PUBLISHING AND THE INDUSTRIAL DYNAMICS OF BIBLIO-CULTURAL IDENTITY IN CATALAN AND SCOTTISH LITERARY FIELDS

Daniel Boswell

A thesis submitted in partial fulfilment of the requirements of Edinburgh Napier University for the award of Doctor of Philosophy

(July 2014)

Abstract

This thesis provides a comparative analysis of the way contemporary processes of global change have affected the development of the publishing industry in nations which can be labelled small. It is centred on the cases of Scotland and Catalonia, nations with comparable political and demographic similarities in size and composition but also disparities in terms of their linguistic distribution and governmental organisation.

The analysis interprets the sectors as a whole, looking specifically at the publication of texts in trade, academic and specialist markets. The research includes an overall qualitative analysis which synthesises a quantitative approach by adapting the interpretive perspective of social network analysis to undertake a survey of each sector in its entirety. This is supplemented with in-depth, semi-structured interviews with key stakeholders that represent the poles of the sector in microcosm, as identified through the survey data. A model is developed as an analytical framework, which provides a theoretical contribution to the subject area and underpins the structure of the research.

The study identifies the relationship between processes of change at the level of global enterprise and markets and the development and sustainability of materials published at the level of the local, and analyses how this inter-relation contributes to national identity development whilst considering the extent to which these processes affect the dynamics of this industrial activity in the cases of Catalonia and Scotland. Wider conclusions about other comparable small nations are drawn by interpreting the similarities and differences in these two nations. Particular factors for consideration include the linguistic status and socio-political situation of each location. The study also incorporates a diachronic perspective by underpinning the research with a contextual analysis of the historical development of the publishing industry in each nation from the seventeenth century to the present day. This research aids understanding of the position small-national cultures occupy in an increasingly globalised market and is designed to provide the basis for examination into the subject area from other comparable nations by focusing in on particular cultural variables as suggested in the conclusion.

Acknowledgement

Table of Contents

List of Tables and Figures

Chapter 1 – Introduction

1.1 Scope

In the modern era, the industries of cultural production are organised according to contemporary paradigms of business. Their boundaries of activity are no longer regulated by the invisible barricade of notionally national limits. The world system is oriented in such a way as to encourage the transcendence of this boundary (Morrell, 2013).

In the realm of publishing, companies have evolved over the centuries which now dominate the international scope of this cultural product. These businesses increasingly agglomerate and subsume small independent enterprises which are more typically integrated at the level of national economy and incorporate their products into broader markets which are developing at a global level. In this way the national entities cross barriers as a point of departure into a wider global cultural market. In the world of publishing we see this today through the proliferation of multinational bestsellers in the realm of mainstream fiction, and the domination of certain transnational media corporations such as Harper Collins that, along the lines of Pareto principle economics, represent around 20% of the production in their markets and control around 80% of the total profitability/income (Bunkley 2008, Kirsh 2013). This increasingly international business order is abetted by the great social technologies of this era; computers and Internet (Hesmondhalgh, 2007). These tools have facilitated the global march by permitting communication between peoples who, prior to their invention, were separated geographically and culturally without an economically and practically (in terms of speed of delivery) viable way to cross these frontiers.

Historically, physical location has been important to publishers in so far as it has bounded the limits of their market, on one level from a political perspective whereby trade rights and market bases have been set up and disputed between frontiers. However, in advance of that and of the industry itself, the borders of activity for publishers has been defined by the diffusion and distinction of language and natural borders created by linguistic distinction from neighbouring populations (Li, 2013). That definition, which can be argued to have contributed

to the formation of the modern nation as a concept, today has mutated thanks to the transnational communication that technology and modern commerce have brought about (Tapscott, 2013). As certain linguistic cultures consolidate their international weight, new boundaries of identity are being stimulated, not limited geographically but culturally through access and exposure to the soft power of varying media.

This study will provide a comparative analysis of the publishing sectors in two particular small nations; Scotland and Catalonia. It will focus on the configuration/organisation of the sectors as a whole. The research has a multidisciplinary approach that includes considerations from book history, sociology, cultural studies, economics, political science and the study of creative industries. The main approach of the analysis, however, is a synthesis of the study of cultural production, assuming Bourdieu's (2004) field theory interpretation, and an adapted form of analysis surveying the sector through an adaptation of the techniques used to conduct social network analysis (Scott, 2000) This approach investigates the features and developments of the book publishing sectors within the context of small nations and the effect different varieties of social identity have on this organisation/clustering. The research is mainly concerned with the present but looks back over the history and development of the book publishing sectors in these locations over the past four centuries. The date of autonomous devolution to Catalonia in 1979 (Generalitat, 2013a), and the years following, provides an interesting point of departure for the progress a newly liberated cultural identity can make in the modern age, whilst that same date provides a suitable historical backdrop in Scotland for the advent of the most contemporary configuration of a civic, economic/politically grounded nationalist argument in Scotland (Taylor, ND). The role of publishing in identity configuration will be examined from a variety of perspectives that acknowledge duality/dualisms in the process of development and change, taking into account linguistic identity, urban/capital vs. rural/periphery (dialectics), mass vs. minor market and independent vs. corporate strategy and structure. In order to fully understand the context of the sectors under investigation one has to be aware of the historical and political realities which shape their configurations and how different variables might alter the structure of the fields. For this reason a comparative study will prove most appropriate as

a way of examining two locations which are highly similar as western European nations within wider states but with certain peculiar characteristics in opposition to one another which might account for the discrepancies in the configuration of their publishing sectors. It is also important to define the limits of the industry being examined because, in terms of the publishing sector, many different forms of textual producers can be found. Under the remit of this investigation, the focus will be upon companies designating themselves as publishers who handle, or have at some point in their history, the production of printed books forming a backlist which they oversee and maintain as the primary part of their business activity. This precludes individual magazine/newspaper enterprises with no book publishing element and accounts for companies that are publishers yet may be imprints or a publishing wing of a wider enterprise such as an architectural association or a media communications corporation.

1.2 Rationales

The subject matter of the research can be justified from several perspectives. In the modern era certain linguistic cultures have developed to the point where their reach and distribution is global, arguably at the expense of minor linguistic cultures in their areas of operation. This reinforces the market for products produced in these locations but also emphasises demand towards the dominant linguistic culture, rather than the more localised national culture. The local emphasis on stressing national cultural heritage in these nations has remained strong if not significantly developed. As nationalist sentiment has been fostered, it appears on the surface to have developed along a model of predominantly civic nationalism (Olesen, 2008, Weber, ND), alongside the political change, which has seen Catalonia revitalised by re-emergence of a publishing culture with support from the Law of Linguistic Normalisation, and the Scottish independence movement revitalised by parliamentary devolution. Acknowledging this we can expect certain significant changes may have occurred in these locations, which might be influenced and in turn influence a change in the nature of supply of cultural products, and this is worthy of academic examination.

This research analyses the characteristics and points or clusters of activity within the publishing sectors of these two nations to identify the level of cultural

consideration inherent in the overall production output, and in order to identify and qualitatively measure the opposing forces of distinction that add definition to other actors in the field where the boundaries of global and national markets are accentuated and/or become blurred. The study focuses on the investigation of the cultural and nationalistic aspects of publishing as an act of cultural production.

One question to be addressed, which is of consequential value to the future of creative industrial development, is the sustainability of the small enterprise, intrinsically linked to the locus, the habitus within which its business is located, shaped and directed. Publishing markets rely and become dependent heavily upon linguistic identity. If a *lingua universalis* (or a few *linguae universales*) spreads to a greater extent, and small national book publishers who relied upon minor domestic language markets can no longer look to these markets for sustainability, can they adapt or must they become taken over by transnational corporations that administer the materials of these global languages from an industrial vantage point superseding the limits of the national.

1.3 Objectives

The primary objective is to provide a comparative analysis of the processes that occur in the publishing sectors of small nations to evaluate how the sense of national responsibility impacts upon production, if at all. As a sub-objective of this, the intention is to identify different levels of production at work within the sector, some of which are affected and others not by the sense of national identification. In order to achieve this, a cross-section of international and domestic market production will be examined, with an appreciation of digital strategies in both instances.

The other crucial concern of this study is the effect globalisation of the publishing sector is having on the development and activity of smaller publishers as cultural producers more active within the production and sustenance of local cultural networks. The objective is to draw upon the data to derive a qualitative analysis of the impacts of globalisation on smaller local/national publishers.

1.4 Hypothesis

Judging from the objectives and observations taken from the literature, the hypothesis of this study is that, in line with Mann's (1997) conception of differing socio-spatial networks, the production of national cultural artefacts remains important because it impacts upon the global development of culture at a 'local' level. Thus nationalistic and globally-orientated business ideologies can be integrated to support cooperatively the production of culturally assertive literature in small nations.

Also, at practical level, 'endangered' publishing enterprises of cultural value can sustain profitable enterprise through considered assimilation of digital production and distribution processes. However, it also appears that a distinct linguistic market, which predominantly speaks that language, will bolster national publishing much more successfully than small nations that predominantly must cater to larger cultures' linguistic markets. The hypothesis is therefore that the interaction of local and global production is crucial, that if there were not the possibility of interacting in global markets, there would be a greater threat to the ability of small producers to adapt and survive. In part this is because the global interactivity is important in evolving and maintaining the market.

1.5 Research Questions

The purpose of this investigation is to explore the field of publishing in small nations in terms of its relationship with national culture and the extent of change brought about by increasingly globalised cultural business networks. The examination can be broken down into a number of concerns which require extrapolation to provide a wider analysis of the greater hypothesis. A number of individual but interlinked research questions have been designed to approach and characterise these concerns.

These research questions can be grouped into subcategories. The first involves questions of national and global cultural enterprise. These are:

- What role does the publishing industry play in the process of constructing the nationalistic ideology of a small nation?

- Can a framework for the relationship between processes of globalisation and nationalism in small nations be identified? In what ways does the model affect/interact with the production of culture in these nations?

- What factors influence publishers in small nations to develop a business model based around market profitability or cultural reinforcement and how do relationships between both types arrange themselves? Can a balance be struck between the two and if so what are the characteristics of this balance?

- The majority of the mainland Catalan population is bilingual, whilst in Scotland, English is the dominant language and Gaelic bilingual speakers represent a small and isolated demographic. This analysis examines whether this is the primary socio-cultural distinction between Catalonia and Scotland. In the case of publishing activity it suggests there is a much wider market which can purchase and support minority language materials in Catalonia. Is Catalonia's publishing sector more consolidated as a publishing cluster as a consequence of the market and cultural stimulus afforded it through its bilingual population?

- Is the relationship with a wider global culture detrimental to the development of local small nation publishers?

The second area of enquiry includes questions of organisation within creative networks, clusters and fields:

- Is small nation publishing in these case studies cohesive or more a collection of independent producers who individually contribute to an unconscious network?

- Are links to existing dominant clusters beneficial to small nation sectors in cases of this type?

- Can a distinction be observed between companies working in urban centres which approach the more global model of publishing and those acting without these centres as being specifically local and cultural in their outlook?

The third area of enquiry involves questions of industrial policy and technology and their role in supporting development within change:

- As a model for new systems of production, how is the gradual evolution of digitisation affecting the publishing industries and what positive/negative consequences can this have for small nation publishers?

- Does small nation cultural policy succeed in supporting the gamut of nationally-based publishers and how is this success measured?

Within this final category there is also a subset of questions revolving around the major challenge for all industry; the 2008 global financial crisis which has evolved over the period while the research has been undertaken.

- In what ways is the economic crisis a threat to the Small nation publishers? Is it the same kind of threat as to the global multinational model or different?

- What are the opportunities for, small nation publishers if any, during this crisis?

1.6 Definitions

Globalisation

Malcolm Waters' (1995) defines globalisation as "a social process in which the constraints of geography on social and cultural arrangements recede and in which people become increasingly aware that they are receding." Hesmondhalgh uses the term to refer "to changes that have brought about greater connection between different parts of the world." (2007, p.311) It is related in this context to internationalisation, "the process by which businesses based in one nation, or in one particular set of nations, buy and partner companies in other nations, and the increasing presence of such links."

Nationalism

John Breuilly has written that 'nationalism' "can refer to ideas, to sentiments, and to actions. In the first sense nationalism is understood primarily as the work

of intellectuals […] In the second sense nationalism is understood primarily as the sentiments, attitudes, values – in brief the 'consciousness' – that characterise a particular culture […] In the third sense nationalism is understood as organisations and movements which aim to assert the national interest in some other way." (1995, p.404) This thesis assumes an interpretation of nationalism which identifies the practice of publishing as an accumulation of these nationalist references, where publishing 'enacts' ideas and sentiments which exist on a spectrum of nationalism which ranges from zero to total conscious nationalist expression. The form that nationalist expression takes can vary as the thesis is not concerned with individual interpretation of national ideals so much as the gestalt representation of nationalism achieved through the production of cultural materials which on balance embody the overarching representation of these ideals.

Nation

This thesis is concerned with social groups which can be defined as nations based on their shared culture, history, ethnicity and language. However, each of these factors does not need to be accounted for in order for a group to be defined as a nation, but evidence of one or more of these factors may contribute to the group's designation as a nation. An ethnic group (ethnie) does not necessarily represent a nation, which might be defined as a more abstract cultural-political unit. A certain consciousness, being aware of this unity, is another requisite determinant of national status.

Small Nation

Small is a relative concept so it is important to provide a more precise and succinct definition which can apply to the nations under examination and more generally to other comparable locations. Within the context of this thesis the concept of a 'small' nation relates to the nation's cumulative geographic, linguistic, demographic, economic and jurisdictional status.

Region

The terms 'region' and 'regional' may also infrequently appear in this thesis. This thesis is concerned with the issue of nationalism, not regionalism, and as

such any mention of the term should not be understood as relating to theories of regionalism, which are not under examination here. However, often the terms nation and region are convoluted and often become intertwined and there are certain instances where it has been necessary to mention terms relating to region in the course of this work. Scotland and Catalonia are both nations in this context but can also be understood as regional nations within the wider nation-states of the UK and Spain. Whilst the UK's composition presents Scotland as a national country within the Union, in Spain the different areas which make up the state are actually titled autonomous community regions, effectively corresponding to different provinces in the Iberian Peninsula, and at points it has been necessary to refer to these as such. However, this is conflated by the fact that it has also been necessary to refer at points to certain sub-national regions within each nation such as the Highlands and the Terra de l'Ebra. These should be understood as geographic regions within the nation. Finally you will also encounter references to region and regionalism in certain references from other works, such as Snyder (1982), depending on the stance and terminology being used by the particular source in that instance. However, these references do in fact correspond to theories which correspond to the nationalist concerns of this thesis.

Digitisation

Hesmondhalgh offers a definition of digitalisation as "The increasing use of digital storage and transmission in cultural production and circulation and the increasing use of such digital systems, as opposed to analogue ones." (2007, p.311)

Culture / Biblio-culture

Culture is one of the most complex sociological concepts to define. It can be applied in a number of contexts which do not necessarily provide a cohesive corresponding definition. However, in Wallerstein's (1990) use of the term it is assumed that individuals participate in multiple cultures which can define different groups classified by groups of traits. Therefore, he states, "culture is a way of summarising the ways in which groups distinguish themselves from other groups. It represents what is shared within the group, and presumably not

shared outside it." (Wallerstein 1990, p.32) I have extended this definition to apply specifically to groups concerned with the production of physical and digital text for social dissemination, labelling this 'biblio-culture'. In turn this term can be used to differentiate one nation's publishing field from another, though a caveat should be noted as these cultural fields occur simultaneously and crossover different levels of inter and transnational fields. They cannot necessarily be defined as only sharing those characteristics which are not shared outside them, albeit the configuration of these characteristics may be distributed differently.

Cultural/Creative Industry

The term 'cultural industries' is complicated and contested. Hesmondhalgh (2007) explains that a "preferred alternative […] is creative industries." However, Hesmondhalgh favours the term 'cultural industries because "it not only refers to a type of industrial activity but also invokes a certain tradition of thinking about this activity and about relationships between culture and economics, texts and industry, meaning and function." (2007, p.15)

International vs. Transnational vs. National vs. Local

The term transnational refers to extending or operating across national boundaries. A 'transnational' company is understood as a large company operating internationally, also often called a multi-national. International, on the other hand, refers to activity or relationships existing, occurring, or carried on between two or more nations. 'National' can be understood as that which is common to, or characteristic of an entire nation whilst 'local' relates to that which belongs or relates to a particular area. Assimilating these concepts in terms of physical locations and the relationship of communication and command between these locations, this thesis assumes an understanding of these terms which relates to Mann's (1997) depiction of different levels of 'globality'. In this context 'transnational' is that activity occurring at the highest level above that of national. 'International' is that level of business occurring between organisations from two distinct national levels of policy constraint and finally 'local' occurs at the lowest level in the nation, depicting the interaction of

enterprises which can be differentiated by their characteristics and fields of activity.

Field and Network and Cluster

Richard Jenkins defines Bourdieu's concept of a field as "a structured system of social positions – occupied either by individuals or institutions – the nature of which defines the situation for their occupants." (1993, p.85) He continues that it is "also a system of forces which exist between these positions" (1993, p.85), which links the concept to that of the network relationship between the institutions brought about by these forces. It is also important to understand each institution in terms of their practice and habitus, other key terms in Bourdieu's toolbox. The habitus is "an acquired system of generative schemes objectively adjusted to the particular conditions in which it is constituted." (Bourdieu, 1977, p.95) Within this, each institution has its 'practice' which can be defined loosely as being located in space and in time. Practice is intrinsically defined by its tempo. It is not 'wholly consciously' organised and orchestrated. Jenkins (1993) explains that nothing is random but as events follow on from each other practice occurs. One of the metaphors used by Bourdieu to describe practice is "a feel for the game" (1990, p.66), and in business terms this concept has a particular meaning of the repositioning of enterprise, both consciously and unconsciously in response to micro and macro-environmental factors.

Network, within the context of this research, relates to the relationships which exist between institutions within the field. It is the cumulative layer of connection between the individuals. In social network analysis social relationships are interpreted in terms of their equal and unequal relations. In this research the institutions in the network consist of publishing enterprises, each of which is represented as a node in the overall network. The value of considering the distribution of institutions within the field as part of the network is in recognising that "the contacts [which take place] between actors in groups are seldom simply randomly distributed." (de Kruif 2005, p.118)

Hesmondhalgh describes business clusters as "groups of linked businesses and other institutions located in the same place (a city or region), which enjoy

competitive success as a result of their interconnections." (2007, p.310) He adopts the term 'creative clusters' to refer to cultural industry equivalents of this phenomenon.

Commodification of Culture

This is defined as "The historical process by which cultural objects and services are increasingly made to be bought and sold on capitalist markets extended over time and space." (Hesmondhalgh 2007, p.309) It is connected with industrialisation of culture, "the introduction of significant capital investment, mechanised production and division of labour into the realm of cultural production." (Hesmondhalgh 2007, p.311)

1.7 Structure of Thesis

The overall thesis is structured in seven chapters. The first provides an outline of the purpose of the thesis, providing details of its subject matter, rationale, objectives and hypothesis in addition to outlining the research questions of the thesis, definitions of key terms and this summary of the document's overarching structure. It is followed by a literature review, which provides a synopsis of the main findings and arguments of the relevant literature. It can be broken into two parts, the first addressing general theoretical concepts and the second providing an overview of how these concepts have been applied to the nations under examination and any studies which have examined the publishing sectors in these nations to date. Due to the nature of the study which is largely unprecedented in any of its specific concerns, the first part approaches three concepts of socio-cultural organisation and change which are crucial to a theoretical consideration of the subject matter. The primary perspectives considered are Nationalism, Globalisation and Digitisation, each within the context of cultural development. The second part of the literature review provides an overview of previous studies of nationalist ideology and identity creation in Catalonia and Scotland and an overview of the latest analyses of the publishing sectors in each nation. Chapter 3 provides a comprehensive methodology including an overview of the theoretical underpinnings and critical perspectives of the study, a detailed description of the process of data collection itself and finally an explanation of the limitations of the study and elements

which could not be achieved due to a lack of data resources. Chapter 4 details the process of developing the framework of an analytical model for the study. This is done by synthesising analyses of the historical and theoretical development of the publishing industry in both nations in an attempt to create a model for interpretation which is both diachronic and contemporaneous, so as to be able to draw conclusions which can be applied universally to other nations of comparable make-up. The chapter has three parts, the first dealing with the history and development of publishing in Scotland and Catalonia from the seventeenth century to the latter half of the twentieth century and the second dealing with the theoretical structure of identity politics within the context of cultural productivity in small nations, using the demography of each as the basis for comparison. The information from each part is analysed and synthesised in the third part to create the analytical framework that underpins analyses of the primary data detailed in the following chapters. Chapter 5 deals with the overall picture of the publishing fields in Scotland and Catalonia and the main characteristics of the publishing sector as a whole in each nation. This is in two parts. In the first, visual maps are provided which demonstrate the invisible tethers linking together the cultural activity of publishers in each nation, adopting and adapting the representational methods of social network analysis. In the second, the socio-metric elements of these networks are presented in much greater details, with each element investigated to build the industry databases used in the development of the visual maps. This includes detail such as distribution, export and import activity, digital development and collaborative practices of the enterprises within each network. Chapter 6 adds qualitative depth to the assertions made in the previous chapter by focusing on a number of specific and comparable cases that are representative of the enterprises which denote the borders and/or polarities of the field. As this thesis takes the view of sociological work by thinkers such as Bourdieu (1979) who propose that identity and meaning are developed through a process of differentiation these cases are used to model and limit the boundaries of industrial biblio-cultural identity in Scotland and Catalonia providing a closer and more character-based picture of activity in the fields. They are constructed from a combination of secondary sources and primary interviews and look at Independent commercial publishing, large reference and academic groups, peripheral independent commercial publishing, specialist publishing and

publishers dealing with translated materials. This qualitative depth is developed in the second half of the chapter which draws the examination away from a focus on institutions towards a consideration of issues identified in constructing the databases and comparative case studies. This part takes coded data from a small series of in-depth interviews to create a series of dialogues with industry professionals on a variety of topics grouped across four areas of concern, described as cultural, linguistic, global and industrial. Chapter 7 concludes the thesis by reviewing the main findings of the research and revisiting the main objectives and hypothesis of the study. This is followed by the bibliography and the appendices, which contains the interview survey tables, the list of interviewees, positions and contacts and the network databases created for the analysis provided in Chapter 5.

Chapter 2 – Literature Review

2.1 Nationalism and Publishing

2.1.1 Nationalism: Publishing and the birth of Nations

The practice of publishing has a clear link to the early development of modern nations. In part, the spread of national 'unifying sentiment' between common local communities can be identified as occurring in tandem with, or in the wake of, print production and widely circulated texts that have encouraged the merging of cultural groups with approximate linguistic qualities into more identifiable and cohesive units. The circulation of books in these areas facilitated the consolidation of linguistic vernaculars, which provided a more distinct umbrella under which locals could agglomerate into common localities.

Benedict Anderson identifies this effect in his book *Imagined Communities* (1983). He discusses the use of printed materials during the Reformation to demonstrate how print-as-commodity had made possible the unification of cultures that were simultaneously experiencing relatively similar ideologies. In particular, the rapid diffusion of Martin Luther's theses transformed the stage for print circulation over the following decades, ushering in a massive increase in the production and sales of printed texts (Anderson, 1983). Whilst it is difficult to imagine from the vantage point of the modern era, where common texts and signifiers encapsulate our livelihood, this period represented the first point at which a popular form of culture could effectively be marketed and promoted with scalable circulation. "In effect, Luther became the first best-selling author so known." (Febvre & Martin 1976 cited in Anderson, 1983: 39) The combination of popular ideology and print-as-commodity was able to generate markets of much wider reading publics, bound together by the demand for linguistically accessible texts.

There is no intrinsic connection to tie the process of standardising language to a particular impulse towards national pride and its sibling nationalism but it does show the commercial impulse that underlays the very conceptualisation of nation-building, what Anderson calls "the revolutionary vernacularising thrust of capitalism" (1983: 39). In fact, the choice of language appears "as a gradual, unselfconscious, pragmatic development" (Anderson, 1983: 42). What may

seem a deliberate attempt at mentally demarcating the boundaries of cultural identity by limiting communication to within those boundaries is just as likely a consequence of convenience as a methodical effort (Anderson, 1983). However, the unifying interaction between "a system of production, a technology of communication and the actual fatality of linguistic diversity" (Anderson, 1983: 43) is less refutable.

The other important point to bear in mind with regard to this process of cultural unification is the idea of 'fatality' both in language and culture as a whole (Anderson, 1983). Here, this relates to the idea of languages' sustainability, their potential for survival in light of usage, circulation and demand. Today this is relevant to small nations that retain a distinct language like Catalan, Flemish or Occitan. The distinction of their language adds cultural authority to the nationalist agendas of such nations. The same concern can be seen in reverse in Scotland where there exists a declining population of Gaelic speakers, cut off from a wider culture with which to sustain their own, whilst the dominant language of the country is a derivative of English. This is an interesting dilemma. Whilst the global accessibility of the English language aids Scotland's integration into the international community, it also subjugates Scottish cultural production to the general market, whose demand is focused around more typically Anglophone or American products. Interestingly it is this integration that may be regarded as heightening the sense of distinction in cases where the shared approximate languages are at extreme poles. In this case Scots, whilst being intelligible to English speakers, is distinct in accent and dialect and within the context of publishing Scots literature represents a rallying point for the intellectual nationalist argument, resonant in the fiction of writers like Welsh and Robertson. However, Anderson's assertion of the problem of standardising the vernacular supports the understanding of the failure to differentiate Scots. A truly cohesive, standardised vernacular for Scots is not readily available, even derived from Scottish literary figures. Anderson also acknowledges that modern states frequently have languages in common; therefore "the concrete formation of contemporary nation-states is by no means isomorphic with the determinate reach of particular print-languages." (1983: 46).

Essentially, what Anderson suggests is that self-organisation of early modern local communities had been held back by the counter-weights of 'death and

language', unable to gain enough evolutionary momentum until capitalism and print came together to embed identity by "creating monoglot mass reading publics." (Anderson, 1983: 43) It was in this way that print gave fixity to language, which in turn created 'fields of exchange and communication' for local communities that represented a basis for national consciousness. These fields worked both to expand the range of public identification with common peoples and to apply boundaries to that range at the point where 'convenient' relative identification was no longer possible (Anderson, 1983). In Anderson's view, whilst the processes informing the origins of nationalism are largely unconscious, once conceived, they become models for manipulation of power to be replicated.

