seem simply to replicate the efforts of shops already attending these events. Wales as a whole needs to become a brand; a location on the map for literature and publishing and a destination for those seeking quality.
- Mae hysbysebu ar hyn o bryd yn tueddu i fod yn ymarfer mewn pregethu i'r cadwedig. Mae angen hysbysebu mwy ar Facebook etc er mwyn cyrraedd cynulleidfa newydd, gan wneud yn siwr bod modd cael at y cynnwys o fewn ychydig o gliciau. Angen galluogi rhagor o rynghysbysebu rhwng ee S4C a Radio Cymru a Golwg 360 a chylchgronau. Angen darparu cynnwys (ee nofel) mewn sawl cyfrwng (ee llyfr, e-lyfr ar gyfer ffôn, e-lyfr yn y porwr, fersiwn llais synthetig). Angen defnyddio mwy ar y lleisiau synthetig Cymraeg i wneud darllen yn haws i'r rhai sy'n cael trafferth darllen.

Criticism of WBC Distribution

- The Distribution Centre is a great service for booksellers, and is allegedly self-financing, but are the reps' salaries allocated to the Centre or to the Council?
- The aim of subsidies to English-language publishers isn't clear. Is it to ensure there are successful Wales-based publishers, or is it to ensure that the output of Wales-based publishers reflects and promotes the culture of Wales? Perhaps it's both, but they're different issues with different answers.

Criticism of Magazines funded through WBC

- There is a question as to whether these are the periodicals we need in contemporary Wales. Planet comes closest to reflecting the connections between literature, politics, economics within the culture, NWR and PW have a literary brief that is relatively narrow. A political / cultural review, appearing every month, in the style of the new Welsh 'O'r Pedwar Gwynt' would be a major contribution to civic debate in Wales. 'Wales Arts Review' may play this role, but its focus is cultural and standard very uneven. Planet seems to

occupy its own valuable space. There is some overlap between Wales Arts Review, NWR and Poetry Wales and this might be worth looking at.

- Ar wahan i Planet, mae'r cylchgronau Saesneg eraill yn go anniddorol ac yn fewnblyg. Byddai cael Poetry Wales i ddilyn patrwm Barddas a NWA i ddilyn Barn er enghraifft, o ran bywiogrwydd, o ran bod â phresenoldeb cenedlaethol a chymunedol, ac o ran bod â naws llai siwdaidd, elft yn gam ymlaen.
- The current periodicals franchise model creates dependency rather than an entrepreneurial business model. A low-level, annual grant is less useful than a more focused injection of support in the early days, followed by tapering support over 3-4 years, on the basis that, at the end of that investment period, if the product is unviable and has no audience, it should be wound up. The outcome is clear: well-resourced businesses should be able to build sales and advertising revenue with sufficient funding up front to develop audience, distribution networks, subscribers, a strong advertising base and new outlets.
- The recent magazine funding review was an opportunity for a bold remodelling of arts media in Wales, one that might have proved Wales the envy of the world in this area. But a conservative decision, where inadequate funding was spread thin, rather than serious thinking applied could in the long run prove the undoing of the Welsh literature. Conflicts of interest and cronyism were demonstrably on display in this process. What little effort is able to be put into the digital sphere is used extremely well, and value for money is easy to evidence.

Importance of Publishers

- Un o nodweddion y byd cyhoeddi yng Nghymru yw fod yr argraffwyr-gyhoeddwyr, rhai fel Gomer, y Lolfa, Gwasg Carreg Gwalch etc yn dal yn bwysig. Ar y cyfan, rwy'n credu fod hwn yn gryfder i'r diwydiant, gan fod y cyhoeddi yn rhan o fusnes mwy, ac am fod y perchnogion yn meddwl fel pobl fusnes. Wrth gwrs, mae'r cyhoeddwyr 'pur' (hy cyhoeddwyr nad ydynt yn argraffwyr hefyd) yn gwneud cyfraniad sylweddol yn ogystal.

Bookshops

- Mae'r cymorth bychan a roddir i siopau annibynnol yn werthfawr, er mai bychan ydyw. Mae'r siopau hyn yn dal yn rhan bwysig o'r fasnach lyfrau, ac yn fannau cyfarfod yn ogystal.
- Diffyg siopau llyfrau sy'n gwerthu llyfrau iaith Gymraeg. . . gwybod bod pethau ar gael ar-lein, ond mae'n well codi copi mewn siop a dod i benderfyniad ar ol darllen cwpl o baragraffau. 10 milltir o leiaf i'r siop agosaf ata i sy'n gwerthu llyfrau Cymraeg ac mae hwnna mewn lle lletchwith iawn i barcio

Support for Welsh Books Council and LW

- The Welsh Books Council and Literature Wales are fantastic organisations!
- Grants from Literature Wales and WBC allow small presses to thrive. Generous bursaries exist for new and established writers. Literature Wales is especially good at organising lively events, and encouraging public interaction with both Wales's literary heritage and its present literary culture - in both languages thrive
- Along with Literature Wales, the Welsh Books Council does an amazing job in enabling, preserving and promoting its vibrant literature community and industry. The threats to that are very much financial. It is essential to maintain existing writers and encourage new writers in both English and Welsh and not drive them away from Wales by restricting funding. We are already seeing cuts to events and the promotion of books. This is a threat. It would be so easy for people to turn elsewhere for books.
- Mae'n bwysig nodi fod y diwydiant at ei gilydd yn effeithiol ar hyn o bryd, yn y Gymraeg o leiaf. "If it ain't broke..."

Advantage of having more than one organisation

- Concentration of literature resources in a single organisation, is unprecedented, unparalleled and is not repeated in other art form sector. For the literature sector to be served effectively, there is an urgent need to distribute resources among several organisations with complementary briefs and relevant expertise. In other words, there is a need for more than one literature portfolio organisation to be working in Wales.
- Mae Llenyddiaeth Cymru hefyd yn rhoi ysgoloriaethau i awduron. Fe allai rhai ddadlau fod yma ddyblygu diangen, ond fyddwn i ddim yn dadlau hynny. Mae pwyslais LIC ar ddeunydd llenyddol yn y ddwy iaith, gyda phwyslais ar lenyddiaeth greadigol a rhoi rhyddid i'r awdur ddatblygu ei weledigaeth. Mae pwyslais y Cyngor Llyfrau yn fwy ar ddarparu deunydd darllen amrywiol ar gyfer darllenwyr o bob math. Dydi hyn ddim yn golygu nad yw awduron yn cael arian awdur CLIC ar gyfer nofelau, ond mae'r pwyslais yn wahanol. Er enghraifft, mae'n annhebyg y byddai CLIC yn rhoi comisiwn sylweddol i fardd i ysgrifennu casgliad o gerddi. Felly mae dadleuon teg yn erbyn canoli'r nawdd i awduron mewn un corff.

Support for Literature Wales and the activities it funds

- Tŷ Newydd is an important organisation but was more engaging and dynamic before being absorbed into Literature Wales

- Tŷ Newydd looks as if it is now in very good hands and has a great new programme on offer.
- Canolfan Tŷ Newydd is a great resource
- Mae cyrsiau Tŷ Newydd yn fendigedig - rwy wedi mynychu sawl un. Buasai rhagor o gyrsiau undydd yn wych, gan fod y gost o fynychu rhai wythnosol yn ormod i nifer o bobl ar incwm isel.
- Literature Wales does a good job, and the subsidies for publication are very valuable.
- I like the aspect of Literature Wales' work which gets out and works with and engages writers from every background. This is essential. I have seen first hand the massively empowering effect this has on people. Literature Wales should be proud of what it does in this field.
- Literature in Wales is thriving and is more than an industry. Literature in Wales supports and enhances industry, culture, health and wellbeing. It needs to be supported for those reasons.
- The revenue to Literature Wales is very well spent. A small and nimble organisation does very much on very little. Their work with the South Wales Literature Development Agency is to be praised. They reach communities in need of literature and who deserve access but rarely gain it.
- Llenyddiaeth Cymru'n gwneud llawer o waith da. Llyfr y Flwyddyn yn denu sylw; Awduron ar Daith yn syniad ardderchog;
- The bursary system is an excellent use public funding to support literary activity and enable the production of literary works analogous to support for other art forms.
- Bursaries - excellent examples of high quality texts produced as a result.
- Funding the development of new writing is seeding our literary culture. Writing takes time and time is a resource. These bursaries foster new talent, and they have a track record of success: Jonathan Edwards and Kate Hamer, for example, have been recognised on a national level for their achievements in huge competitions, and LW money is part of that success.
- Support for young writers and emerging authors, I work with young people who have benefitted enormously from the Young Writing Squads and the writers who work with them are often inspired.
- Support in terms of professional development for authors through Literature Wales – both creative mentorship, bursaries and workshops - is key to nurturing Welsh writing talent. Ty Newydd is also central in this process of

encouraging the best writing, but also puts Wales on the map in the UK and abroad as a nation which takes literature seriously.

- Literature Wales has a social justice and educational plan to get more people from disadvantaged backgrounds reading: this is extremely important for local communities and can only be done through arts funding.
- Grants for publishers and especially magazines also work very well to get the best works of fiction and non-fiction published - many books which have gone on to have great success could not have been published without this financial support.
- There have been some excellent initiatives from Literature Wales taking literature to disadvantaged groups in the Valleys, prisons, etc but the funding of such projects is always vulnerable to the whims of government - this is disappointing and counter-productive.
- Gwaith Llenyddiaeth Cymru gyda sgwadiau sgwennu gan awduron yn effeithiol. Angen ehangu y rhain i bob ardal er mwyn hyrwyddo diddordeb yr ifanc.
- Digwyddiadau proffil-uchel fel Llyfr y Flwyddyn - eto yn rhoi llwyfan i bob mathau o lenyddiaeth, sgil-gynnyrch ar gyfryngau eraill, etc.

Criticism of Literature Wales and activities funded through the organisation

- Literature Wales does a number of very good things but it is too fragmented and too vulnerable to the whims of Welsh Government policy.
- Nid wyf bellach yn gweld llawer o bwrpas i gorff fel Llenyddiaeth Cymru. O'm rhan i mae'n gorff aneffeithiol, araf ei weithgarwch a simsan ei gysylltiad gyda awduron.
- The remit of the organisation is confused and confusing. It does not represent writers' interests, nor does it promote writers. It is not a writers' agency. Indeed many writers object loudly and persistently to its focus on literary tourism, its downgrading of Book of the Year, and its popular projects that have little bearing on current writers and the promotion of their work. The Dylan Thomas and Roald Dahl projects are nothing to do with current Welsh writers or their work. In fact they have served to eclipse Welsh writers, and reinforce internationally narrow and limited view of Welsh literature.
- Big branding projects such as celebrating dead authors connected to Wales are not working in the long term. They look backwards in time, they are top-down, and in the case of Roald Dahl they make Wales look desperate because they seem to want to rub off some of a great international writer's shine onto Wales and looks as if we don't have a contemporary scene. Of

course there are piecemeal efforts to include contemporary writers in these projects but the main aim seems to be about associating Wales with existing older brands. This model could be pretty damaging in the long-run.

- The money Lit Wales spends on activities associated with long-dead writers. Whilst I have no problem whatsoever in celebrating Wales' rich and diverse literary culture, and in bringing its writers to new audience, I do question the value of the Dylan Thomas centenary (and the now annual Dylan Day) and the Dahl centenary. This seems to me thinly disguised tourism, centred almost solely in South Wales, which supports already wealthy literary estates, while the development of new talent and the sustainability of the publishers face cuts after cuts. Lit Wales does some brilliant, important work, but this policy of giving money to the dead is very short-sighted. The impact on further cuts to Welsh publishing as a result of this will have a long-term cost to literary culture in Wales, particularly for the next Dylan Thomases.
- The services (especially Literature Wales) are not joined up and do not seem to work in a grassroots consultative way with the whole scene. This means resources are wasted because they don't take advantage of the talent and connections already working in the field and often it seems LW promote poor quality work because they are not able to reach out to the scene and find what is working and seem competitive rather than collaborative.
- I cannot see the pathways from Literature Wales' bursaries to the Welsh publishers. There could potentially be a more connected partnership, particularly where emerging writers are concerned, that extends beyond the bursary and critical mentoring into support for first publication.
- Literature Wales is not really working as well as it should. It is only really good at promoting itself. It needs a new vision, a different kind of leadership in order to be properly collaborative, responsive and imaginative.
- The Lit Wales website needs revamping, it is old fashioned, it makes it difficult to find out how and when or even if the bursaries are available and it could be a lot more active on social media.
- There are some schemes run by Literature Wales that fund writers directly, and encourage writing from a young age, and these should be the core projects. There are times when a showcase for writers is useful, but it's of limited value if we're not encouraging new writers and readers.
- Dwi meddwl fod angen ystyried beth mae Llenyddiaeth Cymru yn wneud gyda'i harian nhw gan nad yw £900,000 o grant ddim yn cyrraedd awduron a darllenwyr go iawn.
- Literary festivals, and I am thinking particularly of Dinefwr, should have more literature and comparatively less popular music and reliance on 'stars' to bring

in the punters. Careful thought should be given to what literature festivals are actually for.

- There should be far less emphasis on 'competitions'. There is a place for one or two such as the Wales Book of the Year or the John Tripp prize for spoken poetry but the apparently endless proliferation of them devalues the whole art of writing. Writers should be encouraged to engage readers, not strive to win competitions. Selling books is a finer achievement than winning prizes and does more to raise the profile of writers in Wales.
- Literature Wales' bursaries for writers scheme is not responsive to the needs of writers. The length of time between making an application for funding and getting a decision, is too long. A faster scheme for smaller projects - say 1 month - would be much more writer friendly.
- Mae Llenyddiaeth Cymru fel asiantiaeth yn gweinyddu ysgoloriaethau, prosiectau a digwyddiadau megis Llyfr y Flwyddyn yn effeithiol ond nid yw ochr arall ei gweithgaredd, sef bod yn gymdeithas awduron, yn gweithio'n foddhaol. Mae'n rhaid i gymdeithas awduron fod yn ethol ei swyddogion ei hun ac yn pennu ei blaenoriaethau. Mae strwythur o Fwrdd wedi ei benodi yn gweithio ar gyfer Llenyddiaeth Cymru fel asiantiaeth; ond nid yw'n addas ar gyfer cymdeithas awduron, ac nid yw'n ennyn teimlad o berthyn.
- Dyw Llenyddiaeth Cymru, er yn llwyddiannus mewn rhai agweddau o hyrwyddo (mae cyfraniad y Lolfa Len yn yr Eisteddfod Genedlaethol yn wych iawn, er enghraifft) ddim yn rhoi pwyslais ar werthu cynnyrch. Mae hyn yn hanfodol o safbwynt cyhoeddwr. Mae'n ymddangos mai cynrychioli buddiannau'r awdur (a rhai awduron yn unig) y mae Llen Cymru yn bennaf.
- Tŷ Newydd seems to be heading for privatisation under Literature Wales who seem to be looking for ways to make money out of through tourism and corporate events in order to recoup their losses because their courses are not full and the centre is unsustainable if it is not run properly (which it has been in the past). But it was a resource that was bought specifically for the writers of Wales, most of whom do not get its benefits because they cannot afford to visit. Who is now able to enjoy it? It seems mostly Literature Wales staff and well-off would-be writers. Perhaps a more co-operative model could be devised to make sure that the grassroots readers and writers can also benefit from it but also be a part of making it work - e.g. have a stake in its running.
- The Writers on tour scheme is too cumbersome and poorly funded to achieve its aims. Literature Wales appears to focus on educational (school) initiatives and young writers rather than the writer community as a whole.
- Get rid of Literature Wales and probably the whole Arts Council - consult, design and develop a new strategy to support literature in Wales (if necessary) - then consult design and develop some more - get *new*

constituencies of people - especially writers and artists who are outside the core cabals.

- Literature Wales has been made less effective and more bureaucratic by its reorganisation and the role of writers in it has been diminished. The semi-detachment of Academi from it has weakened the position of writers, and the abandoning of AGMs for Academi has deprived writers of an important forum. Cuts in funding for Writers on Tour are a major blow.
- The value of Literature Wales is difficult to evaluate.
- Dydw i ddim yn teimlo fod Llenyddiaeth Cymru'n cynnig yr un gwerth am arian ag y mae'r Cyngor Llyfrau'n ei wneud.
- Buaswn i'n hoffi gweld ailedrych radical ar yr hyn y mae Llenyddiaeth Cymru'n ei wneud
- Rol a swyddogaeth Llenyddiaeth Cymru - pa mor effeithiol ydyw mewn gwirionedd?
- Ad-drefnu Llenyddiaeth Cymru o'r bôn i'r brig: mae wedi crwydro oddi wrth ei amcan gwreiddiol ac wedi tyfu'n ormod o fonolith biwrocraataidd. Rhai agweddau da yn perthyn iddo, ond mae'n rhy unffurf erbyn hyn, ac yn gallu dieithrio pobl.
- Rhaid gofyn ai Llenyddiaeth Cymru yw'r corff mwyaf priodol bellach i reoli cymaint o fywyd llenyddol Cymru.
- There is still an awful lot of creativity in the sector and when organisers and curators focus on quality - something that Literature Wales sometimes doesn't seem able to do - some amazing things can happen. But as with anything in the current market economy, development is limited.
- Literature Wales rarely publishes local events of reading series that do not adhere to a certain (unknown) mandate. Several highly interesting and well-known authors that have read in Cardiff received no notice.
- Literature Wales only seems to work in Cardiff, Gwynedd (Ty Newydd) and wherever the Eisteddfod is. I cannot remember the last time I saw a LW event in West or Mid Wales. It is notable that the poetry scene is more connected in a community than the fiction scene (through my observations) - probably because of the distribution of live events.
- We need a writers' organisation that is either separate from Literature Wales, or a Literature Wales that supports and promotes living, working writers. The Writers on Tour support has been cut so much as to make it difficult or impossible for many venues to pay writers for events; writers themselves will

often find themselves out of pocket for events because of the poor fees payable and the poor rates of travel reimbursement. At the very least to show support for writers, the portion paid by Literature Wales should be returned to its previous level. Literature Wales needs to reassess its priorities, and shift funding from the big-scale literary spectacle and literary tourism to instead support sustainable levels of support and promotion of writers.

- A lot of money from what I can see, goes towards promoting books via live events within Wales. Having seen an ad for the Art Tent in the Eisteddfod in The London Review of books recently made me wonder why Welsh books aren't promoted that way - to a very broad spectrum of readers outside Wales? I feel that the live events are often poorly attended and are made up of those people who are all ready in the know.

Book of the Year

- The Book of the Year needs to be better supported, with the prize money returned to its previous level if it is to be taken seriously both inside and outside Wales. At present it's an embarrassment. As a national prize, it should be of greater value than a prize for a single poem. It also needs to be appropriately branded and marketed to maximise the sales potential of all listed titles.
- The Wales Book of Year Awards appears to generate a little publicity but has little real impact on sales of nominated books or on the visibility of literature as a whole.
- Wales Book of the Year has been downgraded in a way that has deeply undermined instead of supported the profile of Welsh literature. The challenge for Literature Wales is to decide if it is for the promotion of Welsh writers, or for tourism.
- Why does a publicly-funded prize (Wales Book Of The Year) arbitrarily exclude many books published in Wales, just because they aren't published by grant-funded traditional small publishers?

Confusion about Current support – WBC and LW

- Too much responsibility given to Literature Wales and Books Council. A new agency is needed. Complaints about both bodies are rife. Their 'readers' reports' are ridiculously inadequate
- Mae'n anffodus bod hollt rhwng y ddarpariaeth grant rhwng 'cyhoeddi' (CLIC) a 'llynyddiaeth' (Llynyddiaeth Cymru) ac addysg (CBAAC a'r hen ACAC - DCELLS). Mae pob un o'r uchod â'u cryfderau a'u gwendidau, ac oll yn gweithio'n galed yn eu his-feysydd. Ond mae'n hen bryd gosod y "diwydiant" cyhoeddi ar sail mwy cadarn a chynladwy. Dyna ddylai'r flaenoriaeth fod - helpu i gynnal gweisg (efallai trwy annog uno neu gyd-weithi rhwng gweisg

neu gwmniau 'cyfryngol', fel ddigwyddodd yn strategol efo chwmniau teledu annibynol oedd yn gweithio i S4C). Ddylai bod strwythur ac arweiniad strategol i ddod â'r asiantaethau at 'i gilydd, i gyd-weithio.

- Er bod nifer o ddigwyddiadau difyr yn cael eu trefnu gan Llenyddiaeth Cymru, a'u bod yn cael eu gwerthfawrogi gan y rhai sy'n eu mynychu, ni ellir osgoi'r teimlad fod dau gorff sydd mor wahanol i'w gilydd o ran syniadaeth yn gadael i rai pethau gwympto rhwng dwy stôl am nad yw'n gyfrifoldeb y naill na'r llall. Mae pwyslais yr un corff ar 'lenyddiaeth' a diffyg adnoddau'r llall i hyrwyddo 'llyfrau' yn ddigonol yn golygu fod ffocws un corff yn llawer rhy gul ar awduron, waeth beth fo'u cynnyrch diweddaraf, a'r corff arall yn rhy brysur yn hyrwyddo creu deunydd o safon a dosbarthu i'r siopau sydd eisoes yn bodoli i wneud unrhyw waith mentrus sy'n torri tir newydd.
- Gellir cwestiynu'r arfer o roi ysgoloriaethau i awduron i ysgrifennu, o'i gymharu â threfn y Cyngor Llyfrau o daliadau comisiwn drwy'r cyhoeddwr. Mae'r ail yn fwy cost effeithiol ac yn debycach o arwain at gynnyrch sydd ei angen. Er bod y ddau gynllun yn cefnogi awduron, y mae cynlluniau Llenyddiaeth Cymru'n dyblygu gwaith y Cyngor Llyfrau mewn sawl maes.
- Buasai'n llawer gwell gen i weld mwy o arian hyrwyddo a marchnata llyfrau (a darllen) yn cael ei roi i'r Cyngor yn hytrach nag i Lenyddiaeth Cymru ar gyfer ehangu'r farchnad ddarllen yn Gymraeg, gan wneud y diwydiant hyd yn oed yn fwy hyfyw a chynaliadwy.
- Mae Llenyddiaeth Cymru wedi datblygu i lawer o gyfeiriadau yn y cyfnod diweddar gan ddyblygu gwaith a wneir gan y Cyngor Llyfrau. Gan nad yw'r arbenigedd cyhoeddi/ llenyddiaeth bellach yng Nghyngor y Celfyddydau (sy'n ariannu Llenyddiaeth Cymru) nid ydynt o bosibl yn ymwybodol o holl ystod gwaith y Cyngor Llyfrau ac mae perygl fod sefydliadau'n mynd ar draws ei gilydd. Un posibilrwydd o osgoi hyn fyddai gwneud Llenyddiaeth Cymru'n gleient i Gyngor Llyfrau Cymru, neu bod Cyngor Llyfrau Cymru a Llenyddiaeth Cymru'n dod yn uniongyrchol gyfrifol i Lywodraeth Cymru.
- Dylid astudio rôl CLIC a Llenyddiaeth Cymru i weld os oes gwir angen y 2 gorff yn gweithio mewn maes mor gyfyng (yn enwedig o ran y Gymraeg). Yn yr un modd, a oes angen mwy nag un 'noddwr' yn y maes cyhoeddi addysgiadol? Y peth lleia ddylid ei wneud ydi gosod ambarel strategol dros yr holl noddwyr gyrff hyn, gyda'r nod pennaf o greu adeiladwaith cyhoeddi mwy hunan-gynhaliol yng Nghymru a fyddai'n fwy cadarn a chynaliadwy yn yr hirdymor.
- Clarity is needed on the particular roles of Literature Wales and the Welsh Books Council. There seems to be some overlap in relation to marketing and promotion in particular.
- In my experience, there is little interaction and engagement between the several bodies set up to support Welsh literature. I once asked Lit Wales for

guidance and was given a pasted copy of their relevant web page. Only from reading the summary of support today, do I see that they should have pointed me toward the Welsh Books Council.

What could be done differently?

Move LW activities to WBC

- Cyfuno gwaith Llenyddiaeth Cymru a Chyngor Llyfrau Cymru gan sicrhau gwell gwerth am arian i bobl Cymru.
- Dylid cael UN corff a fyddai'n uno cyfrifoldebau'r Cyngor Llyfrau a Llenyddiaeth Cymru (ac arbed arian o ganlyniad?)
- Edrych o ddifri ar y berthynas rhwng Cyngor Llyfrau a Llenyddiaeth Cymru. Dod â holl agweddau gweinyddu grantiau cyhoeddi (hamdden ac addysgol) o dan un corff.
- Rwy o'r farn y dylai y Cyngor Llyfrau lyncu Llenyddiaeth Cymru - i greu un corff - fel one stop shop - mi fyddai arbedion ariannol byddai modd eu dargyfeirio i gynyddu'r gweithgaredd marchnata a'r gynhaliaeth i awduron cynnwys. Hoffwn weld systemau "incentive" ble mae modd i'r gweisg gael cymorthdal i fentrau masnachol lle mae partner yn dod i'r bwrdd gan gyfrannu cyllid - yn yr un modd a sy'n digwydd mewn cynhyrchiadau teledu sy'n gyd-gynhyrchiadau. Os oes gwasg yn medru denu buddsoddwr i brosiect yna mi ddylai bod modd i'r Cyngor fedru cynnig cymorth ychwanegol i hwyluso prosiectau o'r fath.
- Mi fyddwn ni yn ystyried bod potensial da i'r Cyngor Llyfrau sy'n sefydliad gweithgar gweithredol lyncu'r corff "celfyddydol" - Llenyddiaeth Cymru. O uno'r ddau sefydliad yna byddai angen ailstrwythuro yn amlwg er mwyn ffocysu ar yr elfen farchnata a denu awduron poblogaidd /hwyliog/heriol i greu cynnwys apelgar fyddai a gwell cyrhaeddiad i ddenu darllenwyr newydd.

Move WBC activities to LW

- Scrap Welsh Books Council and invest in an agency like Literature Wales which, with proper funding, can become more pro-active.
- Efallai dylid rhoi cyfran o gyllid y Cyngor Llyfrau i Llenyddiaeth Cymru er mwyn i'r corff hwnnw ymgymryd a'r gwaith hyrwyddo a marchnata Llenyddiaeth a chyhoeddi er mwyn sicrhau mwy o greadigrwydd yn sgil synergedd.
- Dylid trosglwyddo'r gyfrifoldeb am ddsbarthu'r grant cyhoeddi o'r Cyngor Llyfrau i Llenyddiaeth Cymru. Dylai'r Cyngor Llyfrau wedyn ddatblygu ei ochr masnachol.