2.1.2 Distinguishing forms of nationalism

Anderson's (1983) insights help in conceiving the origins of both nation-building and the national sentiment that developed hand in hand with it, seemingly in part as a consequence of the process of differentiation which was undergone in order to establish the boundaries of each culture. Today it is common to speak of nationalism when discussing culture and tradition but a concrete definition and understanding of how to evaluate this ideology remains incomplete. Nationalism cannot be understood as a singular, catch-all term for one attitude. It takes many forms which can be interpreted at various levels but essentially what is crucial in aligning it with cultural enterprise is an appreciation of the degree to which it can be considered beneficial or detrimental, or as Spencer and Wollman (1998) put it 'good or bad'. The definition is crucial because without it, the multifaceted nature of nationalistic sentiment can easily be misinterpreted, and the broadest failure would be to not acknowledge the multiple and diverse factors which influence this sentiment, however it may be manifested.

In Spencer and Wollman's (1998) paper *Good and bad nationalisms: a critique of dualism*, a common theme is the attempt to make this clear distinction between the progressive and malign. They focus on how such apparently fundamental differences may be understood "as differences of degree" (Spencer and Wollman, 1998: 255) rather than polarities of principle. In this sense both the relative determinations of 'positive' and' 'negative' nationalism

are always at work against one another, relating meaning in a dialectical fashion.

In order to develop a full picture of the influences acting upon nationalism we must assess the issue through triangulation of the common dualities at work (Spencer and Wollman, 1998). The most common dichotomies at work within such ideology include, but are not restricted to, oppositions like western/eastern, political/cultural, civic/ethnic, liberal/illiberal, rational/emotional, patriotic/chauvinistic, constitutional/authoritarian and crucially national identity/nationalism and national liberation/imperialism.

The point about these oppositions is that the distinction is less defined in reality than through analysis of critical literature. The claim is not that all nationalisms are essentially similar but "it may be more serious to underestimate what apparently different nationalisms have in common […] for at the heart of the nationalism as a political project, whatever form it takes, is an essentially exclusionary logic." (Spencer & Wollman, 1998: 256). The problem of 'the other' is what Spencer and Wollman (1998) determine all nationalisms to have in common, creating the conditions where good becomes bad by considering what the 'other' in each case is represented by and why and how.

Of particular relevance to this study are their critiques of political/cultural, civic/ethnic and liberal/illiberal. In the first opposition Spencer and Wollman (1998: 259) locate the political as a western form connected to the "revolt against absolutism". This is seen as progressive, poised towards the future. The cultural is interpreted as eastern, a reaction to this where the political public was poorly established, forming "a cultural movement led to oppose the 'alien' example" (Kohn 1965 cited in Spencer and Wollman, 1998: 260) and thereby turning inwards to tradition and past history. The polarities of this opposition are less apparent in practice as those political nationalisms can be observed showing 'pride of their culture' and are 'anxious over its health and security'. Referencing Mitchell and Russell (1996), Spencer and Wollman (1998) quote that "cultural assimilation is the price that must be paid…for integration into the political community" (1998: 260).

A similar interaction occurs between civic and ethnic forms of nationalism. Civic nationalism can be interpreted as progressive, representing an agglomeration of

common interest for the sake of achieving shared goals, in contrast to the ethnic, primordial form of nationalism which seems based around a rejection of the different, with no sense of betterment other than the potentially false sense of security through solidarity. However, in practice civic nationalism frequently seeks ethnic justification to make sense of its goals. An example of this would be American citizens who claim European heritage. Civic nationalism forces together groups that inherently seek self-identification, thereby acting as a crèche for ethnic concerns which bolster negative incarnations of nationalism, including racism (Spencer and Wollman, 1998).

The most obvious duality which directly addresses the core concern over whether we can differentiate and act upon distinctions between good and bad forms is that of liberal versus illiberal nationalism. However, in practice liberal forms of nationalism are perceived as weakened by their dependence on openness which offers little to counter the reactionary. Therefore liberal principles become harder to maintain particularly once control is gained by a minority, if they wish to sustain that control. Spencer and Wollman conclude "it is not clear that the liberal belief that loyalty to the nation should not and need not override other values can be sustained either theoretically or empirically" (1998: 269).

2.1.3 Nationalism and Modernity

Any attempt to understand contemporary analyses and application of nationalist theory must also focus on the nation-state's role in the process of modernisation (Arnason, 1990: 209). However, theorists' approaches to this method differ and frequently capture particular aspects at the expense of a more total comprehension. Johann Arnason (1990) collates and evaluates the dominant approaches in his essay *Nationalism, Globalisation and Modernity*, drawing out the perspectives and frameworks of greatest value whilst highlighting their deficiencies for future studies to amend.

Three interpretations of nationalism by Tiryakian and Nevitte (1985), Gellner (1983) and Smith (1986) can be assimilated to derive the main exponents of the theory and deficiencies in present comprehension. Tiryakian and Nevitte (1985) maintain that the primary value in analysing nationalism comes from its

importance in effecting political innovation. This perspective is back-grounded by their conception of modernity as "a set of innovative adaptations to the social, cultural and physical environment which social actors adopt voluntarily" (Tiryakian and Nevitte, 1985: 59). Their approach is informed by Maussian theory, in the objective linking of characteristics of nationhood to the continued self-definition of the nation with the national form representing a step beyond the tribal, ethnic and imperial, and Weberian theory, in the focus on the political in national self-determination and the intrinsic link between the two in establishing power-relations (Arnason 1990). In Tiryakian and Nevitte's (1985) conception, these theories regarding the attainment of political self-rule are amalgamated with the formation and preservation of culture as mutual characteristics which define a nation. In light of this, nationalism is defined as "the making of claims in the name, or on behalf of the nation" (Tiryakian and Nevitte, 1985: 67), and in this way becomes a means of progressing modernity collectively along the lines of the dichotomies identified by Spencer and Wollman (1998); in this case "one kind of nationalism identifies the national community with the political centre of the nation-state, another sides with the periphery against the centre" (Arnason, 1990: 212).

Gellner's (1983) theory is formulated in a very similar manner to that of Tiryakian and Nevitte's (1985), initially highlighting the political unit's coincidence with the cultural unit to form the state, showing nationalism to presuppose specific interpretations of socio-political power by generating the attitudes which affect self-identification. Again, the core idea behind it is "the definition of political units in terms of cultural boundaries" (Gellner, 1983: 11). However, Gellner's (1983) approach differs from Tiryakian and Nevitte (1985) in that "the fusion of cultural and political unity […] is not built into the concept of the nation. Rather, the convergence of […] state formation and the constitution of national identities is regarded as the aim and achievement of nationalism" (Arnason, 1990: 213) In opposition to common perception Gellner (1983: 55) sees nationalism as the historical instigator "engender[ing] nations, and not the other way round". In this way the 'voluntaristic' effort necessary in nation-building according to Tiryakian and Nevitte (1985) is appended by nationalism. However, whilst identifying these interrelations his definition of culture does not go beyond a conceptual system of ideas and "the thesis that a difference in

language entails a difference in culture, whereas a linguistic homogeneity does not preclude further cultural differentiation" (Arnason, 1990: 213).

Arnason (1990) certifies "the location of nationalism in the field of relations between culture and power" (1990: 216) despite the fact that a structural functionalist bias rules over the preconceptions of each of these approaches. However, this is useful in leading to culture as the primary instigator in the creation of power structures which is crucial as he states "nationalism defines and justifies power in terms of culture" (Arnason, 1990: 217). Anthony D. Smith's (1986) approach evaluates the consequences of this perception. Nationalism must be dependent on the nation in its cultural manifestations and modern nations, no matter how progressive, are dependent on earlier forms of collective identity; "they require ethnic cores to survive" (Smith, 1986: 212). Smith's (1986) stress on the importance of looking back to ethnic roots to understand the modern configuration of nations does not edit out the potential for new modern developments. Akin to Anderson (1983) but wider in perspective, Smith (1986) posits the formation of nations and emergence of modernity as the result of conflation between economic integration, administrative control and cultural co-ordination. This affected the ethnic impetus by demoting it beneath new forms of collective social integration, generalised as the 'civic', whilst encouraging fusion with these new outlooks in order to provide a basic mythology of symbols upon which to build. In this way he attests to Spencer and Wollman's (1998) critique of dualism, as Arnason (1990) explains "the 'civic' and the 'ethnic' component are thus interdependent and equally fundamental aspects of the modern nation but they can also give rise to conflicting definitions of nationhood and types of nationalism" (1990: 218). Smith's (1986) argument that "the formation of nations […] is co-determined by the ethnic antecedents, and the latter can […] enter into conflict with the more distinctively modern factors" (Arnason, 1990: 218) is convincing but still lacks a more comprehensive assimilation into a wider examination of modernity. Arnason's suggestion of where to take future examinations amends this lack to incorporate a comprehensive view:

"If nations and nationalism can only be understood as changing mixtures of modern and pre-modern elements, this might be a special […] case of a more general pattern: the permanent and co-constitutive presence of tradition within

modernity. We could […] try to use the problematic of nations and nationalism as a new key to the interpretation of modernity, rather than subordinating it to a pre-existent model." (1990: 218-219).

2.2 Small Nations

2.2.1 Small Nations: A different kind of Nationalism

The construction of modern states, created by grouping political units through a sense of nationalism derived from loosely common characteristics, has in turn led to the formation of the mini-nationalisms (Snyder, 1982). Snyder (1982) describes this as the consequence of the "drive for unification forcing together peoples of diverse backgrounds, of different languages and cultures. […] It is the sentiment of a people who feel they are held in bondage against their will. "It calls for a separate identity based on historical, geographical, linguistic, cultural, religious and psychological ties." (Snyder, 1982: 12),

In these 'small nations' the broad tenets of nationalism become engulfed in greater nuance and subtlety, where ideas of difference, distinction and separation become less defined. The people of small nations may share common features with those of larger similar or nearby nations, whether through language, boundary or appearance, but this makes the sense of difference no less fundamental. Certain similarities may even serve to emphasise the differences. The factors influencing this heightened sense of distinction, particularly in areas like the autonomous communities of Spain which are subjugated to a dominant culture or far off centralised government, are varied and complex, but often include economic disadvantage, skimming of cultural values, territorial marginalisation, lack of a sense self-destiny and religious or political differentiation.

Snyder (1982) lists the common complaints of small-nationalisms as being territorial, relating to the range of the nation, and a sense of unsatisfied cultural destiny and cultural difference which he interprets negatively as motivated by xenophobia as are larger nationalisms. More recent work around the subject has shown these attitudes to be outdated and simplistic interpretations of the right to self-determination, particularly the territorial claim which has been put to the test by the late twentieth century geo-political situation following the

dissolution of the Soviet Union, and the assumption of xenophobia which is likely a misinterpretation of the dualism at work when ethnic concerns underpin civic ideology. However, Snyder's (1982) observation is important in providing a snapshot of how twentieth-century historical analysis has interpreted the complaints of small cultural and political movements which may in turn have a causal affect upon the configuration of their nationalist ideology today.

It is interesting that Snyder (1982) suggests that national minorities within older states are of a type that believe today that they were left out in the nation-making process. This would include Scotland and Catalonia and indicates that their sense of self-determination was cut short and has since remained as a simmering counter-thrust to the accepted history of contemporary geo-politics. This idea furthers an interpretation of small nation publishing as a means of countering seeming cultural dilution brought about by linguistic market consolidation and the thrust of capitalistic globalisation. These processes seek to streamline and agglomerate individual and national distinction for the purpose of wealth-maximisation. However, quantifying this psychological interpretation through the working processes of business is complicated and amounts to a further historical analysis which is not helpful in understanding and evaluating the potential paths of any nationalism beginning to assert itself more forcefully, although it may be useful as a considered observation into either conscious or unconscious attitudes in the nations in question.

Snyder's (1982) interpretation of cultural differentiation is negative in the sense that he sees affinities between cultures as being basic which generates resentment of the imposition of alien culture. A more objective, reasonable set of terms for the desire for cultural individuality may be explained economically as the capacity for local culture supports tourism which generates wealth and international recognition, enacting commodification of culture. National consolidation, where it seeks to integrate culture, can diminish this capacity. However, a local culture is equally capable of establishing itself alongside a dominant culture and can pose opposition to the central which, far removed from the local, can struggle to maintain power to the extent of devolving the actual limits of power that are needed to the local culture.

2.2.2 The Right to Self-determination

Margaret Moore (1997) explores the right of peoples to determine their own national destiny. She argues that the capacity to exercise "political self-expression" (Moore, 1997: 221) should amount to a defensible, equal right between all nations. Her argument against the status-quo of self-determination, based upon a territorial conception of nationalism, expounded by Snyder (1982) and others, is that the composition of the modern nation-state system uncovers the myriad inconsistencies in UN law surrounding the definition of this right.

She points out that the modern use of the term 'nation' is often falsely appropriated as very few modern nations are in fact that (Moore, 1997). They are in reality states. A territorial right to self-determination thus becomes inadequate. It treats national and cultural identity as irrelevant and becomes contradictory when the civic equality it presumes to spread to its members is imposed upon people who consider the formal extension insufficient in light of their own separate demands for identity (Moore, 1997), as frequently occurs in the case of small nations. Attempts to maintain the integrity of territorial self-determination were witnessed collapsing by the international community with the fall of Yugoslavia (Moore, 1997).

Moore (1997) also calls out modern liberal political philosophy in the defence of territorial claims as "it is hypocritical for large states, with a secure national identity and political institutions expressive of that identity, to demonise the nationalism of smaller peoples" (1997: 225). Even in liberal polities, dominant cultural identities are expressed against the marginalisation of others. In defence of this Moore cites Kymlicka who states "It is not possible to be neutral on issues of national identity, from government language to schools" (Kymlicka, 1996 cited in Moore, 1997: 225). This observation is important to a realistic approach to the study of publishing because a progressive outlook requires concessions to be made on the part of both dominant and minority 'nationalities' regarding the realities and inadvertent but necessary relations between extant nationalisms.

Moore (1997) also attempts to disqualify the most common arguments that are used against the right to national self-determination: that the concept is indeterminate, destabilising and threatens overlapping nationalities. The first

issue is rejected by assuming that a subjective understanding of nationality and jurisdiction can overcome the theoretical obstacle of who self-determination explicitly applies to, and who it does not. That it is destabilising is a consequence of the form of typical extant nationalism, but failure to accommodate national identities can be equally destabilising. The claim to instability cannot be overcome but what is important is that the international community encourage 'non-aggrandising' forms of nationalism to develop (Moore, 1997: 233). The final problem of overlapping communities can be interpreted defensively in the case of small nations, particularly where political autonomy is concerned, as it is these cultures which are most under threat. The issue must again be approached from a subjective understanding of nationalism. In doing so a more imaginative and potentially flexible constitution based on equal recognition may be plausible, incorporating a hybrid approach to the integration of political and cultural units in a malleable fashion which facilitates navigation of the ethnic/civic core.

Moore's (1997) observations are of value to this study because they approach the question of whether any nationalist sentiment has a claim to its own empowerment. The act of publishing represents a means of defending this right culturally, but politically is not recognised as demonstrative because older interpretations of geographical boundaries hold primary sway over international law despite the inherent contradiction in the composition of modern nations. Moore (1997) counters the complaint of larger nations to the instability caused by smaller nations' political demands by shedding light on the hypocrisy of claims to neutrality on the issue of cultural identity. In the end any culture must make divisive decisions regarding matters of public interest. However, her theoretical proclamations of subjective appreciation of nationalism to counter indeterminacy and overlapping interests are given less empirical weight as these suggestions are hypothetical and idealised, the complaint already levelled against the original problem of self-determination.

The problem of self-determination also faces attack from adherents of modernity seeking to overcome the political stage of the nation-state in favour of wider global integration. European unity faces the challenge of developing collective identity on a much wider scale. For Balcells (1996), the solution lies in the dissolution of the traditional and existing nations which are configured as

states in favour of realigned territories designed according to linguistic boundaries. This, however, seems poised towards the same trapping of overlapping nationalisms, and enforced realignment may stir similarly aggressive and reactionary ethnic response as in Eastern Europe. The component nationalisms of Europe are not perfect or entirely separate replications of each other. It is the clash between established nations combatting the emergence of new, against the growing force of prominent national demands, like those in Catalonia, Scotland and Belgium, which shape the political and cultural scene of modern Western Europe. Balcells (1996) adds to his definition of what cultural integration could be, when seen in a progressive light, by summarising his position on small nations within the European constituency. He explains "a Europe of regions is not a Europe of tribes. It is a Europe of units that each gives cultural identity to the citizens of a world that is otherwise a mass, standard world." (1996: 200).

2.2.3 Class and Nationalism: Social Politics

Erica Brenner (1995) provides a useful Marxist explanation of nationalism which grounds the theory within a social, class-based interpretation. Brenner's observations may be useful in accounting for social undercurrents which propel nationalism in small nations. The Marxist model observed that different classes may apply a "prescriptive concept of nationality" (Brenner 1995: 105), implying that elements of territory, history, culture and statehood which represent identity are ascribed significance by people with conflicting objectives, and the social significance of elements of that nationalism will be determined according to those objectives. The core tenets and implications of their position are that political or cultural nations cannot be extricated from their social circumstances or bases. They also suggest that nationalist movements are driven by class struggles and can be analysed in terms of promoting or disrupting these interests and that the international context is also to be considered in conflicts below the level of states and nations (Brenner, 1995: 103-104). This is an important factor for incorporating a theory of modernity into nationalist ideology. They also make the claim, counter to the apparent motivation of many small nations, that the appeal of nationalism cannot primarily be understood in terms

of a need for self-definition against other national groups. Instead they suggest a social underpinning to do with welfare and equality (Brenner, 1995: 104).

This prescriptive approach encourages enquiry into how nationalist actors seek change in line with their own aspirations rather than documenting a descriptive, historical analysis of the factors which shape nationalist sentiment. She notes that "the two men did not align nationalism with the interests of a single class." (Brenner, 1995: 107) They avoided the shortcoming of always identifying a dominant controlling actor by applying the assumption that "class interests cannot be used to assert an abstract set of nationalist aims which class actors were expected to pursue" (Brenner, 1995: 107). They specify that class actors may hold two levels of nationalist interests; 'substantial' in specific political, economic arrangements, and 'prudential', formed through conflicts with other classes. These levels explain motivation for class actions in terms of the ends which they hope to maximise and also the negative attitudes which encourage action, particularly self-preservation, which they cite to explain why actors might support programmes that do not stand for maximisation of their interests (Brenner, 1995).

Brenner's (1995) evaluation is useful to this study as it outlines a Marxist interpolation of class struggle into a theory of nationalism which may be consistent with the nations of this examination. Particularly in Scotland the model of nationalism can benefit from an appreciation of the class actors at separate levels who inform the aspirations of Scottish self-identification within a more dominant and linguistically equivalent English/British culture. However, Jonathan Hearn (2002) has additionally suggested that Scottish civil society needs to be understood as a 'zone of status-group formation' along the lines of the Weberian model of classes (economic) parties (political) and groups (prestige) (Clark & Lipset, 2001). He argues that any attempt to evaluate Scottish class and identity to nationalist demands should pay attention to the role of status groups in the formulation of such ideologies, and this analysis may be applicable more generally to nations without states where integration and identity politics must be coordinated at a number of different social levels.

2.3 Globalisation and Nationalism

2.3.1 Three Globalising Trends that affect our Understanding of Nationalism

Arnason's (1990) evaluation of various theories of nationalism also indicates that such ideologies cannot be sufficiently examined in the present era without incorporating the effect of modernising processes upon them. The nationalist theories he examines each fail to question "a received image of modernity […] which limits their interpretive and explanatory scope". (Arnason, 1990: 219) He details three important changes of modernity which need to be considered in terms of how nationalism conforms or evolves and interrelates to each: globalisation, pluralisation and relativisation. He accepts the definition of globalisation as "the crystallisation of the entire world as a single place" (Robertson, 1987a cited in Arnason, 1990: 220) and "a global–human condition" (Robertson, 1987b cited in Arnason, 1990: 220) but acknowledges the need for suitable frames of reference which are less prone to reductionism. Pluralisation refers to the awareness of the multiple and growing "interdependent but mutually irreducible" (Arnason, 1990: 220) elements which come together to generate modernity, not simply as characteristics of this age but manifestations of the complex logics which interact leading to its creation. Relativisation links these modern configurations to cultural tradition. Arnason (1990) explains "internal tensions and conflicts of the tradition are reactivated in a new context" (1990, pp.221) The concept builds on Smith's (1986) notion of 'ethnie' to amalgamate modernity and tradition as a synthesised ideology for further change, rather than a firm, hybrid culture. Arnason (1990) is careful to alert the reader to the points of contact between the three concepts and nationalism. The theories of nationalism already expounded demonstrate the relevance of these connections. Pluralisation can be seen as part of Gellner's (1983) conception, if nationalism is the link between independently functioning cultural and political processes, and relativisation is inherent to Smith's (1986) approach towards the ethnic foundations of modern nations. Any examination of modern national integration following the above principles must consider its relation to global integration and according to Arnason "globalisation theory specifies the framework within which the two other approaches have to be located." (1990: 222) In this way Arnason (1990) devises one approach to understanding the

national by interpreting it in a global context without limiting its scope or excluding the validity of other social forces.

2.3.2 Idealism and Different Levels of Globality

Idealistic discussions of globalisation's potential capacity to overcome current geo-political tensions are common amongst theorists. Michael Mann's (1997) article 'Has globalisation ended the rise and rise of the nation-state' addresses this optimism in terms of the assumption that the emergence of this model will potentially eradicate previously extant models of nationalist self-definition. Mann (1997) outlines the modern innovations which enthusiasts put forward to defend the possibility of a single global society, including the changing nature of capitalism towards a post-industrial, informational, transnational model, and the new 'global limits' and eco threats which can only be challenged by organisations above the level of a nation-state. The rise of transnational corporations requires a process of global unification and acclimatisation in order to "deliver suitably packaged imagery and symbolism which will convey the definitions of the services they provide." (Smith, 1990: 172). New technologies have also increased the viability of diverse local and transnational identities. Social movements can now be mobilised globally, and the contemporary phase of post-nuclearism is undermining the expectation of militaristic 'hard' geo-politics as irrational. However, this is a far cry from denying the general survival of nations as wielders of economic, military and political resource.

Despite these developments John Tomlinson (2008) is more sympathetically disparaging of the idea of singular global culture. Globalisation is having the effect of what Tomlinson (2008) calls a process of accelerating 'connectivity', which encourages an assumption of 'global culture' influenced by the apparent connectivity of an integrated global economic system and the global impact of local industrial processes. However, increasing connectivity does not 'necessarily' imply global unification, as it would be false to claim the globalising effects are felt by every person in every place on the planet equally, and cultural division is apparent all around us. Tomlinson (2008) therefore qualifies globalisation as an uneven process with areas of concentration and neglect, rather than a single producer. He sees the tendency among western critics to identify the production of one global culture as a historical tendency towards

cultural universalism originating in concepts like the Edstorf Mappa Mundi, Marxist communist society and the corporate spread of western culture (Tomlinson, 2008). The failure inherent to each of these configurations of global culture is a "tendency to see the world from their own particular cultural vantage point." (Tomlinson, 2008: 10). This does not account for the hermeneutic reinterpretation of cultural artefacts once received. Tomlinson's (2008) offered solution to this methodological misapprehension is to propose we approach cultural processes "by understanding the effects of globalisation as they are felt within particular localities." (2008: 10).

The real task then is to determine the degree to which nations are declining or being transformed. To aid in this endeavour Mann (1997) distinguishes five contemporary 'socio-spatial networks' (1997: 281) of social interaction; local (sub-national), national, inter-national (relations between nationally constituted networks), transnational (passing through national boundaries unaffected) and global. Mann sets out to question whether "the social significance of national and inter-national networks [is] declining relative to some combination of local and transnational networks" (Mann, 1997: 282), and what contribution the inter-national networks are making to emerging global networks. However, he immediately recognises the growth of these networks occurring alongside the expansion of transnational powers, particularly those of industrial capitalism and broader cultural networks. Therefore national/international networks grew much more at the expense of local rather than transnational networks.

2.3.3 The Challenge to Nations and Rise of Global Culture

Tom Nairn (2008) has commented that globalisation, rather than homogenising, actually accentuates difference and breeds confidence in marginal cultures. He argues that the conditions which theorists like Gellner (1983) identified as leading to nationalism in past eras have and are in the process of changing. Whilst globalisation may undermine the nationalism which came about as a crystallisation of then modern dominant nations and cultures, it does not drain the concept of nationality, identity and cultural contrast "and the wish to have, or to win, different forms of collective 'say' in the brave new globe." (Nairn, 2008) In the modern era he claims it is plain to see old dominant users of nationalism, the major European powers, Russia, and the newer 'offspring' of that era,

America but also emerging powers like India and China, clinging to the traits of nationalism, particularly conflict, which mobilised the power balance in the past epoch (Nairn, 2008). This is to defend against the rise of emergent small nations, which maintain a common desire for cultural expression independent from their nationalist ideologies. In this way he interprets his conception of nationalism as being an epochal ideology maintained by surviving beneficiaries challenging the greater process of global history. He succinctly posits his own view of the capacity for independent cultures to subsist in the modern era of globalising processes by asking if they can answer affirmatively to the question "Are you small and smart enough to survive, and claim a positive place in the common global culture." (Nairn, 2008) He cites the electorate's vote for the SNP in Scotland in 2007 as an example of this affirmation. "Globalisation is providing new stimuli for nationality-politics. Not so much for "nationalism" in the late nineteenth and twentieth century sense, but […] the emergence of new, smaller communities of will." (Nairn, 2008) Malcolm Waters (2001) also identifies with this sentiment, seeing the territoriality and sovereignty of established states being reinterpreted through globalisation, with the issue of accepted nationalities coming under pressure. He cites the formation of the EU and the resurgence of nationalism in small nations as partial evidence of this, commenting "the firmness of the linkage […] that had been imposed by the realpolitik of the superpower order is widely being called into question." (Waters, 2001: 149)

Anthony D. Smith (1990) elaborates on the idea of global culture in his essay *Towards a global culture* by discussing its definition. In his understanding of what we mean by 'global culture', culture should really be termed cultures in the sense of a "collective mode of life" which inherently pre-supposes alternative modes. This concurs with Arnason's (1990) identification of pluralisation's important role in the modernising process. Common elements would be far too generalised for us to properly speak of one globalised culture. However, he concedes to seeing the sense in which culture, in an evolutionary manner does seem to converge. Smith (1990: 173) identifies the project of a "truly European Community" presaging the manner in which a global culture might be created. It is interesting that he sees the roots of supra-national organisation along these lines harking as far back as movements like the Holy Roman Empire, the

Carolingians and even Rome. Smith (1990) identifies this trend in connection with recent late twentieth century history and the demands of typically small European nationalisms. "Movements of ethnic autonomy in Western Europe have sometimes linked their fate with the growth of a European Community that would supersede the bureaucratic straitjacket of the existing system of nation-states, which have signally failed to give peripheral ethnic minorities their due in the post-war world." (Smith, 1990:175)

Michael Keating and John Loughlin (2003) suggest that European integration rejects any attempt at creating a homogenous unit with a single culture and identity. They consider the process to espouse cultural diversity as a fundamental principle of integration. Equally, it is integration which encourages an awareness of national diversity. Their convergence lies in politics and administration which are influenced by national restructuring and the over-arching gaze of globalisation. They explain "the current new regionalism is distinguished by a combination of elements previously thought incompatible: the presence of a regional culture, language and identity is now considered to have a positive relationship with economic development rather than the reverse; political autonomy is now considered important in the context of a wider, competitive Europe." (Loughlin and Keating, 2003: 155) The idea of combination is crucial to understanding the globalising processes these theorists see acting upon individual cultures. Smith (1990) also acknowledges that "though individual national cultures remain distinctive and vibrant, there are also broader European cultural patterns which transcend national cultural boundaries to create an overlapping 'family' of common components." (1990: 187).

2.3.4 Nationalism vs. Globalisation

Smith (1990) idealises the integrative capacity of globalising processes within the modern configuration and sees no room for the nationalist concerns of small nations and political agglomerations. "We are entering a new world of economic giants and superpowers, of multinationals and military blocs, of vast communications networks and international division of labour [with…] no room for medium or small-scale states, let alone submerged ethnic communities and their competing and divisive nationalisms." (Smith, 1990: 174). He argues that

"nations and nationalism may have been functional for a world of competing industrial states, but they are obsolete in the 'service society' of an independent world based upon technical knowledge." (Smith, 1990: 175). However, in their introduction to *The Conditions of Diversity in Multinational Democracies* Guibernau, Gagnon and Rocher (2003) reject this assumption that nationalism in emerging nations or small nations represents an anachronistic world view in reaction to increasing globalisation and loss of cultural diversity. They disregard the negative labelling of minority nationalisms as 'tribal' on the grounds that contemporary forms of nationalism differ substantially from classical nationalism (Guibernau, Gagnon and Rocher, 2003). They also interpret the new nationalisms taking hold in nations without states as grounded in the defence of collective rights and bound up with transformations brought about by globalisation, specifically citing Scotland and Catalonia (Guibernau, Gagnon and Rocher, 2003). These nations correspond to Guibernau, Gagnon and Rocher's (2003) definition of multinational democracies, democratic societies that are not only multicultural but also multinational by comprising two or more nations. In this case they are described as containing significant internal diversity. Guibernau, Gagnon and Rocher (2003) hold that the struggle of small nations within multinational democracies to become political actors and provide a strong sense of identity for their members contributes to the revitalisation of civil society, reinforcing democratic practices. In light of this, Smith's (1990) evaluation of nationalism seems reductionist. However, he may be interpreted as highlighting the historical circumstance in which nations and nationalism function as a driving psychological force and its geographical manifestation to encourage the shaping of commerce and infrastructure. These effects are inherently limiting if taken as completed ideologies. In order to allow their reconfiguration as functional tools in the new world order the objective comprehension of these terms, as suggested by Moore (1997) must be reinterpreted subjectively, in a way that accommodates Mann's (1997) different 'socio-spatial networks'.

Mary Kaldor (2004) disagrees with Smith's theory because she interprets it as advocating an enduring form of nationalism, whilst she defends a modernist paradigm that nations are a temporary phenomenon. Whilst she grounds her appreciation of modern nationalism in the effect of globalising forces of

electronic communications and the supplanting of industrialism with an information economy, Kaldor's (2004) interpretation is centred on conflict. She identifies two divergent strains of emerging modern nationalism brought about by global political and cultural restructuring. The first is the militant nationalism observed in parts of Eastern Europe, whilst the second, termed 'cosmopolitan' is typical of small western-European nations. The difference between the two forms is openness and exclusivity, cultural diversity vs. cultural homogeneity, with the cosmopolitan representing the open, culturally diverse context. This is akin to Nairn's (2008) evaluation of globality as "either neo-liberal progress or some new universal oppression". She says "small nationalism can also be about enhancing democracy at local levels, and the defense of cultural diversity." (Kaldor, 2004: 173) However, though the cosmopolitan is "better suited to the structural conditions associated with globalisation" (Kaldor, 2004: 173) it makes no assumption of a pre-existent global culture, a misunderstanding frequently held against it by critics. Important to this study, she highlights Anthony Appiah's (1996 cited in Kaldor, 2004: 174) notion of a 'rooted cosmopolitan', "someone who loves his or her homeland and culture and feels a responsibility towards making [it] a better place. […] Patriotism can mean freedom not exclusion", an important characteristic of cultural drive in the nations under examination.

Mann (1997) posits the argument that nationalism cannot simply be overwritten by the emergence of global culture, because many of the underlying tensions which nationalism as an ideology has functionally allowed societies to cope with, may no longer be relevant to a global culture: new tensions for a new era, not just political and social but also environmental, are emerging to substitute them. A corresponding global response, akin to that which was informed by and in turn informed emerging ethnic ideologies and nationalisms may prove inevitable. In the social sphere Mann (1997) believes "since authoritative social regulation remains overwhelmingly the province of the nation-state, the emergence of new identities may ultimately reinvigorate its politics and broaden its scope." (1997: 297) He also observes "ethnic politics may fragment existing states, but – given the defeat of alternative multinational and socialist states – they fragment them into more, supposedly more authentic, nation-states." (Mann, 1997: 296). This highlights the importance of developing an inter-

relational model which describes how nationalism works within a global system. Mann's (1997) evaluation demonstrates the viability of integrating small national and global networks of cultural production.

2.4 The Digital Age

2.4.1 Digitisation: Global and National Perspectives

Important as it is to ground a study of contemporary cultural nationalism within the frame of globalisation, today it is hard to discuss the process of global change without also addressing the major technological and telecommunications changes of the era. The manner in which global culture is developing across transnational lines of communication would not be possible without the advances in information technology and communications of recent times. However, in turn this process is facilitated by the mass market accessibility of the technology to a global public, made possible thanks to the optimisation of production and distribution processes available to larger, wealthier super-corporations, a key manifestation of globalisation.

The impact of digitisation for the cultural industries is largely immeasurable at present as the ramifications of digital production and distribution are still unclear. Successful platforms for the delivery of cultural materials are a work in progress. It is also easy when discussing digitisation to understand it as being synonymous with the internet. Hesmondhalgh (2007) points out that it is important that "the internet is best understood as part of a broader process of digitisation – the increasing use of digital, as opposed to analogue, systems of storage and transmission." (2007: 75). The crucial questions to be addressed are whether digitisation has changed cultural production and if so how, taking into account the opportunities and risks associated with digital production and delivery.

It is also important to establish definitions of what can be understood as positive and negative effects in order to appropriately evaluate the relative merits of this form of delivery and consequently apply these traits of value to the process of publishing. Digital distribution is in many ways facilitating the growth of a global culture mediated by transnational super-corporations with access to a non-localised market. However, as briefly hinted in Anthony D. Smith's (1990) work,

digitisation represents an opportunity to maintain and distribute economically unviable materials of interest only to a limited local market, offering publishers and other producers of culture in small-nations the chance to capitalise by exposing low-interest materials to new, wider digital communities.

At the same time a balanced appreciation is necessary. It is easy to overstate digitisation's importance for personal benefit, as academics can draw attention to forward-looking work, companies can generate new markets from the latest gadget and governments can appear progressive by championing initiatives for the future. The essential innovation of digital electronic storage is that it makes cultural components like words, images and audio more transportable and manipulable by converting them to a computer-ready format and also allows for their interconnection (Hesmondhalgh, 2007). However, irrespective of the convenience that digitisation offers producers and consumers, it takes considerable resources and money to develop and incorporate digital initiatives successfully. The opportunities are not only online. In recent years much has been made of the gradual convergence of media. Mobile phones may present one platform for the ultimate convergence of communication and content media, "combining voice and data, fixed and mobile, telecoms and internet, digital content and delivery." (Locke, 2004). The capabilities of 3G (3rd generation) mobile phones are making this ideal increasingly a reality. However, whilst convergence may open new markets, it also increases the danger of competitor technologies decreasing business. The continued globalisation of the markets also presents a threat to its potential, leading the mobile services industry to be driven by a few global operators who monopolise cultural dissemination leading to increasing homogenisation.

In particular digitisation can have a profound effect on the division of labour in the production of culture. The potential benefits detailed by Hesmondhalgh (2007) include the ease with which it allows consumers to be producers. It may also allow for more creativity, diversity and innovation as physical restrictions are removed in the digital space and this can mean greater choice for the consumer as well as a boon for producers seeking new markets. However, it is more difficult for companies to dictate the development and distribution of their products. Regarding digital music, in 2000 former Culture Secretary Chris Smith, acknowledged "Consumers are driving the online revolution and they

want the ability to get [music] they want, when they want it and where they want it." (BBC News, 2000) Essentially all the potential benefits and drawbacks of digitisation relate to the idea of power-balances within cultural production and in line with previous sections of this thesis, the issue of power also has an important bearing on culture's role in defining nations.

2.4.2 The Internet, Digital Devices and the fears of the Cultural Industries

It is understandable the internet has come to be perceived as a threat to print media as various attributes make it superior/preferable. It is always accessible and for producers such accessibility makes timeframe routines, such as deadlines based around traditional working days, obsolete. It also takes away any advantage physical distribution might have in regards to location. Equally its features demonstrate why it can be considered a 'liberating force'; in print media, there is no longer a need to produce and distribute physical copies. Direct relations can be established with consumers through websites and social networking. Participation can be actively encouraged with phenomena like blogging and podcasting which accommodate deregulated word-of-mouth marketing. It also becomes possible to break down products for consumption into smaller more desirable components, for instance single articles can be accessed without purchasing a whole newspaper. The ebook industry in Japan, is already approximating a value of 52 billion yen per year and Japanese publishers have expressed concern for their print models (Japan Retail News, 2010). The primary threat is digital 'manga' on mobile phones. Japanese publishers are also concerned by the dominance this affords major multinational conglomerates and the changing nature of the industry reflected by the music industry which enacted a process of 'switching' to digital media that seemed to negatively impact CD sales. Their concern is to find a happy medium between print and digital production, and are looking to collaboration and partnership to achieve this (Holland-Smith, 2010).

Digital reading devices heighten publisher's anxieties over digital text. James Bridle (2010), a digitisation and publishing entrepreneur and consultant, holds that innovation comes from recognising a context in which people want to read. Allen Lane was acutely aware of this and Bridle (2010) cites his paperback dispenser machine as an early example of convergence, mixing affordability,

context and a new distribution method. Today platforms like Google Books and the Kindle store fulfil this role and circumvent the role of the publisher. He believes that by placing their focus primarily on formats, most publishers do little to obstruct this circumvention of the supply line. In Bridle's (2010) opinion the most important aspect of reading and the printed product is temporality. For readers value is discerned from the obvious effort expended in producing a book. With digital conversion the customer's perception of value drops to near zero, whilst the devices which present the material become valuable. The answer for publishers may be to focus on making "the full life of the book" (Bridle, 2010) visible, from writing through to post-reading reflection, incorporating not only strategies for the content industries but also the support structures and forums that have grown around them. He believes this can revitalise publishers as passionate custodians of literary quality, overcoming the technology companies which can never replicate these traits (Bridle, 2010).

Another problem for publishers is the clear, critical skill gaps which exist for incorporating digital programs into their existing processes. A report on the UK industry by Skillset revealed problems which lay in training and recruitment as older experienced publishers have shown distinct discomfort with the changing landscape (Neilan, 2009a). Where there are vacancies, they are difficult to fill as suitable candidates will often be more attracted to other creative media industries with higher salaries. Reliance on recruitment practices and unpaid work experience are also factors, reinforcing a perception that publishing is 'old-fashioned' (Neilan, 2009a). The Skillset report also indicated that an understanding of digital intellectual property rights and digital platforms and products is lacking (Neilan, 2009a).

Other digitisation projects are also indicating problems inherent to the industry's handling of rights. Google's 'google print' and Amazon's 'look inside' features have caused controversy by raising concerns about copyright violations because with the facility of digital distribution the issue of copyright ownership becomes less clear. In the case of the above examples one report indicated that "a common problem in both contracts is that the companies reserved the right to effectively change any clause, making it hard for authors and publishers to determine what rights they are giving up or maintaining." (Kidman, 2006)

Authors are therefore as much if not more at risk than publishers may be in this kind of enterprise.

Hesmondhalgh argues it would be wrong to suggest that internet communication and digital devices make older forms of cultural media in general obsolete. He cites the fact that the internet sector still drew far smaller revenues than other cultural industries in the early 2000s as evidence of this. This line of argument seems outdated as in the last decade revenues have increased as the Internet has engaged with a wider and new digital generation and alternative online business models have developed. For instance in 2012 the European Multi-channel and Online Trade Association published a report indicating that Europe was the largest e-commerce market with sales reaching 307 billion dollars (Montaqim, 2012) and in April 2013 PriceWaterhouseCooper reported that 2012 US Digital Ad Revenues had risen to 31.6 billion dollars (Marvin, 2013). However, Ofcom (2011) demonstrates that global TV revenues from 2006 to 2010 still grew year-on-year, up to 239 billion pounds, indicating an equally strong market. The essence of Hesmondhalgh's (2007) argument is that the Internet's success is not at the expense of other media. He comments "the Internet […] is not replacing television and other cultural forms; it is supplementing them" (Hesmondhalgh 2007, p.249) For instance its tendency to facilitate the tailoring of advertising to customised audiences makes opportunities to reach mass audiences even more valuable, evidenced by the massive rates broadcasters charge to show advertisements during major sporting events and other inter/national media spectacles.

Cynicism and fear over piracy have meant that the potential advantage digital downloading offers to media companies dominating the industry have been largely ignored. Concerns include finding a way to prevent customers reproducing infinite copies of digital files and finding a method of payment that they feel happy with. Prevention methods are largely dependent on the successful development of digital rights management systems embedded into hardware and software to prevent unauthorised usage. According to Hesmondhalgh "those competent enough to circumvent it are likely to be small. […] As DRM (Digital Rights Management - systems used to protect against illegal copying) technologies become more sophisticated, such hacking may ultimately be no more significant than other copying technologies that have

plagued the cultural industries since the 1960s." (2007: 253) His suggestion here is that whilst irritating, this level of copy transgression is controllable for the industry without incurring serious losses. The activist and blogger Cory Doctorow adopts a different stance in regard to DRM systems. According to Doctorow (2008) the inherent flaw of DRM is that it is designed in such a way as to be hacked by necessitating a key, which is embedded into the software. The ridiculous nature of this logic is in Doctorow's eyes, justification for why copy prevention represents a misguided commercial philosophy, and he champions the cause of 'copyleft' and the opportunity of using the internet as a free marketing tool for the sale of physical products. However, the improvement of DRM systems has influenced the development of digitally distributed media for two separate markets with incompatible formats - computer and third generation mobile phones - encouraging industrial diversification. Even with the threat of illegal copying, corporations still retain control over the marketing and promotion that largely determine what music most consumers get to hear and know about (Hesmondhalgh, 2007). However, the struggle over digitisation is interesting, particularly in regard to file-sharing, because of the tension it creates between producers and consumers.

2.4.3 Digital Global Inequality

Whilst the internet also offers powerful resources to individuals, its democratising capacity is limited by the inequalities of access which exist, often termed 'the digital divide'. The importance of communication and knowledge cannot be underestimated when it comes to questions of participation in an economy, society and culture. Murdock and Golding (2004) claim "to be disconnected is to be disenfranchised." (2004 cited in Hesmondhalgh, 2007: 257) This inequality is broad and complex. Today only 39% of the global population are reported as using the Internet according to the International Telecommunications Unions' report (ITU 2013). The developed world dominated this with an estimated 77% of users coming from here, and another estimation of 75% of Europe being users. However, in Asia and the Arab States this figure drops to below 40% and in Africa only around 16% of the population are estimated to be users.

In considering the availability of Internet it is important to pay attention to what type of access is involved. Inequalities run very deep and the digital divide is a much more complex matter than just whether or not it is possible to access the internet, being connected with age, technological durability, and the kind of internet access subscribed to. In the UK it is reported that 10 million residents have never used internet (Lane Fox, 2010). Often this amount derives from society's most disadvantaged people. Martha Lane Fox (2010), the UK Government's Digital Champion, investigated the issue and provided data to suggest 39% of the over-65s, 38% of the unemployed and 19% are adults in families with children. This figure is startling considering that 40 million adults use the web in the UK, and around 30 million do so on a daily basis. Of those not using the internet, it is interesting that only 14% cited prohibitive costs as the reason, suggesting that provision of skill is a concern and that support, particularly for the elderly, must be improved (Lane Fox, 2010). It imperative to understand this divide in order to theorise correctly about the extent to which digitisation can be seen as aiding the unification of global culture, rather than simply improving the connection between certain privileged social sectors

For those with access there are democratising effects like the ability to form micro-networks. However, whilst older conceptions of identity, including nationalism in its physical manifestations may be destabilised via the internet, hierarchies based on identity, gender, race, or class may give way to alternative forms, which may or may not share their inherent characteristics. Equally, whilst globalisation implies a universal culture, the actual configuration of national digital cultures maintains as many differences and inequalities as real-world counterparts' infrastructures. It has been claimed that Latin American countries' companies are more vulnerable to theft via mobile devices and need improved data protection policies (Wharton, 2008). Whilst technologies may be universal the human systems incorporated into them remain variable.

2.4.4 The Internet, Commercialisation and Accessibility

The commercialisation of the internet has damaged the perceived potential it had to challenge forms of communication prevalent in other cultural industries. Advertising encroaches upon all aspects of it, spam and sign-ups leading to unwanted emails remain constant and there are few points where commercial

and non-commercial content are separated. The main problem with advertising is that forms of communication come to rely on it as their main income become beholden to their advertisers, in turn potentially having a deleterious effect on the content. Edwin Baker (2002 cited in Hesmondhalgh, 2007: 259) points out that advertising favours content that is increasingly connected to marketable products and services and tends to militate against that useful to, or valued by, poorer elements in society. Also networking technology has been appropriated in such a way that practically all uses we make of the web are recorded for market research. Surveillance of users as consumers is built into the very structure of web technology via cookies and logging software under the claim that this allows users to be targeted more efficiently avoiding the irrelevant, but all-encompassing advertising that still pervades (Hesmondhalgh, 2007). In this way it seems that the cultural dimension of the web has been commandeered by the multi-national corporate environment and ethos.

The internet and Web have altered existing social relationships to production and consumption, producing large amounts of small-scale cultural activity, new means of inter-personal communication and mechanisms to enhance activism. This does not cancel out the power concentrations in the cultural industries but does represent a disturbance. Unfortunately this disturbance occurs within a very specific section of the global population. The radical potential has not yet entirely been contained by its partial incorporation into a large, profit-orientated set of cultural industries.

2.5 Catalan Nationalism

The process of differentiation is fundamental to Catalan nationalist discourse. Albert Balcells (1996) traces Catalonia's national self-identification back to the seventeenth century and historical entwinement with Spain much further back than the relatively brief era of Francoista oppression. Teresa Vilarós (1999) goes further, stating "It is […] impossible to understand the processes of building and protecting Catalan national and cultural identity apart from the national politics of the Spanish state and the geopolitics of the economic culture imposed by the global post-industrial market." (1999: 40) Negotiability is a commonly demonstrated attitude within Catalan cultural reaffirmation and must be so in order to bridge the divide between Catalanism and the Spanish culture which had pervaded for so long. Whilst "the ancient but still very much alive hostilities between Catalonia and central Spanish power" (Vilarós, 1999: 39) are still pertinent, Balcells (1996) affirms that radical nationalism only affects a minority and has no political, electoral sway. This negotiability is underlined by political attempts to define Catalan identity which emphasise residence and integration rather than ethnic originality; "A Catalan is whoever lives and works in Catalonia, a Catalan is whoever speaks Catalan" (Conversi, 2002: 23).

2.5.1 Post-Franco Reorganisation

The first Catalan cultural congress was called in 1976 with the aim of planning out the future of the culture in a manner which would promote growth whilst remaining "sensitive to all cultural initiatives of a universal quality." (Roig, 1976 cited in Vilarós, 1999: 38) This determination engendered a political stance vigilant of hypocrisy and an ethos of inclusivity which was reaffirmed with the introduction in 1983 of a 'law of Catalan linguistic normalisation' which gave the Catalan language official status. The reinstatement of the statute of autonomy (from 1932) in June 1977 and restoration of the Generalitat were a response to the Catalan demand for independence. These actions established Catalonia's political viability as a minor nation. However, as Vilarós (1999) explains, due to political change across Spain and the realignment of European power and states at this time, Catalonia's political demands for self-determination appeared less urgent.

However, today, global economic instability has led to a rise in unemployment by 27.2% in Spain (BBC News 2013e), and has rekindled quietened separatist demands and reinvigorated the nationalist cause and the Catalan government finds itself in a more empowered position (Minder, 2012), though also under pressure from more left-wing separatist movements (BBC News 2012).

2.5.2 Establishing European Identity

Catalonia began to assert its position within Europe through radical cultural differentiation from Castilian culture, espousing flexibility in navigating between partnership with centralised Spanish government and independent economic and cultural involvement in the European markets. This double-positioning is typical of the development of socio-spatial networks identified by Mann (1997). However, Europe's own syncretic identity was, and continues to be, largely derived from mass-culture. This can also be destructive to National culture, particularly in cultures where state support for sustainability is lacking. Balcells (1996) claims "Europeans now see the authentic forms of culture of the various European countries as exotic, while jazz and rock are viewed as universal" (1996: 197). Without a substitute for the national structure to encourage social cohesion and rationalise political and social activities, the emerging inidigenous culture may become homogenised.

However, for Catalonia, European integration also presented a platform to underpin nationalist sentiment and raised wider geo-political issues. The nation's geographical position has helped it benefit economically, often being labelled 'the gateway to Europe' (Keating, 1999) with all the import/export advantages that implies. Soon after decentralisation Catalonia found itself ahead of other locations with lower levels of unemployment and with foreign investment. In 1987 it reached 5% economic growth (Balcells, 1996: 188), exceeding the rate for Spain. According to Balcells (1996), investment was aimed during this period at increasing production capacity and "Catalonia ranked first among the self-governing communities of Spain for the volume of foreign investment received, absorbing one-third of the total amount […] invested in Spanish firms." (1996: 188) However, as further European integration is sought dependence on the world economy is equally increased.

In defence of the wider national Spanish project Francesc Granell (2000) has commented that Spain as a whole has been active, particularly economically, and it should not be understood that Catalonia participates in the EU in a manner that is counter to more general Iberian politics. He comments "it was Spain that provoked debate over whether the EC should open its doors to European countries with non-democratic political systems." (Granell, 2000: 65) He also concludes that with regard to the progress of globalisation, "Spain has never adopted a nationalistic approach to Community negotiations. It has defended basic national interests, but within an overall strongly Europhile approach to integration." (Granell, 2000: 67).

In summary, Catalonia identifies itself within a European framework, as does the present Spanish state. However, the nationalist Catalan concern, it seems, is to encourage greater European integration as a means of distancing and dissociating itself from its relationship with Spanish identity. To this end the nationalist strain of Catalanism would move to identify itself as a nation within the European community, separate from Spain and Spanish membership within the EU.

2.5.3 Cultural Commodification and Production of Culture

Catalan culture and language is still designated 'minor' at national (Spain) and international level with around 6 million speakers (Vilarós, 1999: pp. 40). However, Catalonia's constitution as a nation but also one of Spain's autonomous communities may be crucial to maintaining its present market forces, determined by its ability to supply specific demands. The classification helps generate some of this demand, conveying Catalan identity as a commodity which can be marketed and disseminated profitably. Vilarós (1999) writes "Catalan national identity […] is no longer a 'historical essence' or 'truth' ideologically appropriated. Rather, in the post- Franco era [it] has become a commodity, […] which can be shaped." (1999: pp.46) This is one method for small nationalisms to exploit their cultural 'mapping' and promote production. However, as a commodity, culture cannot remain free from external demand and becomes difficult to protect against parochialisation (Vilaros 1999).

In all forms of cultural development, production and dissemination in Catalan or for Catalonia is enacted in consideration of its capacity for integration into a wider global culture market. Cultural identity is becoming increasingly shaped through media and communications. Josep Gifreu (1994) comments that, for minority identities, means of communication become 'traffic controllers' (1994: 263), in reinforcing cultural circuits and symbols of identity. Whilst a local language is the most obvious ethnic means of achieving this, he believes that in modern European nationalisms, a national press and materials with which to build an audiovisual cultural memory are equally useful. Various commentaries (Webber & Strubell I Trueta, 1991: pp.16, Jones 2004: 8) have drawn attention to the success of the broadcasting of *Dallas* in Catalan as a major contributing factor towards linguistic normalisation, re-birthing the language in an international context "inseparable from its global marketing and media diffusion." (Vilarós, 1999: pp.46) Balcells (1996) also believes the emergence of Catalan television has been crucial to the teaching of language in public life. Where in 1985 TV3, the first Catalan television station, had only 60% regular viewers it increased to 90% by 1990 (Balcells, 1996: 191). Vilarós (1999) observes that "The Catalan project of linguistic normalisation and revival of national identity in part complies with and is dependent upon the new global market's demands of commodification and commercialisation." (1999: 46) A process of hybridisation of global and local culture took place to assimilate standardisation. This same process occurred in publishing, influencing an intake of translated works into Catalan for public consumption. However, as with *Dallas*, the success of these translations can only be fully understood in terms of the global context in which the texts are generated and circulated. Vilarós (1999) identifies this development with Jameson's (1990 cited in Vilarós, 1999: pp. 47) concept of 'dedifferentiation'; the dichotomised corollary between cultural politics and market targeting of demand. Successful Catalan language publications based on televised materials assimilated and reconfigured global contexts into local demand. She also cites the erotic bestseller *Amorrado al pilo* and the relative high circulation of the Catalan daily newspaper *Avui* to highlight the success, in nationalist terms, of mass-market Catalan letters (Vilarós, 1999). For critics, this has encouraged an unappealing evolution of cultural products which assume a narrow, and largely middle-class (Vilarós, 1999: 48) socio-historical representation of Catalan culture targeted at a post-capitalist audience

befitting the commercialised global consensus of post-industrial society. However, this marginalisation is for the sake of economic and political practicality.

2.5.4 Language: Solidarity or Solitude

The proximity between the culture and its language is evident from its rapid reinvigoration in post Franco Spain. In 1982, only 3 years after the Statute of Autonomy was passed, the Generalitat set in motion a campaign for the normalisation of the Catalan language. The language plays a huge role in emphasising cultural distinction (Jenkins & Sofos, 1996) (Keating, 2001). Michael Keating (2001) explains that whilst long persecuted as a state language, it has remained historically prevalent in social use and widely spoken among the middle classes. However, business and commerce, particularly in larger firms, is regularly handled in Castilian. There is little regulation of language in business although consumers do retain the right to be served in Catalan if they so choose. Names and written materials often remain in Castilian because command of written Catalan was still very poor following decentralisation, particularly in Barcelona where the concentration of Catalan to Castilian is less pronounced than in the rural areas. Barcelona, despite being the capital of Catalonia, is also the more marginalised location for Catalan identity within the nation.