Move Literature Wales to West Wales

- Byddai'n braf gweld Llên Cymru yn symud ei phencadlys allan o Gaerdydd hefyd. A oes rhaid i bob brif swyddfa yn y sector cyhoeddus a gefnogir gan ddatganoli fod yng Nghaerdydd. Mi fasa Aberystwyth yn hub naturiol i'r diwydiant cyhoeddi. Bod angen rhoi statws arbennig i Geredigion fel conglfaen cynhyrchu llenyddiaeth a llyfrau yng Nghymru. Mae angen dathlu a gwar hod y diwydiant sydd yn y gorllewin.

Organisations too close

- The Welsh Academy & Literature Wales & the Welsh Government are all too close --- a bit of creative friction would produce a better result. The Welsh Literary Establishment appears as a clique ---- the same names featuring again and again with a tendency to endorse celebrity culture. There should be an effort towards democratisation. The outcomes would be more people being and feeling involved.

Impact of Welsh Government financial support and value for money

- The financial support from the Welsh Government to Welsh publishers seems to be working well. It is especially important as most of these publishing companies are based and therefore provide jobs in rural areas of Wales.
- Cymharol fach yw'r hyn a fuddsoddir yn y maes, ond mae'r impact a'r cyrhaeddiad yn fawr o ran cefnogi ystod o deitlau yn nwy iaith Cymru, cefnogi swyddi golygyddol mewn gwesig Cymreig, a chyfrannu at nod Llywodraeth Cymru (un ddiwylliannol, cymdeithasol ac addysgol) o greu Cymru ddwyieithog. Tynnwch yr hyn a gyflawnir o'r pictiwr a dychmygwch yr anialwch ddiwylliannol y byddid yn ei chreu!
- Mae nawdd cyhoeddus i gyhoeddi yn y ddwy iaith yn hollol hanfodol yng Nghymru, a dyna pam y mae'r wasgfa barhaol ar wario cyhoeddus yn gymaint o fygythiad. Mae'r llywodraeth yn sicr yn cael gwerth am arian o'r nawdd a roddir i gyhoeddi yn y ddwy iaith. Fe geir budd diwylliannol o'r nawdd trwy gefnogi awduron o bob math i greu, a hefyd y nawdd i ddarlunwyr, ffotograffwyr a dylunwyr sy'n rhan o greu llyfrau. Yn ogystal, fe geir budd economaidd o'r nawdd - mae'n gymorth i gynnal nifer dda o swyddi, a'r rheini wedi eu gwasgaru trwy Gymru, gan gynnwys nifer dda yng ngogledd-orllewin a de-orllewin Cymru. Heblaw am y nawdd i'r rhai sy'n creu'r deunydd crai, mae'r nawdd a roddir i'r fasnach lyfrau yn gymorth mawr i gwmnïau argraffu a'r holl gadwyn sy'n golygu fod y llyfrau a'r cylchgronau yn cyrraedd y prynwyr a'r darllenwyr - Canolfan Ddosbarthu'r Cyngor Llyfrau, y siopau llyfrau (gan gynnwys y siopau annibynnol a'r siopau cadwyn), a'r llyfrgelloedd cyhoeddus a'r ysgolion.

- Subsidy of books and magazines in Wales should be continued, as it helps provide access to cultural content that would be unavailable elsewhere. News media in Wales is especially weak – the newspapers in Wales offer very little in serious cultural or political discussion, and the online presence of some has declined to essentially being meme-based click-bait. Assistance to magazine publishing in Wales means there are at least some voices discussing issues relating to the Welsh nation and its position internationally.
- Without the grant system that is in place for writers (and cultural magazines), the arts in would suffer immeasurably. The market has never effectively sustained the work of a valuable national literature, and dependence on it will only result in compromised art via dubious sponsorship deals.
- Support for the publishing industry is essential. Without it, the industry will definitely collapse. The future of criticism in Wales is without doubt digital, and at present the WBC model struggles to find space for such ventures that could really put Wales on the map in this area.
- The importance of investing in Wales's culture cannot be underestimated.
- External perception that the sector is over-subsidized is a huge challenge. The cultural value of the industry far outweighs the financial input from e.g. grant funders and WG. It means the industry is always on the back foot, always having to defend itself - this is time and energy that would be better spent innovating, thinking creatively and making a difference to the people of Wales. Instead, they have to constantly fight for their right to exist.

Funding to industry vital due to weakness of print media in Wales

- Gellid dadlau bod y diwydiant cyhoeddi yn bwysicach yng Nghymru nag yng ngweddill Ynysoedd Prydain yn sgil gwendid y wasg a'r cyfryngau torfol yma. Heb fawr o adlewyrchu ac archwilio ein hunaniaeth ar deledu na radio, nac yn y wasg brint ddyddiol, mae angen sicrhau bod y diwydiant cyhoeddi a'n llenorion a'n academwyr yn cael cefnogaeth deg a chyflawn i wneud hynny ar ran y genedl.
- There should be no further cuts to financial support for books and magazines in either language. The Welsh Government should continue to fund English medium cultural magazines in Wales. The publishing industry in Wales punches well above its weight in terms of quality. Publications such as the New Welsh Review and Planet: the Welsh Internationalist provide a much-needed focus on topics that are not adequately covered by other media outlets in Wales and beyond. Attacking these publications with further cuts would leave few, if any places to read in-depth discussion and coverage on topics such as literature, politics, art and culture in general
- On limited finances the small presses are doing remarkable work. They should be supported in the current financial climate.

Changes to funding arrangements – less subsidy needed possibly

- I would do things 100 per cent differently. Do not pander to the subsidy-junkies because they cannot, meaningfully, provide useful large-scale employment to the publishing sector. Target large London publishing houses to set up back office, even front office, operations here. This is exactly the approach that the Welsh government is taking in relation to professional services - and it has borne fruit. These are real, high value, tangible jobs, that are self sustaining. Attract the social media companies to set up publishing hubs in the city - the Buzzfeeds, the Facebooks, the Huffington Posts of this world. This involves selling and marketing to these operations, not simply shovelling cash to established, vested, interests.
- I don't think English language fiction and non-fiction should be subsidised - they should be subjected to market forces. Whilst this would reduce the amount and nature of what is published, overall it should improve quality via proper editing and reduce the number of niche works by the same old names.
- There is a clique of the same writers who receive a disproportionate amount of support/publication subsidy. There should be more attempts to publish and promote emerging writers on a national level.
- The Welsh publishing industry is very heavily subsidised, to the extent that many books are published which would never have seen the light of day in England. That is because across the border publishers do not, by and large, publish books if they do not think they will sell and turn a profit. They have to carry the risks. In Wales, in contrast, many publishers inhabit a comfort zone in which subsidies enable them to publish books which hardly anybody actually wants -- and which will never repay their costs via sales. In other words, they are entirely non-commercial, and are products of a system entirely dependent upon subsidies and grants. It's easy to say: "Ah yes, we need those books anyway, because we need a vibrant publishing industry and because these books help us to define ourselves as a nation." But do we really need (and can we really afford?) a flood of non-commercial titles in Wales?
- Actual sales figures for books in Wales are seldom publicised. That is because it suits everybody to keep as quiet as possible. It is widely known that in Wales a book is counted as a "best seller" if it sells 700 copies. At that level, if the publishers were operating in a real commercial world, a book might just about cover its costs -- there is no way it could be considered as a best-seller.

Need to be more Commercial

- The main challenges faced are those of developing a viable commercial model. The sector (apart from Accent Press) is almost entirely reliant on a grant system which in effect keeps large areas of publishing skill at 'amateur'

level. With poor editors, authors remain poor in terms of skill and ability. With no real free-market testing or accountability, publishing is shielded from being competitive, with publishers instead choosing to chase (often pointless and self-promoted) awards as a success criteria instead of sales. The funding model means most publishers in Wales are actually incentivised NOT to sell lots of copies of a book, as this would leave them with a tougher case to make for winning the next grant. The whole scene is doomed to amateurism and as a result cannot produce a product capable of selling outside of Wales, and often not even capable of selling within Wales. I know no system like it in the world.

- I wonder if a little more exposure to the hard commercial world might actually make the Welsh publishing scene a bit leaner and more efficient, without in any way threatening our civilisation and our great Welsh cultural traditions? For example, just to encourage publishers and writers to think a bit more seriously about what the market actually wants, and to take marketing rather more seriously, it might be rather a good idea to insist that if a book sells fewer than 1,000 copies in its first two years, any grants and subsidies paid must be paid back..... and by that I mean REAL sales, involving real money, and excluding all returns.
- Literature promotion agencies, grant-giving bodies and distributors within Wales need to ensure they understand the realities of the global publishing trade to target resources as effectively as possible at publishers as well as at readers and writers.

Cultural and Economic impact of the industry

- The key challenge is the contradiction between cultural imperative and economic realities. Like any nation, Wales needs a thriving publishing industry that provides a platform for its own specific cultural output; to document its own history, its specific cultural heritage and traditions, in both languages.
- Both the publishing sector and Literature Wales face the challenge of popular and government arguments about accessibility and value for money. Though both involve economic activity, and publishing supports a wide network of jobs, the value of cultural activity needs to be protected. It's indicative that where we once had a Culture Minister, the culture portfolio, which includes literature and publishing, is now a minor part of the Economy portfolio.

Balance between both language

- Looking inwards the balance between the two main languages is always an area of debate. In theory English language literature and culture has the Anglophone world as its potential market while Welsh language authors need support due the limits of the audience. But Anglophone culture has to fight for a space in a crowded field, while the Welsh language community continues to support its authors and writers by buying their books. Parity is, I think, key.

Culture can function as means of uniting the nation across lines of language and background.

Importance of newspaper industry and press to democracy

- In the newspaper industry there is a lack of belief in the product from the people who run it. They are in shock by the rise of the internet and have lost all confidence in print. This is foolish as newspapers remain profitable but there is a demand to squeeze every last penny out of publishing organisations for the profit of shareholders. Local media is incredibly important for small businesses and giving our local communities a sense of identity. More should be done to encourage small scale print newspapers that encourage quality journalism. If we lose our local print media our local democracy will be in a very dangerous territory where there is no oversight to keep it in line.
- As our local newspapers face challenging times it is clear they are incredibly important to fostering a sense of community across Wales. But papers are facing huge falls in readership in the UK, on the continent there are schemes in place to provide public support for local press. Could the panel consider how it could encourage local communities to become more engaged with reading their local press whether it is y papurau bro or large paid for English titles. This could involve engaging publishers to ensure their publications are distributed freely in schools, residential homes and workplaces.

Digital developments and impact on print

- Danger in 'eggs in one basket' as regards electronic publishing. Statistics seem to indicate that printed books are regaining popularity . . . however, a lot of printers are already going out of business, taking their experience with them.
- The publishing industry is an ever changing market since digital books arrived. Anyone can 'publish' a book and the market is awash so directing readers to a book or genre is an increasingly difficult business. Some traditional publishers have been slow to move with the times. Mainstream publishers are even more keen to stick with what has worked before and breaking into the market is difficult for new writers.
- Rising number of books published and market dominance of Amazon in e-books has led to less diversified book consumption. There is a lack of targeted book promotion and support for local rather than global digital advancements.
- There is no doubt that digital presents both opportunity and challenge for publishing, but this is being faced by publishers globally. Customers tend to place a greater value on a product they can hold and keep, and their expectation is to find digital resources for free. Whilst this is shifting with a

greater number of subscription products available across genres, nevertheless, profitability of digital products can often be lower. It is for this reason that digital innovation is key; an e-book can only provide so much value to a customer. A truly interactive experience can take provide so many additional benefits – rather than simply convey content, digital can enhance and check understanding, react to a user, offer a dynamic user experience etc.

- Print copies as physical objects sell and are thus more sustainable than online. People don't really like paying for online content. Also something that would be helpful for Wales would be a new media news and current affairs and cultural blogging platform - perhaps via YouTube.
- I can't stress enough the importance of print. The print editions of magazines also give a substance to the publications.
- I browse the websites occasionally, but I wouldn't subscribe were it not for a print edition. Even established, respected publications, when reduced to online/digital only format recede into the abyss of the internet. Look at the example of the Independent newspaper – it is now online-only and essentially missing from the popular discourse and an alternative voice is missing from national newspapers. I understand it is a different situation to national newspaper, but the principle is the same: an article published online, it is read and is gone. A print magazine becomes part of the culture itself.
- Er gwaethaf llyfrau electronig a'r bygythiad digidol mae llyfrau Cymraeg a Saesneg yn ffynnu ac y mae gwyrth o awduron creadigol a beirdd yn creu pethau sy'n siarad â phobl heddiw. Rwyf wedi cyhoeddi llyfrau a phethau ar y we. Rwy'n derbyn breindal ar lyfrau. Nid wyf wedi derbyn DIM o'r deunydd ar y We. Sut ydym yn mynd i greu deunyddiau digidol nad oes neb yn barod i dalu amdany'n nhw, nad oes modd creu unrhyw incwm ohonynt fel y mae pethau ar hyn o bryd os nad ydynt yn gemau neu feddalwedd. Mae gan Amazon fonopoli bron ar lyfrau. Mae angen os deallaf yn iawn, greu system rheoli testun fyddai'n caniatáu rhyddhau deunydd Cymraeg heb orfod plygu i drefn a chostau Amazon.
- Mae'n bwysig i'r llyfrau bod yn lle mae'r bobl, ac ar y funud dyw hynny ddim yn cael ei gyflawni ar gyfer llyfrau yn ddigidol. Mae sawl siop ddigidol boblogaidd: Kindle; Kobo; iBooks a Google Play. Ar y funud dim ond y lolfa sy'n cyhoeddi i Kindle, a does neb yn cyhoeddi i'r lleill. Wrth gwrs mae Gwales ar gael, ond dyw pobl gyffredin ddim am fynd drwy'r strach o lawrlwytho oddi ar Gwales ac wedyn llwytho oddi ar gyfrifiadur (os oes ganddynt un!) i'w dyfais darllen. Mae'r siopau ar lein yma ar y dyfeisiadau yn barod, llwythwch y llyfrau arnynt, nid yw'n anodd.
- Ers sawl blwyddyn rwan mae recordiau finyl wedi bod yn dod efo cod y tu mewn i lawrlwytho y gerddoriaeth yn ddigidol. Beth am i lyfrau cynnig yr un peth? Prynu copi caled mewn siop llyfrau lleol, a bod y siop wedyn yn rhoi

allan cod i'r copi digidol, unai oddi ar Gwales (sydd yn mynd a ni nol i bwynt 1, ond mae rhywbeth yn well na dim), neu fod ffordd arbennig o allu dewis pa siop ar lein fydd y cod digidol yn gweithio arno?

- Dwi'n siŵr fydd rhai pobl yn gweld hyn fel cael dau beth am bris un. Ond nid cyrraedd y gynulleidfa sy'n bwysig a gallu ehangu sawl person sy'n darllen yn y Gymraeg? Tyfu'r gynulleidfa sy'n bwysig â'i neud yn rhwydd i bawb allu darllen yn y modd maent eisiau.
- The Library of Wales series shows the benefits of "physical" (as opposed to "digital") literature. The current trend seems to be to displace traditional, physical publishing with modern (and, no doubt, less expensive) digital publishing. I think that both have a role to play and that one should not be prioritised over another--at the very least, growth in digital publishing should not be to the detriment of the core, physical publishing on which its content and values are based. For instance, older readers (who I suspect make up a large proportion of the demographic who use the services of the Welsh Books Council) are more likely to appreciate physical books and magazines, so I am sure that they would be grateful for the continued provision of such physical publications.
- Mae cael cylchgronau gweladwy ar silffoedd mewn siopau yn hollbwysig i greu ymwybyddiaeth o fodolaeth cylchgronau Cymraeg. Os gorfodir rhai o'r cylchgronau i fod yn rhai electronig yn unig, byddant yn fwy anweledig ac ni fydd y cyhoedd yn gyffredinol yn ymwybodol o'u bodolaeth. Mae'n bwysig cynhyrch copiau caled.

Self-Publishing

- The WBC grant aid programme for publishers specifically excludes aid to small publishers which are run by writers and which are in effect self-publishing enterprises. In other words, there is no attempt to differentiate between self-publishing and vanity publishing. This is not very sophisticated! I have published an 8-novel saga (set in West Wales) which has racked up sales of over 80,000 copies -- which means that the books are professionally produced and well enough written to have become highly successful. But I received no financial help from WBC. That was rather galling when I see grant aid being dished out to scores of titles that have sold hardly at all..... if I had received grant aid, I would have been able to put much more effort into marketing, design and publicity.
- Self-published books are also barred from competitions, according to the current rules. So my main fiction title, which has sold over 35,000 copies, could not be entered and could not compete on a level playing field with other titles of lower quality and more limited appeal.

Accessibility Issues

- From my personal experience as a poet, I find very little support for anything that is not happening in the main cities (Swansea and Cardiff in the region of Wales that I live) and for the main literary festivals. I cannot recall seeing a single online writing group, either poetry or prose, in a long time, whereas in the last six months I have been able to participate in three poetry classes, at an advanced level, held online but run by Irish organisations with the support of Arts Council Ireland.
- My blindness makes it difficult for me to get to in-person courses and events, but in an increasingly digital world there are many people who would welcome such offerings. The benefits of having a balanced program of in-person and online events is significant. People like myself with accessibility difficulties benefit from having a digital option; people who for other reasons find in-person events a challenge can find an online format more welcoming; the rural nature of many parts of Wales can make groups and events difficult and expensive to access, where an online event, or video and audio coverage presented online can go some way towards making an event accessible; and simply in terms of supporting Welsh writers of all genres the digital opportunities can encourage new writers to put pen to paper as it were, and can make the Welsh population as a whole more aware of the many excellent Welsh writers.
- In terms of cultural, I do feel that here in Wales there ought to be BME workshops to help with progression in writing.
- I feel that there ought to be a platform for BME writers in Wales UK. Also, help for people with disabilities ought to be published regularly (as and when).

Inequality/Deprived Communities

- Too much of the time projects for deprived communities are of poor quality and come in with pre-existing ideas of what will work, e.g. rap for young people that is of bad quality and derivative etc. It has to be grassroots and not top-down. We can look to the socially-engaged arts practices for ideas. This cannot just be one-off support for individual communities but an overarching project that looks across the spectrum of the scene.
- Illiteracy in young people (especially in socially deprived areas/post-industrial villages and towns) is huge problem in Wales, and obviously this has a knock-on impact on publishing and literature in general. I believe the Welsh publishers, authors and readers have a responsibility to tackle this problem as best they (we) can, though it is obviously very difficult.

Comparison with Other Countries

- In some Balkan countries, cash-strapped as they are, there are minimum rates of payment to authors of publicly funded literature which are

safeguarded and publishers etc are obliged to honour them. In Wales when cash is short, publishers, arts admin and bookshops continue to receive living wages (just) while authors' remuneration is reduced frequently to token payments or zero.

- There is no mechanism for authors to complain and it seems no independent check on what payments are made or whether publishers honour contracts.
- Unlike Ireland, Wales does not appear to support its writers and those aspiring to write. Other European countries, especially Norway, possess a unique and respected literary culture due in part to the support of the government.
- Ireland—though the Irish mightn't see it so—genuinely excel at nurturing talent. There's a supportive literary community and established writers generally send the lift back down. The downside is a lot of hype for pretty average but it's probably a small price to pay for the exposure that new Irish writers consistently receive. (An interesting exercise: googling 'new voice in Irish fiction' gives you 36,000 results. Googling 'new voice in Welsh fiction' gives you zero. One could draw lot of conclusions from this...)"
- Ireland has a very strong model for bold and exciting voices coming through Irish independent literature. An investigation into this would be very valuable, and give the industry an idea of how to expand. However, within the Welsh publishing industry there is an identifiable lackadaisical attitude to this need.
- Publishing may be centred in London, but this should not prevent Wales from becoming a publishing hub - after all, in the 21st century, physical distance from London agents and events is less of a barrier. I would like to see Wales follow Scotland and its inspiring presses, like Barrington Stoke and Canongate - institutions which balance an essential Scottishness with a broader remit (e.g. addressing dyslexia, in the case of Barrington Stoke).
- Wales does not pull its cultural weight on the publishing scene. The normal route for a young writer is to be published by a Welsh publisher before being picked up by a larger, London-based publisher. I'm at the very beginning of this process and from what I've heard of the experiences of others I would rather skip being published by a Welsh publisher and jump straight to a London publisher. I would hope to receive better editing and marketing as a result. The people working in the publishing industry in Wales work hard on behalf of their writers but the sector seems to be restricted by the current grant structure. Also, a lack of literary agents in Wales is a problem for writers. If a writer wants to work with an agent they have to look to London.
- Welsh publishers have reasonable impact in 'cultural' Wales, but almost none beyond it. There is a glass border between Wales and England (and by extension the wider world). The Welsh publishers are still too small (and semi-professional) to compete with English operations. Welsh publishers have

pitiful book distribution beyond Wales. Consequently, most of the better Welsh authors (who often begin with Welsh publishers) 'graduate' to bigger English publishers. Nevertheless, the Welsh publishers are still an important breeding ground for authors and serve a national function in Wales (though there is lots of room for improvement in terms of outreach).

- Publishing in Wales is often restricted by the Welshness/Welsh content of the literature - there are good writers and publishers in Wales writing about non-Welsh subjects or from a non-Welsh perspective. Our sense of Welsh identity should be more than just location and should reflect the diverse and interesting cultural landscape that Wales is. Publishing here should be more akin to that of Scotland and Ireland.
- In its London head office, the last remaining physical bookshop chain, Waterstones, has four Scottish buyers, four Irish buyers and no Welsh buyers as we come under 'England and Wales' yet it has recently become extremely difficult to win any significant orders for titles from Wales, even when they are about non Welsh subjects, such as titles set in other European countries.
- Build on the wider culture, including Scandinavian noir - and find a Welsh Poldark!

Overseas – book fairs

- The support from the Welsh Government to attend key book fairs in Europe, eg Bologna, has been instrumental in boosting the profile of Welsh books and Welsh culture, even if it falls short of that provided to Irish and Scottish publishing.
- Wales needs an international champion. There is so much potential in selling rights to home-produced literature in both English and Welsh, yet the cost of attending such high-profile events such as Frankfurt Bookfair, Bologna, Beijing, Guadalajara, in order to promote such business is prohibitive for the individual publisher. Also, to facilitate this, the nation needs to build a profile - San Marino, Iceland, The Vatican, even the Faeroe Islands all have national bookstands at Frankfurt, yet Wales does not.
- It is incomprehensible that Wales is not represented as a nation at the major international book fairs such as Frankfurt, London, Chicago (BEA), Beijing and Tokyo. These fairs have evolved from being merely book exhibition to major market places of content exchange and trading. A nation that is not represented effectively does not exist. It is particularly disheartening that smaller countries like Iceland, the Baltic states and even regions like Flanders and Catalonia, or closer to home Scotland and Ireland do have a country presence whereas Wales does not.
- Consideration should be given at establishing a specific fund for a Wales presence at international content fairs, or at least at Frankfurt Book Fair in

recognition of its importance. Further consideration should be given to the idea of Wales becoming a Guest of Honour at Frankfurt Book Fair, a process that would take at least 5 years in terms of readiness as several Million Euros of funding.

Support for Schools vital

- Providing that schools are provided with sufficient budgets for schools' resources (primary and secondary), my recommendation is to set-up/support the introduction of a Welsh educational publisher.
- Teachers and students will benefit from focussed, targeted resources with the philosophy of the Welsh curriculum at its heart. This will also allow Welsh education and resource provision to be truly integrated from a social, cultural, technological and financial point of view.
- A Welsh educational publisher will ensure that Welsh schools' budgetary spend on resources remains in Wales and contributes to the Welsh economy.
- An educational publisher will provide employment opportunities and contribute to the growth of the Creative Economy.
- The UK education system and accompanying resources are highly regarded across the world with many English educational publishers benefiting from strong positions in global markets. This could be a great opportunity for Wales to export its publishing products.
- With digital demands for schools increasing, we have a strong opportunity to retain and grow our creative digital individuals within Wales.
- Limited initial investment and set up costs as there are plentiful, experienced freelance workers and much of the process able to be outsourced to established organisations.

Relevant resources for schools

- There is no major publisher who produces resources specifically aimed at the needs of Welsh teachers and students, which places Welsh schools at a distinct disadvantage. Welsh schools who wish to purchase trusted, quality resources are forced to buy English curriculum resources which have been tweaked to 'sufficiently' fit the Welsh curriculum, resulting in a diluted approach.
- Resources for Welsh schools are a lower priority for English publishers and usually delivered too late in the year to allow teachers to prepare for a new term. With huge forthcoming changes to English and Welsh curricula resulting in an imminent diversification, this issue will worsen. Welsh schools should

enjoy the same opportunities as their English (and Scottish) counterparts - ring-fenced, sufficient budget to enable purchase of quality, relevant, Wales-focused product available at the right time.

Importance of curriculum – appreciation of literature

- The main challenges faced by the publishing industry is that our young people are not taught an appreciation of books. The way the new curriculum is structured means that a love of anything creative (especially genres such as poetry) are actively educated out of people. Wales needs to continue to pioneer with schemes such as the Lead Creative Schools to encourage creative approaches. Our young people are the future and so we need to be opening their minds creatively so that they will actively choose to engage with Wales' rich and diverse publishing autonomously. This can only be achieved by a drastic overhaul of the education system.

Importance of University of Wales Press (UWP)

- It is the only academic publisher in the world that has at its heart a central mission to disseminate scholarly research in both national languages on the history, politics, culture, literature, law etc. of Wales, and all are published simultaneously in print and various digital formats.
- It is the only publisher in Wales with a comprehensive international distribution network for both print and ebooks, with worldwide distribution partners in North & South America, Europe, India, Asia and Australia/New Zealand thus guaranteeing that Wales is represented internationally as a nation which takes scholarship and learning seriously.
- It is the only publisher in Wales that offers Open Access in all its variations on internationally recognised platforms and its own website (www.uwp.co.uk), is fully bilingual and content rich, providing relevant information to the Academy in Wales.
- Without a thriving UWP, trade publishers in Wales will become the only potential outlet for scholarly works yet these will not meet scholarly expectations, due to the lack of expertise and commitment to academic standards and quality.
- It is the only publisher in Wales that operates a stringent and rigorous system of peer review to ensure the upholding and safeguarding of academic standards. Academic achievement and excellence are intrinsically linked to publication, as monographs and journal articles are central to the Research Excellence Framework.
- Without an internationally respected publisher such as UWP offering publishing opportunities for mandated UK-wide exercises such as REF, scholars will turn their back on the study of Wales, marginalising its relevance and limiting the contribution of Welsh universities to REF. This will lead to a

catastrophic lack of Wales-related research which in its simpler forms is used to inform school curricula, educational programmes by the BBC Wales, ITV Wales and S4C and other media to tell the unique story of Wales.