Keating believes linguistic normalisation represented a "conscious decision in political circles in Catalonia to emphasise a civic and territorial rather than an ethnic nationalism." (2001: 167). His view is that bilingualism could not be endorsed outright for fear of weakening an unstable cultural identity. However, a policy of mono-linguilism was equally rejected as this would not make economic sense in line with aspirations of making Catalonia a centre for trade. Balcells (1996) perceives the issue as problematic stating "bilingualism would not be a negative factor if it were as widespread among the Spanish-speaking population as it is among Catalan speakers." (1996: 189) The result is a kind of conversational underclass, historically rooted in the language's suppression. In practice this becomes a form of linguistic prioritisation, where Castilian assumes dominance over Catalan when used in discussion, as linguistic switching is common amongst Catalans. This division serves to undermine the

normalisation of Catalan but equally becomes a kind of cultural barrier to the sense of Catalan identity as separate. It is a constant reminder of a culture unsure of its own standing.

The backlash against Catalanism also had an intellectual base. Keating (2001) notes "in 1981 a manifesto calling for equal status for Castilian was signed by 2,300 intellectuals and professionals." (Barrera, 1985 cited in Keating, 2001: 176) This event has influenced subsequent controversy around the tendency to identify Catalan culture with production in the Catalan language, as occurred during the preparations for Catalonia's showcase at the 2007 Frankfurt Book Fair. It underlines the contradiction inherent to the identity politics of the nation, which whilst manifested as an uniquely separate identity (with its own language and traditions) is in practice contingent to the culture in which it exists and is manifested in unison and opposition to. At University level the linguistic issue may also hinder students from moving and studying within other parts of Spain, as whilst most students are expected to study within their own autonomous community there is a 5% quota for countrywide mobility (Keating, 2001: 170). However, due to the linguistic restriction only a third of the places available in Catalonia are taken up, constituting national segregation at an educational level which the autonomous government was so eager to overcome (Keating, 2001: 170).

Vilarós interprets Keating as seeing "the space of minority language as a site of resistance against global commodification and de-differentiation." (1999: 49) The definition of 'who is Catalan' is broadly linked to Catalan language which can be treated by the dominant political party as an instrument to forge common identity, by integrating ethnic communities across boundaries of 'class, race and religion'. However, it can also be equally divisive, causing social stratification and the parties promoting it have been charged by opponents with attempts at clientelism. Balcells (1996) also acknowledges the political danger, explaining that Left-wing parties, whilst supporting normalisation of the language, have in the past charged the dominant CiU party with monopolising Catalanism. This is a dangerous charge suggesting the manipulation of national sentiment to the benefit of a political party seeking to maintain power balance evidenced. It indicates a strain in the nationalist sentiment between the political attempts at a more militant policy of cultural solidarity, against the more hybridised form

evolving in the public sphere, which Balcells (1996) considers dominant and not politically affiliated.

2.5.5 Bilingualism and the Issue of Immigration

Mass migration into Catalonia has been a concern, in a nationalist sense, as some maintain it threatens dilution of the language and identity. The government's early response to this perceived threat was inclusively radical. In 1986 an immersion programme in primary education was set up to integrate incomers and new generations into Catalan society (Jenkins & Sofos, 1996: 161). The policy's radicalism was attested to by its backlash when first incorporated. Children up to 8 were to be taught in Catalan. Where class concentration was over 70 per cent Castilian speaking, innovative techniques should be employed to teach in Catalan (Keating, 2001: 169). Whilst parents could opt out and demand individual tuition in the same classroom, this would often likely lead to the psychological segregation that most feared. For Castilian speaking Catalans the policy represented suppression. They felt marginalised by the expectation towards Catalanisation. The decision was met with derision particularly in areas like Tarragona which remained primarily Castilian (Jenkins & Sofos, 1996: 161). David Corkill (Jenkins & Sofos, 1996) says the policy was perceived as a form of dictate akin to Franco's regime, "but in reverse" (ABC, 1993 cited in Jenkins & Sofos, 1996: 161). However, Keating (2001: 170) holds that the policy proved successful in increasing the ability, particularly amongst the younger generation to read and write in Catalan. Ultimately the policy was changed but the case highlights how bilingualism might be interpreted politically as counter-productive to cultural identity.

Despite the fear of linguistic dilution, the social integration of immigrants is crucial to Conversi's (1997) understanding of the Catalan model for nationalism which he describes as a series of 'progressively integrating concepts', from the civic territorial definition of nationhood, which maintains political integrity, through to having an acquirable membership through voluntary efforts, symbolised by mastering the language, achieved through immigrant inclusivity. Immigration is important because the influx of people from alternative cultures makes domestic nationals acutely aware of cultural difference habitually. Diffusion of Catalan to immigrant groups has proved relatively successful with

the percentage of immigrants able to understand Catalan going from 79.8% in 1981 to 90.3% in 1986, increasing over 10% in 5 years (Conversi, 1997: 211). Conversi (1997) offers that one hypothesis for the rapid assimilation is 'relative deprivation theory' which suggests that the autochthonous group is economically better placed, acting as a reference group for a pattern of behaviour which the immigrants aspire to emulate. Conversi (1997) explains "in sociolinguistics the phenomenon is known as linguistic prestige" (Weinreich, 1956, cited in Conversi, 1997: 212). Keating (2001) also notices this, positing that in social use Catalan fluency is more common amongst the middle classes than the working class. This has a contingent effect on immigrants; "[Catalan] is not surprisingly stronger among natives than incomers. These cleavages are mutually reinforcing since incomers tend to be working class. Yet this also provides a strong incentive to learn the language as a necessary piece of social capital for upward mobility and integration into the host society." (Keating, 2001: 171)

2.5.6 A Different Kind of Nationalism

Catalonia's cultural history is marked by hybridity (Vilarós, 1999). This characteristic is inherent through its diglossia, its contingent position within Spain and its immigrant intake and is crucial in incorporating linguistic and cultural solidarity. Culture and language must remain open and receptive to change to adapt and survive and resist the assimilative effect of global 'capitalist commodification'. Angel Pes (1998: 144) holds that Catalonia has profoundly rooted traditions with which to nourish this progressive path, providing a proper context for its development. These include, the democratic tradition of Catalanism maintained in the face of counter-democratic situations and under the pressure of powerful, alien ideologies, and its historic configuration as a land of diverse heritage, a nation pertaining a mixed biology and culture, with immigration having been a continuous trait. This democratic tradition and diverse, mixed cultural heritage are two excellent legacies with which to construct the future within a global community. Keating (2001) interprets this as a different form of nationalism he describes as 'post-sovereigntist'; using national identity as a means of enforcing social cohesion to battle global forces of homogenisation without necessarily maintaining the

familiar structure of 'statehood' which legitimated pre-industrial national positions.

2.6 Scottish Nationalism

Scotland was an independent country when it entered into a political union to create the United Kingdom of Great Britain in 1707. Whilst contemporary renderings of the history of Scottish nationalism, particularly in film, are prone to romanticised and often violent affirmations of the country's ancient demand for independent recognition, the political realities of Scottish nationalism are far less single-minded. Louis Snyder comments that "separatism still exists but it is muted […] they hold on to […] qualities of a separate nation, but they do not have the distinction of being a separate state." (Snyder, 1982: 25-26) Michael Keating evaluates that "nationalist doctrine in Scotland is overwhelmingly civic rather than ethnic" (Keating, 2001: 220), with an assumption that the population is derived from those who live within the country. Regarding the potential for territorial nationalist sentiment, Snyder commented "The Scots have decided not to activate any specific identity in a quest for self-determination […] Geographical proximity is a strong motivation: Scotland forms a continuous unity with England and Wales. No large body of water separates them." (Snyder, 1982: 26) Keating echoes this; "Scotland is one of the few nations whose geographic boundaries are subject to no serious dispute, at least on land." (Keating, 2001: 220) However, the geographical situation may be a crucial factor for the internal culture of Scotland, separating its northern and southern business sectors to a small extent, consolidating its largest industry centres in the lowlands territory between Glasgow and Edinburgh, and distancing the alternative language culture of Gaelic from an urban centre thereby limiting its circulation, although there are many other factors.

2.6.1 Practical Nationalism

An anti-English strain is often emphasised within the nationalist discourse of the nation. This could be interpreted as one catalyst for Scottish identity, acting as a dialectic reaction to an encroaching alien identity, but the sentiment is typically directed towards state structures and there is really no violent tradition attached to the doctrine compared to the situation of similar locations like Northern

Ireland (Keating, 2001: 220). The distinct characteristics of contemporary Scottish nationalism are more difficult to trace as they are not overwhelmingly shaped by a unique language or historical differentiation. Keating describes it as a "less romantic form […] based on practical arguments about institutions, accountability and policy" (2001: 222) whilst Snyder (1982) downplays the conflict with England claiming "rivalry between the two peoples is based more on politico-economic than cultural factors." (Snyder, 1982: 30) Grounds for separatist sensibilities are most obvious from an economic context. These tensions seem to rise from the latter half of the twentieth century with the beginnings of change to the political composition of Europe and decline of the British economy. Snyder (1982) claims this sentiment was augmented "in 1973 with the discovery of North Sea oil, which Scottish nationalists claimed as the exclusive property of a future independent Scotland." (Snyder, 1982: 26) "England tends to be economically un-balanced, and a potentially rich Scotland must share her troubles." (Snyder, 1982: 31) During this period the Scottish National Party began using the slogan "It's Scotland's oil" to stir this sentiment (Nairn, 2003: xix). The McCrone report produced in 1975 but not publicly released until 2005 lends weight to this argument, suggesting that majority control over UK North Sea oil revenue presented the first credible argument for Scotland being advantaged by independence (McCrone, 1975). Tom Nairn notes that many interpretations of nationalism in this era suggest its formulation to be "a response to economic exploitation" and sense of "being unfairly tied down by 'backward' metropolitan centres." (Nairn, 2003: xviii) However, Snyder maintains that despite this grievance the Scots reaction was relatively mild and acknowledged England's own economic turmoil (Snyder, 1982: 26).

Snyder, writing in 1982, claimed that most Scotsmen felt relatively little cultural deprivation and politically-charged motivation towards independence maintaining "This is true of all classes, regions, and age groups." (Snyder, 1982: 26) However, it is hard to maintain this all-encompassing assertion today, particularly in regard to class differentiation. Generally speaking, the middle and upper classes are more amenable from a societal perspective to English ideology whereas working class citizens, whilst typically being indifferent to the political circumstance of the nation, in practice will maintain a strong sense of cultural distinction from English identity, manifested ethnically as a distinction of

accent and manner (Keating, 2001). It is this form of nationalist ideology which underpins one aspect of the character of cultural production designed with Scottish identity in mind. Keating (2001) qualifies this by explaining "there is much evidence that national conflict in Scotland is closely tied to perceptions of class struggle and opposition to the [then] Conservative government with its English base. Scottish identity is closely correlated with social class, with the upper classes least likely to identify themselves as Scottish (Brown et al., 1999 cited from Keating, 2001: 211) [reflecting] the greater sympathy of the upper social classes for the values associated with English conservatism."

Regarding demand for independence Snyder (1982) observed that past indecisive referendums have not demonstrated overwhelming support for nationalism, suggesting it to be little more than a symptom of frustration rather than subjugation. There is also a psychological element to the rejection as a sense has been embedded into the culture that the link with England and the union is too strong to dissolve. However, more recently Keating (2001) has demonstrated this sentiment to be shifting somewhat "The survey data on identity are rather patchy and there is some inconsistency in the findings but polls since the mid-1980s show Scots overwhelmingly choosing a Scottish or dual Scottish/British identity, with most giving priority to the Scottish one. National identity in Scotland is nothing new but its political significance may have changed. The percentage considering that there was a conflict between the nations increased from 58 % in 1979 to 81 % in 1992." (Brand et al. 1993, cited in Keating, 2001: 211) However, Keating does not feel this is indicative of a rise in ethnic nationalism as only 9% in 1992 considered the conflict serious, compared with other higher concern conflicts like that between classes. More recent surveys in 1999 and 2003 have also interpreted the ethnic context of Scottish nationalism in terms of its anti-English strain. Whilst these surveys indicate the existence of ethnic nationalist concerns their results remain inconclusive in terms of majority representation, and in terms of the sample group questioned which was largely of English origin. Respondents were questioned about how much of a problem with this form of racism exists and results demonstrate that the problem does exist, with 49% of the non-Scottish minority sample agreeing in 1999 and one quarter of respondents saying they

had felt discriminated against by Scots according to the 2003 Glasgow University survey (BBC 1999, Finn 1999, Macleod 2003).

It is also important to acknowledge this separation between classes because these forms of social division may in part dictate the content of national cultural output including publishing, affecting the marketing of particular titles and more broadly the commissioning choices. This could be particularly problematic for publishers seeking to consolidate domestic and export markets, if the material for the domestic market must be so separate to that of the foreign. However, as demand is split publishers may still be able to target export titles at one pole of the domestic market.

2.6.2 Caledonian Antisyzygy

Caledonian antisyzygy is the term used to denote a characteristic identified by writers during the earlier half of the twentieth century's enlightenment project as inherent to Scottish identity. It represents "the idea of duelling polarities in one entity" (Martin, 2009: 84). The idea was applied specifically to the literature of Scotland as a method for the analysis of conflicting forces which seemed at play within the narratives of many major Scottish authors. However, this term can also encapsulate the inherent dichotomies which can be observed across the gamut of oppositions which makes up Scottish identity, from the Highlands/lowland to the religious split of Catholic/Protestant. Snyder, for instance, identifies such a split in the ethnic origins of the people. "The Scots divided themselves into lowlanders, who traced their origin to Teutonic sources, and Highlanders, who believed themselves to be of 'pure' Celtic stock. These two traditions coalesced into a distinctive Scottish culture. […] For a time the two cultures were mutually hostile before being fused into one form." (Snyder, 1982: 30) David McCrone (2001: 138) also makes reference to a sense of separation or fragmentation common to intellectual analysis of Scotland citing Christopher Harvie's identification of social schizophrenia between 'red' Scots, who are 'outward-bound' and 'black' Scots who stay within the home culture.

The observation should not be taken as a simple generalisation to encapsulate the nature of Scottish identity and/or literature. The author Alasdair Gray has questioned whether such a feature, at least in its relation to the themes of

literature is any different to other nations; "Has any land lacked writers who do that?" (Gray, 2000) However, it is useful to this study if for no other reason than its indication of the evolution of Scottish authors' attitudes towards their own social history. It identifies with the strain of nationalist tension, both cultural and political, which underlies the distinct characteristics of Scottish identity laid out in this section.

2.6.3 Production of Culture

Despite Snyder's (1982) economic rationale, the cultural dimension of Scottish nationalism is important. It is the domain within which the cultural industries of the nation exist, but also in many ways against which they fight, particularly to find a foothold as respected international producers of texts, overcoming the parochial entrapments of tartanry which have dominated one side of the Scottish cultural industries as a whole. Part of the problem is to do with perspective. Keating explains "Parochialism has indeed been a problem for Scottish cultural production; but the mark of much of the contemporary cultural revival is its ability to be both Scottish and universal and the willingness to see Scottish culture as part of a broader European picture, rather than as a provincial branch of British production.' (Keating, 2001: 230).

 In his investigation Snyder (1982: 31) found that the UK media tended to portray Scottish culture as more national (an exclusive sense of independence from other nations within the UK) than regional (an inclusive representation of the country as a continuous and extended part of the UK), maintaining the culture as one contingent aspect of a wider UK culture. Keating (2001) expands this to show that whilst commercial media output is prolific with "Scottish Television [producing] some 1300 hours of Scottish content per year", because of the small population with which to build an audience, producers rely on exporting programmes to the English market (Linklater, 1992 cited in Keating, 2001: 234). Consequently he sees it as "caught between the demands of its Scottish audience and the constraints of the UK framework." (Keating 2001: 234).

It seems that other contemporary Scottish cultural production has diversified, with a number of artists and producers emerging to challenge the parochial and

the UK mass-market by addressing the social realities of 'Scottishness' free from the context of its relation to anything but itself. This has been particularly obvious in literature and music, typified by the writings of novelist James Kelman and the social messages of bands like Runrig and The Proclaimers (Keating 2001: 232). Keating (2001) comments "Not all the new writing is explicitly nationalist, but it is specifically Scottish, addressing contemporary issues and presenting Scots with images of their own society to think about." (Keating, 2001: 232) It could be argued that it is within cultural formats that the alleged split personality of Scottish identity manifests itself most prominently between British parochial palatability and swaggering, uncouth anti-establishmentarianism. This indicates how crucial an understanding of cultural production, particularly within the literary field, is to the project of disentangling the complex identity of this small nation. As Keating (2001) observes, as with any other nation, there is no single homogenous Scottish national culture.

However, there is also another element to Scottish cultural production worthy of consideration; products that originate in the land and in the minds of Scottish artists but are consumed textually, usually at an international level, as British iconography. In the case of literary characters like Sherlock Holmes and James Bond, global recognition of these 'texts' makes them representatives of Scotland's impressive capacity for producing culture. However, these emblems wear their national identity less brazenly. Consequently the greatest standard bearers of this capacity generally become absorbed as part of 'the union' with little social recognition paid to nationalist sensibilities. An important evaluation to make of small-nationalisms which are represented as contingents of a wider culture is how they are able to derive socially beneficial recognition from less-explicitly national cultural products. To what extent can these products be considered a part of the culture if their heritage remains unacknowledged?

2.6.4 Europe

Keating construes contemporary Scottish identity as having developed a greater sense of confidence, overcoming the inferiority complex which seemed and has been argued to have influenced the Scottish cultural configuration in the past, and he claims this has made it easier to conceive Scotland as part of the wider European community. "Culture is no longer a retreat from social and political

reality but a way of viewing and discussing it. This reality is of a pluralistic and modern society whose place within the United Kingdom and Europe is problematic and which contains within itself acute social and economic problems." (Keating, 2001: 233)

Politically, Keating implies European integration is less of an issue in Scotland than England, and generally there is little popular interest. However, "the 1992 election survey showed Scots somewhat more favourable to European integration." (Keating, 2001: 228). This stance is still relevant today corroborated by survey research carried out by Survation (2012) on behalf of SkyNews.

Contemporary debate seems to place emphasis on the potential for Scotland's role as a national actor within the wider European network along the lines of Loughlin and Keating's (2003) culturally diverse integration. However, presently Keating (2001) claims "most of the initiatives to promote Scottish interests abroad have focused on economic development, including inward investment, exports and tourism." (2001: 249) The quasi-autonomous management of these initiatives represented a slight move away from centralised control in regards to foreign affairs, though Keating explains this "was tightly constrained" (Keating, 2001: 249- 250). He also acknowledges that "Scotland's international presence has paled beside that of Catalonia [stemming] largely from an institutional deficiency, the lack before 1999 of an elected tier of government to define a Scottish interest [and] coordinate the efforts within civil society to project Scotland abroad." (Keating, 2001: 253)

2.6.5 A way of pronouncing English

A final problem for Scottish nationalism is the lack of a distinct linguistic basis. Snyder comments "unlike the characteristics of mini-nationalisms elsewhere, language is not a compelling factor for Scottish separation." (Snyder, 1982: 29) However, Scotland is in fact home to Gaelic and Scots. Both are officially recognised languages but they remain marginalised. Gaelic is figuratively and literally a minority language. The UK census in 2001 confirmed the language to be in decline, spoken by fewer than 60,000, 1.2% of the population, having dropped by 11% over the previous 10 years (BBC News, 2003) Gaelic is largely

geographically restricted to the western highlands. There is no forceful revival movement with which to mobilise the language though some "Gaelic-language organisations in Scotland promote the use of Gaelic even though it has been supplanted by English" (Snyder, 1982: 29), and in 2008 the BBC launched the completely Gaelic television channel BBC Alba with online resources in Gaelic, albeit with questionable success (Meiklem, 2008).

Scots (including Lallans and Doric), derived from the same Anglic root as modern English. Consequently it has often been treated little more than a derivation of English or, with ever decreasing use of Scots vocabulary, as "a way of pronouncing English that easily identifies most Scots within the British Isles." (Keating 2001: 201) In literature "there have been sporadic attempts to revive the earlier forms as a means of stimulating Scottish nationalism, but they have not made much progress." (Snyder, 1982: 29) According to Keating (2001) "a generation of writers in the 1920s and 1930s, writing in English and Scots, addressed contemporary social issue, though the attempt by some of them to devise a standardised Scots […] was a failure." (2001: 232) However, Scots has received renewed political support since the election of the Scottish National Party to government. A 2010 report produced by the social research branch of the government concluded that most Scottish adults use Scots in everyday communication on a regular basis but its usage in reading and in writing is limited. Whether speakers or not, Scots was considered by those interviewed to play an important role in the cultural identity and history of Scotland. However, whilst concluding that on balance views were more positive than negative, the report also acknowledged that a substantial proportion of those surveyed were simply not engaged with the Scots language (Scottish Government, 2010). Nevertheless, the emerging status of Scots bodes well for future publishing opportunities in line with the idea of small nations' capacity for cultural commodification perceived by Vilarós (1999). However, in order to develop a wide-enough domestic market for Scots-language products, reading and writing must be brought up to the standard of everyday communication so standardised teaching materials will be necessary

2.7 Catalan Publishing

2.7.1 Catalonia's Publishing Sector

In a nation like Catalonia, where a minority national language is hosted alongside a more widely spoken state language of international scope, the publishing industry benefits from an expanded market. The act of publishing also becomes a crucial facilitator of cultural representation which can be used to reinforce national identity. Balcells, writing in 1996, provided a historical background of the progress made by the Catalan publishing industry since the passing of the statute of autonomy. He acknowledged that publishing had supported the process of reinforcing national identity, but was not widespread enough, though the number of books published was rising steadily in number of titles and copies of each title available; "The 4,145 books published in Catalan in 1987 brought the number of new titles per year in Catalan to four and a half times what it had been ten years earlier." (Balcells, 1996: 190) A report by Alain Couartou (1998) bolstered this account, indicating that between 1982 and 1996 production of books in Catalan rose by approximately 300% from around 2,000 a year to 6,000.

However, the industry must accommodate the demands of both the Castilian and Catalan linguistic cultures. The issue of dual representation was brought to the fore during the 2007 Frankfurt book fair, where Catalonia was featured as honoured guest; the first time a national culture which forms part of a wider nation had been selected. Nationalists felt that only works published in Catalan should be featured, marginalising the large proportion of Catalan writers and publishers producing material in Castilian for the global Hispanic market (Knapp, 2007). Despite this, the consensus is that Catalan language plays a vital role in supporting Catalan identity.

A recent report discussed the state of Catalan publishing in depth. The authors, Scott Van Jacob and Robin Vose (2010), reflected on the state of the sector in 2007. The study provides a breakdown of the industry's various configurations and available markets but is focused upon those Catalan publishers working specifically to produce 'Catalan' literature whilst offering analysis of this as a comparative to the production of Castilian texts. Its authors contend that Spain

is a leading country for publishing, aided by a ready Hispano-American market of around 550 million (Van Jacob and Vose, 2010: 131).

2.7.2 Composition, Production and Profitability

According to the Catalan Institute for Cultural Industries (ICIC, 2007), in 2005 Catalan publishing companies accounted for 53.5% of total Spanish domestic publishing turnover and 49.9% of foreign turnover. They recorded 1,569.31 million Euros in turnover from the Spanish domestic market for private Catalan publishers and another 167.54 million from export sales. Catalan language products generated 235.62 million Euros, 15% of the total turnover. By 2008 the distribution declined a little to 51% of the total Spanish domestic book trade but achieved a greater total domestic turnover of 1,623.84 million Euros to which Catalan language publications contributed 255.56 million up proportionally from 2005 by 0.8% (ICIC, 2010).

The ICIC (2010) acknowledged 306 extant Catalan publishing houses in 2008. Barcelona is one of the two leading Spanish publishing cities and according to Van Jacob and Vose's report (2010) it can be difficult not to confound the entire Catalan sector with the city itself which comprises at least 278 companies. The ICIC (2007) indicates that most of the sector's focus is directed towards optimisation of supply and demand, linguistic support and establishing foreign markets whilst maintaining the domestic market as far as possible.

Catalonia is home to a wide variety of publishing houses which include Planeta, one of the ten largest publishing groups in the world and the largest international publisher in Spanish language titles (ICIC, 2007). There is a large multinational presence within the Catalan industry and this has a positive effect on the nation's activity in international markets. The ICIC (2007) suggests it also helps strengthen Catalan language publishing as simultaneous production of Catalan and Castilian versions of a title can prove strategically beneficial, facilitating the negotiation of publishing rights.

According to the 2007 report (Van Jacob and Vose, 2010) the Catalan language publishing sector is led by Grup 62, which consists of nineteen publishing entities. A 5% increase in the number of Catalan titles had occurred since 2002 compared to an 18% increase in Castilian. Including back lists the total number

of available Catalan titles was 54,840 up from 42,287 in 2003. In 2007 296 publishers produced 31,097 titles. Approximately a quarter or 27.5% of titles, 8,544, were in Catalan. However, the average number of copies produced per Catalan title was 3,113, making up only 14.8% of the total copies produced. Van Jacob and Vose (2010: 132) suggest this might be due to government subsidies which incentivise a greater profit margin for publishing specifically Catalan titles, whilst the smaller market for these texts reflects the total output.

According to an updated spread sheet from the ICIC (2009), exports of books in 2009 dropped globally from their levels in 2008. The total average drop was 20.63% from 108.99 million exports to 86.51 million. Of most concern may be the drop of 28.72%, from 49.14 million to 35.03 million, to Hispano-America. In line with this, imports overall were up 18.96% from 5.98 million to 7.12 million across the world with the exception of non-EU Europe, which had dropped 32.41% over the year. 86.3% of these imports came from the European Union but the largest proportional increase of 328.72% came from the U.S.A/Puerto Rico bracket, rising from 40,983.82 imports in 2008 to 175,706.58 in 2009.

2.7.3 Government Support

The government itself is a major publishing unit within Catalonia and this insight offers interesting comparatives. No data for the number of titles produced by the Generalitat is available since 2004 when Van Jacob and Vose (2010) report that 4,494 items were listed, mostly in Catalan. The purpose of its function as publisher is to produce works for limited markets which would prove unprofitable for commercial producers, including maps, reports and technical documents but also specifically cultural materials and collaborations with commercial publishers "that increase knowledge of Cataluña." (Van Jacob and Vose, 2010: 133). It also functions as a distributor, running its own store on the Rambla in Barcelona. The government also helps the sector by providing subsidies to publish in Catalan and regulating the industry (ICIC, 2003 cited in Van Jacob and Vose, 2010: 136). According to the ICIC's Book and Press Policy newsletter "subsidy amounts available in 2005 had been increased by 25% over the 2004 allocation and 3,600,000 Euros was allocated overall in 2006 to subsidise book production." (ICIC 2006 cited in Van Jacob and Vose, 2010: 136). The Generalitat also at one time functioned as a major support supplier

for libraries, purchasing Catalan language works to be shared throughout the nation. Government support is also passed on through cultural institutions like the Ramon Llull Institute which "gives grants to promote Catalan literary works." (Van Jacob and Vose, 2010: 136) Private institutions are also crucial and recognised by the government for their role in undertaking and promoting research which relates to Catalan culture. For commercial publishers it is difficult to publish technical and scientific works in Catalan as the limited market makes the practice less economically viable than producing the material in Castilian. Van Jacob and Vose, 2010: 133) examination of the 'Marcombo' company revealed that it must "sell about 3,000 copies of a translated work to be profitable." However, the government provides the company with subsidies of between 15% and 20% for each each Catalan title which helps profitability.