- The current funding model sees UWP depend on an annual core grant from the University of Wales to cover part of its staff and running costs; it also receives individual book grants from institutions/other funders, and has income from sales and content licensing as is usual in the creative industries; the commissioning process has lead times of several years ahead, which is why a guaranteed core grant is vital for UWP to operate its business and ultimately guarantee its survival.
- A government subsidy, proportionate to what other similar size publishers receive should be considered to secure UWPs future and vital contribution.
- Currently there is no specifically ring-fenced subsidy in place for the structured support of academic writing/books that focus on Wales, in either language and which are almost exclusively published by University of Wales Press (UWP). The discontinuation and subsequent re-routing of the former HEFCW publications fund means that the funding of such titles is left to individual HEIs in Wales. Key publishers in Wales like Gomer, Seren, Parthian, Honno etc benefit from guaranteed annual subsidies as well as being able to apply for additional grants. In contrast most of the publications of UWP are expressly excluded due to their academic nature. Arguably every nation does need at least one rigorous academic publisher, and Wales is fortunate to have such an institution
- Literary and cultural criticism, history and social studies are all integral to a healthy, diverse, informed literary and cultural scene. The continued insecurity and uncertainty of University of Wales Press and funding for the study of Wales cannot be excluded from the interrelated web of publishing in Wales: both need to be secured for the long term, and providing this funding through the Books Council on behalf of all Welsh research universities, rather than through the University of Wales should be considered as one option.
- The existence of a University Press dedicated to Wales is crucial. English and American presses will occasionally publish Welsh-centered material, but there is no sustained commitment to this. The idea that the best academic research will always find an outlet is bogus. Academics work in a highly competitive market in which only certain kinds of works on certain themes get published. The last ten years has seen a flourishing of cultural criticism on Wales, and some of it is making a broader impact (witness the Welsh studies conference that took place at Harvard University this Summer), but without the University of Wales Press and the indigenous Welsh presses much of this work would not have seen the light of day. Sustaining a world class academic publishing culture is a challenge but one that must be faced in any mature nation.

Too parochial?

- Emphasis on maintaining the crachach Welsh language has reduced focus on Welsh as a developing bilingual agile medium..the language police undermine its application and reduce its use
- Writing is turning into a middle class middle brow scene where only the worthy or well heeled survive or receive encouragement.
- Industry too narrow minded on being 'Welsh' and not publishing commercially viable literature by Welsh authors. The industry is an exclusive clique, with the same authors and publishers. It lacks appeal to the general public.
- There is a lack of transparency in Welsh publishing and the literature industry that breeds cronyism and conflicts of interest that may line the pockets of various authors and academics but impoverishes Welsh literature.
- For the most part, the Welsh literary/cultural scene seems dominated by an in-crowd. The amount of money being given to writers who already have significant (largely university) jobs seems bizarre. WG has tried to 'open up the arts to all' but definitely hasn't reached the literary culutre yet (the sector's fault mainly, not WG's). This would make wales's literary scene more representative and more encouraging for those interested in writing (whatever their standard). Publicly funded literary projects should be about writing not just 'good' writing!

Translation/Wales Literature Exchange

- Welsh Books Councils support for publishing in both languages is valuable, but should be complemented by increased support for translation. Wales Literature Exchange's support for foreign publishers translating literature from Wales is an effective model but the size of the translation fund is the smallest in Europe and, crucially, there is no funding available for translation from Welsh into English to facilitate translation into other languages. This is gap in provision which makes it difficult for Welsh-language writing to be effectively promoted abroad. International literary activities are effectively supported both by Arts Council Wales and Wales Arts International), but the level of funding available is inadequate, both in relation to the needs of the sector and in comparison with other European countries.
- Mae'r Gyfnewidfa Lèn wedi llwyddo i ddod â llenyddiaeth Gymraeg i gynulleidfa ryngwladol a rhoi cyfleoedd newydd i awduron
- Mae'r Gyfnewidfa Len wedi cael llwyddiant rhyfeddol yn gwerthu hawliau tramor i lenyddiaeth Cymru.

- Wales Literature Exchange does wonderful work and must continue. Its independence of other literary organisations is an important part of its strength.
- O'r holl gyrff sy'n cael eu cefnogi, Cyfnewidfa Lên Cymru sydd fwyaf anweledig. Does dim sôn yn aml am unrhyw lwyddiannau, arloesi na digwyddiadau sy'n arddangos eu gwaith na'u gweledigaeth. Rwy'n derbyn bod cyfran o'u gwaith yn ymwneud â rhwydweithio dramor, ond byddai'n dda eu gweld yn meithrin presenoldeb mwy amlwg drwy wella eu cyfathrebu y tu hwnt i gylch dethol o awduron. Cyfnewid nid cyfieithu'n unig. Ble mae'r prosiectau a fyddai'n dod a llenorion o dramor i gyswllt a phlant Cymru, neu'r gweithdai sy'n dod a'r technegau rhyngwladol arloesol i sylw ein cyhoeddwr er enghraifft?

Importance of Books – Welsh Language

- Producing Welsh language books is paramount to helping the Welsh language survive. Our identity, history and culture will be quickly lost if we fail to invest and secure funding to support all Welsh Publishers, authors, artist and the wide range of people involved in literature and producing beautiful books in Wales.

Incredible talent in Wales

- I think we have incredible talent here in Wales, in English writing as much as Welsh, and we need to spread our focus out from the universities and into the far edges of our country.
- Wales is a place of incredible talent with a strong heritage. But more should be done to showcase the work of today's authors. Create more author residencies.
- Among all of the dimensions of cultural activity that Wales should be known for world wide, literature (in traditional and innovative forms) is in my opinion paramount. I was aghast at the recent initiative to cut funding that supports literary/scholarly activity in Wales - and extremely grateful that it was stopped. In my opinion Wales has never before had such an energized set of writers, scholars, and publishers in Welsh and in English - and now is the time to capitalize on this energy.
- Our cultural heritage is precious and as we have seen with the Welsh Language at great risk. It is essential these are nurtured and supported in a self confident Wales, proud of its cultural achievements and wanting to build on these.

Raise Standards

- Fe fyddwn i'n pwysleisio fod cynnal a chodi safonau yn y byd cyhoeddi yng Nghymru yn bwysig iawn. Rwy'n sôn am ansawdd y deunydd crai ysgrifenedig, safon y deunydd gweledol a'r dylunio, safon y golygu a'r darllen proflenni, a'r argraffu. Gyda chwtogi ariannol mae'n beryg i safonau ostwng. Yn hytrach mae angen eu cynnal, ac mewn rhai achosion mae angen eu codi. Mae hyn yn bwysig, yn enwedig yn achos y deunydd Cymraeg. Mae peryg inni weithiau fodloni ar safonau eilradd gyda llyfrau a chylchgronau Cymraeg; mae'n hollbwysig fod y deunydd Cymraeg yn apelgar ac yn cystadlu o ran safon â deunydd Saesneg.

Working in Partnership is vital

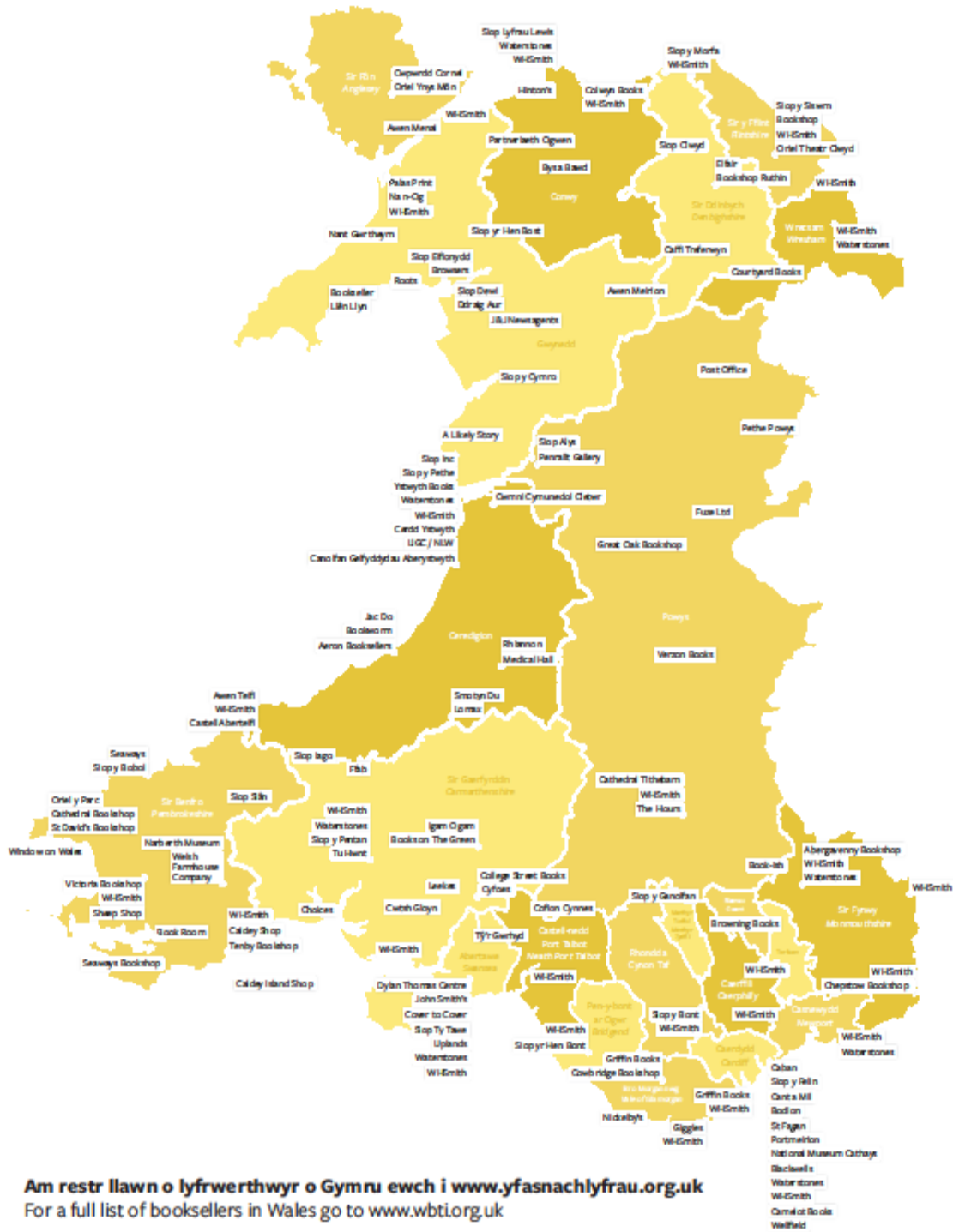
- Mae gwaith cyrff fel Cwlwm Cyhoeddwrwyr Cymru, a'r cyfryngau, yn hollbwysig, ond hefyd rhaid annog cydweithio o ran y gwasanaethau Llyfrgell, ysgolion, colegau a phrifysgolion, addysg barhaus i oedolion, manwerthwyr Prydeinig sy'n gwerthu yng Nghymru (maes y mae'r Cyngor Llyfrau wedi ymdrechu ag ef ers blynnyddoedd, ond heb fawr o lwyddiant) ac unrhyw gyfle arall. Mae angen mwy o strategaeth gyfun, sy'n tynnu asiantaethau ac adrannau gwahanol y Llywodraeth ynghyd er mwyn hyrwyddo llyfrau o Gymru yn yr un modd ag yr hyrwyddir bwyd, treftadaeth, amgylchedd y wlad. Mae'r diwydiant cyhoeddi yn ased bwysig, a dylid ei gwerthu'n llawer ehangach oddi mewn i Gymru ac oddi allan.

Annex 6: Maps showing location of publishers and booksellers in Wales

Cyhoeddwyr yng Nghymru Publishers in Wales



Llyfrwerthwyr yng Nghymru Booksellers in Wales



Annex 7 : International comparisons between Wales and other countries

This section aims to draw some comparisons between the publishing and literature sectors in Wales and those of other European nations – both ‘autonomous regions’ or ‘sub-state legislatures’ and sovereign states.

Comparative data in these sectors is difficult to obtain or compile for several reasons. First of all, home data is not easily available in many countries because it is not collected or published, sometimes due to commercial sensitivity as well as for other reasons. Secondly, in the case of autonomous regions, data is not always collected at the regional or sub-state level and then cannot be disaggregated from larger data sets (e.g. state level data). Thirdly, when data is available, the indicators used do not often correspond across different countries, making like-for-like comparison difficult to establish. In addition, language communities – and hence literary and publishing scenes – operate across regional and state borders, (like English language publishing in Wales, of course) which introduces further complexity to such contexts. Bilingual (or multilingual) contexts can also vary in relation to the literacy levels of speakers and their reading habits in each of their languages, as well as to the size and diversity of the literature and publishing sector in each language. Also, with the exception of children’s books and educational material, translated literature hardly features in the Welsh-language publishing, whereas in languages other than English, translations (of anglophone best sellers in particular) contribute significantly to numbers of titles, sales etc.

Beyond very broad demographic and economic figures, such as GDP, number of speakers etc, PISA results can provide one common indicator to gauge general levels of reading and literacy across the selected states/nations/regions. Frankfurt Book Fair produces information on the Book Markets of participating countries – usually, though not always, sovereign states – but even so, the data presented in these Book Market Analyses is not consistent across each context.

The information presented in this section has been compiled from numerous sources in order to present the Welsh data (sourced from the Welsh Books Council) in comparison, where possible, with that of other European countries. A number of key indicators were selected and applied to Welsh-language and English-language publishing. International comparison may be particularly relevant to Welsh language publishing, so that the actual figures (sales, number of titles etc) can be presented alongside those of similar sized language communities, as well looking at the figures in terms of percentage or per head of population.

The Panel requested additional data from the Welsh Books Council in order to establish some criteria for international comparison, focussing on number of titles, print run and sales (including digital publications).

Welsh Books Council Data

The Welsh Books Council provided data for 2013-2014 and 2014-2015 (the most recent data available, as data is collected in September each year and taking into consideration the request for 18 month sales). The Welsh Books Council data included two separate data sets: (a) grant supported titles and (b) titles distributed by its Distribution Centre, for both Welsh-language and English-language titles.

(a) Grant Supported Titles

	English-language grant-supported titles		<i>Increase/Decrease on previous year</i>	Welsh-language grant-supported titles		<i>Increase/Decrease on previous year</i>
	2014/15	2013/14		2014/15	2013/14	
<u>1) New titles per year</u> (not including reprints/revised editions)						
a. All books	113	93	22%	209	202	3%
b. Educational*	0	0		0	0	
c. Children	25	10	150%	107	99	8%
<u>2) Print run and Average Sales</u>						
a. i) Literature - average first print run**	1,557	852	83%	1,220	1,068	14%
a. ii) Literature - average 18 month sales	1,920	1,381	39%	885	772	15%
b. i) Poetry - average first print run	763	600	27%	710	738	-4%
b. ii) Poetry - average 18 month sales	415	329	26%	445	375	19%
c. i) Literary/Cultural Magazines - average print run	850	850	0%	Data unavailable		
c. ii) Literary/Cultural Magazines - average sales	604	567	6.5%	708	730	-3%
<u>3) Best sellers</u>						
a. Poetry (single poet and/or anthology)	1,389	722	92%	866	629	38%
b. Literature	25,756	7,914	225%	3,147	2,539	24%

* The grants support children's leisure books but educational titles are not currently eligible for funding since these are supported via the Education Department of the Welsh Government. Please see the next tab 'All Titles Distributed by WBC'.

** **First** print run is often lower than the sales achieved since further print runs can be produced if titles are successful. Also, e-books are produced and are not included in print run figures.

(b) Titles distributed by the Distribution Centre

	English-language titles distributed		Increase/Decrease on previous year	Welsh-language titles distributed		Increase/Decrease on previous year
	2014	2013		2014	2013	
1) New titles (per calendar year), not including reprints/revised editions						
a. All books	761	670	14%	646	432	50%
b. Educational*	94	33	185%	279	110	154%
c. Children	88	36	144%	177	152	16%
2) Total Sales (per Financial Year**)						
a. Literature - total sales within financial year (units sold)	18,921	11,812	60%	20,087	18,105	11%
b. Poetry - total sales within financial year (units sold)	5,708	4,900	16%	4,830	3,845	26%
3) Best sellers (distributed)						
a. Poetry (single poet and/or anthology)	1,568	235		649	335	
b. Literature	2,252	2,939		1,593	871	

* Number of new titles distributed is noted per calendar year.

** Sales are the total number of books sold **within** the financial year (all titles, new and backlist).

Best-sellers: literature

Welsh-language best sellers in literature are usually the prize winners at the National Eisteddfod (Y Fedal Ryddiaeth and Gwobr Goffa Daniel Owen), and can expect to sell 2,500-3,500 during the first 18 months of sales. Figures such as these look extremely small when compared to data on the UK best sellers, where the top 500 – or top 1% – of authors account for 32.8% of the annual £1.49bn in sales⁵³. However, in terms of population, 3000 in Welsh (with just over half a million speakers) is equivalent to sales of 375,000 in French in France's 66.8 million population (not including other French speaking populations, such as Belgium). In 2016, the best seller in France sold 694,840⁵⁴ (translation of JK Rowling *The Cursed Child*). The second best seller, Guillaume Musso's *L'instant présent* sold 565,880 followed by *La fille de Brooklyn* at 458,799 also by Musso, the best-selling French author alive today. In 2016 in France, nine of the top ten books sold 300,000 or more⁵⁵⁶, the list includes non-fiction (such as cookery etc) as well as literature..

Literary best sellers in the Catalan language (which has a speaker community of around 10m), sell 55,000 copies⁵⁷. Catalan speakers are also literate in Spanish or in French, as are Welsh speakers in English. Given the difference in population, it might be expected for Catalan-language sales to be roughly 20 times Welsh-language sales, in which case 55,000 in Catalan would be equivalent to 2,750 in Welsh.

The average first print run for English-language grant supported literary titles - in Wales was 1,557 (2014-15) and 852 (2013-14). The first print run for Welsh - language grant supported literary titles was 1,220 (2014-15) and 1,068 (2013-14). In the Basque Autonomous Community (population just over 2.1million inhabitants; some 700,000 Basque speakers), the first print run for contemporary literature in 2013 was 1,504⁵⁸, up from 1,114 in 2012. There is some translation into Basque of contemporary and classical literature, though readers are also able to (and at least as likely to) access these works in their Spanish translations.

Best sellers in Welsh Language Poetry (single author collections) were 866 (2014-15) and 629 (2013-2014), with average print runs of 738 and 710 for poetry during the same periods. These figures compare favourably with poetry sales and print runs

⁵³ <https://www.theguardian.com/books/2016/jan/15/earnings-soar-for-uks-bestselling-authors-as-wealth-gap-widens-in-books-industry>

⁵⁴ <http://www.lefigaro.fr/livres/2013/01/23/03005-20130123ARTFIG00425-vente-de-livres-musso-devant-cinquante-nuances-de-grey.php>

⁵⁵ <http://www.lefigaro.fr/livres/2013/01/23/03005-20130123ARTFIG00425-vente-de-livres-musso-devant-cinquante-nuances-de-grey.php>

⁵⁶ <http://www.edistat.com/>

⁵⁷ http://www.ara.cat/especials/santjordi2016/lectura-catala-creix-passa-anys_0_1561044010.html

⁵⁸ Gremio de Editores de Euskadi / Euskadiko Editoreen Elkarte (2014) XIX Informe De La Edición En La Comunidad Autónoma Vasca: Comercio Interior 2013

in a number of language communities. In Maltese for example, with a population of approximately 433,000 (slightly lower than Welsh speakers; a different kind of bilingualism with English), the average first print run for poetry is 500 copies⁵⁹. Similarly for Catalan, with twenty times more speakers than Welsh, the average print run for poetry is around 400 copies. In the case of Spanish poetry published in Barcelona – an important global publishing centre in the Spanish speaking world – the average first print run is estimated at 1,000 copies.

The number of **new titles published per year** in Wales (as defined by the number of new titles per year distributed through the Welsh Books Council) was 1102 in 2013 and 1407 in 2014, with 432 and 646 in Welsh and 670 and 761 in English. In Maltese, the figure is just under 900 titles including some 200 educational titles. In Iceland, with a population of 330,000 just over 1/10th the size of Wales or ½ the population of Welsh speakers, the number of new titles per year is 1383 (2014). In actual terms, the Icelandic book market is similar to that of books published in Wales (and distributed through the Welsh Books Council). Also, in actual terms, three times as many books are published annually in Icelandic compared to Welsh, and six times, relative to population size, (though the mechanics of the education market in Wales may skew some of the data to the detriment of the size of the book market in Wales). In terms of translations or original work, 62% of children's titles in Icelandic are translated, and 38% original works. In general fiction, 50% is Icelandic and 50% is translated.⁶⁰ In 2015, 361 of the 1352 books published were translations⁶¹. Of course, Welsh language readers also read (and buy) English language books (including English language translations of books in other languages), though there may be some variation between consumption of fiction and poetry in both languages. In the Basque Autonomous Community (population just over 2.1 million inhabitants; some 700,000 Basque speakers), just over 2800 books (all titles), were published during 2013, 47% of those (or 1,346) in Basque, and most of the others were published in Spanish. Of the 1,346 books published in Basque, some 950 were aimed at children or the school/education market.

Book sales in Iceland in 2014 sales gross reached 28 million Euros which makes an average gross per inhabitant of 83 Euros, the highest in Europe, with every Icelander buying at least eight books per year⁶² (mostly as gifts) and 50% reading at least 8 books per year. Some 48% of the Catalan population (over 14 years old) buys 7 books per year excluding text books, (cf 2011: 46% and 8 books). Comparative data for the Welsh market is not available.

In Flanders (in Belgium), which has a population twice that of Wales and ten times that of Welsh speakers, the **'overall sales for the book industry** in 2014 amounted to around €365 million. Approximately 70% of this amount was earned inside Flanders. Here, the education and science segment occupies a strong position (€172 million), while non-fiction, fiction and children's books together achieved combined

⁵⁹ <http://ktieb.org.mt/wp-content/uploads/2016/01/annual-report-english-digital-v3.pdf>

⁶⁰ <http://2seasagency.com/publishing-iceland-reading-national-sport/> Giulia Trentacosti

⁶¹ <http://utgafuskra.is/statistics.jsp?lang=1>

⁶² http://www.buchmesse.de/images/fbm/dokumente-ua-pdfs/2016/buchmarkt_2016_iceland_58774.pdf

sales of €82 million. The remaining 30% came from sales outside Flanders, with the Netherlands and France as the primary target markets.⁶³ The Belgian publishing industry – and in particular in literature – is overshadowed by the publishing industries of Paris and Amsterdam. Authors who start their publishing careers with Belgian publishers in either language (French or Dutch/Flemish) tend to move towards the bigger publishing centres of Paris or Amsterdam as their careers progress. This situation is not dissimilar to that of English language writers in or from Wales.

In the Basque Autonomous Community, some 445 people are employed in the publishing sector (excluding printing) and there are 107 publishers (excluding the Government and Public Authorities). Some 16% of these publishing houses are part of larger publishing groups; 80% employ no more than 4 people and 50% of the publishers have no more than 1 employee. The total sales generated by the publishing industry in the Basque Country in 2013 was €5m, with sales of Basque language books accounting for €2.5m.

Bilingual populations such as speakers of Welsh, Basque and Catalan are in general either equally literate as adults in both languages or sometimes more literate in the dominant language (English, Spanish/French). Reading patterns reflect this: 26% of the Catalan population reads more regularly in Catalan (up 5% since 2011), while 71% reads more regularly in Spanish (down 6% since 2011)⁶⁴. Some 82% of the population of Catalonia is able to read Catalan⁶⁵ and 97% able to read Spanish. Also, 66% of Catalan population read books for work, study or pleasure (compared to the European average of 68%), which is 4% higher than in 2011. Just over half of the population (52%) reads weekly or more often⁶⁶, and the older generations read less than younger or middle aged groups.

Digital reading in Catalonia: 24% of all Catalans read books in digital form, up from 6% in 2011 and, according to *Cambra del Llibre*⁶⁷, this is largely due to piracy. Digital sales represent 3-5% of all book sales, with some 25% of new titles also available in digital format. In 2013 in the Basque Autonomous Community, e-books (in all formats) accounted for just 1.5% of the output of all publishers in the region, in Basque, Spanish and other languages. School material accounted for two thirds of this. In Wales, sales of e-books via *Gwales.com* account for less than 1% of all titles sold through the Welsh Books Council Distribution Centre. No data was found for the total number of e-books bought by the Welsh population through other outlets (e.g. Amazon). The percentage of digital sales in English-language grant supported titles in 2014-15 was 31%, somewhat lower than 39% for 2013-14. In the case of Welsh-language grant supported titles, the equivalent percentage in 2014-15 was 2%, and just 7% of titles were offered as e-books. Digital sales are extremely marginal to the

⁶³ http://www.buchmesse.de/images/fbm/dokumente-ua-pdfs/2016/flandern_webseite_2016_en_57470.pdf

⁶⁴ http://www.ara.cat/especials/santjordi2016/lectura-catala-creix-passa-anys_0_1561044010.html

⁶⁵ http://llengua.gencat.cat/web/.content/documents/publicacions/altres/arxiu/EULP2013_angles.pdf

⁶⁶ http://premsa.gencat.cat/pres_fs/vp/docs/2016/04/18/13/53/0faf43c0-2ae0-495b-b7ab-a3b2a003b7c2.pdf

⁶⁷ http://www.ara.cat/especials/santjordi2016/lectura-catala-creix-passa-anys_0_1561044010.html

general Welsh language book market at present, and are much more impactful in the sales of English-language titles. There is some evidence to suggest that this may be more compounded in small book markets. In 2014, Icelandic e-books accounted for less than 1% of the total market share⁶⁸.

Although comparative data is patchy, it is still possible to make some limited comparisons between Wales and other countries. As has been noted elsewhere in this report, there are some significant data gaps in Wales – such as the size of the Welsh Book Market, the number of printed books bought in Wales and the number of e-books bought by the Welsh population etc. In the case of both English-language and Welsh-language publications, the Welsh Books Council data points to increases from the 2013-14 figures to the 2014-15 figures across most categories, though it cannot be assumed that this growth will continue. The figures for Welsh language publishing in general compare reasonably well with other languages of similar population sizes, and, when per capita adjustments are made to Welsh language literature – and to poetry in particular – the figures compare very favourably with more widely spoken languages.

⁶⁸ <http://www.islit.is/en/news/nr/3965>

Annex 8 : Diamond Review

EXTRACTS FROM INTERIM DIAMOND REPORT (December 2015)

Relevant paragraphs, reference to University of Wales Press p13 and pp95-96.

“A set of themes emerged relating to the Welsh language and Welsh-medium provision:

(xxiv) The importance of Welsh-medium provision; mixed opinion on the extent to which current arrangements support measures to widen access to HE through the medium of Welsh; and recognition of the role of Coleg Cymraeg Cenedlaethol.

(xxv) The key role of higher education providers in developing a highly skilled bilingual workforce and preparing for a bilingual nation.

(xxvi) Support for the teaching of Welsh culture and history; the University of Wales Press and the Wales Dictionary of the Welsh Language.”

“xxvi) Support for the teaching of Welsh culture and history; the University of Wales Press and the Wales Dictionary of the Welsh Language.

EXTRACTS FROM FINAL DIAMOND REPORT (September 2016)

Executive Summary

“19. The Review Panel supports the principle of public investment, alongside commercial approaches, for an academic publishing house in Wales. We believe that the timing of the independent review of Welsh Government support for publishing and literature in Wales should permit all stakeholders to develop a sustainable business plan for University of Wales Press.”

Body of report:

“ 9.11 The University of Wales Press (UWP)

9.11.1

The Review Panel received strong representations regarding the importance of the University of Wales Press in supporting the Welsh language and Welsh studies more widely; and the Review Panel is persuaded of this important role. It therefore supports fully the decision, on 15 th March 2016, of the then Deputy Minister for Culture, Sport and Tourism, to announce an independent review of the Welsh Government’s support for publishing and literature in Wales.

9.11.2

The Panel is fully supportive of the remit of the review, which will look : a) at the Welsh Government’s current cultural, social and economic aims in supporting the publishing industry and literature in Wales and whether these are being achieved ; b)

at digital developments within the publishing industry and whether the current system of support is fit for the modern industry; and,

c) at support for publishing and literature in disadvantaged areas across Wales. The Panel supports the principle of public investment, alongside commercial approaches, for an academic publishing house in Wales and believes that the timing of the review should permit all stakeholders to develop a sustainable business plan for the UWP.”

Annex 9 Welsh Government's Major Events Unit : Support for Literature and Festivals

2016	Event	Type	Funded body	Level of funding	Location
14 May	International Dylan Thomas Day: 2016 Events/activities across Wales - http://www.literaturewales.org/our-projects/international-dylan-thomas-day/	Cultural literature /	Literature Wales	£15k	Pan-Wales activity
26 May – 5 June	Hay Festival: To support a project to improve digital connectivity at the site of the Events to support live social media interactivity, and to establish a new production unit to capture, edit and distribute audio and video content to a global audience	Cultural / Literature	Hay Festival of Literature & the Arts	£17.5k	Hay-on-Wye
18-21 Aug	Youth Arts Festival: The Funding will support the development of the newly established (2016), Youth Arts Festival for Wales. Creation of new employment and training opportunities in the area and development of opportunities for young Welsh artists and performers.	Cultural Literature /	Youth Arts Festival for Wales	£35k	Newport
17-18 Sept	Roald Dahl 100:	Cultural /	Wales	£400k	Pan-

Throughout 2016	<p>'Roald Dahl's City of the Unexpected' co-production by Wales Millennium Centre / National Theatre Wales</p> <p>Pan-Wales outreach funding scheme delivered by Literature Wales, http://www.literaturewales.org/roalddahl100/ and the</p>	Literature	<p>Millennium Centre &</p> <p>Literature Wales</p>	£100k	Wales
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Annex 10: Arts Council of Wales Funding 2012/13 to 2015/2016

Funding through lottery and grant in aid to projects with 50% or more literature activity

Organisation	Type	Title	Project Description	Grant	Fund	Year
Theatr Bara Caws	Annual Revenue	Annual Revenue 2012-2013	Annual Revenue 2012-2013	287,556	General Activities	2012/13
Literature Wales	Annual Revenue	Annual Revenue 2012-2013	Annual Revenue 2012-2013	851,915	General Activities	2012/13
University of Wales Trinity Saint David	International Opportunity Fund	Research and development visit, Sweden	For Dominic Williams from Coracle and Elena Schmitz from Literature Wales to undertake a research and development to Sweden to develop ideas with partners in Sweden and Ireland for a EU Culture bid.	900	General Activities	2012/13
Trezise, Rachel	International Opportunity Fund	Kikinda 2, Serbia	For Rachel Trezise to participate in the Kikinda Literature Festival in Kikinda and Sarajevo in Serbia.	1,059	General Activities	2012/13
Atkinson, Tiffany	International Opportunity Fund	Rosario International Poetry Festival, Argentina	For poet Tiffany Atkinson to take part in bilingual readings of her work with Jorge Fondebrider in Buenos Aires, and take part in the Rosario International Poetry Festival.	1,762	General Activities	2012/13
Bangor University	Strategic Awards	Pontio Stepping Stones Project	Pontio Stepping Stones Project 2012/13	105,000	General Activities	2012/13

Literature Wales	Dylan Thomas 100	A Dylan Odyssey/ Odyssey Dylan - a series of DT literary tourism public tours	15 literary tours inspired by Dylan Thomas words and worlds taking place across Wales, Oxford, London and New York.	30,000	General Activities	2012/13
Cooper, Christine	Creative Prof: Training	Learning Welsh	For Christine Cooper to further develop Welsh language in her work as storyteller and musician.	590	Lottery Distribution	2012/13
Hudis, Rosalind	Creative Prof: Training	Training via mentoring scheme	For Rosalind Hudis to participate in a new mentoring scheme offered by Cinnamon Press.	600	Lottery Distribution	2012/13
Gibbard, Gwenan	Creative Professionals	Agweddau hen a newydd ar Gerdd Dant	For Gwenan Gibbard to research the traditional art form of Cerdd Dant, and develop, following a period of experimentation, the beginning of new work.	3,000	Lottery Distribution	2012/13
Flintshire County Council	Organisations: Large	Dan Ganas / Under Canvas	A collaborative project, led by Flintshire County Council, working in partnership with Denbighshire County Council, aiming to offer high quality Welsh Language participatory arts opportunities within various settings - schools, community and	9,900	Lottery Distribution	2012/13

			health, across two counties encompassing the timeframe of the National Eisteddfod in Denbigh in 2013.			
Laugharne Literary Festival	Organisations: Large	The Laugharne Weekend 2013	Support for The Laugharne Weekend 2013, an annual festival which champions new writing and music and blends the experimental with the mainstream.	20,000	Lottery Distribution	2012/13
Beyond the Border Storytelling Festival	Organisations: Large	Audiences, Audiences, Audiences	The development of three new initiatives aimed at developing audience for Storytelling across Wales, as well as building the audience in Wales for the Beyond the Border Festival itself.	28,990	Lottery Distribution	2012/13
DS Cymru	Organisations: Small	DS8	A proposal for DS Cymru to present its annual digital storytelling one day festival at Chapter Arts Centre.	2,616	Lottery Distribution	2012/13

Literature Across Frontiers	Organisations: Small	Literature Across Frontiers - policy development research and online international literature and translation resource	For Literature Across Frontiers to enhance for a Wales based audience for two areas of work: the development of a comprehensive online resource and specific research into literature in translation within the UK	4,980	Lottery Distribution	2012/13
Cardiff University	Organisations: Small	Fiction Fiesta 2013	A proposal to develop a series of literary events in Cardiff over one weekend to raise awareness of and to celebrate literature in translation.	5,000	Lottery Distribution	2012/13
National Library of Wales	Dylan Thomas 100	Promoting NLW as premier venue to visit/study Dylan Thomas - enhancing their programme of DT-related activity	A series of artist commissions by NLW to create work that for a multimedia exhibition inspired by Dylan Thomas and the NLW archives.	37,000	Lottery Distribution	2012/13

National Theatre Wales	Dylan Thomas 100	Under Milk Wood	National Theatre Wales working with BBC Cymru Wales to create a hyper connected live broadcast of Under Milk Wood.	100,000	Lottery Distribution	2012/13
Theatr Bara Caws	Annual Revenue	Annual Revenue 2013-14	Annual Revenue 2013-14	287,556	General Activities	2013/14
Literature Wales	Annual Revenue	Annual Revenue 2013-14	Annual Revenue 2013-14	851,915	General Activities	2013/14
Daws, Martin	Creative Wales Ambassadors	USA 2014	A project between Martin Daws, performance poet and current Young People's Laureate for Wales, and partners Literature Wales and Urban Word New York.	25,000	General Activities	2013/14
Gwyn, Richard	Creative Wales Ambassadors	Unfinished Journey	Cardiff based writer and translator, Richard Gwyn, researching and writing a non-fiction account of the process of travel, with visits to writers, translators and festivals in Latin America.	25,000	General Activities	2013/14

Curtis, Tony	International Opportunity Fund	Poetry reading and interview in Paris, France	For Tony Curtis to deliver a poetry readings in Paris and to meet with translators for his work.	449	General Activities	2013/14
Poetry Wales Press Limited	International Opportunity Fund	Sha'ar Festival, Israel	Poetry Wales editor, Zoe Skoulding, to participate in the Sha'ar International Poetry Festival in Israel.	550	General Activities	2013/14
Wales Arts Review	International Opportunity Fund	Cerith Mathias - Tennessee Williams Festival, USA	Wales Arts Review for Cerith Mathias to travel to New Orleans to attend the 2014 Tennessee Williams Festival to develop further relationships with the festival.	620	General Activities	2013/14
Elfyn, Menna	International Opportunity Fund	Bremen International Poetry On the Road Festival, Germany	For Menna Elfyn to participate in the Bremen On The Road International Poetry Festival, Germany.	800	General Activities	2013/14
Cyfnewidfa Lên Cymru	International Opportunity Fund	Festival of the European Short Story, Zagreb and Varazdin, Croatia	Four writers from Wales - Jon Gower, Owen Martell, Deborah Kay Davies and Rachel Tresize - to participate in the European Short Story Festival in Croatia, with Wales as guest of honour in 2013.	1,380	General Activities	2013/14
Rhydderch, Francesca	International Opportunity Fund	Beijing Bookworm International Festival 2014,	For Francesca Rhydderch to participate in the Beijing Bookworm International Literature Festival.	1,570	General Activities	2013/14

		China				
The Original Print Place	International Opportunity Fund	Welsh and Amsterdam Storytelling Collaboration, Netherlands	For storytellers Guto Dafis and Lauren to attend Welsh and Amsterdam Storytelling Collaboration during a Welsh Printmaking Exhibition, Amsterdam.	1,640	General Activities	2013/14
Owen, Karen	International Opportunity Fund	Writers' Chain Wales-Latin America	For Karen Owen to participate in the Wales-Latin America Writers Chain across Patagonia.	2,100	General Activities	2013/14
Hopwood, Elin Mererid	International Opportunity Fund	Writers' Chain Wales-Latin America	For Mererid Hopewood to participate in the Wales- Latin America Writers Chain across Patagonia.	2,100	General Activities	2013/14
Gwyn, Richard	International Opportunity Fund	Writers' Chain Wales-Latin America	For Richard Gwyn to participate in the Wales Latin America Writers Chain across Patagonia	2,100	General Activities	2013/14
Atkinson, Tiffany	International Opportunity Fund	Writers' Chain Wales-Latin America	For Tiffany Atkinson to participate in the Wales - Latin American Writers Chain across Patagonia	2,100	General Activities	2013/14

Literature Wales	International Opportunity Fund	New York and Chicago partnership building for Literature Wales, USA	For Chief Executive of Literature Wales, to undertake a research and development visit to New York and to Chicago.	2,500	General Activities	2013/14
Literature Wales	International Opportunity Fund	Bardd Plant Cymru and Young People's Laureate visit to New York, USA	For Bardd Plant Cymru Aneirin Karadog and Young Peoples Laureate Martin Daws to visit New York to participate in the Free Word conference and The Bronx Writers Centre and to perform at the Bowery Club.	2,500	General Activities	2013/14
Gwyn, Richard	International Opportunity Fund	23rd International Poetry Festival of Medellín, Colombia	For Richard Gwyn to participate in the Poetry Festival of Medellín in Colombia and to work with Colombian poets in Bogata.	2,581	General Activities	2013/14
Cyfnewidfa Lên Cymru	International Opportunity Fund	Writers' Chain Wales-Latin America	For Wales Literature Exchange to lead a series of translation workshops and readings between Welsh, Chilean and Argentinian writers across Patagonia, in partnership with the Club de Traductores Buenos Aires and local partners. WLE will be joined by film maker Gideon Koppel.	5,000	General Activities	2013/14
Bangor University	Strategic Awards	Pontio Stepping Stones 2013-14	Pontio Stepping Stones 2013-14	105,000	General Activities	2013/14

Oriel Myrddin Trust	Dylan Thomas 100	Laugharne Residency and commissions	A residency in Laugharne for artist Craig Wood and the selection of 5 artists to undertake commissions for new work inspired by Dylan Thomas.	22,500	General Activities	2013/14
Bangor University	Dylan Thomas 100	A mini-festival, part of the Dylan Thomas 100 celebrations	A mini-festival of five different concert events entitled My Friend Dylan Thomas,	23,105	General Activities	2013/14
Chapter Cardiff Ltd.	Dylan Thomas 100	Lleisiau/Voices	A collaboration between Chapter and Good Cop Bad Cop, celebrating Dylan Thomas' legacy and other voices.	27,000	General Activities	2013/14

Locws International	Thomas 100	DT100 Abertawe Mega Poem (working title)	A new commission as part of a new strand of Dylan Thomas related programming as part of the inaugural International Contemporary Art Biennial for Wales in 2014.	30,000	General Activities	2013/14
Carmarthenshire County Council	Dylan Thomas 100	Carmarthenshire DT100 - Laugharne, Boat House and Writing Shed activities.	A year long programme of activity centred on this iconic venue, bringing to the attention of the nation the collections, assets and interpretations of the Boathouse and Writing Shed.	37,500	General Activities	2013/14
City and County of Swansea	Dylan Thomas 100	Dylan Thomas Festival	A year-long cultural festival comprising of large-scale arts activities encompassing a variety of artforms, to take place in and around the city of Swansea.	100,000	General Activities	2013/14
Hay Festival of Literature and the Arts Ltd	Capital Lottery	Box Office Infrastructure	Purchase of new box office equipment.	9,515	Lottery Distribution	2013/14
James, Keith	Creative Professionals	Time let me play. From the poetry of Dylan Thomas	For Keith James to present a collection of Dylan Thomas poem set into songform across small venues in Wales.	3,550	Lottery Distribution	2013/14

Cooper, Christine	Creative Professionals	Cad Goddeu / The Battle of the Trees	Working with theatre director Emma Kilbey and musician Ceri Rhys Matthews to further develop the piece Cad Goddeu / The Battle of the Trees.	3,831	Lottery Distribution	2013/14
North Wales International Poetry Festival	Organisations: Large	North Wales International Poetry Festival 2	Support for North Wales International Poetry Festival.	17,216	Lottery Distribution	2013/14
Laugharne Literary Festival	Organisations: Large	The Laugharne Weekend 2014	Support for The Laugharne Weekend 2014.	30,000	Lottery Distribution	2013/14
Literature Wales	Organisations: Large	Dinefwr Literature Festival 2014	To develop and deliver the second Dinefwr Literature Festival in partnership with the National Trust and Cadw.	100,000	Lottery Distribution	2013/14
Hay Festival of Literature and the Arts Ltd	Organisations: Large	Hay Festival Wales (Including Scribblers Tour) 2014	Support for Hay Festival of Literature and the Arts.	100,000	Lottery Distribution	2013/14
xx Women's Writing Festival	Organisations: Small	2014 XX Festival of Women's Writing	For support towards xx Festival 2014, an annual festival of women's writing held at Chapter Arts Centre.	5,000	Lottery Distribution	2013/14

Literature Wales	Organisations: Small	Owen Sheers, Calon and the WRU on Tour	A tour co-ordinated by Literature Wales taking Owen Sheers reading from and discussing Calon, his prose book resulting from his residency with the RFU.	5,000	Lottery Distribution	2013/14
Stephens and George Charitable Trust	Organisations: Training	kids rule rock and do newsletter	Support for a part time officer to co-ordinate a Young Person's Newsletter Project and deliver weekly workshop sessions with young people from Merthyr.	5,000	Lottery Distribution	2013/14
Venue Cymru	Organisations: Training	Writing Conference (Comedy) / Welsh Language Training	A training package of two strands - A Craft of Comedy Writing Training Conference aimed as aspiring young writers who wish to develop a career in this field, along with the enhancement of Welsh Language skills for Venue Cymru customer focused staff.	11,313	Lottery Distribution	2013/14
Theatr Bara Caws	Annual Revenue	Annual Revenue 2014-15	Annual Revenue 2014-15	284,680	General Activities	2014/15
Bangor University	Annual Revenue	Annual Revenue 2014-15	Annual Revenue 2014-15	285,000	General Activities	2014/15
Literature Wales	Annual Revenue	Annual Revenue 2014-15	Annual Revenue 2014-15	830,617	General Activities	2014/15

Literature Wales	Direct Funding	Independent Review of the Young People's Writing Squads	Literature Wales to commission a consultant to undertake an independent review of the Young People's Writing Squads in Wales.	5,000	General Activities	2014/15
Literature Wales	Capital Lottery	Ty Newydd Refocus Project	Project to develop Ty Newydd.	30,000	Lottery Distribution	2014/15
Shaw, Eleanor	Creative Prof: Training	Speaking to the stars, Autobiographical storytelling	Eleanor Shaw to attend Speaking to the stars, Autobiographical storytelling course in Amari, Crete.	599	Lottery Distribution	2014/15
Donahaye, Jasmine	Creative Wales Awards	Slaughter	For Jasmine Donahaye to spend a period of four seasons observing, investigating and trying to capture in writing the changing processes of slaughter through the year, as well as narrating the relationship between the place and its environment.	20,000	Lottery Distribution	2014/15
Jones, Mab	Creative Wales Awards	Rakugo, Storytelling & Performance Poetry Studies	For Cardiff based poet, Mab Jones, to focus on areas of writing and performing beyond her usual practice as 'stand up poet', exploring new modes, methods and techniques. She plans to experiment with the Japanese storytelling tradition of Rakugo and to receive mentoring from	20,000	Lottery Distribution	2014/15

			acclaimed performance poet, John Hegley.			
Stockford, Caroline	International Opportunity Fund	Eskisehir Poetry Festival 2014, Turkey	For translator and poet, Caroline Stockford, to participate in the Eskisehir Poetry Festival, Turkey.	284	Lottery Distribution	2014/15
Skoulding, Zoe	International Opportunity Fund	IV Festival Internacional Centroamericano de Poesía, Guatemala.	Support for Zoe Skoulding to participate in the Festival Internacional Centroamericano de Poesia in Guatemala.	1,000	Lottery Distribution	2014/15
Williams, Dominic	International Opportunity Fund	Sweden and the Language Arts	For Dominic Williams to undertake a visit to Sweden to meet with potential future collaborators and to perform and present his work.	1,010	Lottery Distribution	2014/15
Wales PEN Cymru	International Opportunity Fund	PEN Pregunta - Mexico	For Dylan Moore to represent PEN Cymru at the PEN International Pregunta Conference in Mexico. The visit will link to PEN Cymru's participation in the UK Mexico Year of Culture 2015.	1,185	Lottery Distribution	2014/15

Karadog, Aneirin	International Opportunity Fund	International Laureates' Summit, Bologna, Italy	Support for Bardd Plant Cymru, Aneirin Karadog, and National Young People's Laureate, Martin Daws, to participate in the inaugural Laureates Summit in Bologna.	1,200	Lottery Distribution	2014/15
Wales PEN Cymru	International Opportunity Fund	PEN International Congress in Kyrgyzstan	For Sally Baker of PEN Cymru to attend the PEN International Annual Congress in Kyrgyzstan.	1,464	Lottery Distribution	2014/15
Gwyn, Richard	International Opportunity Fund	Book launch and public lectures in Buenos Aires and Santiago de Chile	For Richard Gwyn to launch the Spanish translation of A Vagabond's Breakfast at the Santiago Book Festival, Chile, and to participate in a series of public events and workshops in Argentina.	1,914	Lottery Distribution	2014/15
Literature Wales	International Opportunity Fund	Brave New Voices Festival, Philadelphia, and Urban Word, New York, USA	For Louise Richards, Outreach Manager at Literature Wales, to attend the Brave New Voices Youth Slam Festival in Philadelphia and to hold meetings with Urban Word in New York.	2,020	Lottery Distribution	2014/15
Cyfnewidfa Lên Cymru	International Opportunity Fund	Ffair Lyfrau Guadalajara	For Cynan Jones to attend Guadalajara Book Festival 2014	2,250	Lottery Distribution	2014/15

Literature Across Frontiers	International Opportunity Fund	Translating Poetry in Georgia and Kurdish Turkey	For Literature Across Frontiers to organise two translation workshops - one in Georgia and the second in Turkey - in collaboration with local partners and involving Welsh poet Ifor ap Glyn.	5,000	Lottery Distribution	2014/15
Laugharne Literary Festival	Organisations: Large	The Laugharne Weekend 2015	Support for The Laugharne Weekend 2015.	13,324	Lottery Distribution	2014/15
Poetry Wales Press Limited	Organisations: Large	Gelynion - Enemies Cymru	Bilingual project from Poetry Wales with the Enemies Project with events in Newport, Swansea, Cardiff, Hay on Wye, Bangor and Aberystwyth.	15,610	Lottery Distribution	2014/15
Literature Across Frontiers	Organisations: Large	International Literary Exchange for Wales	For Literature Across Frontiers to develop a programme of activity ahead of, and feeding into, their Creative Europe application.	27,376	Lottery Distribution	2014/15
Literature Wales	Organisations: Large	South Wales Literature Development Initiative	Support to continue the South Wales Literature Initiative previously supported through ACW's Local Authority Initiative programme, with activity with local communities across four local authorities: Caerphilly, Neath Port Talbot, Newport and Torfaen. Additional activity to be delivered in Bridgend, Merthyr Tydfil, RCT and Vale of Glamorgan.	30,000	Lottery Distribution	2014/15

Hay Festival of Literature and the Arts Ltd	Organisations: Large	Hay Festival and Scribblers Tour 2015	Support for the Hay Festival Wales 2015, including for their festival programmes for children and young people - Hay Fever and HF2 - and their initiatives for schools - Hay Schools Programme and Scribblers Tour.	69,000	Lottery Distribution	2014/15
Gladstone's Library	Organisations: Small	Young People's Gladfest Programme	Literary events for young people at Gladfest 2015.	2,000	Lottery Distribution	2014/15
Wales Arts Review	Organisations: Small	WAR Digital media and audience development project	Project to redesign and upgrade functionality of the website, to improve audience/ readership accesses and interaction with Wales Arts Review content.	4,480	Lottery Distribution	2014/15
Menter Y Felin Uchaf Cyf	Organisations: Small	Fourth Branch Mabinogi Research and Development	Research and Development project to look into co-commissioning a new performance and forge a stronger network of Welsh venue partner relationships to develop and tour the work.	4,750	Lottery Distribution	2014/15

The Escape Artists North Wales CIC	Organisations: Small	Altered Images	Escape Artists N Wales CIC to deliver Altered Images a project engaging residents at Ty Newydd Approved Premises Bangor, who are newly released from prison.	4,950	Lottery Distribution	2014/15
North Wales International Poetry Festival	Organisations: Small	Bangor Poetry Festival	Support for 3rd North Wales International Poetry Festival.	5,000	Lottery Distribution	2014/15
Literature Wales	Organisations: Small	Lolfa Lên - Eisteddfod Genedlaethol Maldwyn a'r Gororau 2015	Support for the Lolfa Len/Literature Tent at the National Eisteddfod 2015.	5,000	Lottery Distribution	2014/15
Stephens and George Charitable Trust	Organisations: Small	Spread the Word Literature Festival	Support for Spread the Word Literature Festival 2015	5,000	Lottery Distribution	2014/15
Theatr Bara Caws	Annual Revenue	Annual Revenue 2015-16	Annual Revenue 2015-16	278,702	General Activities	2015/16
Bangor University	Annual Revenue	Annual Revenue 2015-16	Annual Revenue 2015-16	279,015	General Activities	2015/16
Literature Wales	Annual Revenue	Annual Revenue 2015-16	Annual Revenue 2015-16	743,174	General Activities	2015/16

MOSTYN	Strategic Awards	MOSTudno	Our Space award, including development of audience for Literature events	23,980	General Activities	2015/16
Potter, Clare	Creative Professionals	Sucking on Sugar Cane	A collaboration between poet Clare E. Potter and Jazz musician Gareth Roberts.	3,000	Lottery Distribution	2015/16
Stammers, Ben	Creative Professionals	rAdda	A collaboration between visual artist and photographer Ben Stammers and accomplished poet and Bangor University Senior Lecturer Zoë Skoulding, based around and inspired by the subterranean river that flows underneath the heart of Bangor.	3,000	Lottery Distribution	2015/16
Reynolds, Anthony	Creative Professionals	Abse and Co	Setting of five poems of Dannie Abse, and five original poems by the applicant, to create a suite of ten pieces consisting of music, sound, poetry and spoken word.	5,000	Lottery Distribution	2015/16
Henry, Paul	Creative Wales Awards	The Glass Aisle	Creating work in response to a particular stretch of the Monmouthshire & Brecon Canal.	17,570	Lottery Distribution	2015/16