2.7.4 Catalan Language Educational Materials

Of the books produced in Catalan in 2005, 44.6% were non-university text books and 17.6% were children's literature (ICIC, 2007). This is indicative of an emphasis on supplementing younger generations, underpinned by an educational policy designed to promote Catalan linguistic instruction. However, Michael Keating (2001) comments that a significant problem beyond primary education and particularly at university level is the absence of translated texts. Though some commercial publishers are dealing with the production in Catalan of technical documents and some sociological works, University texts remain predominantly published in Castilian. This is due to the lack of a significantly large enough reading market to make the mass production of academic texts economically viable in the Catalan language, as opposed to Castilian production which benefits from having a viable export trade market as a major world language. In one sense this is an inevitable failing of Catalan language publishing within the Catalan national project. The project's ideological orientation demands it actively pursue a policy of linguistic distinction whilst also insisting upon a forward-thinking, Europe-orientated form of commercial realism which reveals the language policy to be unviable unless flexible. As Keating (2001: 170) puts it "to be economically viable, scientific texts need to have access to the Spanish-American market." Scientific and technical titles and other titles not immediately relevant to Catalan culture are rarely published in

Catalan since the market for Castilian is wider and most Catalans are capable of reading Castilian.

2.7.5 Translated Materials

Translation is important to the industry with 854 titles translated from Catalan to Castilian in 2007 forming the majority of Catalan translations, with works into English following at 456 titles (Van Jacob and Vose, 2010: 133). Other world languages are significantly less represented. However, translations of international bestsellers into Catalan are also an important part of core trade for Catalan publishers, representing a safer profit strategy. Van Jacob and Vose (2010: 134) cite the publication of the Harry Potter series as an example of this; it was not only a financial success but also augmented interest in local children's literature. Eight such books on the list of Catalan fiction translations in recent years were English language novels with mass market appeal, including *The Da Vinci Code* and George Orwell's classic *1984*. (Van Jacob and Vose, 2010: 140).

2.7.6 Children's Materials

Van Jacob and Vose (2010: 134) also indicate the future of the children's book market is relatively stable with production of books in Catalan for children common. The 'Dia de Sant Jordi' (Saint George's Day) festival is a major opportunity to promote this sector as book market stalls are set up across Catalonia and children are encouraged by parents and schools, particularly in rural areas, to go and pick out new books for themselves. The festival environment is a positive reinforcement which makes the products more appealing for the children to receive as gifts. Libraries in Catalonia reinforce the market for children's literature by maintaining large, separate collections for children up to the age of fourteen which are frequently the best stocked and attended sections (Ventura 1993). In terms of their reading habits, Van Jacob and Vose (2010: 139) cite the 2007 survey 'Reading habits and book purchases in Catalonia' which showed that out of those polled who last bought books in Catalan, 30.3% were in the 14-24 age bracket, suggesting that the younger generation of adolescent readers are contributing to the reader market, which is a hopeful sign for the future.

2.7.7 Breakdown of the Reader's Market

This survey also established a general breakdown of reader habits and composition. The most important observation is that "overall, 93.9% of the respondents can read Catalan." (Gremi d'Editors, 2001 cited in Van Jacob and Vose, 2010: 139), which indicates the majority of citizens are passably literate in Catalan. The population of Catalan speakers is approximately 9 million so the authors conclude this equates to "a market of several million readers for books in Catalan." (Van Jacob and Vose, 2010: 139). The survey also provided a reflection of buyer impulses in Catalonia. 72% of respondents purchasing books in 2006 did so for entertainment purposes followed by 10.7% purchasing as gifts, 4.7% for reference and 2% for work purposes, which supports another useful point derived from the poll; that in the case of both Castilian and Catalan titles, fiction works are the most popular, bolstered by the translations of bestsellers mentioned earlier. It is also interesting to note that according to Van Jacob and Vose (2010: 140) in regard to non-fiction bestseller lists "it is not unusual to find works relating to Catalan identity". In 2007 a book about the future of Catalan culture was placed at number two on *La Vanguardia's* list and remained for six weeks, indicating a strong strain of local interest in nationalist culture.

In terms of bookstore sales, Van Jacob and Vose (2010: 135) suggest "about 60% of all titles sold are Castilian titles with Catalan titles selling about […] 30% of all titles", which they highlight as positive considering the restrictive breadth of subjects publishable in Catalan. Book prices are fixed by law in Catalonia, meaning all stores can only discount their stock by 5%, so the only advantage available to larger chains is a wider variety of stock (Van Jacob and Vose 2010: 136).

2.7.8 Digital Initiatives

An important area of study for this paper will be the use of internet and online reading as it relates to the publishing sectors of small nations. In the case of Catalonia, Van Jacob and Vose (2010) claim that internet sales saw little increase compared to other outlets between 2001 and 2006, even though most bookstore chains sell works via their online websites. However, they also comment that the number of independent bookstores has decreased by 37%

over the last 25 years, and part of this change may be attributed to fewer readers but also alternative entertainment choices for Catalans and particularly increased internet and personal computer usage. This suggests that whilst online retail is not a popular medium for consumer purchases the interest in online activity is booming. Whilst there are no direct figures for usage "Wikipedia [reports] that Catalan is the 27th most used language in the internet as of 2004" (Global internet usage cited in Van Jacob and Vose, 2010: 140) and with over 200,000 articles Catalonia's version of Wikipedia is the largest minor national language site. According to Eugenia Serra's (2007) LIBER-EBLIDA workshop presentation there are at least four separate projects offering digital promotion and access to print materials within the Biblioteca de Catalunya (Catalan Library). The library's program budget has increased dramatically in recent years, going from 30,000 Euros in 2005 to 630,000 in 2007 and it was also one of the first libraries to join the Google book scanning project (Serra 2007). Digitisation projects are supported by a range of institutions including the Generalitat which backs a site offering "free access to journal content published by scholarly or cultural Catalan institutions." (Van Jacob and Vose, 2010: 140) A report by the Generalitat (2008) on digitisation produced for the Catalan cultural sector indicated that publishers will benefit most from new production methods and business models. The report examples Josep Prous, a publishing house which specialised in medical texts as a model of success. It changed its name to Prous Science and began offering online resources and its turnover went from 300,000 Euros a year to 18 million a year. It has now been acquired by Thomsen Reuters. Retrospective digitisation of texts already in print was also highlighted in the report as being of paramount importance. This procedure has particular resonance in Catalonia as many Catalan works were nearly lost during Franco's reign and digitisation facilitates their conservation.

2.7.9 The Danger of Hyperactivity

Despite much positive activity Van Jacob and Vose (2010) make the point that a degree of "hyperactivity" is evident within the Catalan book publishing sector, which threatens to negate the positive initiatives undertaken to promote published works within the nation in a variety of ways. An example is the issue of overproduction of titles and the large number of awards which are made

available to writers. The authors explain that numerous Catalan publishers and the Generalitat feel that overproduction is a serious problem as new titles are published too quickly ousting previous works before they can establish a continuous audience. It is most evident in regard to Catalan language titles for which the market and number of buyers are smaller while spending power is limited. Van Jacob and Vose (2010) feel that partial culpability should be ascribed to subsidisation as this has encouraged more works of limited readership to be produced at a faster rate without consideration for the market. In regard to prizes the authors explain that, whilst the publishers who organise these generate support for national creativity and also valuable publicity for their own lists, there are a "large number of awards, almost one for every day of the year" (Van Jacob and Vose, 2010: 138) and the value of these prizes in drumming up publicity and interest is typically negated by their sheer quantity.

2.8 Scottish Publishing

2.8.1 Scotland's Publishing Sector

Despite its status as small-nation, Scotland has a long history of involvement with publishing. However, the twentieth century history of Scottish publishing has been turbulent and in recent years is once again in the throes of major change as the consolidation of digital publishing makes itself felt within the industry (Scottish Arts Council, 2004). Ian McGowan (1997: 214) identified a period of decline in the industry from the mid-twentieth century as many of the founding organisations of the sector increasingly became taken over by multinational corporations. However, resurgence in Scottish cultural innovation and production occurred around the 1970s. New publishing houses like Mainstream and Canongate emerged; publishing works with a Scottish character for an international market (McGowan, 1997: 215). By the 1990s these publishers were encountering business growth problems and sought expansion through mergers and offices in London. When success has been forthcoming, as with Polygon's award in 1993 and James Kelman's booker prize in 1994, it reasserted the cycle of marginalisation, prompting notable Scottish authors to transfer to publishing houses in England (McCowan, 1997, McCleery 2009). In the recent Literature Working Group Policy document (2010) this position was described as a 'chicken-and-egg situation'. This portrait of Scottish

publishing depicts an abundance of potential with little opportunity for capitalisation leading McGowan to label the revival 'fragile' (McGowan, 1997: 216). This status was reaffirmed in a 2007 review of publishing in Scotland which concluded "publishing companies remain fragile, vulnerable to external takeover when flourishing and to disappearance when unsuccessful." (McCleery, Sinclair & Gunn, 2008: 97).

2.8.2 UK vs. Scottish Publishing

Defining what constitutes Scottish publishing can be an equally complex issue. Scotland's connection with the English sector makes it difficult to differentiate for Scottish book production which may or may not be connected to a London base or a multi-national corporation. These corporations may represent wider media market interests so it becomes a case of distinguishing between certain products that may inter-relate. One solution is to focus on distinctions in the output which is targeted at the Scottish market, and output produced in Scotland for exterior markets (McCleery, 2009). What distinguishes these is intent, the former concerned with reflecting "cultural nationalism and its literary historiographical expression" (McCleery, 2009: pp.7) and the latter producing materials often dependent on markets outside Scotland. The connection to UK trade has meant that Scottish publishing houses experiencing relative success tend to, in part or wholly, migrate southwards to benefit from the wider network of industry contacts and marketing base (McGowan, 1997: 214). The cultural element of publishing is crucial to a country like Scotland in championing marginalised elements, which could not otherwise be published. On its website the trade body Publishing Scotland acknowledges that "the wide range of non-fiction published in Scotland fosters and promotes notions of Scottish cultural identity." (Publishing Scotland, 2010) However, competition from the much larger English, London-based publishing sector is very difficult to overcome with limited resources, particularly as a number of multi-national super-corporations with international distribution networks hold sway over key markets. This situation seems to threaten the cultural advancement of the nation by assimilating its greatest expressions of independent identity, publisher's and the local literary talent they take with them, into a wider Union. This is an obstacle for small-medium sized publishers which make up the core contingent of the

Scottish industry, so the domestic market has to be the main focus for small indigenous publishers. Out of the roughly ninety publishers that exist in Scotland, sixty-eight of which are members of the trade association, "50 have fewer than 100 titles in print." (McCleery, Sinclair & Gunn, 2008: 88). According to the 2007 review, 77% of publishers derived more than half their turnover from domestic sales whilst 53% acknowledged over 75% of their sales were domestic (McCleery, Sinclair & Gunn, 2008: 90).

2.8.3 Composition of the Industry

According to the 2007 review "the number of active publishers in Scotland, defined through membership of the SPA [now Publishing Scotland], has remained fairly static over the past 20 years." (McCleery, Sinclair & Gunn, 2008: 97) These range from large conglomerates to sole traders, employing a total of around 1,500 people, excluding freelance workers (Publishing Scotland 2010). The Scottish industry is represented by a wide range of publishing interests, from a few large, domestic to international publishers like Canongate, Birlinn and Mainstream through to a much larger base of small to medium sized publishers producing limited circulation materials. The main focus of these smaller publishers is not necessarily profitability. Whilst they are typically the most eager to celebrate cultural identity through their productions, their "increasing marginality often reduces their engagement with the population at large." (Prescott 2005: 88).

Publishing Scotland's website states "in a typical year, Scotland's publishers produce 3,000 titles, fiction accounting for around 30% of this, account for a sales turnover of approximately £195m at invoice value, pay royalties to over 14,000 writers, and place emphasis on pioneering the launch of new literary talents across the gamut of publishing." (Publishing Scotland, 2010) However, for the few large publishers, the Scottish market is not necessarily their main source of turnover and they do not always make it their primary target. According to the review published in 2004 "The five largest publishers average between them 10% of their total sales in the Scottish market," whilst for smaller publishers "Scotland can account for between 70-99% of their total sales." (Scottish Arts Council, 2004: 10). Interestingly in terms of the diversity of book production in Scotland, fiction holds less sway over the market than in the

rest of the UK and often non-fiction and cultural materials may sell in greater numbers (Scottish Arts Council, 2004), suggesting the local market maintains a heightened interest in local culture. Part of the reason that these genres are more successful may be that they are better suited to the production methods of small publishers, who are also more capable of targeting specified markets. However, this can also have a negative effect, leading to a situation where much of these publishers' production will appear to cater for local or national tastes and maintains the status quo of attaching small publishers to small markets which will not facilitate growth outside Scotland.

2.8.4 Support Structures

The Scottish publishing industry is mediated by help from a number of national and independent institutions. The Scottish Publishers Association, which changed its name to Publishing Scotland in 2007, carries out the task of nurturing any publishing enterprise in Scotland. It provides support to the industry in a comparable fashion to the support offered in other small nations, particularly in encouraging the emergence of diverse new, small ventures (Scottish Arts Council, 2004: 4). It also provides collective services including marketing and promotion. It helps represent members at book fairs in a national context to crystallise the identification of Scottish publishing and works in collaboration with a variety of other book-orientated Scottish institutions including the Scottish Book Trust, Edinburgh Book Festival and UNESCO City of literature Trust to encourage the positive development of the sector. However, the organisation is reliant upon funding from the Scottish Arts Council as fees from members are not enough to cover the cost of its functions (McCleery, Sinclair & Gunn, 2008: 95).

The Scottish Arts Council can also decide to provide grants directly to Scottish publishers, usually to offset the production cost of specific titles based on cultural or literary merit set against their estimated financial return. In 2007 the council also began providing funding based upon publishers' submissions of their future publishing programmes for a specified number of years to promote the development of forward planning and stable business. However, the 2007 review suggests that this consolidation means funding is available to fewer publishers and smaller publishers with poor resources struggle even more to

compete (McCleery, Sinclair & Gunn, 2008: 96). More recently some complaint has been made over the application procedure and composition of applications which need to be 'drastically simplified' (Literature Working Group, 2010: 21). It was also suggested in this report that the range of publishing which receives support should be extended and investment models should be emphasised. This has the dual benefit of providing investors a stake in success (though no expectations for failure) which can feed back into further investment, and will also discourage publishers from overestimating claims.   National lottery funding has also proved helpful in supporting the sector by aiding the cause of projects designed to reinforce Scottish identity. Unfortunately in the 2007 review the greatest danger to the sector seemed to be that more general contemporary culture industry initiatives paid greater attention to alternative forms of media and, whilst conceding the importance of disseminating Scottish writing, were not putting forward practical policies to support this belief (McCleery, Sinclair & Gunn, 2008: 96). The 2010 literature working group proposed that a more business-focused model like that suggested through investment may encourage initiatives like Scottish Enterprise to be more considerate of publishing (Literature Working Group, 2010: 22).

2.8.5 Minority Languages

It is a crucial point of departure from other comparable small nations that the dominant language of production for Scottish titles places them in direct competition with the wider market for Anglophone materials. The market for Gaelic and Scots materials exists but remains limited. The domicile of Scottish Gaelic is the Gaelic Book Council centred in Glasgow which helps to mediate the small literary output of a select group of highlands based authors and academics who work within the language, as well as the review journals and magazines published in support of the canon. Historically the printed output of Gaelic has been relatively meagre although its literary content, typically of homeland and the disintegration of community, is fundamental in questioning national and cultural identity. The first book of original Gaelic verse in printed vernacular emerged in the mid-eighteenth century (Cheape, 2004: 18). Writing on the subject in 1997, Ian McGowan discussed the problem of Gaelic publishing as an extreme of the Scottish situation. The very limited available

readership of (at the time) approximately 80,000 bilingual speakers in a remote area makes it difficult and uneconomical, given that English language materials would serve any necessary literary demands. This is a similar situation to that of many minority European languages in decline, and whilst funding and subsidies are made available it remains an uphill struggle to keep the language, and thereby culture, in print (McGowan, 1997:215).   A resurgence of interest in Scots in the wake of the Scottish National Party's election has encouraged more production of Scots language texts though in a somewhat unfocused manner. The exception to this is the publisher Itchy Coo which publishes bestselling children's fiction in Scots and has worked in recent years with pupils, staff, libraries, local authorities and national organisations to promote greater acceptance of Scots within education and all manner of cultural life. Typically Gaelic and Scots publications, like the wide range of Scottish non-fiction publications produced by small publishers, are produced to foster and promote notions of Scottish cultural identity and champion the cause of Scottish culture. However, these titles still have very limited distribution and publishers must constantly search out ways of subsidising these publications which are unlikely to be produced elsewhere.

2.8.6 Digital Initiatives

Digital initiatives have been undertaken in a variety of ways within Scotland. Publishing Scotland has focused on development in the field of digitisation. The site booksfromscotland.com has been developed in an attempt to incorporate the online platform as a means of promotional reaffirmation both nationally and internationally. The focus at the 2010 Publishing Scotland conference was about social networking and digital publishing as progressive strategies for the future. The event was indicative of the continued interest and importance of developing models for the integration of digital programmes into existing publishers' practices, rather than threatening them as a replacement. The interest in this strategy was clearly attested to by the turnout to each of the showcase events. The Literature Working group report (2010) also identified particular deficiencies in backlist digitisation and digital rights knowledge. It recommended assistance in devising a programme of digitisation for publishers, possibly from the National Library of Scotland which is already undertaking a

digitisation project, and also the provision of expert legal advice to assist in redrawing authors' contracts to accommodate digital publication. Canongate has led the field in digital books production, with plans to digitise its full back catalogue to provide 450 titles as ebooks (McCracken, 2009). They have also experimented with the digital medium, providing a variety of additional content online for their publication of *The Death of Bunny Munro.* Managing Director Jamie Byng commented "We are using the medium, not just replicating content. That's where the real opportunities lie." (McCracken, 2009). However, whilst incorporating digitisation more symbiotically into the existing processes of the sector must be attempted the digital format is more amenable to some forms of publishing than others and the threat of the platform is also being felt within the Scottish industry. In 2007 "the effect of the Amazon marketplace [could] be seen" (McCleery, Sinclair & Gunn, 2008: 89) as a contingent factor in the increasing decline of turnover between 2002 and 2007. One of Scotland's historic publishers, Chambers Harrap, has been for the best part of a century a market leader in the field of dictionary and reference works. However, free online lexicographical sites have encouraged a declining market for dictionaries and at the end of 2009 the publisher's Edinburgh office was closed (Neilan, 2009b). This kind of closure of reputed Scottish publishing institutions is damaging to the whole sector, having a massive economic effect, causing the loss of numerous jobs and also enforcing the cultural loss of one of Scotland's most historic industries. It is "a further warning of the devastating impact and speed of economic change." (Literature Working Group, 2010: 21)

2.8.7 Competitiveness vs. Collaboration

The danger for the Scottish sector is that whilst it remains largely innovative and with a positive mind-set towards change, its potential is precarious. With focused funding and a pool of business-minded professionals as custodians it shows a remarkable capacity for overcoming the dual onslaught of the larger, global Anglophone market directed by London and New York, and its own parochial past translated today as souvenir books. However, the current recession places the industry under strain not only because of decreased demand but also changes in the retail sector away from traditional routes, towards supermarkets and online sales which ask for greater discounts. This

change threatens national diversity as stock purchase becomes increasingly centralised and homogenous (Literature Working Group, 2010: 20). Under this pressure the Scottish sector can seem to react in-cohesively. Most recently tensions have arisen between a few professionals within the industry and the Publishing Scotland trade body (Jones, 2010). The publishers involved have called for the closure of Publishing Scotland, interpreting it as a waste of funds which would be better served direct to the publishers. However, the other side to this argument comes from the perspective of proportional representation as the complaints were levelled at large successful publishers with turnovers capable of sustaining themselves. It is the small and often unheard groups who need support. Without delving too deeply into trade politics, this problem may not endanger the stability of book sales in Scotland. However, it is a divisive issue which sullies the image of the sector. The 2004 review suggested that companies and industry bodies must work in partnership to develop a comprehensive, 'shared vision' which strengthens the industry and reinforces its contribution to Scottish identity (Scottish Arts Council, 2004). This was echoed in 2007; "Collaboration underpins approaches to publishing in Scotland." (McCleery, Sinclair & Gunn, 2008: 97). Dan Prescott (2005) comments "what the industry represents, as much as what it does, acts on the popular imagination. The very existence of an independent industry feeds national pride, intellectual activity and is proof of a thriving community." (Prescott, 2005: 88). This is a logical assumption but in order for it to have a positive effect the industry must appear to be a cohesive unit. Whilst there is a delicate balance between cooperation and competition, consensus seems to be that the balance in small nations such as Scotland is generally better aided by concentration on collaboration to make up for the limited source of skilled business workers available to grow the industry.

Chapter 3 – Methodology

3.1 Theoretical Underpinnings and Critical Perspectives

As the nature of the research is cross-disciplinary, involving consideration, adaptation and application of ideas derived from the fields of Book History, Sociology and Cultural and Political Studies, it is important to clarify the exact nature of the critical perspectives being adopted. The perspectives have been selected as key influences on both the analytical framework for the study and the methods adapted in order to carry out the primary research and data collection.

Bourdieu's writings concerning the field of cultural production and the habitus and practice of entities within the field are fundamental to a definition of the book publishing sector in each nation. Using his terms the aim will be to establish the structure and limits of the fields which concern the production of physical texts in small nations. Bourdieu's (2004) study critiques the configuration of the literary field from the perspective of creators of content, and defines the positions of actors in the field by observing and denoting their social oppositions. This research applies this approach to the contemporary publishing sector of cultural industry.

This theoretical underpinning works together with an adapted assimilation of the method of social network theory, which seeks to understand the composition and interplay of actors within a network. This approach has been influenced by Jose de Kruif's (2005) study of relationships in the nineteenth century Dutch literary market, which demonstrated through analysis of the network that certain individual actors could be identified as key facilitators. It extends the concern of Bourdieu's fields to investigate the extent to which individual enterprises in the publishing field consciously and subconsciously interact and whether certain enterprises are vital in supporting the stability of networks which have evolved as historical publishing clusters. Through this the intention is also to observe the wider consequences of cause and effect, and ultimately how far contrasting types of enterprise can be interpreted as corresponding with, rather than opposing .

These two critical approaches provide the basis for an analytical framework which seeks to understand the total gestalt of each nation's production of texts in relation to cultural development.

The interpretation of these 'network fields' is then analysed from a critical perspective influenced primarily by two articles by theorists from the fields of political science and sociology; "*Good and bad nationalisms: a critique of dualism*" by Philip Spencer and Howard Wollman (1998) and "*Has Globalization Ended the Rise and Rise of the Nation-State?*" by Michael Mann (1997). Spencer and Wollman's article provides a vocabulary for the polarities of influence which dictate the extent to which each individual actor within the network can be interpreted as a cultural agent. This polarisation can also be understood at the greater level of the field itself to define the limits or boundaries of the field as a reflection of oppositions in nationalistic and cultural determinacy. This approach combines definitions of cultural nationalism as discussed in the literature review with the oppositions which define the limits of the field in Bourdieu's seminal article "The Field of Cultural Production" (2004). Mann's article is important because his arguments suggest a distribution of 'levels' through which these fields interact with others. In this formulation social identity is configured within these various socio-spatial networks which are stratified as different layers. This proposition allows for the idea of identity relations occurring at the level of the international, the transnational, and the national. A critical element of this thesis' interpretation is that these networks can occur concurrently so that processes of internationalisation can be seen interacting in the same field as nationalising processes. This interpretation provides a hierarchy for the levels of cultural production which also accounts for processes of identity formation that occur beneath or alternatively within the national level, called the local in the context of this thesis. This research proposes an interpretation of globalisation which acknowledges and incorporates the effect of 'glocalisation' (Oxford Reference, 2013).

It rejects the idea that globalising processes are intrinsically homogenising and lead to degrading and generalised reconstructions of cultural identity on the basis that identity configuration in these fields is complex and based on dualisms which assimilate and synthesise both homogenising and heterogeneous representations of culture. However, within this context, the

paradigm does not preclude the idea that individual producers of culture in the field, from whom qualitative analysis is drawn, do adhere to the personal belief that globalising processes are inherently homogenising.

The research paradigm of this study is qualitative and is rooted in a sociological understanding of critical theory derived from the Frankfurt school, acknowledging particular influence from the studies of cultural definition and reproduction by Walter Benjamin (1936) and Theodor Adorno (1975) in addition to Antonio Gramsci's concepts surrounding cultural hegemony, which Strinati comments "suggests that groups accept the ideas, values and leadership of the dominant group not because they are physically or mentally induced to do so, nor because they are ideologically indoctrinated, but because they have reason of their own." (1995, p.166) It critiques the articulation of conflicting ideologies of identity formation which influence the production of culture in the physical world in a dialectical fashion. The intention is to evaluate cultural identity. As there is an industrial prerogative, the analysis also aims to interpret these processes in a practical, industrial context to provide a summary of praxis in these fields and recommendations concerning the obstacles and opportunities for enterprise.

3.2 Data Collection

The key questions and issues identified in the analytical framework are then approached and analysed in greater depth through three sources of data; archival, database statistics and qualitative interview. The aim with each type of data was to collect information on the publishing sectors in both nations and provide a breakdown of overall organisation and distribution, according to the themes of interest. By using multiple models of data collection, the research provides a rounded interpretation of the issues facilitated by combining a qualitative and quantitative approach. This is useful because it is not possible to collect a complete dataset due to the unavailability and unwillingness of certain companies (particularly private organisations) to provide data which they regard as strategically important (particularly their average revenue and other financial details). The analytical framework compensates for this failing by attempting to add further detail where there are gaps in the collected statistics, and makes the ultimate aim of the quantitative data a support mechanism for an overall

qualitative study. This provides the opportunity to check the reliability of the collected data, the credibility of the sources and the validity of the developed analytical framework.

The value of archival data analysis is that it is unobtrusive in social science research and can be collected from diverse sources including financial records, government documents, mass media and press and company statements (Jick 1979, p.605). This research uses archival data from government, academic, press and industrial sources. To carry out the analysis various data is needed. These data were gathered from various sources including the individual publishers' websites, industrial and professional associations such as Publishing Scotland, the Gaelic Books Council, the ICIC, the Gremi d'Editors and Associació d'Editors en Llengua Catalana, the Catalan government website for statistics, the Scottish government website, and relevant media sources. This data collection has been used to supplement additional data gathered to a limited extent through questionnaires sent to a number of publishers by email because the sample response to the questionnaires was ultimately very small.

The data were incorporated into two databases, one for each field under examination. A coding key was developed which reinterpreted the data numerically for input into the database. Each one is divided into three pages. The first page, which did not require re-coding numerically, lists each enterprise and its geographic and web address. The second page provides demographic characteristics regarding each enterprise, including the number of employees, production output, specialisms and age. The third lists data that connects each enterprise within the network, including the target markets, import and export, distributors, sales channels and any other characteristics of collaboration. The database has then been used to draw on statistical analysis of the fields in chapter 5. It also provides all the information required to compose the network maps at the beginning of Chapter 5 to deliver a visual representation of the composition of these networks within the fields.

The other main source of data for this research is from interviews with publishing and related professionals, who were identified as representative of important facets within the overall network of the publishing fields through the database.

There are different types of interview research detailed in the relevant literature such as personal interview, mail questionnaires and telephone surveys. Personal interviews were chosen because they provide more in-depth information on the experiences and views of those working in the publishing sectors (Boyce and Neale 2006, Seale 2004). Interviews suit the aim of the research to gather qualitative data to derive a picture of the sector which has reflective depth, rather than a complete statistical and logistical reproduction.

Non-scheduled semi-structured interviews were primarily used, because some of the professionals came from differing backgrounds and the same questions across the board would have been irrelevant to some (Mason 2004, Gubrium and Holstein 2002). By allowing for flexibility in the questioning process, the interviews could be fitted to the context of each person interviewed, whilst maintaining a general structure which always related back to the core areas of enquiry. The interview material was then combined with other archival data, derived from websites and documents to create case studies focused on the key areas of enquiry identified through the analytical framework.

The mixture of methods used is reflected in the structure of the interview questions. Each interview guide featured between five and seven questions depending on the interviewee, and combined so that the overall interview process is presented as a conversational dialogue. Core objectives of the interview guides can be separated into two groups; questions focused around the objective business strategy and industrial motivations of each interviewee's own company/organisation, and questions directed at the sector as a whole taking into consideration the themes of globalisation, digitisation and another variable, often language but also geographical location and others.

The interviews contained open-ended questions, which varied to a degree depending on the profession of the interviewee and the type of organisation involved. Open ended questions have advantages, including flexibility, non-predetermined responses and greater potential for depth of response (Gubrium and Holstein 2002).

The responses were then coded into topics of enquiry and reorganised to be used as evidence for two sections of analysis which together form chapter 6. The first section is composed of comparative case studies compiled from a

combination of interview and archival data and the second section is an extended discussion of key themes derived from the analytical framework using the coded information from the interviews as supportive evidence.

3.3 Limitations

There are some problems with the gathered survey data in particular, and the archival data. The published accounts and details of industrial strategy and policy as well as other related information varies from company to company in each of these sectors and as a consequence it is difficult to get a fully compatible comparative picture of the field as a whole. Statistics are not made available consistently or regularly although a number of sources have proven particularly helpful in filling in gaps. Due to the difficulties in collecting a consistent dataset special care has to be taken in acknowledging its limitations and being aware of potential misinterpretations it might present about the wider sector's nature. Being unable to complete the datasets, estimations had to be made to fill gaps where secondary and primary sources, which would evidence the statistics, were not available. For this reason it is absolutely vital to stress that the data depicted in the databases is not totally collated from confirmed sources and in some cases had to be deduce-based or calculated assumptions of how comparable completed entries tended to be composed. Whilst this is a useful way of offering an approximate representation of each enterprise variables which do not conform to the typical trends emerge that would be encountered less frequently in a definitively sourced dataset. For this reason it is very important to stress the qualitative, not quantitative, nature of this study.

One reason for extending the depth and context of the interview research into a larger chapter of dialogues on particular issues was because the primary method for retrieving data for the fields' network databases' was intended to be through questionnaires distributed to as many enterprises in each sector as possible. However, this ultimately had to be abandoned at the request of the Catalan Gremi d'Editors so as not to counteract publishers' willingness to complete the body's own annual data retrieval questionnaire. In return for abandoning this process the head of the Gremi d'Editors arranged the six in-depth interviews with Catalan publishers extrapolated in chapter 6.

It is also important to acknowledge the relevance of the comparative configuration of these two cases to other European and global small nation publishing fields. As already explained, the particular cases under examination have been chosen specifically for their comparability, but the variables of their overall configuration do not easily relate to many other small national fields. Therefore, in the conclusion of this thesis I reaffirm that there are limitations to how far the analysis of these particular cases can be used as a model for all other small nations. It cannot be said empirically that analysis drawn from a comparison of the cases of Scotland and Catalonia can be applied as a broader interpretation of the network configuration and practice of publishing fields in other small national groups, such as the Flemish, Czech or Canadian. It is important therefore that the variables which denote Catalonia and Scotland as comparable cases are very clearly detailed. This has been carried out in chapter 4, which provides a historical and theoretical overview of publishing and its relationship with each nation's cultural configuration, so that the model developed is typical of these two locations. To analyse other small nation publishing sectors using the same or a similar method, consideration must be given to the variables which compose the analytical framework. These may be changed as necessary in accordance with a prior diachronic, infrastructural analysis of any other national cases.

Additionally, for this study to provide a complete overview of the context of the interactions within the field it would need to be extended further, to examine other facets of delivery and reception. The perspective of reception is particularly important to provide a reflective, qualitative counterpoint to the perspective portrayed from the vantage of production, presented in this thesis. The original intention was also to present a reception of culture perspective, but during the research it became clear that the time required to develop methods for data collection and analysis of the reception of texts was too large and beyond the scope of a single study. As the division between the perspective of production and reception has a clear point of separation, the analysis of reception has been cut from this particular section of the research and is suggested in the conclusions section as a potential opportunity for continued investigation through a later study.

Chapter 4 – Historical and Theoretical Perspectives

4.1 Historical Contexts

The point of historical departure for book publishing in 'modern' Catalonia is similar to that of Scotland. It begins during the seventeenth century and expands during the age of enlightenment. This era is important as a period of dissemination of knowledge, made possible by the earlier invention of the printing press that permitted mass production of popular works. It is fitting that in this era, underpinned by the technology of publishing, we also begin examination of the development in these two nations of editorial sectors that are the focus of this study.

4.1.1.1 Publishing in Catalonia before the Eighteenth Century

During the seventeenth century the book trade in Catalonia had slumped from its early development. Manuel Llanas (2007) claims that at this point Catalan presses as a whole worked solely for the home market and major elegant editions were imported from elsewhere in Europe including Antwerp, Lyon and Venice. As with most European publishing in this era over 40% of all Catalan and Castilian published books were related to religion (Llanas 2007 pp.48).

The Spanish linguistic hegemony can be seen developing during this period with the steadily growing tendency to print scholarly works in Castilian and works of cultural prestige in Castilian or Latin. Catalan became relegated to practical texts. Much Golden Age literature, including *La Celestina* and *Don Quixote,* came off Catalan presses, printed for export, whilst Catalan culture was largely neglected (Llanas 2007, pp.48). There are figures to show that out of 1,000 books produced in the seventeenth century, 672 were in Castilian 222 in Latin and 112 in Catalan (Torra, cited in Llanas 2007, pp.49).

However, other developments in this period also shaped the development of the Catalan publishing field. Family dynasties began to appear within the industry during this century (Llanas 2007, pg.49) and the mass production and circulation of news pamphlets rapidly escalated. Llanas (2007) argues that this became a vital tool in the cultural resistance because although both Catalan

and Castilian were used, when it referred to European events Catalan was the dominant language of print.

4.1.1.2 Publishing in Catalonia in the Eighteenth Century

In 1714 the Catalan state was conquered by Philip V following the War of Spanish Succession (Generalitat 2013b). The period that followed, between the seventeenth and eighteenth century, is representative of the political upheaval which the Catalan 'state' has experienced since. It also gives some idea of the economic interdependency and state of coexistence with Castile (Spain) which is ingrained historically in its identity. With Philip's reincorporation of the Catalan state into Castile the cultural suppression was reintroduced, which can be seen as a cycle of heritage in the history of modern Catalonia. Philip abolished the independent sovereignty and attempted to impose the Castilian language and customs on the populace. This cultural regimentation continued until the early twentieth century and the creation of a Catalan commonwealth (Barcelona 2013). Despite this an economic recovery began, backed by an increase in population around the mid-eighteenth century.

In this era of economic development two characteristics of the evolution of the Catalan trade can be identified in their growth stages. During this period the first paper and textile factories were built in Girona, underpinning its role as an industrial centre and the historical infrastructure for the publishing trade based out of Barcelona (Llanas 2007).

Also during this century family legacies became more and more commonplace because, before the advent of industrial publishing in the nineteenth century, setting up an enterprise required little capital (Llanas 2007) and later on the formula for the majority of nineteenth century firms, influenced by this background, was a limited partnership between founding owners and sleeping partners, often relatives or friends, who only invested capital (Llanas 2007).

4.1.1.3 Publishing in Catalonia in the Nineteenth Century

As is typical of the boom and bust cycles in cultural productivity in Catalonia's history, the end of absolute monarchy encouraged a rise in the number of

publishing enterprises between 1833 and 1841 (Llanas 2007). However, only a small number of them produced appreciable output. Llanas notes that "24 [publishers] contributed 80% of total output, of which 64% was from the fifteen oldest houses established before [1833]." (2007, pp.88) The consequence was that throughout the remainder of the century many publishers migrated to Madrid to find space.

From 1860 to 1880, industrialisation took place in line with development of new printing technologies. Using the available figures, Llanas has surmised that productivity "multiplied by 3.5% in two decades" (2007, pp.81). Industrialisation also prompted the development of transport systems and networks that facilitated the rationalisation of book distribution (Llanas 2007). With these changes to the infrastructure of the trade the concept of the modern 'publisher' arose and distinctions between the roles of printing, publishing and bookselling were established.

The mass-market became more viable in this era. The Moyano Law of 1857 enforced compulsory schooling and this provided the opportunity to learn to read and write, encouraging a growing readership (Llanas 2007). It is also an early example of public policy supporting the industry, encouraging the instigation of large scale textbook publication. However, Llanas (2007) says literacy was associated with urban areas which only accounted for 40% of the population at the end of the century. "Around 50% of men and 74% of women remained illiterate in 1887." (Llanas 2007, pp.75) New marketing systems such as subscription and serialisation emerged, encouraging this readership (Llanas 2007). Early in the century religious publishing had continued to be dominant (Bonaventura Carles Aribau cited in Llanas 2007, pp.87) but from the end of absolute monarchy certain parts of society became more secularised. A consequent drive to re-secularise led to the creation of new publishing houses dedicated exclusively to religious publications, such as *Llibreria Religiosa* in Barcelona, which still existed until 1969. However, the Renaixenca, the Catalan romantic revivalist movement, also influenced literary publishing and the eponymous La Renaixenca publishing house (active 1871-1905) was the first Catalan language house of the modern era. Its goal was 'the recovery of Catalonia as a nation' (Llanas 2007, p.100) and it entirely subordinated profit to

its patriotic objective. According to Llanas (2007) industrial publishers of this era viewed their firms as investments designed to yield profits, so they became more experimental in adopting alternative marketing techniques and formats to target affluent city-dwellers. Their innovations in payment methods, necessary to improve the affordability and value of their encyclopaedias and travel books, were particularly crucial. Llanas maintains this allowed the Catalan cluster to overtake Madrid, with the rise of firms like Montaner i Simon which became an important publisher in Spain and later a leading exporter to Latin America.

According to Llanas (2007) the Latin American market had not actually opened up to Spanish and Catalan publishers in the nineteenth century so in 1891 97% of exports to Latin America came from non-Spanish speaking countries. "Only 3% of the total recorded exports came from Spain." (Llanas 2007, p.81) At the end of the century this changed, with exports going from 100,000 tonnes in 1870 to 1,000,000 tonnes in 1898.

4.1.1.4 Publishing in Catalonia from 1900 to 1939

Much of the process of Catalan modernisation occurred during the industrial revolution and the late nineteenth century (Ferrer, 2012). Initially urban movements sprang up and increased the support and strength of the nationalist movement in opposition to the regional parties (Llanas 2007). The rise of the Second Spanish Republic in 1931 forced the exit of the Spanish king and the original Generalitat de Catalunya was formed, its autonomous statute confirmed in Madrid in 1932. This provided confirmation of its own central government, culture sovereignty and its own economy billing.

According to Llanas throughout the nineteenth century publishers' associations had been "nebulous and vacillating" (2007, pp.109). However, the new era marked a major change with the rise of professional bodies, initiated in 1898 with the creation of the Catalan Institute of Book Arts (Llanas 2007). This move towards institutionalisation prompted a greater degree of focus in organising the trade around Catalan language productions.

However, despite efforts in the late nineteenth century, it wasn't until the 1920s that attempts to establish a Catalan language market achieved reasonable

results. Although many of these projects were motivated by resistance to the Primo de Rivera dictatorship (1923-1930), they sparked significant growth in demand. According to Vallverdu's (cited in Llanas 2007, p.114) figures, between 1925 and 1930 "titles [published] in Catalan rose from 7.8% of all titles produced in Spain to 10.3 %". As Llanas explains "these figures are more significant considering that Catalonia accounted for only 11.8% of the Spanish population at the time." (2007, p.114)

A particularly important indicator of the nationalist sentiment in this era was the creation of Editorial Catalana. This was set up in 1917 in Barcelona as a publishing house with national identity and cultural circulation at the heart of its philosophy and operations and backing from the Regionalist Leagues' newspaper. On its inception it issued an explicit statement of intention to culturally 'Catalanise' Catalonia (Llanas 2007). The consumer publishing that had begun to thrive during industrialisation also continued and a number of larger publishing houses from this generation still survive today, most notably Edicions Proa, founded in Badalona in 1928.

Llanas (2007) notes that in the closing years of the nineteenth century the school textbook sector had become marked with irregularities and sleaze, with reports of misdealing at institutional level, excessively high prices, the introduction of new textbooks each year and direct selling. However, during the early twentieth century the commercialised textbook market was consolidated as influential specialised publishers and bookshops began taking over production and marketing, wresting control from "certain sectors of teachers obtaining extra incomes as distributors or intermediaries." (Llanas 2007, p.130) Prior to 1939 the century was also a point of departure for a burgeoning sector of children's publications (Rovira and del Carmen Ribe, 1972).

As in the case of eighteenth century Scottish publishing, much of this early developmental phase of the Catalan language sector was driven by the willpower and influence of certain key individuals, particularly Gustau Gili I Roig and Vicent Clavel I Andres. Gustau Gili I Roig was the most active and dynamic publisher of the first forty years of the twentieth century in terms of the industry's professional development. It was his proposal which led to the formation in, 1918, of an official chamber of books and of intellectual property.

Vicent Clavel I Andres was a Barcelona publisher who also developed agents in Buenos Aires. In 1923 he proposed the creation of Book Day, initially established on the seventh of October by royal decree passed on the sixth of February 1926. Though this was a nationwide initiative it only prospered in Catalonia. The date was changed to the twenty third of April in honour of the anniversary of the death of Cervantes, but by fortuitous coincidence, this also happens to be the day of the feast of Saint George, the patron saint of Catalonia. The importance of Cervantes to Castilian culture meant that this event was continued after the civil war, despite its relevance to Catalonia and it has evolved to become an emblem of Catalan cultural distinction.

Expansion into Latin America occurred in earnest from 1926 onwards, initially led by publishers of Castilian rather than Catalan origin, and Emanuele Maucci Battistini, of Italian origin, who opened a bookstore in Buenos Aires and led development of the Spanish-Latin American market. He was a forerunner to the transnational corporate model of today, closing or selling shops and opening up elsewhere to tap the market as he did in Mexico City. He left behind a network of distributors and contacts, largely from his own family. He opened a publishing house in Barcelona in 1892 specialising in economically priced, inferior quality, books much akin to the later work of Allen Lane. By 1901 his house was producing over a million volumes a year, with two thirds of these destined for the American market. This was essentially the start of the dominant model for corporate transnational Hispanic publishing.

Antoni Lopez Llausas was a precursor for the model of integrating actors in the production chain into one greater media corporation. In 1923 he took over Editorial Catalana, which was in financial crisis and opened a bookshop, Llibreria Catalònia, which is still active. Llausas admired the innovations of the French publishing sector and was influenced in particular by Bernard Grasset. Using the bookshop as base of operations, he renamed the publishing house and created what Llanas (2007) calls a commercial trust, comprising the publisher, a bookshop, a graphics firm, a distributor and a chain of newspaper kiosks, streamlining production. He then began publishing influential original Catalan and translated works, and individual titles including Pompeu Fabra's *Diccionari general de la llengua catalane*, a vital philological work in the development of modern Catalan language and culture.

4.1.1.5 Publishing in Catalonia after the Civil War

However, in the early twentieth century Spain and Catalonia were also swept up in the revolutions which saw the rise of new political ideologies and ensuing social upheaval. With the completion of the Spanish Civil War in 1939 and defeat of the Republicans, the autonomous Generalitat was abolished and remained so throughout the subsequent dictatorship of Francisco Franco. In Franco's 'New State' the Catalan cultural identity (along with those of other distinct Spanish regional nationalisms such as in Galicia and the Basque Country) was seen as antagonistic to the federal cohesion of the Spanish state. Although finished, the consequences of the war, and particularly the poverty and destruction wrought by it, lasted until well into the fifties. At this point the suppression of sentiments of Catalan identity intensified. Catalonia reverted to being a province and was required to behave as part of an integral Spanish nation.

From their first meeting on the third of February 1939, after occupying forces arrived in Barcelona, the book chambers were under government control and had no room to manoeuvre. Soon they were abolished and replaced by INLE (National Institute of Spanish Books), set up to enable the new state to remove the production and circulation of books from the control of private enterprise. The move was also centralist, seeking to concentrate all operations and services in Madrid.

In April 1938, prior to the conclusion of the civil war, an order had been published by the regime, decreeing that books had to be submitted for censorship prior to publication. It remained in force until 1966. Llanas (2007) explains that censors during the peacetime period looked at whether works attacked dogma, the church, ministers of the church, morality, the regime and its institutions or persons who collaborated with the regime.

In scholarly evaluations (Richards 1998) the Franco regime is depicted as perpetrating a planned cultural genocide, aimed at destroying the readership of books in Catalan. Drastic restrictions were imposed on general publishing, supported by specifically linguistic measures that concerned only Catalan publications. "The war caused such a radical break with the past that of all the

series of books in Catalan that had commenced publication prior to 1939, only four survived." (Llanas 2007, p.154) Only ninety nine Catalan titles were published between 1939 and 1943, mostly underground. Josep Pla asserted in 1946 "no Catalan book [was on the market] that had not been published at least 10 years earlier." (Llanas 2007, pp.154)

However, as Franco's regime wore on the level of suppression waned and determination to fight it grew. By the end of the fifties some intellectuals and artists in Barcelona began to resume Catalan cultural activity. Their approach was not insidiously revolutionary, rather a form of soft resistance in everyday life. Llanas (2007) explains that members of the public would complete forms in Catalan, hum Catalan songs around Castilian officials or ask them for directions in Catalan. The prohibition of events and literary censorship only intensified this political stance and as dissatisfaction grew, repression became a futile policy. Llanas (2007) argues that control crumbled as the local clergy, a crucial force in Spanish society came to support the opposition, and industrialists saw their business interests were not being addressed by Madrid.

After 1946 censorship became slightly less stifling, forced by the allied victory in the Second World War. Permits for Catalan language publishing began to be issued on a more regular basis. The Law on Press and Printing, circulated in March 1966 meant, in theory, that compulsory censorship was replaced by voluntary submission of texts for consultation. In reality censors continued to be severe and uncompromising. Historical works and essays did not become commonplace until well into the sixties. As Llanas (2007) puts it "publishing in Catalan took a very long time to recover, and only then at the expense of a sustained and memorable struggle." He says "the number of titles published in Catalan in 1936 (865) was not surpassed until 1976." (Llanas 2007, p.154)

In the wake of the civil war many Catalans, particularly artists and writers, were exiled and found new or temporary homes across Latin America, mostly in Mexico and Argentina. In turn this fed into the international networks, particularly in the case of Catalan publishers' links with the Latin American export market, developing the basis for the globalising expansion of multinational book trade at the end of the century. For example, Grijalbo was founded in Mexico by exile Joan Grijalbo Serres who eventually opened a

second head office in Barcelona in 1960 (Llanas 2007). Grijalbo initiated a process of expansion in the 1980s and was eventually agglomerated by Mondadori.

4.1.1.6 Publishing in Catalonia after the demise of Franco

With Franco's death in 1975, the path was clear for reform. Prince Juan Carlos had already taken over state affairs and as interim leader was proclaimed King. He manoeuvred Franco's conservative faction out of the inner circle of political control and led the country in a process of democratisation (BBC, 2012). The first areas to have their statutes of autonomy reinstated were Catalonia and the Basque Country, in 1979 (Barbería, 2012). With the Law of Linguistic Normalisation Catalan became the official language of educational instruction. The Franco regime's attempted cultural genocide thus became the driving force for the re-invigoration of Catalan and culture.

At this point the cumulative industry had to consider what legal steps to take to adapt to the new political situation. In February 1977 representatives of 61 publishing houses met and unanimously approved a new set of statutes amounting to the creation of a new publishers guild; the Publishers Association of Catalonia (Gremi d'Editors) (Llanas 2007). It was defined as the collective representative of bodies who devoted themselves to publishing and had their head offices in Catalonia (Llanas 2007), a designation which is most interesting for lacking a nationalistic prescription. Then in 1978 the Association of Catalan Language Publishers was set up as a branch of this (Llanas 2007). The Catalan publishing sector entered a period of largely sustained productivity in both linguistic markets with its fortunes tied to its increasingly globalised markets.

4.1.2.1 Publishing in Scotland before the Eighteenth Century

Scotland's publishing industry has a long and varied history. Despite modern day connections between Scottish publishing and the London sector, which can be crucially traced historically, the origin of publishing in Scotland is distinct and individual. In 1507 Scotland's first book, the Bible was published by Chapman and Millar (Mann 2000, Finkelstein 2008). This is consistent with the axis of

interplay that Anderson (1983) identified between the crucial roles of religious demand encouraging publishing and the unification of nationalist sentiment in early modern nations. The Scottish booksellers continued to trade independently of English formal structures (Bevan, 2002), supported by patronage of city councils and universities through the unification of the crown in 1603 for over 104 years until the kingdoms parliamentary, administrative and legal systems were formally joined under the 1707 Act of Union (Feather 2006: 63).

4.1.2.2 Publishing in Scotland in the Eighteenth Century

According to Feather (2006) Scotland's book trade was the precursor for provincial competition to London's dominance. Whilst the Scottish book trade is almost as old as that of London, from the 1770s onwards Scots, collectively and through the work of key individuals, had an influential effect on publishing and book trade south of the border. Three processes in the development of a book publishing culture in the United Kingdom can be identified and observed in this era; the concatenation of legal challenges which moulded and defined the potential of domestic and international trade beyond the control of London, a progressive infiltration of London by Scottish booksellers and publishers which sowed the seeds of hybridity linking the two areas and that continues to have a dramatic impact on their development today, and the rise of family legacies within the trade which are a typically notable historic catalyst for publishing activity globally and particularly in small nations where a measure of success is dependent on the determination of individuals.

The issue of copyright had the greatest impact across the UK during this period. First there was the Statute of Anne (1710) which applied in Scotland. Previously rights had previously been 'derived from royal prerogative', so although the concept of copy ownership already existed the Act represented a different type of rights control (Mann 2000). Scottish booksellers interpreted the statute's meaning to imply that following the stated twenty one years of rights for the present owner the work entered public domain and could be reprinted (Feather, 2006). Therefore provincial demand for books in the north of England, unsatisfied by London, became in part supplied by these sellers' reprints of English books (Feather 1985). As Feather puts it "to the Londoners these were

illegal piracies; to the Scots they were the fruit of legitimate competition." (2006, pp.63) Despite this, in the early 1760s an efficient distribution system appeared to usher in a natural end to this activity (Feather 2006). However, Scottish bookseller Alexander Donaldson, who "concentrated on reprinting […] which he found he could do more cheaply than the London Book trade" (Sher 2006, p.314), prevented this, mounting a formal challenge to the London book trade. This came to a head in the 'Battle of the Booksellers' which led to the repudiation of common law copyright and finally the "Donaldson v. Becket [case] is conventionally regarded as having established the statutory basis of copyright." (Rose 2004, p.237) Although it dominated the UK industry, from the eighteenth century onwards Feather (2006) argues that the London trade was never without competition.

At this time a number of important Scottish publishing figures became linked historically with the London industry. According to Feather (2006) Scottish figures such as William Strahan and John Murray appear to have held a degree of control and power within and upon the London publishing sector. However, although they were active in and integral to the trade many Scots publishers sought "a less subordinate role" (Feather 2006, p.79). A good deal of development also occurred in Edinburgh during the eighteenth century, although according to Sher (1998) increasing competition lowered the profit margins.

4.1.2.3 Publishing in Scotland in the Nineteenth Century

Many historical publishing projects confirm this long interconnection between London and Scotland. A & C Black was founded in Edinburgh in 1801 and relocated to London in the 1880s becoming established in 1889 (University of Reading, ND). However, there are cases which also exemplify some of the pitfalls of this relationship. The highly successful founder of Constable and Co., John Constable's publication of Walter Scott's *Waverley* in 1814 is one. It was a first in breaking into the mass-market as a bestseller, printed in much greater batches than previous books, and set a precedent for Scott's works from 1814-1825 (Feather 2006, Finkelstein 2010). However, both publisher and author were financially involved with London and other Scottish firms and the 1825

financial crisis in London brought them down with accrued debts of over £100,000 (Finkelstein, 2010).

At the beginning of the nineteenth century London publishers were, Feather (2006) argues, even more powerful than when their oligopoly had a legal framework. Their control of the distribution system, access to production facilities and ability to raise capital made them difficult to challenge (Feather 2006). However, as a creative industry publishing enterprises are driven by the determination of individuals and Scottish publishers were defiant. Individual figures are of crucial historical importance in the development of many nations' publishing sectors and this is evident in Scotland's historical development.

An appreciation of the strength of Scottish publishing through the nineteenth century and going into the twentieth century is best gleaned by an examination of the wealth and variety of well documented on-going individual business activity. The domestic distribution of publishing in Scotland, from the capital across its other major cities, is indicative of this, with firms established in this era whose relevance has carried through to the late twentieth century albeit many have vanished in the latest era of globalisation discussed further on.