Dafydd, Sian Melangell	International Opportunity Fund	Kikinda Short Festival 2015, Serbia	Support for Sian Melangell Dafydd to participate in the tenth anniversary edition of the Kikinda Short Festival, Serbia.	440	Lottery Distribution	2015/16
Lewis, Llyr	International Opportunity Fund	European Festival of the First Novel, Kiel, Germany	For novelist Llyr Lewis and his publisher to attend the European Festival of the First Novel in Kiel, Germany.	900	Lottery Distribution	2015/16
Jones, Anthony	International Opportunity Fund	Poetry Translation Residency, Sweden	Support to Anthony Jones to undertake a poetry translation residency in Tranas, Sweden	980	Lottery Distribution	2015/16
Wales PEN Cymru	International Opportunity Fund	PEN International Conferences, Slovenia and Netherlands	For PEN Cymru to participate in 2 PEN International Conferences: Simon Mundy at the Writers for Peace in Slovenia and Caroline Stockford at the Writers in Prison in Amsterdam.	1,499	Lottery Distribution	2015/16
Dooley, Freya	International Opportunity Fund	Enter Text, Finland	For Freya Dooley to participate in the Enter Text residency at Arteles Creative Centre in Finland.	1,899	Lottery Distribution	2015/16
Wales PEN Cymru	International Opportunity Fund	PEN International 81st Congress, Quebec	For delegates from Wales PEN Cymru to participate in the PEN International Congress in Quebec.	2,781	Lottery Distribution	2015/16

Rhydderch, Francesca	International Opportunity Fund	Shanghai International Literary Week, China	For Francesca Rhydderch to launch the Chinese translation of her novel, The Rice Paper Diaries at the Shanghai International Literary Week 2015 accompanied by the book translator, Dr Yan Ying.	3,008	Lottery Distribution	2015/16
Laugharne Literary Festival	Organisations: Large	The Laugharne Weekend 2016	Support for The Laugharne Weekend 2016, an annual festival which champions new writing and music, taking place April 2016.	28,000	Lottery Distribution	2015/16
Literature Wales	Organisations: Large	South Wales Literature Development Initiative	Support for the South Wales Literature Development Initiative 2015-2016, which operates across the local authorities of Caerphilly, Newport, Torfaen, Neath Port Talbot and the Vale of Glamorgan	30,000	Lottery Distribution	2015/16
Learning Links International	Organisations: Small	JamRy - Barddoniaeth Cymru Jamaica Poetry	Exploring the links between Jamaican poetry and Welsh poetry.	5,000	Lottery Distribution	2015/16
Pop Up Projects CIC	Organisations: Small	Pop Up in Wrexham (pilot)	A pilot project to test a small-scale version of Pop Up Education in 9 Wrexham schools during Autumn term 2015.	5,000	Lottery Distribution	2015/16
Literature Across Frontiers	Organisations: Small	North Wales International	Support for the 4 th North Wales International Poetry Festival October 2015	5,000	Lottery Distribution	2015/16

		Poetry Festival				
Literature Across Frontiers	Organisations: Training	Developing the international literature sector in Wales	Project to develop an international programme of audience and writer focussed activity in Wales.	30,000	Lottery Distribution	2015/16
Hay Festival of Literature and the Arts Ltd	Strategic Awards	Creative Wales Hay International Fellowships	Support for Creative Wales Hay International Fellowship 2015-16	25,000	Lottery Distribution	2015/16
Hay Festival of Literature and the Arts Ltd	Strategic Awards	Creative Wales Hay Festival International Fellow	Support for Hay Creative Wales Hay International Fellowship 2016-17	25,000	Lottery Distribution	2015/16
Cyfnewidfa Lên Cymru	Strategic Awards	Wales Literature Exchange programme of work 2015-16	Wales Literature Exchange programme of work 2015-16	47,916	Lottery Distribution	2015/16

Annex 11: Wales Arts International Strategic Funding for International Literature Activity 12/13 -15/16

Organisation	Title	Project Description	Amount	Fund	Year
Wales Literature Exchange	India Wales Writers Chain	Programme of translation workshops and public literary events in India and Wales	5,000	WAI strategic	12/13
Hay Festival	Hay International Fellowship 12-13	Support for Hay International Fellowship 12-13	25,000	WAI strategic	12/13
Wales Literature Exchange	HALMA	Participation in HALMA international network and associated activity	5,000	WAI strategic	12/13
Literature Across Frontiers	Culture Forum	Bursary to participate in EU Culture Forum	530	WAI strategic	13/14
WAI project	Ghazalaw workshop	Translation workshop for Ghazalaw project	2,500	WAI strategic	13/14
WAI project	DT100 New York	Poetry performance programme, NY, for DT100	3,000	WAI strategic	13/14

In Chapters	In Chapters Australia	In Chapters performances, Australia for DT100	3,000	WAI strategic	13/14
Literature Across Frontiers	India Wales	Translation workshops and festival performances, India and Wales	9,000	WAI strategic	14/15
Beyond the Border	India R&D	R&D visit to Jodpur RIFF and storytelling workshops	3,000	WAI strategic	14/15
Literature Across Frontiers	Kathreptis International	Participation in Kathreptis International	408	WAI strategic	15/16
PEN Cymru	Culture Forum	Participation in EU Culture Forum	450	WAI strategic	15/16
WAI direct project	Walking Cities	Partnership project with British Council, with writer collaboration, skills exchange and festival performances	25,000	WAI strategic	15/16
Literature Across Frontiers	China visit	Support for visit to Shanghai and Beijing Book and Literature Festivals	1,106	WAI strategic	15/16



Eich cyf/Your ref
Ein cyf/Our ref

Phil George, Chair, Arts Council of Wales
Nick Capaldi, Chief Executive, Arts Council of Wales
Professor Damian Walford Davies, Chair, Literature Wales
Lleucu Siencyn, Chief Executive, Literature Wales
Professor M. Wynn Thomas, Chair, Welsh Books Council
Helgard Krause, Chief Executive, Welsh Books Council

14 July 2017

Dear colleagues,

Thank you for the detailed responses to the Independent Review of Support for Publishing and Literature in Wales which I have now received from the Arts Council of Wales, Literature Wales and the Welsh Books Council.

I appreciate the range of views provided for my consideration. I note the points of concern some of you have raised about certain aspects of the report, as well as your statements of agreement and constructive engagement with the report in other areas.

As agreed, these have now been shared with the Chair and other members of the independent review panel. They have agreed to consider your submissions and will respond to me directly in due course. This process will largely focus on matters of accuracy, scope, impartiality and strategic effectiveness, as these are the areas you have primarily focused on in your submissions. This will take some time, especially given the academic commitments of both the Chair and Vice-Chair of the panel over the next few weeks. I expect to receive the panel's written response towards the end of the summer break.

I will consider the panel's views on the matters you have raised and provide you with an update in due course. I am open to the possibility, as some of you have suggested, of a meeting between ourselves and the panel Chair at that point. I will consider this further once I have seen the panel's response.

I am pleased that you have all also committed to participating in a separate strand of work, running in parallel with the first, where we will collectively consider the practicalities of taking forward the report's recommendations. I appreciate that some of you have serious concerns about certain aspects of these recommendations.

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

I am absolutely clear that your participation in this work on the practicalities of implementation does not imply support for, or acceptance of, specific recommendations. Neither should you assume that this work implies I have already made any final decisions. I stand by my statement in the Assembly Chamber on 13 June, but I will of course give the outcomes of both pieces of work full consideration before reaching a firm conclusion. In the meantime, your concerns are being looked at and I expect us all to engage fully and constructively in this work over the summer, whilst the programmes of activity you deliver for the people of Wales should continue as normal.

Space must be allowed for these pieces of work to be completed, so they can properly inform the Welsh Government's formal response to the independent review which I will look to publish during the autumn.

Some of you clearly perceive serious issues with the report. You have raised these with me and have agreed with me that the review panel should consider your concerns and respond to them. I have therefore been surprised in recent days to see personal statements appear online which could be seen as seeking to undermine the process we have all committed to, without awaiting the panel's response.

This is not helpful. I hope and expect that we will move forward in a way that allows this work to be completed in good faith and in doing so maintain productive and positive working relationships, both now and in the future.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Ken', with a long, sweeping flourish above the name.

Ken Skates AC/AM

Ysgrifennydd y Cabinet dros yr Economi a'r Seilwaith
Cabinet Secretary for Economy and Infrastructure

Literature Wales – Submission to the Culture, Welsh Language and Communications Committee September 2017

1. Introduction

An independent review of the Welsh Government (WG)'s support for publishing and literature should have been a timely opportunity to evaluate the vitality of this multifaceted and culturally significant sector. Since its creation in 2011, Literature Wales (LW) has forged an agenda of democratising literature and has long called for a better connected sector. It therefore awaited the findings of this review with anticipation. It is unfortunate that this opportunity has been missed owing to the significantly flawed nature of Professor Medwin Hughes' report.

LW has submitted a full response to the Cabinet Secretary, which has also been shared with the Culture, Welsh Language and Communications Committee (CWLCC). The Cabinet Secretary has asked Professor Hughes and the panel to respond in detail to it – as well as to a submission from the Arts Council Wales (ACW), which draws similar conclusions. LW expects clarification on a considerable number of issues, and corrections to many factual inaccuracies.

LW's concerns over the review relate to the following areas:

- i. The robustness of the evidence base
- ii. The lack of connection between the evidence and the recommendations
- iii. The partisan and inaccurate representation of LW
- iv. The panel's under-researched and under-informed view of the literature landscape
- v. Panel members' conflicts of interest
- vi. The fact that the report's Terms of Reference were not addressed

In the light of the public debate since the publication of the review, it is wholly appropriate that the CWLCC hold an inquiry into the process that led to this flawed and partial report and look at ways in which Welsh Government support for the literature and publishing sectors can safeguard the expertise and experience that currently exist and also enhance the sector's connectivity.

In this present submission, LW clarifies its position and offers analysis of the potential effects should the Cabinet Secretary accept the report's recommendations.

2. LW's Remit, Mission and Strategic Areas

2.1 Remit and Mission

LW is the national company for developing literature in Wales and is a member of ACW's Arts Portfolio Wales. As such, LW's remit is to develop literature as an artform by supporting writers and encouraging more people to engage creatively with the written and spoken word on multiple platforms.

As stated in our Business Plan¹, LW's mission is founded on the belief that literature belongs to everybody and can be found everywhere and that, by working with others in a wide range of communities, LW can make literature a voice for all. Working over five strategic areas (Participation, Writer Support, Children & Young People, International, and Digital Creativity), LW builds relationships within and beyond the culture sector to enable people to develop sustainable local literature programmes, enhance skills, address issues of social disadvantage and promote Wales's writers within and beyond its borders.

With the aim of demonstrating LW's and the Welsh Books Council (WBC)'s complementary programmes, it is useful here to identify how LW's remit and established expertise are different from that of WBC. WBC state in their Strategic Plan (June 2016) that their mission is 'to promote and develop the publishing industry in Wales' by supporting Wales-based publishers and booksellers. The focus of the WBC is therefore to *support publishing as a commercial industry*. This is where their experience lies. LW's expertise is very different. Over the years, LW has pioneered in the field of writer development, creative engagement and literary participation, encouraging experimentation and supporting the diversification of literature as an artform.

2.2 Participation Strategy

Each year, LW's expert and specialist staff develop projects and initiatives with over 200 partners from different sectors and reaches around 160,000 participants. These projects aim to address barriers to participation and target groups who would otherwise have limited access to the arts. Through a network of partnerships, LW facilitates workshops in prisons, projects with the Gypsy Roma Traveller community, comic-making workshops with NEETs young people and writing with dementia sufferers. LW's longstanding partnership with HMP & YOI Parc won the **Arts, Business and the Community Award at the Arts & Business Awards² in June 2017**.

It has taken years to develop trust and a working relationship with our partners and audiences. Many of the latter represent the most vulnerable members of society. If the Cabinet Secretary were to move funding from LW to WBC, this complex and delicate work could disappear.

High-profile projects such as Roald Dahl 100 Wales,³ Reading Friends⁴ and regional literature development initiatives⁵ demonstrate the value other agencies clearly recognise in Literature Wales. Some of these organisations in England see Wales as a UK benchmark of excellence in engaging audiences with literature. The fact that LW has over the years developed and sustained writer development in specialist areas – e.g. working with vulnerable young adults – means that we have a strong consortium of writers of all backgrounds in both languages who can work in these areas. LW's aim over the next 2–3 years is to enhance this specialist training and development further.

The discussion of this area of work is one of the most manifestly deficient areas of the Hughes Report. It offers no analysis of the social impact of LW's work or its success in delivering Welsh

¹ https://issuu.com/lencymru-litwales/docs/literature_wales_business_plan_2016

² <http://www.aandbcymru.org.uk/arts-business-and-the-community-2017/>

³ <http://www.roalddahl100.wales/invent-your-event/>

⁴ <http://www.literaturewales.org/our-projects/reading-friends/>

⁵ <http://www.literaturewales.org/our-projects/south-wales-literature-development-initiative/>

Government targets identified through Fusion and the Well-being of Future Generations Act. Nor does the Report identify any ambitions for the future. This leads to flawed recommendations which would seriously compromise the strides made in this area and impact negatively on Wales' position as a UK-wide leader in this field.

2.3. Children and Young People Strategy

It is alarming that in the area of Children and Young People the Hughes Report again presents no analysis of current strategic activity before going on to recommend potentially detrimental changes. As seen in our Participation Strategy, LW's expertise in working with children and young people is in forging new partnerships and enabling organisations and individuals from backgrounds outside the traditional arts to engage with literary activity in multiple forms.

Each year, LW works with partners to engage around **60,000 children and young people** in literature activities. This is done through directly delivered programmes like the Young People's Laureate⁶ and Bardd Plant Cymru⁷ and by supporting schools, youth clubs, young carers' groups, young offenders' institutes and others to find creative ways of working with writers and artists to engage young people.

LW also leads the way in developing performance opportunities for children and young people, which can improve confidence, self-expression and communication skills. In 2015 LW brought the hugely popular Slam Poetry competition to Wales. The focus of Slam Poetry is to encourage political debate and social activism among young people. LW's ambition is to enable a bilingual team from Wales to compete at the world Slam championships in USA.

This strategic, developmental work is not something that can be easily transferred. It is a complex, collaborative structure, built on strong partnerships forged and networked by LW.

2.4. Writer Support Strategy and the definition of literature

The first difficulty here is in the Hughes Report's definition of literature. The report presents an outdated concept focused on *published* work, which is emphatically out of touch with current activity – a view so limited that the report cannot sufficiently analyse the contribution LW makes to literature.

Whereas the Hughes report defines literature merely as the precursor to publishing, literature in Wales in the twenty-first century is something far more dynamic, creative and engaging. What the report disregards is the spoken word, rap, cross artform practice, digital, the graphic novel, lyric-writing and gaming commentary – all of which are part of how we connect with the written and spoken word every day. LW's broad range of activity is able to support literature in all its forms: funding for festival programming; commissioning digital projects; bursaries for creators of graphic novels; and literature and technology projects. This far-reaching spectrum of activity and the underpinning expertise that drives it could be lost if the recommendations of the Hughes Report were accepted.

⁶ <http://www.literaturewales.org/our-projects/young-peoples-laureate-wales/>

⁷ <http://www.literaturewales.org/our-projects/bardd-plant-cymru/>

Starting from such a limited view of literature means that the Hughes Report is unable to appreciate the range of authors with whom LW works to develop a number of skills. There are performers and artists who develop their work in other, less traditional settings – whether through creating Instapoetry, spoken word output, or through delivering life-changing workshops in communities across Wales.

Writers are central to the LW workforce. Each year, LW works with over 500 writers and invests 25% of its budget in individual writers, meaning that over £300,000 goes directly to writers living and working in Wales.

LW aims to support every aspect of a writer's development, by giving a new writer that first boost through a Writers' Bursary to write their first novel or by training them to lead creative writing workshops with young carers or young offenders.

Many recipients of Writers' Bursaries go on to publish their work, and many get book deals with publishers outside Wales – which can lead to significant book sales. The Hughes Report could not sufficiently analyse sales for books published in Wales owing to a lack of data available. However, LW is proud to have supported many writers who have gone on to achieve critical and commercial acclaim. One example is Kate Hamer who received a Writers' Bursary of £5,000. Her novel *The Girl in the Red Coat* has since sold 75,911 copies, generating £400,252 (Nielsen BookData on UK sales).

LW supports writers from Wales, whether they aim to publish or not, whether they publish in Wales or beyond. WBC's mission is to support the publishing industry *within* Wales, and has few established relationships and limited expertise in the context of the UK-wide industry. Were the Cabinet Secretary to accept the Report's recommendations, there is a risk that writers who publish outside Wales could lose out.

3. Governance, Management and Structures

The Hughes Report's non-evidenced criticisms of LW's governance structures are wholly contrary to our funders' and regulators' views. LW's structures and financial reporting are monitored closely by its own Board, as well as ACW, independent auditors, the Charity Commission and Companies House. LW has the expertise, experience and management structures to deliver and monitor its full remit of activity successfully. LW has challenged the authors of the Report to prove otherwise.

LW's inclusive approach is part of its core ethos, which is to promote equality of opportunity and access, together with a dynamic and open-minded way of working. To achieve change in Wales, LW believes that this should start with the organisation itself. LW is proud that these values are reflected in the composition of its Management Board and staff. Directors⁸ represent a range of linguistic and ethnic backgrounds and the majority are women. There is still more work to be done, however, in ensuring that the arts are accessible to all.

LW is also working with Chwarae Teg on its Employers' Programme on an Equality and Diversity Strategy, further enhancing its Strategic Equality Plan. It has also supported many members of staff to undertake management training as part of the Agile Nation 2 programme.

⁸ <http://www.literaturewales.org/about/2623-2/>

4. Economic impact

The funding LW receives from the Arts Council of Wales enables LW to deliver a core programme of activity and also leverage a significant amount of additional income.

Since 2011/12, the income LW raises from other sources has increased significantly. In 2011/12 the ACW revenue grant represented 74% of LW's income. By 2015/16, this had reduced to 61%. In this period, the additional funding and income LW receives beyond its core grant has increased 122%.

Also, following recent renovations and conservation works at Tŷ Newydd Writing Centre, income from venue hire has risen from £815 in 14/15, to £8,085 in 2015/16, with a projected £23,097 in 2017/18.

In addition to direct expenditure through the annual budget, LW activity generates additional investment and significant added value. For every £1 invested in LW by the Arts Council of Wales, an additional £2.50 is generated. This equates to £1.8m each year, based on 2015-17 figures, and includes an additional £114,000 created through Writers on Tour partnerships and an additional £326,000 created through the Tŷ Newydd Writing Centre in commercial income as well as participants' spend in the local area. Further details in appendix ii.

As a national organisation, LW has staff based in the Tŷ Newydd Writing Centre in Llanystumdwy, Gwynedd and in the Wales Millennium Centre, Cardiff. LW's initiatives are delivered across Wales, and some roles work across Local Authority areas – for example our regional literature development officers.

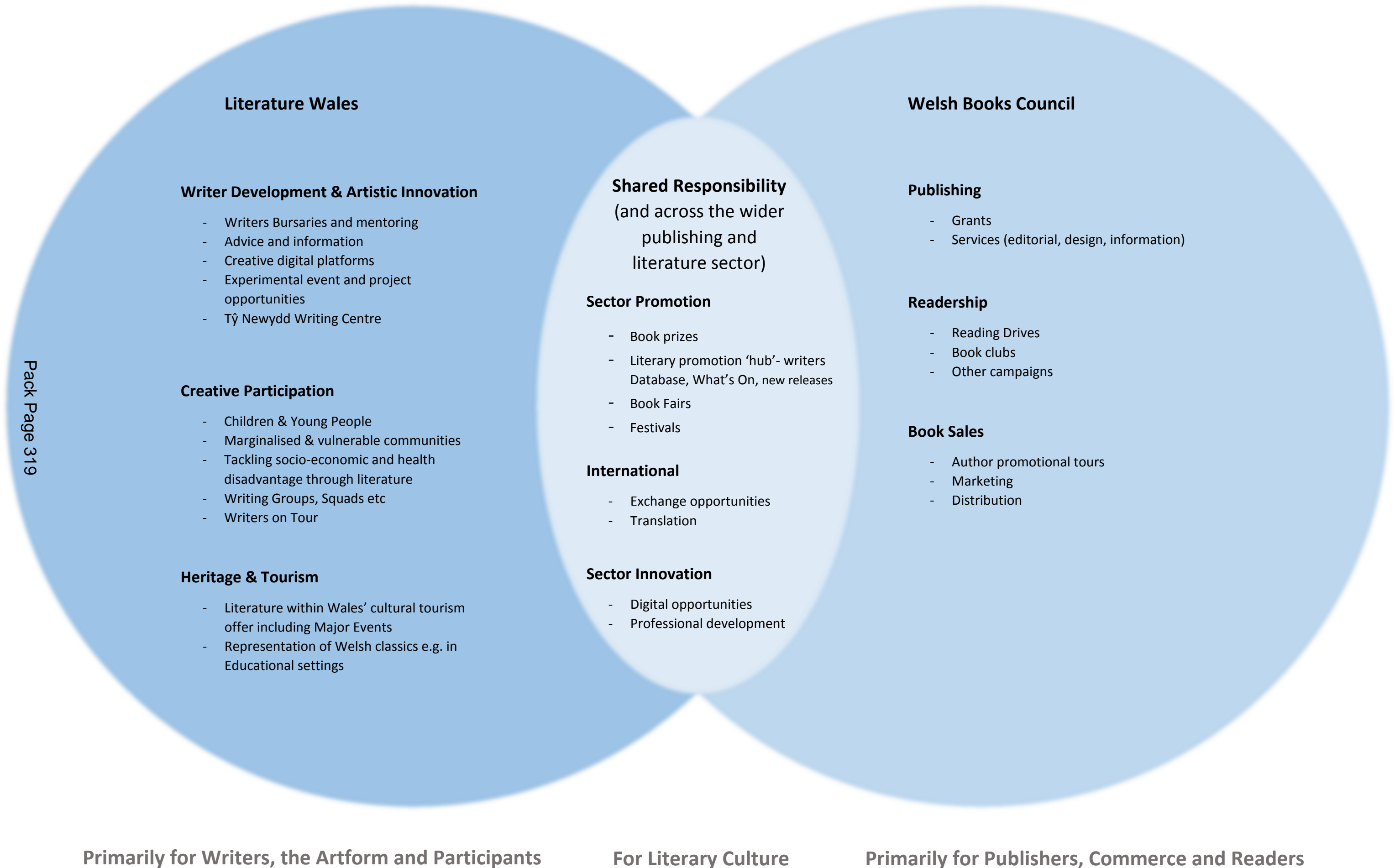
5. Strategic Ways forward

The Hughes Report simply and crudely suggests a “dump” of activities, with no thought given to the practicality, timescales, manifest risks and financial implications of such a transfer. As stated above, LW believes that a more dynamically connected sector, in which current expertise is preserved and enhanced, would better serve the people of Wales. Centralisation would threaten the arms' length principle – a principle we should all stand by in a mature democratic nation. LW would embrace the opportunity to work strategically with all key stakeholders to develop a forward plan that deploys established expertise in a more concerted way. The diagram in appendix i illustrates the current roles of LW and WBC, and offers positive and practical areas of greater collaboration.

This will build on the vision that literature belongs to everybody, and ensure the future vitality of our unique culture of words.

Literature Wales, September 2017

Literature Wales and Welsh Books Council – remits and areas of potential collaboration



For every £1
invested in Literature
Wales by the Arts
Council of Wales, an
additional £2.50 is
generated

An additional
£114,000 is
created through
Writers on Tour

An additional
£308,000 is
generated
through
fundraising

This
equates to
£1.827M*

An additional
£326,000 is
created through
Tŷ Newydd
Writing Centre

An additional
£910,000 is
generated for
others through
partnerships

An additional
£109,000 is created
through other
activity including
major events, Wales
Book of the Year and
literary tours

An additional
£60,000 worth
of in-kind
support is
provided to
others

Writers' Bursaries create additional income from book sales - e.g. Kate Hamer's *The Girl in the Red Coat* received a £5000 Writer's Bursary and has sold 75,911 copies in the UK, worth £400,252**

*Based on 2015-2017 figures

** Based on UK sales figures provided by Nielsen BookData



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**AT Y PWYLLGOR DIWYLLIANT, Y GYMRAEG A CHYFATHREBU
TO MEMBERS OF THE CULTURE, WELSH LANGUAGE AND COMMUNICATIONS COMMITTEE**

Annwyl Glerc,

**Cais am dystiolaeth: Adolygiad
Annibynnol o Gymorth ar gyfer Cyhoeddi
a Llenyddiaeth yng Nghymru**

Mae'n bleser gennyf amgáu ymateb Cyngor Llyfrau Cymru (*The Way Forward*, Gorffennaf 2017) i Ysgrifennydd y Cabinet dros yr Economi a'r Seilwaith yn dilyn prif argymhellion yr Athro Hughes yn ei *Adolygiad o Gymorth ar gyfer Cyhoeddi a Llenyddiaeth yng Nghymru*.

Hefyd yn gynwysedig ceir cyflwyniad byr i'n gwaith, ystadegau allweddol o flwyddyn ariannol 2016/17 a samplau o'n deunyddiau marchnata diweddaraf.

Mae'r Athro M. Wynn Thomas, Cadeirydd y Cyngor Llyfrau a minnau'n edrych ymlaen at gyfarfod â'r Pwyllgor Diwylliant yr wythnos nesaf.

Dear Clerk

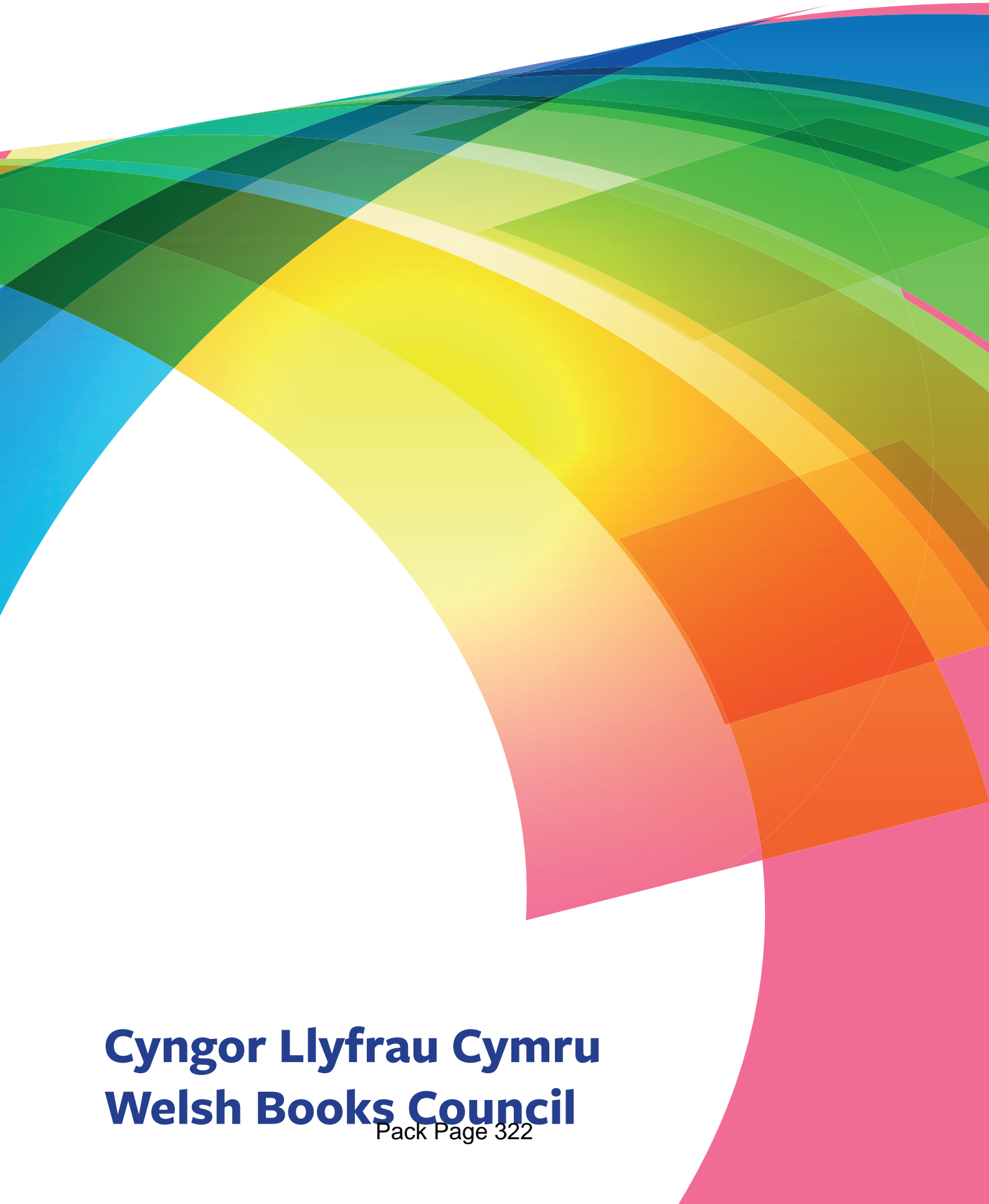
***Evidence to Committee: Independent
Review of Support for Publishing and
Literature Wales***

I am pleased to enclose the Welsh Books Council's response (The Way Forward, July 2017) to the Cabinet Secretary for Economy and Infrastructure following the main recommendations of Professor Hughes's Review of Support for Publishing and Literature in Wales.

Also included is a brief introduction to our work, key statistics from the financial year 2016/17 and samples of the most recent marketing materials.

Professor M Wynn Thomas, Chairman of the Welsh Books Council, and I look forward to meeting with the Culture Committee next week.

HELGARD KRAUSE
Prif Weithredwr / Chief Executive



Cyngor Llyfrau Cymru
Welsh Books Council

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The Welsh Books Council is the major national body enabled by government funding to underpin the entire publishing industry in Wales, in both languages.

The **Welsh Books Council** was founded in 1961 and is a registered charity funded by Welsh Government. Our established aim and purpose is to serve the publishing sector in Wales in all its different aspects, thereby nurturing Welsh writing talent to allow it to maximise its potential in all its different forms.

Grants and Services

We distribute grants to publishers, run training courses and offer a range of services such as editing, design, distribution, sales, marketing, and bibliographic data management services. We work in close partnership with schools, libraries, booksellers and other third sector organisations with the aim of stimulating interest in books, reading and literature in general. We deliver successful schemes such as the Tir na n-Og Children's Book Awards, World Book Day, Quick Reads, author tours, book quizzes and competitions, often in partnership with the Book Trust, The Reading Agency, CILIP and SCL, and pride ourselves in being an open and collaborative partner.

Personnel

We employ 45 people in our administrative offices and distribution centre, all of whom are fully bilingual. We are proud to count teachers, publishing specialists, academics, published authors, editors, designers, library professionals, booksellers as well as highly skilled administrators, finance and distribution specialists amongst our staff. We frequently benefit from the wide experience and skills of our trustees as well as those of members of our independent panels, Executive Committee and Council; they also ensure robust and effective governance.

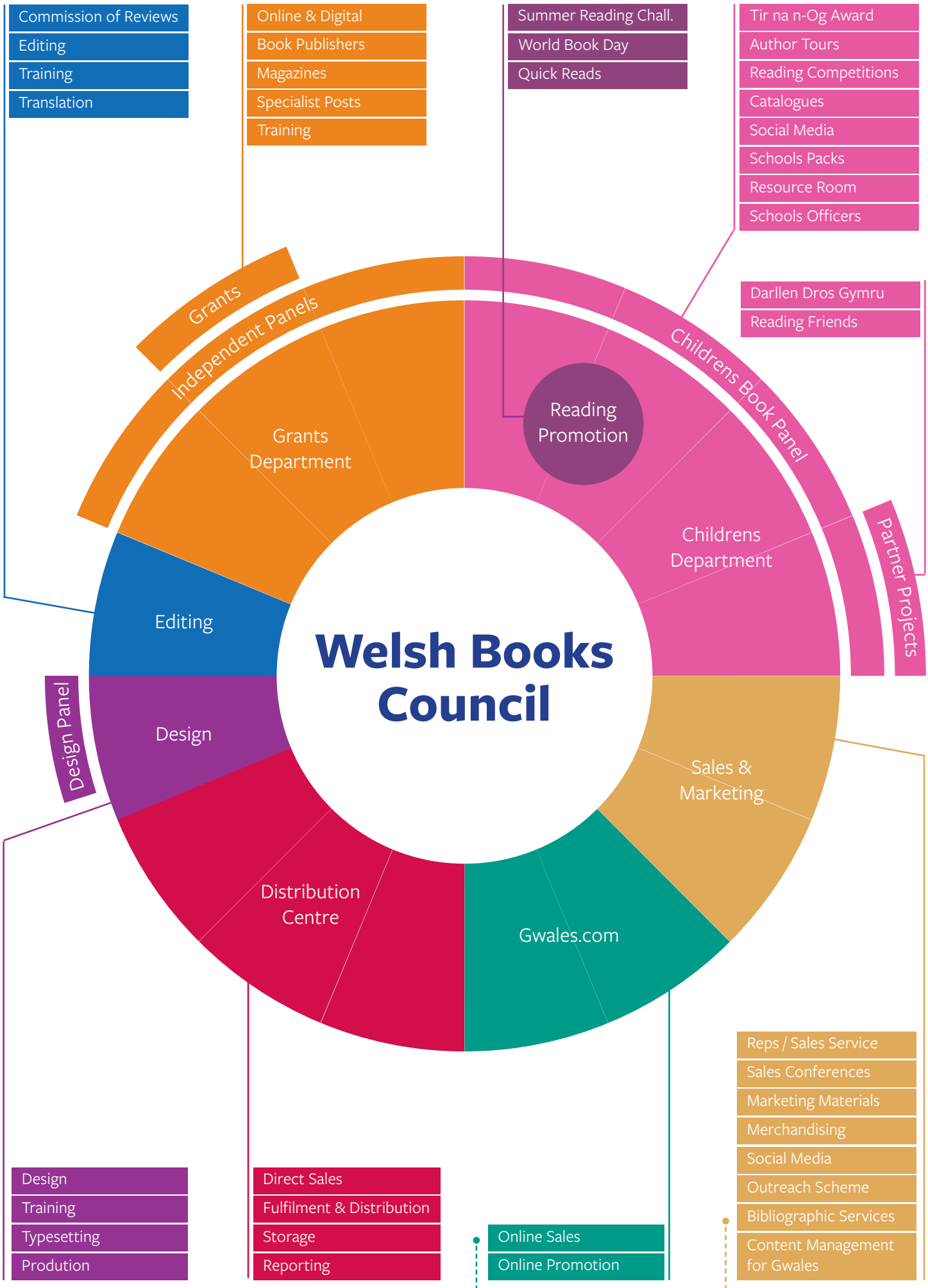
As a national organisation, truly meaningful engagement with our stakeholders lies at the core of our work, and it is this principle which has resulted in a proven track record for over 50 years and which was affirmed most recently

in 2015 by the 'Review of Support for Books from Wales', a report by Martin Rolph for the Culture and Sport Department, 2015.

Response to Professor Medwin Hughes's report
Our work is inextricably linked to all aspects of literary endeavour in Wales, and unsurprisingly our Executive Committee and ruling Council warmly endorsed the recommendations of Professor Hughes's review. It is the unanimous view of our Council and Executive Committee that the recommendations

- recognize that the services to be transferred dovetail perfectly with our current programme of provision
- significantly strengthen current provision but also allow several of its present schemes to be adapted to meet constantly developing needs
- will enable us to significantly reinforce the publishing sector we exist to serve
- are supported by many representatives of the sector who have already voiced their very strong support for the recommendations
- indicate that sufficient additional funding will be made available to us to ensure effective implementation of the recommendations
- if fully implemented, would better enable us both to deliver our own strategic plan (Looking Forward) and to fulfil the strategic priorities of Welsh Government (as outlined in Taking Wales Forward 2016–2021; Well-being of Future Generations (Wales) Act 2015).

We believe that we are uniquely placed not only to develop a clear and focused strategy for the promotion of publishing and literature in Wales but also, crucially, to implement it successfully. Our role as enabler and dispenser will be applied to all new functions, ensuring maximum impact not only culturally and socially, but also commercially. And our positive response to the recommendations has been echoed throughout the publishing sector in Wales.



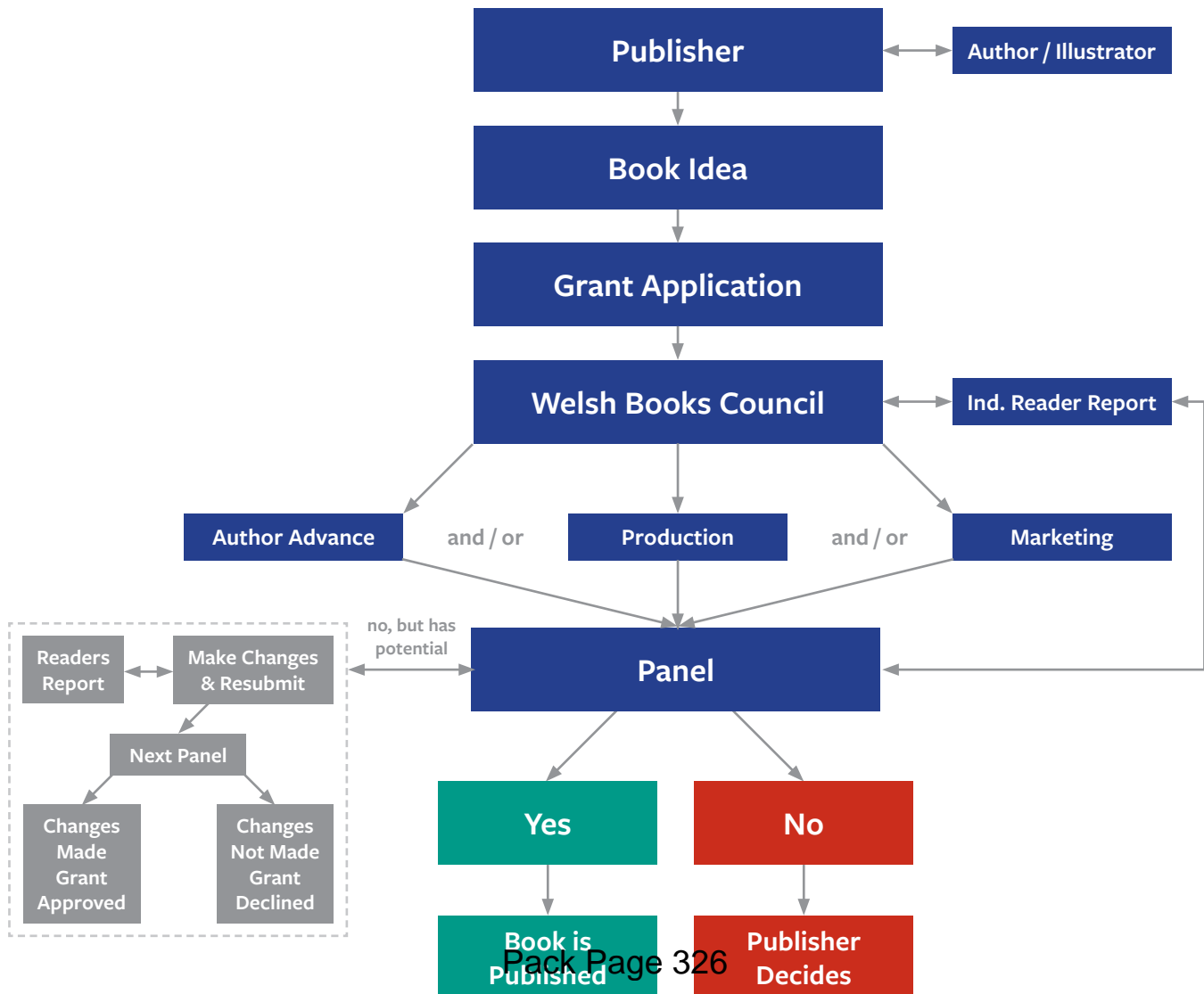
Grants Distributed

£2,299,000

Welsh	English
£1,632,550 (71%)	£666,450 (29%)

	Welsh	English
Publishers Supported	17	14
Posts (Editorial and Marketing)	20	10
Children's Books	123	10
Books for Adults	109	66
Magazines (Printed and Digital)	15	5
Marketing Events	66	22
Digital Journalism	Golwg 360	-

Individual Grants



Design Department

Publishers Supported
11
Number of titles supported
105
Internal Publications & Marketing Items
50+

Editorial Department

Publishers Supported
13
Number of titles supported
147
Reviews
183

Children's Department

World Book Day

Biggest Bookshow author event – 800 pupils
Bilingual materials to schools, libraries and colleges

Summer Reading Challenge

Participation – 39,222 / Completed challenge – 22,953
New members – 1,977 / New Reading Hack volunteers – 135

Author Tour

Participation – 1,464 pupils / Sales £3,256

Reading Competitions

Participation – Primary school pupils - 2,570

Childrens' Books catalogues

Welsh titles – 3,316 / English titles – 1,123

Schools officers

3 schools officers / 790 consultations / Orders - £380,000

Schools pack

Produced biannually / Primary – 1,358 / Secondary – 222

Resource Room

4,885 titles in Welsh and English
Pack Page 327

Gwales.com (Information Services)

30,000 titles on gwales.com 22,000 titles available to order
25,000+ users from 170 countries
172,269 order lines through gwales.com during 2016/17
39 Independent Bookshops benefited from the Bookshop Support Scheme on gwales.com 2016/17
Increase of 18.4% of social media followers since January 2017
1,631 e-books available, 353 in Welsh

Sales & Marketing

Grants of £25,976 were distributed to 16 bookshops
Offers exclusive sales and distribution service
3 sales representatives approx 2,300 visits to customers in 2016/ 2017
Approx. 335 events organised – total sales value of £140,383
18 titles featured in the television adverts on S4C broadcast in November and December 2016 – seen by over 2 million viewers
2,140 shops, schools, libraries received marketing materials such as Llyfrau'r Haf, Summer Reads, Gwledd Nadolig, Festive Reads, Chwedlau Myths and Legends, Hedd Wyn, bespoke Christmas catalogue for Waterstones

Distribution

Total 2016/17 £2,613,611
18,000 parcels per year
Pick Pack Distribute over 650,000 books per year
created 35,000 invoices
98.65% of all orders received dispatched same day
289 staff years industry experience
Over £2m net stock holding
New weekly stock reporting to main publishers
Same day order processing for orders placed by midday and next day fulfilment on trade orders



Position Paper

The Way Forward

July 2017



WELSH BOOKS COUNCIL POSITION PAPER

THE WAY FORWARD

Executive Summary

- The WBC enthusiastically welcomes this thoroughgoing report's recommendations and such of its findings as relate to its work.
- In doing so, it assumes that sufficient additional funding will be made available to ensure effective implementation of them.
- It recognizes that the services to be transferred to its care dovetail perfectly with its current programme of provision.
- Not only will they significantly strengthen current provision but also allow several of its present schemes to be adapted to meet constantly developing needs.
- They will thereby enable the Council significantly to reinforce the publishing sector it exists to serve.
- In anticipation of this, many representatives of that sector have already expressed their very strong support for the recommendations.
- Full implementation of the report would also better enable the Council both to deliver its own strategic plan (*Looking Forward*) and to fulfil the strategic priorities of Welsh Government (as outlined in *Taking Wales Forward 2016-2021*; *Well-Being of Future Generations (Wales) Act 2015*).
- The core response of the WBC to the Report has already been very warmly endorsed by both its Executive Committee and ruling Council.
- The WBC now looks forward to working with its partners to ensure an efficient and speedy transition of responsibilities

Overview

The Welsh Books Council welcomes in the very warmest terms the findings of the recent Independent Review of Support for Publishing and Literature in Wales and accepts its recommendations in their totality. In doing so, it assumes that sufficient additional funding will be made available to ensure effective implementation of them. It looks forward to working with others to effect the transfer of responsibilities as speedily and efficiently as possible.

The established sole aim and purpose of the WBC is to serve the publishing sector in Wales in all its different aspects so as to enable it to nurture Welsh writing talent and to allow it to maximise its market potential. Particularly significant, in the present context, has been an acceptance by a succession of past Ministers, most notably Jenny Randerson and Alun Pugh, of the WBC's core argument that grants/bursaries to writers are most productive when tied directly to an assessment of the likely market impact and performance of the work that is being financially supported and when combined with mentoring and training opportunities.

For more than two decades the work of the WBC for the publishing industry in Wales has repeatedly been commended in the warmest of possible of terms by a whole series of independent reviews and reports:

- ‘Evaluation of the efficiency and effectiveness of the Grant Support Scheme for Welsh Language Publishers’, D.R. Thomas and D.N. Martin (Cardiff Business School on behalf of the Welsh Office), 1995.
- ‘Review of the Publishing Grant administered by the Welsh Books Council’ (Grant Thornton on behalf of the Welsh Language Board), 1999.
- ‘Report of the Task and Finish Group on Publishing for [Jenny Randerson AM] The Minister for Culture, Sport and the Welsh Language’, chaired by Delyth Evans AM, 2002
- ‘Welsh Writing in English’ Report for the Culture Welsh Language and Sport Committee, Rosemary Butler AM (Chair), 2004.
- ‘Review of Support for Books from Wales’, Report by Martin Rolph for the Culture and Sport Department, 2015.

It is extremely doubtful whether any other Welsh body active in the fields of writing, literature and publishing has undergone such sustained scrutiny and emerged with such flying colours. And it is further worth noting that the recommendations in this report are completely consistent with the findings of these previous assessments.

As was to be expected, the examination of the WBC by the panel of this latest review was appropriately testing and rigorous, with a number of challenging issues being raised by panel members in accordance with their particular expertise. However, the Chair and Chief Executive of the Welsh Books Council welcomed the opportunity to respond, believing the occasion provided an excellent opportunity for it to showcase its work and to reflect on how the Books Council’s services could be adapted and extended to meet future anticipated needs.

The recommendations of the review have met with enthusiastic support from the Welsh Books Council as not only are they a clear recognition of its distinguished record of service to the publishing industry but also represent an exciting new opportunity for that service to be significantly augmented and strengthened in a number of important respects. They have been equally warmly welcomed by key players right across the publishing sector in Wales excited by the possibilities for development, growth and enhanced performance that they represent.

The recommendations focus on activities that lie at the very core of literary endeavour. These would benefit from WBCs exclusive focus on books and publishing since within the WBC framework they would not face internal competition either from other more cost-intensive if more glamorous art forms or from high-profile performance events with the advantage of being prominently public-facing.

The proposed transfer of functions would also clearly align with the strategic priorities of Welsh Government (as outlined in *Taking Wales Forward 2016-2021*) and its commitment to the *Well-being of Future Generations (Wales) Act 2015* and it would also reflect key aspects of WBCs own strategic plan *Looking Forward*. In this context WBC would wholeheartedly embrace a name change which would not only more accurately reflect its present status but also clearly signal the widening of its current remit; the change would also be reflected in a changed mission statement to signal a clear intent to embrace and embed the new responsibilities fully, especially with regards to authors and talent development.

Writers' Bursaries: Developing & promoting talent

The publishing industry is underpinned by the creative output of writers; the careful nurturing of emerging talent and professional development opportunities for more experienced authors are central to ensuring a diverse and engaging content; content suitable for publication in book or magazine form is currently supported through our grants system. However, writing manifests itself in many more diverse forms, such as games, scripts, spoken word and live performance, apps, web content, networks and social media. We believe that Writers' Bursaries play a vital role in developing talent, but that the current bursary system is short of ambition and lacks structure.

Using tried and tested principles currently deployed by the Welsh Books Council we envisage a new bursary function that:

- Is established through consultation with writers and their representative bodies
- Attracts high profile panel members with deep expertise and from diverse backgrounds
- Facilitates and encourages risk-taking by authors and at times publishers which is rarely possible within the present confines of the WBC grant system
- Operates two separate panels to ensure equity in opportunity for both languages
- Has a transparent application process designed not only to facilitate the creative process but also to provide real focus with regard to the aims and outcomes desired by the writer
- Embeds mentoring and training as well as follow up and assessment with access to publishers, editors, agents, marketing and digital experts facilitated
- Enables a suitable partner to re-establish the much missed writers' database
- Is national in outlook, working proactively to attract applications from disadvantaged areas
- Is located in North-East Wales, allowing for a wider geographical presence of WBC

Writers on Tour

Events where authors can engage with readers, other writers and particularly disadvantaged communities or young people are central to widening reach and encouraging participation. The inspiration, especially for young people, gained by meeting an admired author should not be underestimated, nor should the marketing opportunity for books. The WBC grant system is very targeted and specific in the support it currently gives for events; a more culturally focussed activity in the shape of Writers on Tour is a natural extension of our current work and also offers new marketing opportunities for all kinds of content and formats.

We therefore envisage a more joined up and holistic approach to Writers on Tour by:

- Acknowledging that very few writers actually earn a living from their writing and that participation at events needs to be supported at an appropriate level
- Ensuring that books are on sale, through a local bookseller where possible, by encouraging applications to WBC's outreach grant scheme
- Considering Author tours in context and ensuring they form part of a structured development of community engagement by reaching out to existing local organisers

- Considering the diverse demands and interests of different communities and proactively encouraging publishers to collaborate
- Making appropriate provisions for young and emergent writers
- Maximising the international potential through joining up with initiatives from British Council Wales and Wales Arts International

For the potential and ambition of the Writers' Bursaries and Writers on Tour schemes to be fully realised careful consideration will need to be given to the current level of funding, which has decreased over the last few years.

Promoting and awarding the best of Welsh writing

Literary awards are an important recognition of excellence; they provide career development prospects for authors and promotional/commercial opportunities for publishers. Whilst the Wales Book of the Year award has a long and distinguished history, the reduction in prize money, and lack of sense of occasion and resultant visibility, has diminished its importance in the eyes of many in recent years. Whilst literary awards are not central to our core services and in themselves do not offer the same structured intervention possibilities of the grants system we appreciate their relevance in the publishing landscape and not least their national symbolism in showcasing the best of Wales. We envisage a revived Wales Book of the Year by:

- Establishing a working group that includes representatives from publishers, authors booksellers, media, broadcasters, libraries, education sector, and sponsors
- Seeking to establish commercial sponsorship or patronage similar to other prizes (this may not be immediately possible in the first and second year of the prize, so appropriate funding would need to be forthcoming initially)
- Seeking to involve the broadcast media from its inception to ensure coverage and maximum exposure within the English-language media in Wales
- Establishing a robust and transparent selection and judging process with high profile expert judges, ensuring quality and independence
- Considering the current genre categories, formats permitted and how to align with the Tir na n-Og awards, particularly with regard to the category 'Young Adult Fiction'
- Consider the introduction of an award category to recognise achievement for design and illustration in children's publishing, possibly in collaboration with HE institutions
- Developing a cohesive marketing strategy, including international opportunities, by collaborating with other organisations such as Welsh Literature Exchange, Literature Across Frontiers, British Council Wales, Wales Arts International
- Establishing a new "Author of the Year" scheme which will be joined up to Authors on Tour and the activities of the marketing and sales department
- Locating its administration in South-East Wales, allowing for a wider geographical presence of WBC

Provision for children and young people

This particular recommendation is very broad in its reach and would greatly benefit from further discussion with the aim of developing a coherent strategy through collaboration with a number of different stakeholders. We are keen to build on the already existing activities of our dedicated Children's and Reading Promotion department (World Book Day, World Biggest Book Show, Great Summer Reading Challenge, Quick Reads, BookSlam) to further our "Reading for Pleasure" agenda, with a particular focus on disadvantaged regions. Reaching reluctant or non readers especially in the 10-18 age group is a key concern and we envisage increased collaboration with schools, libraries, Urdd Gobaith Cymru, S4C and BBC Cymru/Wales to develop innovative ways to engage young people, akin to already existing partnerships such as Bardd Plant Cymru. The strategic interventions available through the current grants systems with regards to content creation would form part of the strategy as would a complete re-think of the way in which we reach young people through our digital and social media presence.

Conclusion

The Council is confident that the transfer of the functions outlined above would serve to strengthen the sector as a whole and that it is uniquely placed not only to develop a clear and focused strategy for the promotion of publishing and literature in Wales but also, crucially, to implement it successfully. The recommendations for an augmentation of the WBC's programmes and services will be considered in the context of a number of other observations and suggestions in the Review as to possible improvements of our work

Within our senior management team, staff, trustees and panel members we possess a deep and comprehensive understanding of the sector both within Wales and internationally. We have a robust governance structure and our decision making processes are transparent and stand up to scrutiny. We also enjoy an excellent reputation as an open and collaborative partner, experienced at giving equal consideration to the varied priorities of its stakeholders.