Publishing in Edinburgh was important in the domestic market and to some extent helped stimulate and maintain a hub of Scottish cultural activity "drawing on a circle of booksellers, writers and subscribers." (Feather 2006, p.79) The demands of the cosmopolitan local population also encouraged diversity in Edinburgh's publishing range. The rise in the eighteenth century of pioneering Edinburgh bookselling and publishing figures built on the Scottish reputation for fine quality production. William Blackwood promoted authors in his monthly *Blackwood's Edinburgh Magazine* established in 1817, considered a marker of Scottish innovation in literary publishing. His family business, *William Blackwood & Sons*, remained independent until the 1980s when it merged with Edinburgh-based printers *Pillans & Wilson* (Finkelstein, 2005). Chambers, founded in 1819, played a crucial role in promoting Scottish publishing interests through cheap, mass volume journals and books. In 1832, the Chambers brothers launched *Chambers' Edinburgh Journal* which flourished. Within two years it was averaging a circulation of 50,000 and by adding a London agent for UK circulation sales rose (Finkelstein 2005, Cooney 2004). The journal and firm

merged with Harrap in 1956 (Finkelstein 2005). Thomas Nelson and Sons was a technologically advanced family concern which relocated to Edinburgh's Southside in 1845 and Thomas invented a special rotary press which was deployed in 1850, increasing its production of texts. It survived as a family run independent until 1962, when the Thomson Organisation took it over, and in 2000 Nelsons merged with Stanley Thornes to become Nelson Thornes, a subsidiary of Wolters Kluwer, a Dutch multinational (Finkelstein 2005). Oliver & Boyd, founded in 1807 forged a reputation in medical and textbook publishing, including in overseas markets. They would remain independent publishers until being taken over in 1896 by the Thin and Grant families, established Edinburgh booksellers (Finkelstein 2005). After many years Oliver & Boyd was acquired in 1962 by the Financial Times organisation and its publishing side was later sold to Longman, now Longman Pearson, ceasing its Edinburgh operations in 1990 (Finkelstein 2005). Legal, medical and university publishing firms also clustered around university centres and Edinburgh's courts to cater for professional requirements and William Green's publishing house was turned into a successful producer of standard legal reference works when his son Charles took over in 1885, becoming the authoritative source of Scottish legal case reporting (Finkelstein 2005). However, it also later fell into multinational agglomeration, taken over by the English law publishers Sweet & Maxwell Ltd. in 1956, which in turn was acquired by Thomson Corporation in 1987 (Finkelstein 2005). Specialist publishers were also prominent in Scotland, particularly cartography publishers. Bartholomew, established in 1830 in Edinburgh was a notable exponent of this specialism (Finkelstein 2005). By the 1880s, few British geographical, medical and botanical works did not have a map, engraving or lithographic illustration produced in Edinburgh either by Bartholomew or by W. & A.K. Johnston (Finkelstein 2005). It merged into HarperCollins in the 1990s (Finkelstein 2005).

In Glasgow others established institutions which came to challenge those of Edinburgh in reputation across a variety of forms of publishing. Blackie and Sons, established in 1809 and amalgamated as a family business in 1831, became known at home and overseas for its readers in grammar, arithmetic, history and geography (Finkelstein 2005), and later developed a reputation in the 1880s, aided by the 1870 Act in education (Norrie 1982, pp.55; Bennett and

Hamilton 1990, pp.11–15) for high quality, morally sound children's books. It would survive through various mergers until 1991, when operations were incorporated into other companies including its former rival Nelson (Finkelstein 2005). The Presbyterian Church also developed what some critiques have argued (Anderson, R 1983(b), Rose 2002) was the best education system in Europe, providing widespread literacy in Scotland before it was achieved in England. William Collins began in Glasgow by publishing religious works in 1819, but became a leading supplier of British textbooks. "By 1875 the firm boasted a workforce of over 1200, producing more than 1.3 million books printed and bound per year" (Finkelstein 2005). Collins lasted much longer than other Scottish publishing enterprises, a family concern until 1981, and then in 1989 it was taken over by News International and merged with Harper & Row to become HarperCollins, with a skeleton operation remaining in Bishopbriggs, Glasgow (Finkelstein 2005).

Standout activity during this era was not entirely isolated to Edinburgh and Glasgow. In Dundee in the 1870s William Thomson invested in the *Dundee Courier and Daily Argus* and took over in 1886. The enterprise was renamed D.C. Thomson & Co., Ltd. in 1905 (Finkelstein 2005). The company is famous for publishing Scotland's most successful children's comics, the *Dandy* and the *Beano*. In the century following its establishment D.C. Thomson managed to defy the fate of other quintessential Scottish publishers and continues to function to this day as a major employer and player in the British printing and journalism world.

Though academic publishing has a less established tradition in Scotland the Aberdeen University Press grew from the end of the nineteenth century to employ over 200 staff in 1904 (Finkelstein 2005). The firm maintained close links to the University. However, it was bought out by the Pergamon Press Group in 1978 and closed in 1992 with the collapse of its buyer's publishing empire (Finkelstein 2005, McCleery, 2007).

4.1.2.4 Publishing in Scotland in the Twentieth Century

During the nineteenth century Scottish publishing experienced massive expansion and towards its end began to move into specialisation. Finkelstein

(2005) comments that in "the twentieth century Scottish publishing faced a period of change in audiences, business structures and world markets". However, domination by the London sector continued. Expansion into foreign markets required access through the London channels following "the loss of the American trade in 1776 and the closure of much of Europe from 1790 onwards" (Feather 2006, pp.79). The period of the two World Wars also affected business dramatically, with the loss of skilled personnel and rationing, and through the remainder of the century there was a steady decline. Finkelstein (2005) recounts that "in 1861 it was estimated that in Edinburgh alone printing and allied trades employed over 3,000 people. Even until the 1960s, Edinburgh's printing industry employed between 5,000 to 6,000 workers". However, a more recent report by the Scottish Arts Council (2004) demonstrated decline. It noted approximately 85 active publishers, ranging from small to medium size, employing around 1250 people. Despite this, many of the small houses work well in the contemporary era, proving successful in specialised, niche markets. A number of larger independents, particularly Canongate and Birlinn, are important national producers with an international market.

Feather says the genealogy of British publishing was "structured around one-person or family businesses often passed down from generation to generation until the succession failed" (2006, p.220) and for many of the largest Scottish firms, this collapse occurred in the latter half of the twentieth century, as Finkelstein's (2005) overview of the key historic enterprises demonstrates. This period in Scotland, as in publishing across the world, has been marked by an extended era of economic globalisation (Waters 1995). In this case the primary characteristic of this globalising process was not a gradual cultural homogenisation but mass agglomeration of individual business into corporations, often of a multinational design (Feather 2006).

Feather argues that the governmental ethos of Thatcherism heralded this process in the UK, pushing "back the boundaries of the state […] to create a market-oriented free trade economy." (2006, pp.220) Replicating the circumstances of the 1840s, in the 1980s price control and regulation of the market were opposed, proving a challenge for the 1900 Net Book Agreement

and through it the agreed and established book trades systems, particularly the relationship between publishers and booksellers (Feather, 2006).

Feather (2006) says that in the 1970s British publishing was still based in Britain, and substantially British-owned, but with worldwide markets. However, he (Feather 2006) suggests the international reach of small and medium-sized businesses continued to be driven by the personalities and capacities of the individuals directing them. Scotland had become locked into this system as a publishing field composed primarily of producers of English language texts.

However, increasing competition influenced change in the relationship between British and American publishers, a process which had gradually increased over the century. (Feather 2006) The relationship had proven historically difficult as British publishers attempted to establish themselves in the United States, increasing competition and encouraging copyright disputes. In 1976 the Market Rights Agreement was brought to an end, effectively deregulating the US book industry and global trade in British books (Curwen 1981). Then American publishers began competing in former British colonies and in the Commonwealth (Coser et al, 1982). From the British perspective the United States was seen as an export market, not a foreign market competitor, and some British publishers invested heavily in an American business strategy leading to a greater overall interlocking of the two publishing clusters.

By the early 1980s, through increasingly globalising processes many publishers had become partial income streams of wider holding companies within the media and entertainment industries. Though many of the historic names remained intact they were not essentially the same. The global media and communications corporations that now dominate British publishing emerged from this. The industry which was historically so personal and family led transformed into a wing of mass media, changing the role of the publisher and the public reception of books.

By the mid-1980s, it became difficult for publishers to compete in both domestic and global markets. Old-fashioned British publishing could not react fast enough, leaving some companies globally exposed and as many had been

family businesses, the problems of generational changeover began to impact. It left such companies ripe for takeover.

As a consequence of the huge acquisitions by American publishers in the 1980s, the American corporate ethos had already become indistinguishable from that of global English language publishing (Abel 1996). Feather's (2006) summation is that at the end of the twentieth century the focus of English language publishing became more centred on a seemingly American hegemony, than on the internal conflict between London and Scottish trade. The acquisition of Collins by News Corporation is particularly representative of the multinational assimilation of the fruits of Scottish industry. Many commentators (Schiffrin 2000, Curtis 1998) speculatively connect this process of hegemonic agglomeration with increasing cultural homogenisation, leading to less distinction with which to characterise Anglophone and global literary markets.

According to Feather (2006) "the commercial pressures on the traditional medium-sized businesses which were actually the larger end of British publishing were almost irresistible by the turn of the century". Despite this, it appears possible for independent houses to develop successfully if they understand and maintain appropriate scale. Many contemporary Scottish publishers stand as bastions to this sentiment and some have achieved notable success in this increasingly globalised trade environment. Canongate, an Edinburgh-based house, regained and guaranteed its independence in a 1994 management buy-out and has since developed a varied list, declaring itself as "balancing quality with sales as an organisation that sets targets at an achievable and sustainable level." (Canongate 2013) In the time since the turn of the century the gradual political devolution in Scotland seems to have encouraged a cultural confidence which, when successfully exploited as in the case of Canongate, offers a fresh opportunity for capitalisation on the part of enterprising innovators of the industry in the contemporary era.

4.2 Theoretical Contexts

4.2.1 Catalonia and Scotland

Throughout this thesis the investigation will be concerned with unravelling connections that typify how unrelated enterprise coalesces in the formation of a national outlet for cultural production, and how this coalescence, whatever its motive, ultimately has a crucial impact in the formulation of national cultural identity. The type of nationalism under examination is very specific; it pertains to cultures adjacent to each other, where one could potentially be engulfed by the other. However, this description does not fully characterise the nature of the cases under examination so further definition is required to explain the term 'small-nation publishing'. These locations are 'small' when observed within a variety of contexts, but here refers specifically to political, geographical, and economic size.

Politically, their make-ups express self–governance but remain under the dominance of a larger entity. Scotland, as a country, remains part of the United Kingdom. Since the Acts of Union, it has been part of the same state as England (Parliament UK, ND). From the Act of Union 1707 until 1998 this political union was wholly responsible for Scottish governance but since a referendum and the passing of the Scotland Act in 1998 personal parliamentary powers have been devolved at what would usually be termed the 'subnational' level (The Scottish Government, 2012). The parliament of the UK continues to constitute sovereignty over Scottish legislature but responsibilities relating to a domestic policy including education, health, and justice refer directly to the Scottish parliament (Parliament UK (b), ND). It can also pass some laws and has some tax-varying capability, but foreign policy remains in the domain of UK government (Government UK 2013). This empowers Scottish government with some control over cultural identity, allowing domestic differentiation from 'British' culture, but means it retains some fiscal responsibility to the Union, prohibiting taxation demands which might radically alter the lifestyle composition of its citizens from the rest of the UK. It also means on an international political stage it is represented as the concern of the UK, again in one sense subnational. However, it is a politically recognised nationality.

Catalonia is today represented by an autonomous government. Its last period with this form of governance had ended with the wars of Spanish succession in 1714 (Generalitat 2013b), although the Catalan Generalitat (2013c) had been revived briefly during the 1930s before the fall of the second Spanish republic. The Spanish constitution of 1978 acknowledges the rights of self-government for 'nationalities and regions', but also declares the 'indissoluble unity' of the Spanish nation under a parliamentary monarchy (WIPO, ND). Again a political position of sub-nation seems ostensible. Autonomous regional governments retain responsibility for administration of schools, universities, health, social services, culture, urban and rural development and, in some cases, policing. The Spanish state is highly decentralised in the modern context, with central government accounting for only 18% of total Spanish spending in 2008 (The Economist, 2008). However, it does retain a position of international representation through central government, though this is less culturally empowering than in the UK.

Geographically, and demographically, speaking these are small nations. The Scottish mainland covers 78,772 km2 (30,414 sq. miles) which constitutes approximately 30% of the area of the United Kingdom (SEPA, 2013). Its domestic population was estimated in mid-2010 at around 5.2 million with a low average population density of 65.6 /km2 (170 /sq. miles), although around 70% of the population inhabits the central lowlands according to the 2011 census (NRS, 2013). The scale of the wider international ancestral diaspora is estimated at between 28 and 40 million with the most significant proportion located in the US and Canada (Ancien, Boyle and Kitchin 2009). With a birth rate of 11.3 per 1,000 of the population against a death rate of 10.3 the population growth rate is very small, lying at 0.54% between 2009 and 2010 (Scotland.org,2013). These figures show Scotland and the Scottish people to represent a physically small nation with little opportunity for geographic and demographic expansion domestically, but with a larger international culture of demand particularly in affluent westernised nations, open to the reception of its cultural production.

Catalonia covers 32,114 km2 (12,399.3 sq. miles) with a population in 2011 of approximately 7.5 million domestically (Idescat 2013). This gives an average population density of 234.6/km2 (607.7/sq. mi), more compact than Scotland

and with a larger domestic population. However, internationally, its diaspora spread is far less pervasive, with an approximate global population of around 8 million (Idescat, 2013), the largest non-domestic population coming from France (around 300,000), and the next largest non-European population coming from Argentina where the estimated figures are between 170,000 and 180,000 (Idescat, 2013). The total annual growth for Catalonia in 2010 was 4.7% (3.4% of which is natural, non-immigrant) with a birth rate of 10.9 against a mortality rate of 8.01 (Idescat 2013). Whilst its international spread reveals a smaller international market domestically, Catalonia's population is indicative of a greater potential for cultural expansion than Scotland.

Positive economic attributes are typical to some degree of small nations, and in this sense the status of 'small' can be interpreted equally as a benefit or hindrance. The Scottish GDP was £124 billion (Pounds Sterling) according to a 2011 estimate (Scottish Government 2013) against a UK GDP of just under £1.44 trillion (Hatton and Pourvand 2012), which is roughly 10% but it must be noted that the UK GDP is boosted by London. The Scottish population of 5.2 million (NRS 2012) represents about 8% of the UK's 63.2 million in 2011 (ONS 2013). This suggests Scotland is wealthier than might be assumed. The Government spends approximately £10,000 (Pounds Sterling) per annum on the average person in Scotland, almost £1,600 more than per person in England (Cramb, 2012). Typical of its 'small' status, it also maintains hubs of industry which employ significant sections of the domestic population, especially the energy industry (The Scottish Government 2013f) and, to some extent, urban dominance of financial industries (Scottish Enterprise 2013).

In Catalonia the GDP was 197,919 million euros in 2010, the latest official figures, (Generalitat de Catalunya 2013e) compared to the Spanish GDP of approximately 1.07 trillion euros dollars in 2010 (Global Finance 2013) which means Catalonia generates about 20% of Spanish wealth whilst the population represents about 16% of the total Spanish population of approximately 47 million (Ortiz 2013), demonstrating that Catalonia is a wealthy economic centre within Spain. Catalonia has become one of the 'four motors of Europe' (4motors 2006), technological and industrial centres of production and economic growth. In terms of industrial hubs again it is typical of the 'small' model, having a

concentration in the financial sector, and a strong chemical and pharmaceutical industry (Generalitat 2013d).

These markers are indicative of the status of 'small' nation, not as a negative connotation but as a statement of location within a global structure. They demonstrate social and cultural independence through their political and economic institutions within a clearly defined landmass and are supported by a self-continuing social structure. However, they also demonstrate collaboration, whether or not desired, with another national entity. In the cases cited these adjacent entities have their own recognised international cultures, in which the 'small' nations are often underdogs. Whilst this creates tension in terms of international cultural recognition, for these small nations, we must ask where the benefits lie in retaining their affiliations. For Scotland, the Union represents a support structure particularly as an economic crutch. However, Scotland provides energy and a domestically based oil industry for international and domestic trade, in addition to other export goods, making its linkage with England mutually beneficial. For Catalonia, international exposure and access is a support, but with the largest regional economy in Spain and direct access to Europe along with the largest urban industrial centre as its capital, the benefits of affiliation with Spain are less clear.

4.2.2 Concepts of 'Nation' and How Nationalism Impacts on Industry

The forms of nationalism and nationhood visible in Scotland and Catalonia do not integrate into a universally compatible model but share enough characteristics to demonstrate comprehensible traits which typify the national concept. The concern is how far the national structure is beneficial to cultural identity and informs cultural production. This investigation accepts the premise that nationalism is a political project, and that value can be drawn from analysing how far it effects political innovation (Gellner 2006). It also conforms to the view that the nationalism of these case studies can be seen both as catalyst of cultural sentiment and constructed by it, as both an instigator and an outcome. In Scotland and Catalonia the formation and preservation of culture are mutual characteristics which define the nation. This cultural nationalism identifies the national community with the political centre of the nation-state, and with the periphery against the centre. Arnason certifies "the location of

nationalism in the field of relations between culture and power" (1990, p.216) despite the fact that a structural functionalist bias (Keel 2013) dominates the preconceptions of each of these approaches. This identifies culture as the primary instigator in the creation of power structures which is crucial as Arnason (1990) suggests nationalism defines and justifies power in terms of culture. Smith's (1986) look back to ethnic roots to understand the modern configuration attests to Spencer and Wollman's (1998) critique of dualism, while Arnason (1990) explains 'the 'civic' and the 'ethnic' component are interdependent and fundamental although they may give rise to conflicting definitions of nationhood. Much twentieth century historical analysis has interpreted the complaints of small cultural and political movements in a pejorative territorial way not present in these cases although it might be fair to examine to what extent the processes seek to streamline and agglomerate individual and national distinction for the purpose of wealth-maximisation. Certainly this does not exclude Gifreu's (1994) view that means of communication become 'traffic controllers' for minority identities, reinforcing symbols of identity with local language as the ethnic and, in modern European nationalisms, a national press and materials with which to build an audio-visual cultural memory as the civic.

Analysis of Scotland will adopt a view of its national composition as separate and distinct more by virtue of culture than state separation, primarily civic rather than ethnic with an assumption that the population is derived of those who live within the country. This connects with the Catalan model, which would contend with anti-territorial arguments in so far as they posit that geography is not a nationalistic driver.

As a continuity of landmass in the UK, Scotland's proximity to the UK, a bordering cultural identity, places its own culture in crisis and to some extent mobilises nationalist sentiment. Geographical situation may also be a major factor for the internal culture of Scotland, separating its northern and southern business sectors to a small extent and consolidating its largest industry centres in the lowlands area between Glasgow and Edinburgh, and distancing the alternative language culture of Gaelic from an urban centre thereby limiting its circulation. Despite the emphasis of Anti-English strains contemporary Scottish nationalist doctrine cannot be construed in the more violent tradition of similar locations such as Northern Ireland. Distinct characteristics of contemporary

Scottish nationalism are more difficult to trace as they are not overwhelmingly shaped by a unique language or historic differentiation. Those in support of Scots dialect would disagree, and although of a minority, the publishing industry is in part composed of this segment. Therefore it is sensible to consider language within a print context. A question remains as to whether Scotland represents a unified nationalism or differing national/local sentiments which are compounded. When compared to Catalan nationalism, the Scottish sentiment seems fractured. Tensions in Scotland seem to date from the latter half of the twentieth century and the beginnings of change to the political composition of Europe alongside decline of the British economy. The McCrone report, only publicly released in 2005, lends weight to this argument, suggesting that majority control over UK North Sea oil revenue presented the first credible argument for Scotland being advantaged by independence (McCrone, 1975). Tom Nairn (2003) notes that many interpretations of nationalism in this era suggest it is formulated in response to the sense of economic exploitation and subjugation to other urban centres. Whilst from a political perspective, economic motivation is a primary justification it is not evident that such a fractured mobilisation of nationalism went beyond the sloganeering of some political quarters. Once again, to differing levels of nationalism, the political administrators and the anti-English cultural public outcry offset each other. Generally speaking, the middle and upper classes are more amenable from a societal perspective to English ideology, whereas working class citizens, whilst typically being indifferent to the political circumstance of the nation, in practice will maintain a strong sense of cultural distinction from English identity, manifested ethnically as a distinction of accent and manner (Keating, 2001). It is this form of nationalist ideology which underpins one aspect of the character of cultural production designed with Scottish identity in mind. Correlating identity and social class is demonstrated by the choice of publishing projects and type of typical literary output.

In Catalonia, differentiation is fundamental to nationalist discourse, and self-identification dates to the seventeenth century whilst historical entwinement with Spain goes much further back. Vilarós goes further, stating "It is […] impossible to understand the processes of building and protecting Catalan national and cultural identity apart from the national politics of the Spanish state and the

geopolitics of the economic culture imposed by the global post-industrial market." (1999, pp.40) Negotiability is a commonly demonstrated attitude. Radical nationalism only affects a minority and has little political, electoral sway (Barnes, 2013). Catalan identity tends to underline residency and integration rather than ethnic originality. Salvador Giner of the Catalan Studies Institute claims "political instability suits the Catalans: in the past they have got more when Madrid has had a minority government." (The Economist 2010) In this depiction the state navigates between partnership with centralised Spanish government and independent economic and cultural involvement in the European markets. This double-positioning is typical of the development of socio-spatial networks identified by Mann (1997). However, Europe's own syncretic identity continues to be, largely derived from mass-culture. As further European integration is sought dependence on the world economy is equally increased. Catalonia's constitution as a regional nation may be crucial to maintaining its present market forces, determined by its ability to supply specific demands. The classification helps generate some of this demand, conveying Catalan identity as a commodity which can be marketed and disseminated profitably. Vilarós (1999) argues that Catalan national identity is no longer a 'historical essence' because its cultural history is marked by hybridity. Keating (2001) interprets this as a different form of nationalism which he describes as 'post-sovereigntist'; using national identity as a means of enforcing social cohesion to battle global forces of homogenisation without necessarily maintaining the familiar structure of 'statehood' which legitimated pre-industrial national positions.

4.2.3 The Role of Publishing in these Small Nations

When considering the third part of this definition, the role of 'publishing' in small nations, consideration must be given of the multiple perspectives which might impel the working and philosophical ethos. Publishing, as discussed earlier, serves as a productive backbone for cultural development as with any other form of cultural production. Yet there is something more to publishing when considering its role and involvement in the construction of nation, nationalism and national identity. Anderson (1983) demonstrated his view of printing's implicit connection with the early development of modern nations and this

involvement is not diminished in the modern era. Works of art, or of administration, which are continually commoditised and distributed through publishers in one sense maintain continual dialogue with the national publics with which they communicate. These are both the local and domestic market they in part cater for and relate to, and the foreign markets they reach for and give meaning to. In this way the delivery and reception of symbols are exchanged using the most intrinsic, rudimentary material of national construction, language.

What has to be considered are the multifaceted theoretical perspectives that might govern the coordination of publishing activity in the construction of a national cultural industry, not as alternatives but rather as multiple viewpoints with a capacity to coexist. An issue to consider here is the question of intent; what the publishers of these materials, the creators of the materials, and/or the readers attempt to achieve by interacting with the text. This intent can in turn be interpreted in terms of conscious action taken, but may result in both intended and unintended outcomes.

On the one hand the act of publishing in a patriotic context might be interpreted as a conscious and concerted effort to develop and support identity through cultural production which reinforces positive archetypes (or negative ones if considering publishing undertaken as a means of bolstering consumer income by focusing on the sale of tourist target material which could reinforce negative stereotypes). This mould is very much a part of the network hypothesis being examined within this dissertation. The patriotic configuration would suggest that publishers in small nations take up 'arms' in a metaphorical sense. Their intent in this context would be to enact cultural production as a response to perceived disparities or neglect in representation in some cases and as proud reproducers of materials that are of value; custodians of historical culture to which book production, as an archival format, is particularly amenable. Another interpretation of the psychosocial development of publishers will to publish as a conscious act of nationalism (and perhaps the most viable when comprehending publishing as separate from the literary function in that it must equally, if not more so, satisfy the commercial concerns of its proprietors), is that in small nations the market for nationalistic cultural materials may be augmented by the public sense of combat against an encroaching cultural

identity. In this case the publisher's intent is also to respond to market demand. Within each of these contexts elements of the nationalist configurations in Scotland and Catalonia would make these interpretations viable.

Another theoretical perspective from which to observe the interaction between publishing and representation of nationalist ideology is the less conscious approach. From perspectives of Bourdieu's field theory (2004) and his subconscious interpretations of practice within a wider habitus (Jenkins 1993), the concept of publishing as a 'national' enterprise might be understood as the cumulative result and product of multiple organisations acting independently with the result being a coalesced body of output representative of cultural materials satisfying a national market and bolstering a national industry. This 'middle-ground' perspective grants less deliberation and consideration to the act of producing materials which also implies less cohesion in the act of publishing from one publisher to the next. The intent of the publisher in this case is business optimisation, and commissioning and distribution decisions are based on practical and pragmatic criteria, independent of other actors in the network. Analysis in this mode is focused on the end product from independent publishing approaches which may or may not be motivated by factors ranging from cultural reinforcement to economic practicality. However, the end result is a body of commercial products which do retain cultural value irrespective of intent and become an embodiment of national sentiment whether cohesive or not. To that extent it will determine the level to which the nation's identity is reinforced through the cultural act of publishing and it becomes an indicator of nationalist intent.

A further perspective looks beyond producers by focusing on the reception of symbols, not only in the materials produced, literary and general, but at the act of publishing and the configuration of publishers from the perspective of the public that regards them. From this theoretical perspective publishers' intent is also autonomous irrespective of nationalist output. The intent behind the symbols comes from the perspective of the consumer. The issue is not whether Catalan or Scottish publishers do, or do not, work under a psychological presumption of acting on behalf of their 'small nations' in generating a culture but if those who buy books generate an environment that seeks to ascribe a national cultural identity to the product. As a simple example take a Scottish

novel, considered counter-culture in that it defies pejorative representations of Scottish culture yet is intrinsically, both in its reception by literary critics and composition by a literary author, an intentionally 'Scottish' novel. The book benefits from some public event which heightens the author's profile. Despite the publisher knowing nothing about the author's work, the decision is made to publish for beneficial market reasons. Although the subsequent public consumption of the novel may attest to an appreciation of the author's intent, its production and publication as a psychologically motivated activity can only be construed as irrespective of this. However, in its reception as a 'national text' it becomes referred to as 'Scottish' publishing. The industry is implicitly connected with the nationalistic exchange despite not being motivated by it. This is similar to the field interpretation in that it is the cumulative result of many productions but becomes reliant on the consumer's (and foreign publics) understanding of the work where the previous perspective does not depend on this but is a sum total of output. Under this interpretation, works may be produced within the culture without retaining any cultural value, they may be received as produced within the culture but in no way representative of it and therefore may transcend any network which might be seen as of value to the national culture.