We firmly believe in our role as enabler and dispenser and therefore more than two thirds of our funding is awarded to grant recipients, thus cementing our reputation as providing "good value for money" and this is a principle we would wish to adhere to going forward.

Those skills and principles underpinning our current work will be applied to all new functions, ensuring maximum impact not only culturally, but also commercially and socially. The WBC's reading of the Review has been strongly and widely endorsed and supported throughout Wales and is reflected in the numerous public comments and testimonials. They underline the WBC's own recognition that these recommendations dovetail perfectly with its own strategic plan and Welsh Government's strategic priorities.

Agenda Item 5.1

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and Communications Committee
Independent Review of Support for Publishing and Literature in Wales
Ymateb gan Gillian Clarke / Evidence from Gillian Clarke

As one of four, including my husband, David, who set up Ty Newydd as our Welsh Writing Centre 27 years ago, I was shocked by the Medwin Hughes report. It is shallow and inaccurate. No member of the panel visited Ty Newydd, or spoke to the staff, or contacted me, its inaugurator and President, and National Poet of Wales for the previous eight years.

As you know, Ty Newydd is our Welsh version of the Arvon Foundation in England, established by Ted Hughes, and of Moniack Mhor in Scotland. Before setting up our Welsh Writers Centre, I had tutored 50 courses for the Arvon Foundation. Ted Hughes wrote to the Welsh Arts Council in support of my bid for a centre in Wales, and his wife, Carol, came in person to speak to them. David and I found a suitable house to rent, and, through writers' donations, I raised £25,000. The Welsh Arts Council matched it. We worked with two others to restore, clean, decorate and furnish the building. Laura Ashley donated bed linen. Other companies gave furniture. Ty Newydd held its first poetry course in April 1990.

Ty Newydd's purpose is to encourage reading and raise standards of writing by enabling people to work with the best writers. Courses in poetry, prose, fiction, drama, film, and other specialist areas are run throughout the year. I tutor two poetry masterclasses, one with the Poet Laureate, Carol Ann Duffy (who tutors nowhere else but Moniack Mhor), and one with another poet-tutor. The report's panel members visited no course, spoke to no tutor, and no participant, and did not contact me.

TN was independent of the WAC until Dai Smith, Chairman of WAC, instructed us to unite with Literature Wales. It was difficult for Director Sally Baker to work under the new regime, so she retired. Tragic events hit the staff. One retired, one died, the newly appointed head fell ill, and after a period with no-one actively in charge, he was forced to retire. We lost customers. After much repair work we now have an excellent team, and have recovered lost ground.

FACTS THE PANEL DID NOT CONSIDER OR GOT WRONG:

1. Ty Newydd courses do have a strong record of helping writers to develop writing careers and to get published. Below is a small sample list of published poets/writers whom I first met as unpublished unknowns, either in my work as Poet-in-School, or at Ty Newydd:

Alice Oswald, Horatio Clare, Adam Horovitz, Will Owen Roberts. Bethan Gwanas, Paul Henry, Owen Sheers, Samantha Wynne Rhydderch, Liz Lefroy, Jane Clarke (Bloodaxe) Lizzie Fincham. (Cinnamon)

2. TN's equally important purpose is to get people reading, and to widen and deepen their reading. We need readers as well as writers. It is not our function to make everyone a published author, but to spread literature and literacy to all.

3. Those who come to Ty Newydd from other parts of Wales, other parts of Britain, Ireland, Europe and the USA, experience Wales and hear Welsh spoken. Many become admirers and supporters of our language and our literatures. The diplomatic power of TN is incalculable.

4. The report is incorrect in several details: there is no Writers House like Ty Newydd in Ireland, which is why so many Irish people come to Ty Newydd. A recent Irish star is Jane Clarke, who attended several Masterclasses, and whose collection, 'The River,' she worked on at TN. Published by Bloodaxe, it has won several literary prizes.

5. One of TN's most ardent supporters, who co-tutors a Masterclass with me every year, is Carol Ann Duffy, the Poet Laureate.

6. There are open courses for all to apply for (as there should be) but for the two annual Masterclasses we select the most promising applicants. Thus the remark in the report about 'retired hobbyists' is insulting and false. In fact, as well as masterclassers, Ty Newydd welcomes the young, the elderly, the disabled, the lonely, those suffering from dementia and those who help them. Language for such people, and those who work with them, has an enabling, curative power. The tutors*, all published writers, are appropriately chosen for each group of participants.

(*It should be noted that the tutor's fee gives a writer, often on a very low income, a useful small return for their creative work.

Writers-on-Tour

My own encounter with many of the writers listed above was first made in their primary or secondary school under Writers-on-Tour. Evidence from teachers could be gathered to support the success of poet visits. Why were they not asked? On a visit to read to patients in a Mental Hospital in Abergavenny, I witnessed an old

man, an elected mute who had not spoken a word for ten years, stand and recite Wordsworth's 'Daffodils'. My poem 'Miracle on St David's Day' tells this story.

National Poet of Wales

This is my other area of experience, and I wish to add detail to the bare mention made by the report: the NPW has a powerful ambassadorial role. Wales used to be invisible in the British literary scene. In my eight years tenure I was invited to represent Wales at festivals in England, Ireland, Scotland, France, Italy, Spain, Luxembourg, the USA, Bangladesh and Mexico. During the centenary years of Dylan Thomas, Alun Lewis, and others, organised by Literature Wales, I re-read every word of the writer celebrated, and was commissioned to write poems, stories, articles and to give readings and lectures in London, Sheffield, Hay-on-Wye, Dublin, St Andrews, Edinburgh, to name but a few. I judged a young Muslim poetry competition. I met the Irish President in Swansea, (Dylan Thomas year) and was invited to the Yeats 150 year centenary in Sligo, where I read in pubs, a graveyard, and on a boat to Inisfree with the Irish Ambassador to London. These encounters made friendships across borders and cultures, and the doors are open for our current National poet, Ifor ap Glyn, to continue LitWales' good work.

Yn ystod y Preswyliaid (Dydd Llun 8 – Dydd Sul 28 Mai 2017).

1. Cyfansoddi cerdd hir *Calendar on Fire* (cyfres of ddeg cerdd) sydd yn darlunio sefyllfa ddychymgus ble byddai Hedd Wyn a'r bardd o Iwerddon Francis Ledwidge yn cwrdd. Ma'r gyfres yn codi cwestiynau perthnasol yn ymwneud â chenedlaetholdeb, Ewropeaeth, dyfeisgarwch ieithyddol, yn ogystal â her moderniaeth ar ffurfiau barddoniaeth traddodiadol. Mae'r gerdd yn holi a oes diwylliant militaraidd wedi tyfu yng Nghymru yn y cyfnod ers datganoli, a sut ydw i fel bardd benywaidd, dwyieithog, gwrth-ymladdol, yn ymhel â hanes rhyfela?
2. Noson o farddoniaeth, rhyddiaith, cerddoriaeth a thrafodaeth ar Hedd Wyn a beirdd y Rhyfel Byd Cyntaf yn Passa Porta, Tŷ Rhyngwladol Llenyddiaeth ym Mrwsel 23eg Mai, 2017.

<http://www.passaporta.be/en/agenda/poetry-of-loss-barddoniaeth-colled>

3. Darlith yn yr Embasi Wyddelig 'Poets of the Black Chair: Francis Ledwidge and Hedd Wyn 1887–1917' Darllen barddoniaeth Hedd Wyn yng nghydestun profiad y bardd Gwyddelig Francis Ledwidge. 22ain Mai, 2017.
4. Darlleniad o ddrafft *Calendar on Fire* yn *Passa Porta* i'r staff, awduron a chysylltiadau'r Ty Llenyddiaeth Rhyngwladol. 17ain Mai 2017.
5. 3 blog
 - 'Brwsel Wythnos Un' <https://www.llenyddiaethcymru.org/lw-blog/6969/>
 - 'Barddoniaeth a Dogfen: Asio Cymru, Iwerddon a Gwlad Belg'
<http://www.llenyddiaethcymru.org/lw-blog/preswyliaid-llenyddol-barddoniaeth-colled-brwsel-2-gan-nerys-williams/>
 - 'Ffiniau, Pŷg a Boezinge' <http://www.llenyddiaethcymru.org/lw-blog/preswyliaid-llenyddol-barddoniaeth-colled-brwsel-3-gan-nerys-williams/>

Ers y Preswylad

1. Darlith yn *Hinterland Festival* (Kells Co Meath) ar Hedd Wyn a barddoni Rhyfel 23ain Mehefin, 2017.
2. Un o'r cerddi 'Taxing the Bachelors' o'r gyfres *Calendar on Fire* (gyfansoddwyd) ym Mrwsel wedi ei ddarlledu gan RTE Radio- *Sunday Miscellany* i nodi canmlwyddiant Hedd Wyn a Ledwidge. 30ain Gorffennaf, 2017.
3. Ysgrif/script radio fer 'Meeting Hedd Wyn in *Le Cirio*, Rue de la Bourse (A Letter)' wnes i sgwennu yn *Passa Porta*, wedi ei ddarlledu ar *Sunday Miscellany* 30ain Gorffennaf, 2017. <http://www.rte.ie/radio1/sunday-miscellany/podcasts/>
4. Darn i *Barddas* aeth allan adeg y canmlwyddiant 31ain Gorffennaf 2017. Deillio o ddarnau wnes i 'sgwennu ym Mrwsel mewn ymateb i'r Gadair 'Wag' a grewyd gan myfyrwyr Mechelen a roddwyd fel cadair coffa i Gymru.
5. Cyfraniad i Raglen Radio BBC Cymru ar *Yr Arwr* wedi ei gynhyrchu gan Irfon Jones. 3ydd Awst 2017 <http://www.bbc.co.uk/programmes/b08zfgcb>
6. Cyfraniad i Raglen Dylan Iorwerth Radio Cymru *O Dan yr Wyneb* 1af Awst 2017.
7. Cyfrol newydd o farddoniaeth newydd wedi ei gwblhau *Cabaret* (New Dublin Press) Medi 2017.

<http://www.newdublinpress.org/store/cabaret>

Digwyddiadau Coffáol (y Dyfoldol)

1. Cyfle i gymeryd rhan yn Nulyn fel rhan o sioe deithiol y Prifardd Ifor ap Glyn *Y Gadair Wag* yn The Irish Writers' Centre, Dulyn (darllen cerddi gwreiddiol) 13eg Medi, 2017.

<https://irishwriterscentre.ie/products/y-gadair-wag-the-empty-chair-an-chathair-fholamh>

2. Cynrychioli safbwynt 'Gymreig' yn nathliadau canmlwyddiant cenedlaethol Ledwidge yn Slane (darn am Ledwidge a Hedd Wyn). *Francis Ledwidge - Poetry and the First World War 1917-2017*. 14eg Hydref, 2017.

Rhaid nodi fod *Llenydiaeth Cymru* wedi bod yn hynod o gefnogol a phroffesiynol yn ystod y preswylad, ac heb os wnath y profiad fy helpu i ddatblygu proffil defnyddiol i bontio cysylltiadau celfyddydol rhwng Iwerddon a Chymry. Ag wrth gwrs, dwi yn hapus iawn i meithrin unrhyw beth all fod yn bositif i Gymru (mewn cyfnod gwleidyddol sydd yn ofnadwy o gythrybus). Mae'n amlwg fod *Llenyddiaeth Cymru* am barhau meithrin eu cysylltiadu celfyddydol efo sefydliadau yn Iwerddon a datblygu rhydwaith gref. Ym mhob darllediad cyhoeddus, dwi wedi crybwyll pwysigrwydd cefnogaeth y preswylad a chefnogaeth *Llenyddiaeth Cymru* a *Llywodraeth Cymru*. Yn y blynyddoed sydd ohoni, rwy'n sicr fydd Cymru yn edrych fwy at y diaspora gref Gymreig o fewn Ewrop, ac ar draws y byd. Wrth gwrs 'diw bardd (sydd yn wreiddiol o Sir Gaerfyrddin) ddim yn esgus i fod yn 'Captain of Industry'. Ond ma gwneud y cysylltiadau celfyddydol yn bwysig i barhad ddelwedd bositif o beth yw Cymreictod (yn fy nhyb i). Dyma'r bursary lenyddol gyntaf o Gymru medrais ymgeisio amdani- gan fod y mwyafrif yn dibynnu ar fod yn drigolyn parhaol. Roeddwn yn ddiolchgar iawn fod y cyfle yno.

I gloi, teimlaf fod *Llenyddiaeth Cymru* yn awchus i ddatblygu proffil a gwerth celfyddyd Cymru tu hwnt I Gymru.

Dwi'n gobeitho fydd y sylwebaeth yma yn helpu i lenwi ambell i 'dwill' ynghlyn ag amcanion rhyngwladol *Llenyddiaeth Cymru* yn yr adroddiad gwreiddiol.

Gwefan:

<https://www.ucd.ie/research/people/englishdramafilm/assoc%20professornerysowenwilliams/>

Document is Restricted

I would like to take this opportunity to draw to your attention the support and positive engagement Literature Wales has given to HMP & YOI Parc over many years of collaboration.

The Creative Arts at Parc, is a thriving and successful department offering prisoners the opportunity to engage in the various education classes and through the additional projects and workshops that take place on a regular basis in all areas of the establishment. Since the prison opened twenty years ago there has been a successful collaboration with Literature Wales to help provide funding, advice and support to offer a wide variety of workshops and projects for the prisoners.

The projects and workshops that have been supported by Literature Wales have given a large number of individuals an experience of and exposure to creative writing in many formats, that they would not have had the opportunity to have experienced without that support. This type of experience is of great benefit to the prisoners as they generally don't have the opportunity to access such events.

One of the main opportunities for Literature Wales to support the creative arts in Parc has been by organising and providing suitable authors to conduct workshops during the annual Hay in the Parc festival. This event, now coming up to its tenth year, runs in conjunction with the Hay Literary Festival and is formally a part of the event. Over the years many well known and local authors have attended the prison to discuss their work and conduct workshops, all of which have been very well received by the prisoners.

Another very successful collaboration has been the projects undertaken with the prisoners and their families to write and illustrate story books have been particularly successful. Literature Wales have provided funding for two projects to date with a writer and illustrator attending for two full days to produce a fully illustrated, original children's book. The workshops for these projects give the prisoners time to work and interact with their children in a very focused way and allows them greater family time together. The outcomes in terms of the quality of

writing and illustration are also of an excellent quality which is an indication of the enthusiasm and enjoyment the families feel.

Over the many years working with Literature Wales, HMP Parc has had the opportunity to organise creative writing workshops with a wide variety of authors and other literary figures to give the prisoners an insight into and an experience of many different aspects of literature. The majority of these have been made possible with Literature Wales providing match funding to arrange for the writers registered with them to visit the prison.

The creative arts has a very high profile in HMP Parc and creative writing is one of the most popular and successful activities within the many arts disciplines offered. This was recently recognised (2017) when HMP Parc won the Arts in the Community Award from Arts and Business Cymru in partnership with Literature Wales. The prisoners gain many benefits from having the opportunity to access all forms of writing and, along with the Writers in Residence employed in the prison, the support Literature Wales gives to the establishment and individual prisoners is invaluable. We have, over the years, found the staff who visit Parc and those in administration, to be very professional, supportive and enthusiastic in pursuit of the aims to provide greater access to literature for as many individuals as possible.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and
Communications Committee
Independent Review of Support for Publishing and Literature in Wales
Ymateb gan Jonathan Edwards / Evidence from Jonathan Edwards.

I write with regard to the recent Independent Review of Support for Publishing and Literature in Wales. I am very pleased to hear that the Culture Committee is looking into this report. I sent a similar letter to this one to the Cabinet Secretary, Ken Skates, and I would be very grateful if you are also able to consider my points below.

As a teacher and emerging writer in Wales, I simply wish to outline here how important and wonderful the work that Literature Wales does is, in the hope that this can help balance the misrepresentations in the report. The organisation is about the best thing about being a writer in Wales, the writer's best friend, and any erosion of the funding or responsibility of Literature Wales would be an erosion of the ability of current and future writers in Wales to flourish. My experience of Literature Wales has been in connection with their Writers on Tour funding, their Dylan's Big Poem project, the Writing Squads, the writing centre at Tŷ Newydd, their writers' bursaries and Wales Book of the Year. I hope to give some idea here of just how amazing these aspects of their work are.

Firstly, as a teacher, I have found the Writers on Tour funding invaluable. Because of it, we have been able to give our pupils access to inspirational workshops and events with wonderful Welsh writers including Mike Jenkins and Rhian Edwards. English as a school subject has to be about so much more than the daily routine of the classroom and exams, and opportunities like this are crucial in terms of pupils developing a passion for English and seeing writing as a potential career. Equally, I have been very lucky because of this funding to visit a number of schools and writing groups in various parts of Wales to deliver workshops, so this funding creates an incredible development opportunity for teachers and writers as well as for pupils. Though I always loved writing, until the age of about twenty I thought that real writers were sort of winged, vaguely mythical beings, and that it was no more possible to become one than it was to fly to the moon. Because of the work of Literature Wales and the increased access to writers that young people have because of it, this is not the case for young people now, and this is an absolutely wonderful thing.

In connection with this, I would like to mention the Dylan's Big Poem project. This involved pupils writing a few lines of poetry on a given theme and submitting them, following which high-profile writers in Wales, including Owen Sheers,

compiled a large community poem using the lines. This was a great thing to do in the classroom, as it allowed even pupils who can struggle with English to produce something they were proud of and had enjoyed working on. The reward of seeing their work included in the final poem was a brilliant thing for them, and it is experiences like these which help develop a passion for English.

As well as delivering workshops in schools, I have worked on a number of occasions with a couple of the Literature Wales Writing Squads. These groups, which meet a couple of times each school term and give pupils access to writing workshops, are a wonderful thing. Those at the Dylan Thomas Centre in Swansea are a particular success story, as attendance is constantly expanding and creating the demand for more workshops. Pupils who attend these sessions throughout their school career have gone on to study Creative Writing at university and to be successful entrants in the Terry Hetherington Award for Young Writers, so the development opportunity these groups provide is incredible. I would urge anyone who wants to fairly understand the importance of what Literature Wales do to attend one of these workshops and to see pupils engaging with the magic and fun of literature. It is impossible not to attend these sessions and to grin and grin at the joy of what students produce, and for the opportunity the students are given I applaud Literature Wales.

In terms of Tŷ Newydd, I have delivered workshops there for both adults and school groups. Tŷ Newydd is a magical place, which allows people to make real breakthroughs in their writing. I know that there are a number of published writers in Wales who have honed their work through repeated Tŷ Newydd courses, and the impact of Tŷ Newydd stays with people for years. Focusing intensely on writing in those beautiful surroundings allows writers to achieve something they would not otherwise be able to. It is particularly rewarding to see how school groups respond to the experience, as they discover something about writing, about themselves, for the first time, in a way they will never forget.

If Literature Wales has given me amazing opportunities to develop as a teacher, what it has given me as a writer is of course even more invaluable. I have benefited hugely from their bursaries programme. This funding, and the way that it is managed by them, offers life-changing opportunities for writers. This is true not just in a practical sense in terms of the time it gives writers to work, but also the way that it makes writers feel that their work has value. Developing an audience, a reputation and a sense that what you are doing has worth, in my own field of

poetry, is enormously difficult, so to receive a bursary like this is an extraordinary thing for writers to hold up against the voices which are telling them their writing will go nowhere. For me, the time was invaluable not just in terms of the poems I wrote during this period but also for the stylistic breakthroughs which continue to be crucial in my work years later. Very simply, I would not have been able to write what I have without the great gift of this time.

Finally, I would like to mention the Wales Book of the Year. My book was very lucky to be shortlisted for this award in 2015, and to receive the Wales Arts Review People's Choice Award, and everything about this process was wonderful. The attention given to a shortlisted book means of course an expanded audience, which is crucial for a poet, the enhanced opportunities for future publication, the sense of being part of a literary community. The awards evening in Caernarfon was a wonderful experience – an amazingly professional and special event in a beautiful location – and given the difficulties of any sort of writing career it is crucial that writers have such glorious opportunities and memories if we are to keep working.

Overall, I very much hope it is clear that Literature Wales make Wales a significantly more fantastic, joyous place in which to write. Indeed, it is unimaginable that our vibrant and exciting literary culture can continue to grow with any erosion to their role. While I am only able to give you my own experience, I know that I am among an enormous number of writers and teachers who feel exactly the same about how lucky we are to have such an energetic, ambitious, friendly and passionate organisation in Wales. I very much hope that these experiences can be taken into account as part of any reflections on the report.

As a writer who grew up in Wales and who retains a close interest in literary matters in that nation, and as a Patron of Literature Wales, I read the Medwin Hughes report with great interest and, I'm afraid to say, growing misgivings. I could not see the logic behind the recommendation to downgrade the support given to Literature Wales, and to reduce its involvement in literary activities so greatly, given the clear evidence of plentiful and valuable activity on the part of that organisation, and the satisfaction expressed by many people who have been involved. There seems to me a clear need for the various bodies including Literature Wales to be supported strongly and with conviction by the Welsh Government, and their differing purposes clearly understood. To reduce the activities currently undertaken by Literature Wales (and which are praised very highly by many respondents quoted in the report) effectively to running Ty Newydd, and to hand over more or less everything else to the Welsh Books Council, seems little short of perverse.

I hope you will consider very seriously the strong dissatisfaction with this report that has been expressed by many people in Wales who have benefited from, and who approve of, the excellent work of Literature Wales, and that the organisation will continue to flourish and encourage the art form that above all others is at the heart of Welsh culture.

I would like to express real concern at the Independent Review for Support of Publishing and Literature in Wales that was made public earlier this year—I believe it was published before being shown to Literature Wales, thus denying them their right to respond and correct inaccuracies; this meant that even though errors in the report have since been proven, much damage has been done not only to the reputation of Literature Wales, but I imagine to the staff too who have been unfairly misrepresented.

Having been supported consistently by Literature Wales for many years, and published in Wales, I feel able to comment, although my opinion was never sought for the review. None of the many professional writers I know who work in a multitude of LW projects, fostering literacy and expression, were asked either. Furthermore, I don't believe staff at Ty Newydd were invited to comment. I'm struggling to understand how this report was 'independent.'

Putting aside the poor presentation of the report, misspellings of names, grammatical errors and so on, I feel strongly that the document and its accusations should be seriously scrutinised.

I met Ken Skates last year during the Literature Wales South Wales Valleys Showcase at the Senedd. I remember him commenting how impressed and moved he was by the work of the refugee women, the elderly people with dementia, and the vulnerable women who had produced and published children's books.

He quoted Baroness Andrews in his *Light Springs through the Dark: A Vision of Culture in Wales*, as saying 'culture can empower disenfranchised and alienated people, and give them a voice;' it was clear from his reaction that he witnessed such empowerment and the raising of voices at the Senedd. Literature Wales has evidenced this empowerment of the disenfranchised. Staff have worked to dismantle barriers to literature and have made significant relationships in the process with countless schools, charities, councils and other professional and grass-roots collectives in Wales, the wider UK and overseas. This was missing from the report. A few casual remarks about the good work were undermining, and I felt, insulting. I fail to see how after years of building these crucial partnerships, that taking away Literature Wales' ability to do its work will be of benefit to anyone. It would be a huge undertaking for the Welsh Books Council to take up this role

and a great loss to the people who have benefited (and will benefit) from Literature Wales' outreach initiatives.

For almost a decade, I have been fortunate to work on remarkable projects through Literature Wales, which have been enriching for the participants and myself in equal measure. This is why I am writing to you; the report did not adequately reflect the incredibly important work done by Literature Wales and the writers and organisations that have collaborated to reach typically excluded people, as well as nurture the promising talent of more able youngsters through writing squads.

There seemed little mention of the South Wales Literature Development Initiative, headed by Louise Richards for the past eight years. Many of the projects she has implemented have won awards which include an Arts and Business Award for the Captured Memories Project; the young mothers who made the children's books won a NIACE Inspired Award for Family Engagement; and Silver Hoodies (an inter-generational film project in the Gurnos) won a TPAS Award; another project reaching isolated people won a Library Service Users Award. I'm sure you have heard about the successful collaboration with Parc Prison which was showcased at the Hay Festival this year? This project has been engaging prisoners and their families in writing, sharing stories, elevating literacy and self-worth (this project recently won an award too). The SWLDI has engaged over 37,000 people in the last ten years with over 200 projects aimed at ensuring that all people in Wales have access to expressing themselves, working with professional writers to help them shape those stories in film, theatre, the written and spoken word, audio, and in community installations.

Ken Skates' 'Light Springs' document defines culture as 'all creative activities that give people purpose, and a sense of belief and identity.' The projects through Literature Wales do not seek to merely enable people to tell stories, to make a mark with the intention of ticking a box, these projects are aimed at making literature accessible to all, about increasing social cohesion, enabling people to make serious changes in their lives both politically and personally. Literature Wales understands that to advance that, people must believe their voices are worthwhile, and in today's political climate where many people feel disenfranchised and unheard, their many projects provide a platform for Voice and well-being.

I left academia in order to pursue more work in community art-engagement because, due to working on projects with LW, I have experienced how life-affirming and essential this outreach is in our constantly fracturing society. This

kind of work has also made me a better writer. I have been supported in my profession by Literature Wales in many ways, having been sent to America to represent Welsh culture at the Smithsonian Folk–Life Festival; as one of the Hay Festival’s Writers at Work; through various professional development projects (such as training to work with vulnerable, socially excluded children); I have been afforded the opportunity to collaborate with artists in other genres in various projects; I was awarded a writing bursary which helped me to write a second poetry collection; I have had help with forms for funding applications, and because of being encouraged to develop my Welsh language skills by Lleucu Siencyn at Literature Wales, I now work bilingually and have been on several television and radio programmes speaking about various projects and have been translating for the National Poet of Wales. Therefore Literature Wales not only works to improve the lives of workshop recipients, but is an organisation able to assist writers to develop their own talent and employment. This has been essential to me.

I feel an opportunity for productive discussion has been lost. There are probably elements of Literature Wales that could have benefited from some fair and constructive feedback; I’m sure the staff would have welcomed that. However some of the harsh criticisms levelled at this body, were already part of forward planning. For instance, I believe that LW was in the process of redeveloping bursaries and mentoring and a new funding scheme at the time of the review.

Despite what must have been an uncertain time, LW have continued to do what they do best, to give access to literature for all, to promote a love of reading and writing, particularly with our little ones—the readers and writers of the future. Bursaries have been applied for, as have other awards, along with many other opportunities for established writers since the report was published. I’d say Literature Wales and its staff are doing a most excellent job. I look forward to an investigation into the report.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and
Communications Committee
Independent Review of Support for Publishing and Literature in Wales
Ymateb gan Dr Dimitra Fimi, / Evidence from Dr Dimitra Fimi

I am a Senior Lecturer in English at Cardiff Metropolitan University. I wish to express my support for Literature Wales.

I have been involved in various projects run by Literature Wales for the last nine years, including talks, conferences, and other similar events. I am currently serving as a judge for the Wales Book of the Year Award.

I am sincerely impressed with the professionalism of the Literature Wales staff and the highly organised, effective, and very popular events they run.

I believe that Literature Wales has played an important role in promoting literature in Wales and I hope to see it continue its excellent work in the future.

I've written in similar terms to the Cabinet Secretary for Economy and Infrastructure.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and
Communications Committee
Independent Review of Support for Publishing and Literature in Wales
Ymateb gan Kate Strudwick / Evidence from Kate Strudwick, Creative Project
Manager Head4Arts

For the past twenty years I have been working in the context of community arts, developing projects in some of Wales' poorest communities in the Heads of the Valleys, East. This focuses on using participation in the arts as the catalyst for effecting change, driven by the strategic priorities of Wales – helping people build the skills they need for employment, to get the qualifications they need and to improve their health and well-being. A major challenge for us all has been in improving levels of literacy and in encouraging parental support for children's learning.

Central to this approach has been the need for cultural organisations to work in partnership with other agencies in order to have a more effective – and more engaging – approach. We work with a huge variety of partners but one of the most stalwart, reliable and creative partners is Literature Wales, via their Community Participation projects.

This support is not always in the form of a financial contribution – more frequently it is about creative input, encouragement, expertise and connecting with other initiatives. However, the results of such collaboration have always been tangible and useful and this needs to be acknowledged. This partnership approach has meant that we have been able to add value to many of our projects by integrating elements that nurture literacy and learning skills that might not otherwise have been possible.

In 2007, in my capacity as Senior Arts Development of Caerphilly CBC, I worked with Literature Wales (then, Academi) to set up the South Wales Valleys Literature Development Initiative. Since then this has reached over 37,000 in communities across the Valleys, running over 250 projects and over 900 workshops – an impressive achievement.

In my present job, I encounter many young people who have benefitted from the Young Writers Squad scheme who then go on to other and tell me about the hugely significant difference that membership of the Squad has made to them. This is only one of so many programmes that Literature Wales has championed that make a huge impact for relatively little outlay.

We are currently working together to introduce an exciting new method of engaging young people with reading, developing and adapting an Italian innovation so that it can benefit children in our bilingual nation.

I very much hope to be able continue this vibrant working relationship with Literature Wales, knowing how effectively this organisation reaches our most disadvantaged communities. It appears that many people are unaware of this crucial aspect of their work – and how much we would miss their help and support if this function were devolved to another organisation that didn't have their considerable experience and expertise.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and
Communications Committee
Independent Review of Support for Publishing and Literature in Wales
Ymateb gan Sarah Goodey / Evidence from Sarah Goodey, Arts Development
Manager, Gwent Arts in Health.

I am writing in support of the upcoming plans for Literature Wales Community Participation projects. Gwent Arts in Health have benefited greatly from the partnership work that we have undertaken in the past together and I am encouraged by the directions that Literature Wales are considering.

Previously, Literature Wales South Wales Literature Development Initiative has provided valuable support in terms of funding and expertise in identifying poets and writers who are best equipped to work on our partner project Healing Words. In 2016, the project delivered tailor-made creative writing and visual arts sessions for the Torfean-based group Wednesday Warriors. The young men who have severe learning disabilities and other challenges thoroughly enjoyed the outdoor experience and there were many positive outcomes from this project which featured in a joint presentation at the Storytelling for Health Conference, Swansea, June 2017.

Literature Wales continue to deliver a high standard of outreach and active participation in their projects ensuring a quality experience for their participants. I would strongly support the development of this project and its associated activities. There is a need and a demand for this initiative especially as it aims to address mental health and employment in communities in Wales where there is a growing need for support in these areas, and by using and supporting the written and spoken word, participants in such projects can hope to gain in confidence and self esteem.

Gwent Arts in Health would like to continue to work with LW and would be able to contribute in kind support of expertise in the art, health and wellbeing field, and in the administration of shared projects. Gwent Arts in Health have previously worked in partnership with LW raising funds locally to deliver the Healing Words project in Newport and Torfaen and would wish to continue and expand to other LAs if possible.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and
Communications Committee
Independent Review of Support for Publishing and Literature in Wales
Ymateb gan Simon Stephens / Evidence from Simon Stephens, Cardiff City FC
Community Foundation & Literature Wales Partnership Work.

I am writing to you regarding the recently published Medwin Hughes Report and to highlight the strength of Cardiff City FC Community Foundation's partnership with Literature Wales.

The Cardiff City FC Community Foundation is the official charity of Cardiff City FC. We use the unique appeal of Cardiff City FC as an engagement tool for social change. Our goal is to support children, young people and families in South Wales to achieve their full potential by creating education and employment opportunities, improving health and well being and reducing offending and reoffending.

We want a future where our communities are more prosperous, healthier, more resilient, and more cohesive. We recognise that achieving this future will require a multi-agency approach and have set out to develop innovative partnerships. We have collaborated with Literature Wales for a number of years, co-designing and delivering projects that engage children in literacy related activities. This approach is not simply about reading books, but about developing reading skills, confidence and a passion for literacy.

We have found this a particularly powerful approach in engaging members of our community that otherwise would not engage in literacy related tasks, and by using the hook of Cardiff City Football Club, and once engaged, the skilled and passionate workforce of Literature Wales to provide the expertise to drive the change. We hope that in the longer term this work can contribute towards breaking cycles of poor literacy within households and amongst specific groups within our community.

I hope that this provides you with a flavour of our existing partnership with Literature Wales and how this is something that as a Foundation we value highly. We believe we have found a means of using the appeal of the professional Football Club brand and the expertise of Literature Wales to make a positive difference within some of the most disadvantaged Welsh Communities in an area that some would not engage with through traditional means.



Department for
Digital, Culture
Media & Sport

Agenda Item 5.2

Secretary of State for Digital, Culture,
Media and Sport
4th Floor
100 Parliament Street
London SW1A 2BQ

www.gov.uk/dcms
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Our ref: MC2017/02104
MC2017/03054

9 August 2017

Bethan Jenkins AM
Chair of Culture, Welsh Language and Communications
Committee
National Assembly for Wales
Cardiff Bay
Cardiff
CF99 1NA
SeneddCWLC@assembly.wales

Dear Bethan,

Thank you for your correspondence of 17 July and 2 August. Thank you also for sending the Inquiry report into the future of S4C.

The Government is committed to the future of Welsh language broadcasting and of S4C. S4C was created by the Conservative Government in 1982, and this UK Government remains committed to supporting the valuable service S4C provides to Welsh speaking audiences. We want to see the channel thrive and flourish in the 21st century and embrace the opportunities of a digital age.

As such, I am very pleased that Euryng Ogwen Williams has agreed to chair an independent review of S4C on behalf of the Government. Mr Williams' in-depth understanding of the broadcasting sector, the Welsh language, and Welsh culture and society make him ideally suited to lead this review.

The review will look at S4C's remit, funding methods and governance and accountability structures. A copy of the full Terms of Reference are attached to this letter.

Your Committee's inquiry addresses many of the same issues and will provide a valuable source of evidence to Mr Williams as he carries out the independent review. Given the independent status of the review, it would not be appropriate for me to meet you to discuss your committee's findings whilst Mr Williams' review is ongoing. I have therefore asked Mr Williams to meet with you in September to



discuss your findings and recommendations, as part of his evidence gathering process.

A handwritten signature in blue ink that reads "Karen Bradley". The signature is written in a cursive style with a light blue background behind the text.

The Rt Hon Karen Bradley
Secretary of State for Digital, Culture, Media and Sport

ANNEX A

TERMS OF REFERENCE, S4C REVIEW

S4C was created by the Conservative Government in 1982, and this UK Government remains committed to supporting the valuable service S4C provides to Welsh speaking audiences. We want to see the channel thrive and flourish in the 21st century and embrace the opportunities of a digital age.

Background

S4C is a Welsh language broadcaster, mainly funded by the TV licence fee, but also supported by Grant in Aid from the UK Government. S4C also generates some additional income through commercial activities, providing around 2% of the channel's funding.

The government has committed to undertaking an independent review of S4C's remit, governance and funding.

1. Objectives

- a. To conduct a review to:
 - i. examine S4C's remit, including with respect to online services, and consider whether changes are required in light of changing viewing habits and technological developments;
 - ii. examine S4C's current governance structure and accountability models;
 - iii. examine S4C's partnership with the BBC and its current funding methods;
- b. To make recommendations to the Government within 3 months.

2. Key considerations

In assessing the objectives above (1a –b), the review will consider the following factors:

- a. S4C's role in promoting, and its impact on the Welsh language and its wider place in Welsh culture and society;
- b. S4C's contribution to the Welsh economy;
- c. S4C's relationship with the independent production sector and other broadcasters and cultural institutions, including whether its partnerships are working effectively and to maximum effect;
- d. Audience opinions, satisfaction and viewing figures of both Welsh speaking viewers, learners and the non-Welsh speaking population, both in Wales and across the UK;
- e. S4C's editorial independence, and appropriate transparency and accountability arrangements;
- f. The way in which S4C is governed and held accountable, including how the S4C Authority is operating and whether alternative models of governance should be considered;

- g. The way in which S4C is regulated and the role of Ofcom;
- h. Value for money, efficiency and the role of the National Audit Office;
- i. The way S4C is currently funded, including the licence fee, grant-in-aid and commercial sources, and its financial relationship with the BBC from 2022/23; and
- j. The extent of S4C's commercial freedoms.

3. Process

The review should seek evidence from a wide range of stakeholders, including the Welsh public, key industry and Welsh language stakeholders, other broadcasters, the UK and Welsh Governments, as well as other interested parties in Wales and across the UK.

4. Output

A report setting out an assessment of the current remit, governance and accountability structures and funding methods, as well as proposals for the most appropriate remit, regulatory, governance and funding models for the future of S4C, including key findings, conclusions and any other supporting information. The report must be submitted to the Secretary of State for Digital, Culture, Media and Sport within 3 months, prior to publication.

ANNEX B



Eurn Ogwen Williams, Biography

Eurn has extensive experience of the Welsh broadcasting sector (both Welsh and English language). He served as Deputy CEO of S4C from 1988 to 1991, and knows the broadcaster well.

Eurn is a Welsh speaker and was special adviser to the National Assembly of Wales Culture Committee's Review of the Welsh Language between 2001 and 2002. He has also worked for minority language broadcasters in Scotland (the Gaelic language BBC Alba channel) and Ireland.

Eurn has worked as a consultant and academic specialising in digital media development in the Welsh language. He was made an Honorary President of the National Eisteddfod of Wales in the Vale of Glamorgan in 2012, a big celebration of all things Welsh.

Between 2008 and 2016, Eurn advised a number of independent producers - Acen, Fflic Boomerang and recently Boom Cymru - on various aspects of their development as programme suppliers to both S4C and other UK broadcasters.

Agenda Item 5.3

Ken Skates AC/AM
Ysgrifennydd y Cabinet dros yr Economi a'r Seilwaith
Cabinet Secretary for Economy and Infrastructure



Llywodraeth Cymru
Welsh Government

Eich cyf/Your ref
Ein cyf/Our ref

Bethan Jenkins AM
Chair; Culture, Welsh Language and Communications Committee
National Assembly for Wales
Cardiff Bay
Cardiff
CF99 1NA
SeneddCWLC@assembly.wales

7 September 2017

Dear Bethan

For information, I have attached a copy of the press release and executive summary from the final report by Dr Simon Thurley, which will be published today. I asked Dr Thurley to look at the success, resilience and sustainability of Amgueddfa Cymru – National Museum Wales.

Yours sincerely

Ken Skates AC/AM

Ysgrifennydd y Cabinet dros yr Economi a'r Seilwaith
Cabinet Secretary for Economy and Infrastructure

Bae Caerdydd • Cardiff Bay
Caerdydd • Cardiff
CF99 1NA

Canolfan Cyswllt Cyntaf / First Point of Contact Centre:
0300 0604400

Gohebiaeth.Ken.Skates@llyw.cymru
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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.



Llywodraeth Cymru
Welsh Government

Review of Amgueddfa Cymru

Executive Summary

by Dr Simon Thurley CBE for the Welsh Government

June 2017

Pack Page 363

Executive Summary

- 1.1** Amgueddfa Cymru is one of the great museums of the UK. In its collections, the expertise and knowledge of its staff, its support of social and community development and its contribution to a knowledge of Welsh history and culture its achievements have been outstanding. For a century the National Museum was almost a proxy for the National Assembly championing the cause of Wales, its history and traditions. Since 1999 it has taken its place in the stable of iconic National organisations funded by the Welsh Government.
- 1.2** The Welsh Government, under successive ministers, has recognised the importance of the museum and of culture in its widest sense to Wales. The Wellbeing of Future Generations (Wales) Act 2015 placed culture at the heart of decision-making about the future of the nation. Most recently in its culture statement 'Light springs through the Dark' the Government has reiterated the benefits that Wales gets from both public and private investment in culture. Museums are seen to play an important role in this. Wales was the first country in the UK to publish a museums strategy in 2010 and two years ago a review was undertaken into local museum provision. More recently a series of reviews have examined the possibilities of the Welsh Government's own funded cultural bodies working more closely together. My review of Amgueddfa Cymru should be seen in this context.
- 1.3** These are testing times for the public sector. Austerity, and now the uncertainty caused by the vote to leave the EU, are financially and strategically challenging. Feelings run high and tensions have arisen. Politicians are forced to make decisions they perhaps would prefer not to make. Directly funded, arms-length bodies, such as Amgueddfa Cymru, have had to respond to changes outside their control and sometimes outside their comfort zone.
- 1.4** At times such as these it is vital that funders and funded work closely together to well defined and publically articulated objectives. It is important that there is an appropriate division between policy and delivery; clarity over the technical framework within which objectives are delivered; assurance that the capability to deliver is sound; that a robust, but not suffocating, performance management system is in place; that feedback from users and employees is transparent and actioned appropriately.
- 1.5** These are some of the foundations upon which Amgueddfa Cymru needs to build its future.
- 1.6** This review has found a successful and thriving organisation of which Wales should be proud. I have been consistently impressed by the passion and commitment of staff and by the quality of the museums. Taking the role of visitor, over the last few months, I have been informed, inspired and amazed by great displays and wonderful objects. It has transformed my understanding of Wales and Welsh culture.

- 1.7 But this has not just been a pleasurable tour of fascinating museums. I have had a hard-edged remit to look critically at aspects of Amgueddfa Cymru's business. In this I have a small number of high level observations and a larger number of lower-level recommendations.
1. Amgueddfa Cymru should consider being more ambitious in its interpretation and tell a story that is not narrowly Welsh but more about Wales's part in the global industrial revolution.
 2. The National Museum Cardiff should work much more closely with Visit Wales, Cardiff City Council and the Welsh Government to position itself as a key part of the offer for tourists to Cardiff City Region.
 3. Amgueddfa Cymru prioritises support to the manager of the Slate Museum and sets its sights on a more ambitious role for the museum in the tourism of Snowdonia expanding operations rather than reducing them and entering into partnerships with public and private sector bodies to achieve this.
 4. The Welsh Government should rationalise the fragmented management of its outstanding sites at Caerleon under the management of Amgueddfa Cymru and encourage a wider local partnership to develop the town as a tourist honeypot in conjunction with the Heritage Lottery Fund.
 5. The Welsh Government and Amgueddfa Cymru seek to acknowledge and understand the causes of current frustrations on both sides.
 6. Then that the Welsh Government and Amgueddfa Cymru develop a shared 10 year vision for Amgueddfa Cymru with a five year focus and three year funding agreement.
 7. That the museum takes steps, including those recommended in this report, to give the Welsh Government confidence in its capability to deliver the strategy.
 8. That the Welsh Government takes steps to create a policy and governance environment that will enable the Amgueddfa Cymru to deliver the new strategy.
 9. I recommend that, taking account of the recommendations in this review and the views of the Welsh Government the Director-General, with the Museum President and Trustees, reviews the skills necessary on the senior management team in order to strengthen its capability to meet the challenges it faces in the next few years.
 10. That the President and the Board with the Welsh Government urgently invest in supporting the senior management team in a programme of rebuilding trust with the staff and unions.
 11. The Welsh Government considers moving to an ends based policy for access to Amgueddfa Cymru rather than a means based policy. This would allow the museum to keep its eye on the desired access policy while itself determining the balance between charged and free services and the appropriate levels of charge.
 12. I recommend that Amgueddfa Cymru in future charges for special exhibitions, establishes an appropriate CRM system and a membership scheme as soon as possible.
 13. Amgueddfa Cymru agrees with the Welsh Government the parameters available for its commercial development including policies on charging, opening hours and the terms and conditions of commercial staff.

14. Assuming the Welsh Government agree flexible commercial freedoms for Amgueddfa Cymru, the museum appoint at Executive Board level a commercial director at a salary that will attract a person of high calibre and wide experience of visitor attractions.
15. The new commercial director introduce appropriate charging regimes, Customer Relationship Management systems, membership schemes and management improvements in catering and retail to expedite and develop the museum's commercial offer.
16. Amgueddfa Cymru reviews its donations strategy, improves the physical infrastructure of donation boxes, and investigates ways of making an appropriate face-to-face ask at each of its sites.
17. That the Welsh Government find a way of providing some transitional funding for Amgueddfa Cymru as part of a jointly owned package to build a resilient business model for the future.

Thurley Review of Amgueddfa Cymru

Today, the Welsh Government will publish recommendations made by Dr Simon Thurley in a review commissioned by the Cabinet Secretary for the Economy and Infrastructure, Ken Skates, to look at the success, resilience and sustainability of Amgueddfa Cymru.

Dr Thurley makes a number of useful observations and recommendations which both the Cabinet Secretary and Welsh Government, and Amgueddfa Cymru will now consider in detail.

Cabinet Secretary, Ken Skates, said: “I’d like to thank Dr Thurley for his balanced, thoughtful and impartial report. The review is a key step to help the Welsh Government identify the most appropriate ways in which we can help ensure Amgueddfa Cymru continues to thrive in the future, in what continue to be challenging financial times.

“As outlined in the report on Historic Wales, I remain absolutely committed to enabling our heritage institutions to maximise the economic benefits that they bring to the people of Wales

“We will now work closely with Amgueddfa Cymru’s Board of Trustees and Senior Management Team to determine how best to take the review and recommendations forward.”

In his review, Dr Thurley recognises the quality of Amgueddfa Cymru’s national collections, the expertise and knowledge of staff, its support of social and community development and its contribution to a knowledge of Welsh history and culture, and describes its achievements in these areas as having been outstanding. His recommendations also look at relations between Amgueddfa Cymru and Welsh Government; opportunities for commercial development as well as policy and governance, and future vision.

Dr Thurley, said: "I hope that my review and its recommendations will form a strong foundation for the museum, together with the Welsh Government, to meet the challenges and successfully move forward to the next stage in its history."

David Anderson, Director General of Amgueddfa Cymru – National Museum Wales said: "We are pleased that the positive contribution made by Amgueddfa Cymru – through its staff, museums and collections – is acknowledged by Dr Thurley in his review.

"He describes Amgueddfa Cymru as one of the 'great museums of the UK and a 'successful and thriving organisation', of which we are extremely proud.

"We recognise the need to make improvements in certain areas of our work including income generation and industrial relations, and Dr Thurley's observations and recommendations provide a helpful framework to help us address these.

Elisabeth Elias, President of Amgueddfa Cymru – National Museum Wales said:

"I would like to thank the Cabinet Secretary for commissioning this Review, which has captured both the successes of this much-loved and iconic national institution as well as some of the challenges it faces.

"As a Board of Trustees we will be considering the recommendations in detail and supporting the Senior Management Team going forward in working with staff, the recognised Trade Unions and Government Officials in their implementation."

Executive Summary and Recommendations:

<http://gov.wales/topics/culture-tourism-sport/museums-archives-libraries/national-museum/?lang=en>

Additional evidence following oral evidence

1) What assessment have you made of the health of Welsh-language news journalism (Bangor University's Ifan Morgan Jones has said that "because of public funding, Welsh-language journalism is enjoying something of a golden age").

This tallies with other comments I've heard that public subsidies are insulating Welsh-language journalism from many of the challenges facing the media at large. Clearly, it is critical that appropriate safeguards are put in place to guarantee independence in any situation that involves public funding for the media, but there is no indication at all that the Welsh-language media's integrity has been compromised in any way by this funding.

2) Does Welsh language news journalism require any different support to English-language news journalism in Wales?

Speaking personally, I believe it is very important that Wales has a strong Welsh-language media, but the relatively small scale of the Welsh-language sector suggests that it would be more vulnerable to market fluctuations, were it not for some level of public support. While I am not saying the current funding strategy needs changing, I believe it would be healthy for this to be under regular review, looking at questions such as whether it would be more beneficial for a wider group of recipients to be given a smaller amount each, or whether a smaller number of larger grants is more productive.

3) Do you publish any Welsh-language content in your publications?

– If not, how could you be encouraged to do so?

The constituent parts of what is now Media Wales have traditionally been English-language publishers, and as such, the company is set up to publish predominantly in the English language. While there are pockets of Welsh-language editorial in our titles, these are generally submitted. We would potentially be interested in

significantly enlarging our Welsh-language online content, but establishing a sustainable means of providing a meaningful Welsh-language would be expensive, and difficult to achieve in the face of the market pressures that the whole industry is currently facing. However, we do believe that the significant reach that WalesOnline possesses could be an asset in terms of connecting high quality Welsh-language journalism with a wider audience.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language
and Communications Committee
Newyddiaduraeth Newyddion yng Nghymru / News Journalism in Wales
CWLC(5) NJW17
Ymateb gan Andrew Campbell, Daily Post / Evidence from Andrew Campbell,
Daily Post

1) The Daily Post is reaching a growing number of people.

The Daily Post has shown substantial digital audience growth while remaining one of the UK's best performing print titles in terms of year-on-year sale. According to the latest ABC figures, the Daily Post's daily digital users stood at almost 109,000 in May 2017 – an increase of 31% year-on-year. At the same time the unaudited print sale stood at just under 20,000 – representing a year-on-year decline of –7.87%. That figure is significantly better than the industry average decline of more than 12%.

This would suggest the growth in digital audience is more than offsetting the loss of print readership and that the Daily Post is reaching new readers. Analysis also points to a large increase in the Daily Post's local digital audience.

2. The Daily Post focuses on local news and things that matter to North Wales people

The Daily Post remains committed to local news and sport in print and online. Add to that content about Welsh culture and regional identity, we have what is, and always has been, the Daily Post's lifeblood. However, the Daily Post continues to publish selected national and international content on all channels which is of interest to its local audience. This is nothing new. Indeed, coverage of the big north west football clubs (Manchester United, Liverpool FC and Everton FC in particular) has always been an integral part of the Daily Post content mix – along with extensive coverage of lower league football and grassroots sport particularly through Trinity Mirror's weekly titles in North Wales.

3) We can see in detail, what people are reading and what they want to read

Our local content decisions are now aided by web analytics which offer real-time insight into how many people are looking at individual stories and where they are from. This allows us to truly identify content that engages our readers. In reality, the 'best' stories perform well in print and online – with analytics adding the statistical confirmation that backs up editorial choices.

4) The Daily Post has invested in its North Wales future

The Daily Post's creation of a North Wales office in 2000 and split from the Liverpool Daily Post in 2003 emphasised an increased commitment to the region. That investment continues and was highlighted by the Daily Post's relocation to a more modern office in Colwyn Bay in May this year. We are committed to retaining a Welsh HQ. However, we have shut smaller offices to save costs. We would always rather close offices than shed jobs.

5) The Daily Post is determined to forge a digital future

In keeping with Trinity Mirror's strategy, The Daily Post produces content aimed at developing and increasing its digital audience while extending the life of print for as long as possible. Print circulation has been declining for decades across all regional newspapers – long before the advent of the internet. We must ensure we have our content on the platforms where people wish to consume it. We are proud of the extensive digital training we are providing for our journalists. We believe we lead the regional media sector in this area.

6) The goal is to be a company in growth

Trinity Mirror's strategy is to build digital audience – and digital revenues – to a level that outstrips the loss of print revenue. The Daily Post is part of this strategy which offers the prospect of a long-term sustainable business. Our digital audience is growing – and we know how to grow it – while the long-term newspaper sales trajectory is downward. The Daily Post and Trinity Mirror as a whole are working hard to develop an array of commercial options that increasingly suit the multi-channel needs of advertisers, however the dominance of Facebook and Google present serious challenges in an already challenging digital advertising market.

7) Politics is local, national and multi-national

The Daily Post has withdrawn journalists from Westminster and more recently Cardiff to avoid duplication of Trinity Mirror resource. These are challenging times for the industry and copy sharing is vital. The Daily Post has access to Trinity Mirror and Press Association content from both seats of Government. By withdrawing from the Assembly, the Daily Post is able to employ a politics reporter based in North Wales with responsibility for covering a more 'local' level of government while adequately covering Westminster and Cardiff. Resource is not infinite.

8) Political decision-making and holding politicians and public servants to account

This remains vitally important. We cover these stories because we have a duty to inform, even though on occasions this means expending resource on stories that are unlikely to drive print sales or substantial audience online. We remain committed to finding new ways of engaging our audience with stories of this nature. The BBC democracy reporting scheme, ultimately funded by the public, presents a major step forward by offering us a means of reporting day-to-day democracy in action while mitigating our need to monetise the content. Within Trinity Mirror we have invested heavily in data journalism which enables us to use central resource in Cardiff and Manchester, and best practice, to support our role as scrutineers.

9) We need support

Continued commitment by public bodies to advertise within trusted local media would help to fund proper journalism and keep titles in business.

Agenda Item 7

By virtue of paragraph(s) vi of Standing Order 17.42

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