The intention in laying out theoretical perspectives as tools for analysis of the case studies is not to select the correct model but rather understand the multiple varying approaches that a variety of producers and receivers might represent. Inevitably the picture that will emerge is of shades of each perspective overlapping so that the industry constructs itself through a compromise of different individual actors, both producers and consumers, motivated by psychological and socio-political impetus and blended to create the framework at national level.

4.2.4 How Culture/Production is Constituted and where it is Located

Whilst the question of the global and the national may seem to provide an implicit definition of limits and levels, it is the points of intersection between these limits that pose challenges and require further delineation. It is important to have an appreciation of the different levels or 'networks', a concept adapted from Mann's (1997) arguments in defining different levels of 'globality' in order to make an acknowledgement of their activity in the context of domestic and

world-markets. It is necessary to distinguish these levels in action, and observe how they may simultaneously be distinguished and interrelate for the purposes of interpreting greater commercial markets of cultural products. These levels might be re-labelled as the sub-national, national and transnational.

The subnational, or local, in this context is derived in a more natural manner without need for configuration and support from marketing and commercial activity, although this is employed. It conforms to Anderson's (1983) anthropological interpretation of the formation of nationalities by being grouped through a common set of identity symbols. It is more directly territorial than the national or international. It is un-empowered in so far as the level of its market is too minimal to satisfy growth and whilst this is not necessary in order to sustain the cultural market of its direct environs it requires support which is bolstered by the collaboration of 'national' enterprise to provide a buffer against dilution. Rather than the materials being endangered it is the market for the materials, the consumer which is at threat without configuring itself within a wider culture. It is this necessity which always lies at the level of subnational as a contingent. Scottish Gaelic and the Highlands culture in general is representative of this.

The national, which in these cases is constituted by Scotland and Catalonia, occurs from the formulation of local identities through the process of differentiation of the other into a more dominant position. It can create a unified sense of cultural identity within the boundaries of its catchment, as demonstrated in the Catalan case. It is derived less necessarily from territorial proximity but is generally held by a common fabric which differentiates it from that which it is not. This may be linguistic in the first instance but is not confined to that. Generally a historically civic memory can be identified separating it from the international and transnational. Within this memory often a sense of previous cultural oppression is identifiable, although this is not necessarily universally the case.

The international identifies with the transnational but must also be separate to it. Whilst the two share a level of market activity which goes beyond the national boundary the transnational may incorporate national traits by sharing these across borders whilst the international attempts to confine a culture that goes beyond the national configuration into a larger grouping either supra-national,

such as the Hispanic or Anglophone cultures, or even detracting from the idea of national characteristics by pre-supposing an all-inclusive global culture (although this is only defined by who it could exclude).

In this thesis the hypothesis is that the national will prove to be the primary concern. The local is important in establishing why intersections occur, and how they affect the mode of industry as a national sector. The international becomes important as a model for the characteristics which differentiate the national from its encroachment by what might be called international or globally dominant cultural markets, such as the English and Hispanic. These definitions act as a housing structure for the model within which publishing in these cases occurs. It is crucial that these boundaries are understood in order to apply comparative theories across both studies. The effects of such definitions and distinctions can be interpreted on both a practical and philosophical level.

In practical terms it is important to recognise factors of beneficial political support. Subsidies or project support from national arts councils and other organisations' funds can be made available both to the national and local frameworks as a consequence of the recognition of national identity and through cultural production the economics of commercialising this output become reinvested into the social aspect of nationalism. This is particularly evident when considering the role of educational publishers who cater to the syllabus market. For example, In Catalonia demand for Catalan language materials generates a market, but it is only by supplementing this with the production (particularly in the case of academic texts) of the more widely spoken and in demand Castilian texts that publishers can bolster this production. In Scotland linguistic materials equate with other English language materials so must compete for the market but the national structure allows for a differentiation of syllabus which means they can produce nationally and export internationally. In this way the three levels of network connect with each other through a web of political, economic dependency.

In philosophical terms the differentiation and limits of the boundaries has to be understood from the perspective of the consumer. Their identification with the different networks (say from Glaswegian to Scottish to English language as an example) dictates the level of demand from the publisher's perspective. This is

particularly obvious in the case of limited market materials which might find some export interest but are directly targeted at smaller communities, perhaps in a territorial sense or specialised groups within the national structure, for instance sports literature that targets supporters. Here the local and the national are connected. We can understand national consumption as being capable also of including the local market but with a focus on cultural concerns from one perspective and whilst they may access published materials that target the international market from another.

4.3 Theoretical Framework Model

An analytical framework has been developed taking this historical and theoretical analysis into account. The framework presents a model for how publishing enterprises which represent opposing poles within the field's boundaries are defined and connected. This model is intended to represent a cycle of interactivity which demonstrates and highlights the processes of influence and consequence in determining how important being able to produce works for a global market is to the sustainability of publishers at all levels in Scotland and Catalonia. The issues that have been raised in this diachronic, theoretical overview of the publishing sectors in each nation (linguistic viability (of minor and major languages), location within the geographic area, infrastructure for production (print and digital), and connection to global markets) have been extracted as key themes which are used as components in organising the analytical frame for the remainder of this investigation, informing the data collection and subsequent presentation of results within this thesis.

The framework addresses the question of whether multinational trade structures are a threat to non-global companies' ability to act and produce within the small nation field by interpreting variables which are characteristic of contemporary procedures affecting the publishing industry. It seeks to connect these procedures by searching for and examining their relationships, assuming the critical perspective expressed in the theoretical underpinnings, assimilated from Bourdieu (2004) and the basic premises of network approaches, that all points within a framework are interlinked through a chain of relationships which although detached from each other are reactive and dependent on the structure of the whole.

There are two realms involved in this, the theoretical and the physical, and the model binds them together by presenting physical variables as processes and influences and providing theoretical interpretations for their connections with each other, in a framework of given assumptions derived from the literature review and further extrapolation of the historical and structural development and consolidation of each cases' field provided in this chapter.

The variables include; physical positioning within the cluster and wider national network, linguistic basis for production, export and import activity, range of product specialisation, the target markets, the size and scale of each enterprise within the context of productivity set against staff size, the age and sustainability of each enterprise, their activity in the rights market, available and employed distribution networks and sales channels. The facilitating variables of processes of digitisation are also introduced as contemporary features which encourage development.

Within the model the central problem, the composition of the small nation publishing field, is bounded by the poles of the enterprises which compose it (on a scale ranging from small independent enterprises to large conglomerates) and the level of markets in which these enterprises act (from the local to the global). These facets of the fields defined boundaries coalesce into distinct, opposing positions of theoretical influence on cultural production and dissemination within the fields, the local and independent structured towards activity which reinforces cultural nationalism, whilst the global, conglomerate extent of the field is more orientated towards processes that contribute to a form of 'corporate imperialism', where power is centred on Global Corporations in place of the Nation (McCown 2010, Pongsiri 2012). The variables are then positioned around these extents of the field model in locations which are indicative of influences at that level of the field, so that both poles can be seen as connected through a cycle of productivity which perpetually reinforces each orientation with, for instance, independent producers developing new markets at the local level which become consolidated as global producers begin to interact in these markets, underpinning growth which supports sustainability, a top-down reinforcement of the total field.

The primary purpose of the model is to act as a chart by which any enterprise within the field can be graded and positioned. From that point by tracing the cycle of interactivity that the framework presents it should be possible to analyse the level of interaction and contribution to cultural identity of any publishing enterprise within the fields of the two cases under examination. When examining enterprises in any other field a new analysis of the historical and theoretical processes at work in that field must first be undertaken to identify the appropriate variables which may differ from these cases. However, every effort has been made to generalise and extemporise the variable used as far as possible, in order to limit the diversification of variables from one field to the next. The scope of the relevant data has been limited by focusing on specific variables and specifying the frame of perspective being adopted for the primary research.
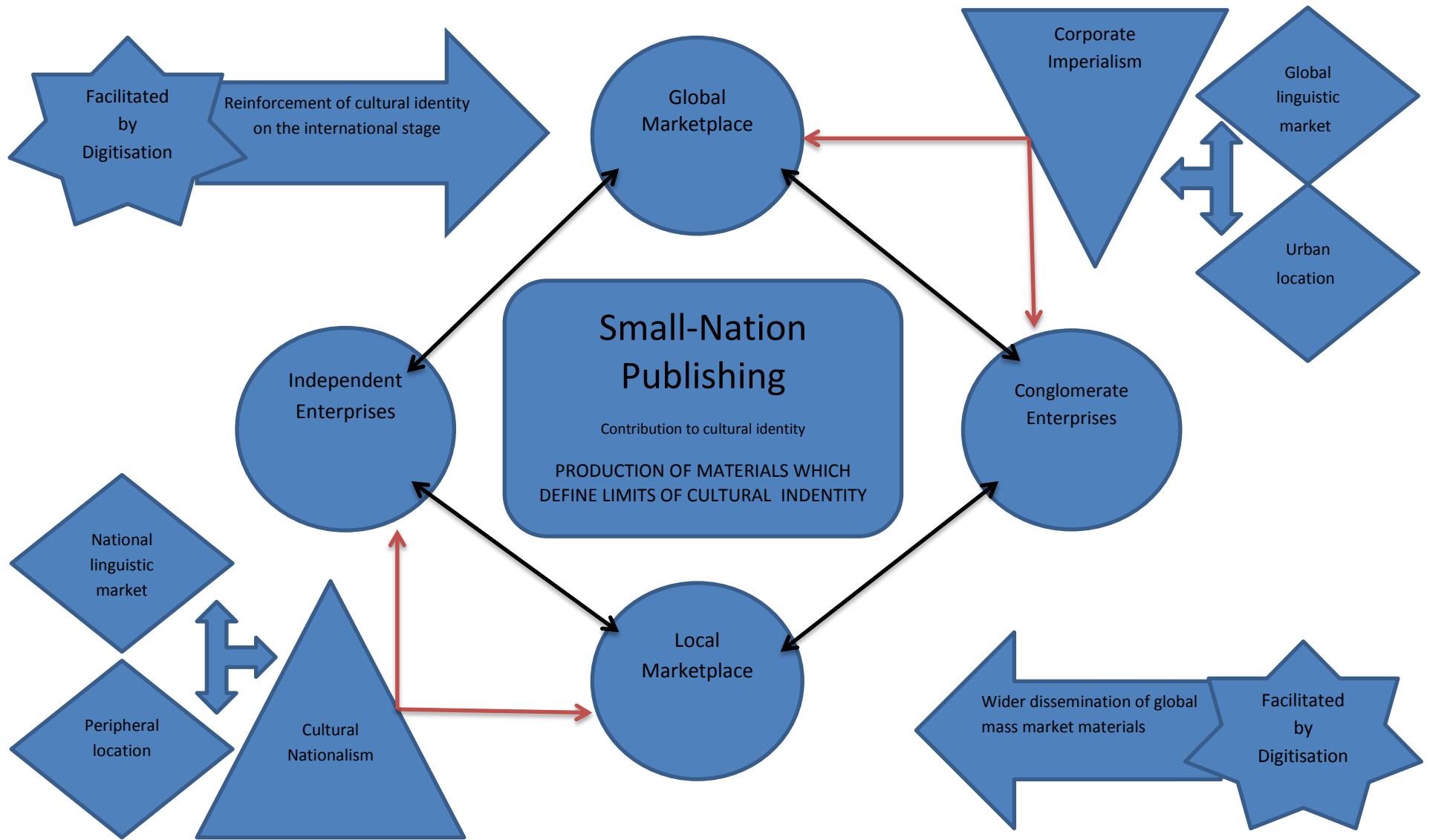
Figure 1: Analytical Framework

Chapter 5 – Analysis of the Catalan and Scottish Fields

5.2 Interpreting the Networks

5.2.1 The Number of Publishers

There are around 300 publishers in Catalonia at any one time (Van Jacob and Vose 2010, Boswell 2012). This fluctuates over or below the 300 mark on a yearly basis, with a decrease in recent years of 5.9% from 306 in 2008 (ICIC 2011) to 288 recorded as members of the Gremi in 2010 (Comercio Interior 2010, 2011). The exact figure is difficult to calculate as certain imprints might be counted individually where in other official survey sources they are counted only as part of larger publishing groups such Grupo Planeta. The database created for this research has been created independently from official sources, agglomerating the list of up-to-date registered members of the Gremi d'Editors and the *ICIC* registration list combined with attempts made to correct overlaps and omissions by searching wholesale distributor sites and other independent sources such as unmentioned imprints from Grup 62 or included in the Edi.cat initiative. It also cross-checks these sources with less recent third-party materials from the 2007 Frankfurt Book fair where Catalonia was guest of honour. The initial number of enterprises included in the database was 309. Then all nodes related to companies, organisation and institutions who work with or within publishing but do not publish were removed and also all the publishers for whom it was not possible to find any of the required data, due to lack of online resource. Having done this, altogether the database lists 247 of the currently active and accessible publishing bodies in Catalonia.

In the case of Scotland the field is less heavily populated and dense than the Catalan cluster. At any one time over the last ten years there have been approximately between 85 and 110 publishers in Scotland (SAC 2004: 8, Publishing Scotland Review 2010-2011: 8). Again an exact figure is hard to place because this is dependent on how to classify and distinguish between publishers in this field and those enterprises undertaking publishing activities but extraneous to the core field. Within this database 158 nodes representing publishers were initially counted. Larger than the officially reported figures, this included all publishing houses, all related companies who work with or within publishing but do not publish, and also a

number of central and council libraries which interact in the field. This was then downscaled to 118, including only the active publishers and enterprises with integrated publishing services for whom it was possible to collect available data. The data for the Scottish network survey comes primarily from data provided by Publishing Scotland, the principal trade body in Scotland. Details for all member publishers have been taken from Publishing Scotland's 2011 yearbook, which provides details of the approximately 57 publishers who were full members of the body in that year, and other minor pieces of information about the remaining publishers and related enterprises registered in Scotland. Other more up to date listings were found on the Publishing Scotland website, whilst nodes that are not associated with Publishing Scotland were identified and included through independent research. Further information on the remaining publishers within the Gaelic language sub-field was provided by the *Gaelic Books Council*, using their own contact database.

The size of the two databases, as a representation of the overall fields, is indicative of their difference in terms of scale. The Catalan network could be averagely estimated at double the size of the Scottish network, whilst the relative size, geographically and demographically, of Catalonia in relation to Scotland is not so great. However, this disparity can be recognised primarily as a consequence of the historical development of each 'cluster', described in the previous chapter, with the Barcelona cluster maintaining a historical position of dominance in publishing in Spain whilst in the UK, London has largely historically dominated the publishing sector.

5.2.2 The Consolidation of the Field

The consolidation of the field is examined by triangulating three categories of data, the number of staff employed, the titles produced to date and different types of publishing enterprise in terms of organisational structure. Together these identifiers are indicative composition of the field between large and small enterprises which is, in turn, an indicator of the balance between proportions of the sector that are suited to act at international and local levels.

In the Catalan database the distribution and composition of the field between entirely independent publishers and those which form part of a conglomerate or an association of some kind is divided 152:89, which is approximately 5:3. Additionally, 2.5% of the nodes in the database are not normal publishers but businesses which offer services or products relating to the publishing field. In terms of the distribution of large and small size publishers where large publishers are defined as employing over 50 staff and small as five and under, with those lying between being interpreted as medium size publishers, small publishers represent 42% and large 9%, out of the 216 enterprises it was possible to provide data for in the staffing tally. However, out of the 9% that are designated large, more than half employ over 100 staff. Almost half of the database nodes, 49%, are medium sized publishers.

Examining the number of titles that a publisher has produced to date is useful for providing a partial reflection of the scale of their operation, set against the number of staff they employ and how long they have been established.

As a comparison 32% had also produced fewer than 100 titles to date, corresponding with the distribution of small publishers. However, 15.4% of the companies had produced over 1000 titles to date, almost double the proportion of large publishers in terms of staff size. In total, 65% of the enterprises have produced over 100 titles. Within this figure, 76% have produced between 100 and 1000 titles to date, the largest segment of the total field. Figure 1 shows that regardless of the size of the publisher, the majority of enterprises in operation typically have a backlist of over 100 titles.

However, of the 32% that have produced fewer than 100 titles, the segmentation into different quotas is even; 28% of these have produced between 20 and 40 titles to date, 18% between 40 and 70 and 22% do between 70 and 100, demonstrating that the breakdown of publishers with smaller production rates is quite stratified from 20+, as shown in Figure 1.
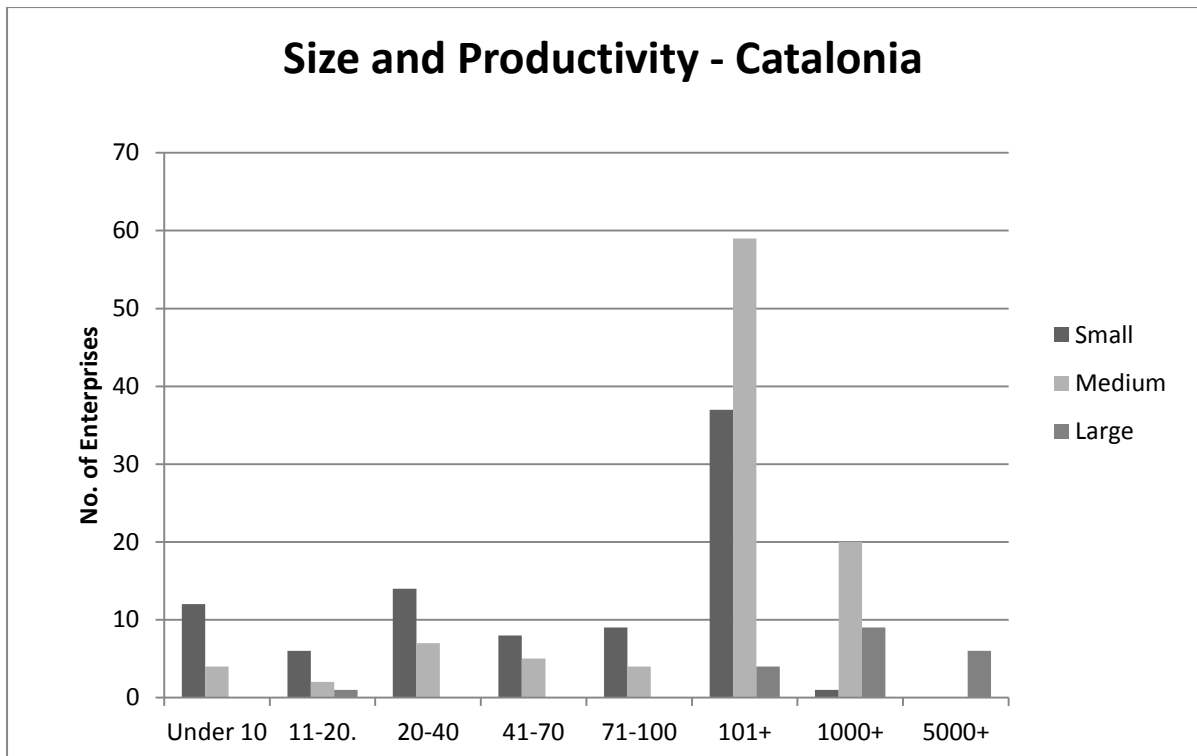
Figure 2: Size and Productivity - Catalonia

Figure 3: Size and Types of Enterprise - Catalonia

In the Scottish database the distribution and composition of the field between entirely independent publishers and those which form part of a conglomerate or an association of some kind is divided 72:44, which is approximately 18:11. Only one of the nodes in the database is not normal publishers but a business which offers services or products relating to the publishing field.

In terms of the distribution of large and small size publishers where large publishers are defined as employing over 50 staff and small as five and under, with those lying between being interpreted as medium size publishers, small publishers represent 80% and large 4%, out of the 118 enterprises it was possible to provide data for in the staffing tally. This leaves approximately 16% of the database as medium publishers. None of the enterprises in the database employ over 100 staff.

As a comparison, of the 115 publishers included in the section on production rates 62% had produced fewer than 100 titles to date. This suggests the market is dominated by small publishers with low output, differentiating it significantly from the Catalan cluster.

Excluding those publishers with non-standard backlist, such as bible publishers, 35% of the nodes have produced over 100 titles to date. 85% of these (30% of the total sample) have produced between 100 and 1000 titles to date. The remaining 5% of the sample that have produced over 1000 titles corresponds with the publishers categorised as large in terms of staff size; chief amongst these is Harper Collins.

Only small publishers have produced fewer than 20 titles to date. However, both more small and medium sized publishers have between 100 and 1000 titles to date than any other margin.

80% of the small publishers that have produced more than one hundred titles were founded before the 1990s. This makes sense and still correlates these nodes with the idea that the Scottish field is populated by small publishing outfits; the only reason these ones show higher production is due to their longevity. There are only a couple of exceptions to this and these are explicable based on publishing model, for example Bright Red Publishing which is an educational publisher with a past paper tender.
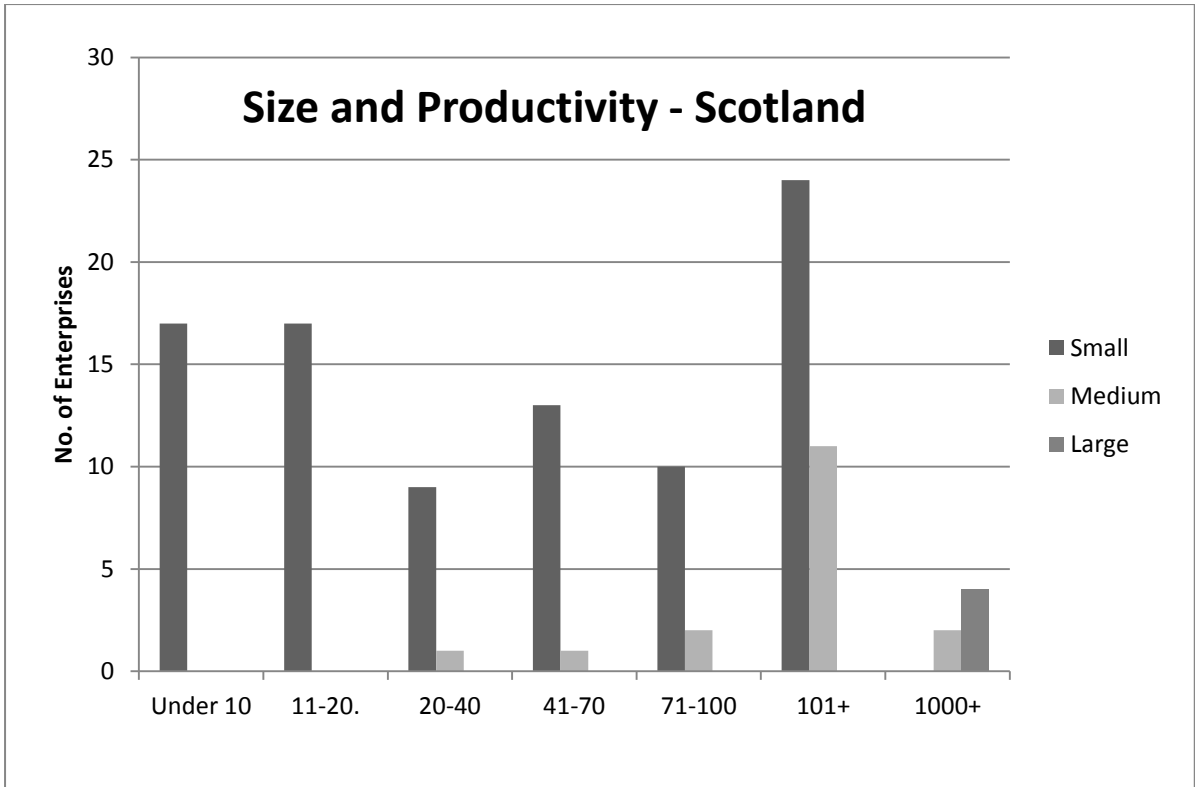
Figure 4: Size and Productivity - Scotland

Size and Type of Enterprise – Scotland
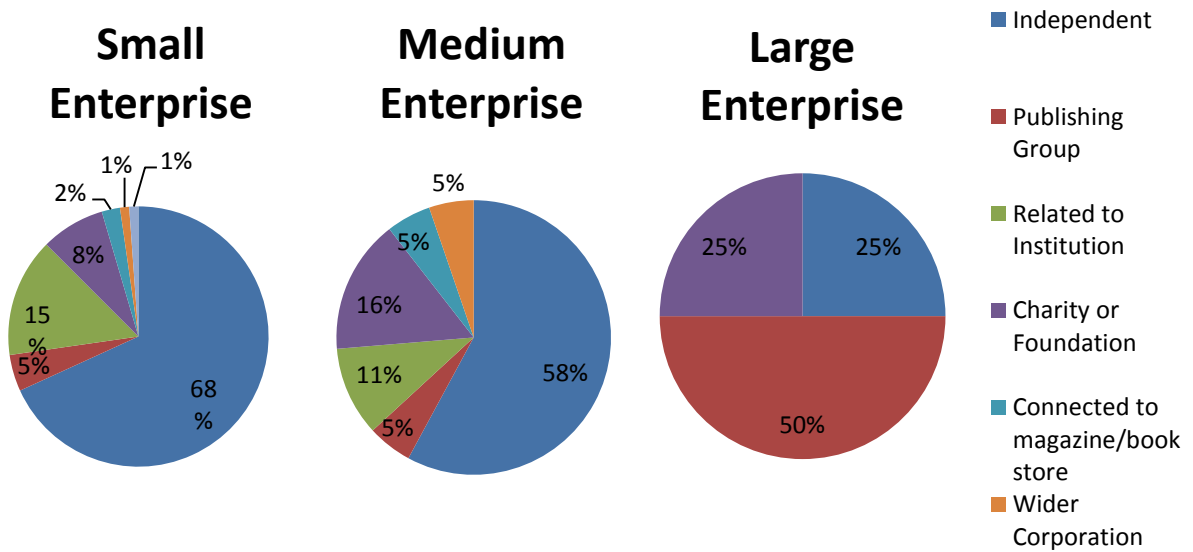
Figure 5: Size and Type of Enterprise - Scotland

When compared with one another (Figure *), the Catalan field demonstrates much higher rates of productivity, over 100 titles, across all its small, medium and larger publishing enterprises, whilst the Scottish field is full of smaller enterprises that have produced fewer than 100 titles to date. However, both houses demonstrate a reasonably even distribution between the various scales of productivity at the sub-100 level of the long tail of the field.
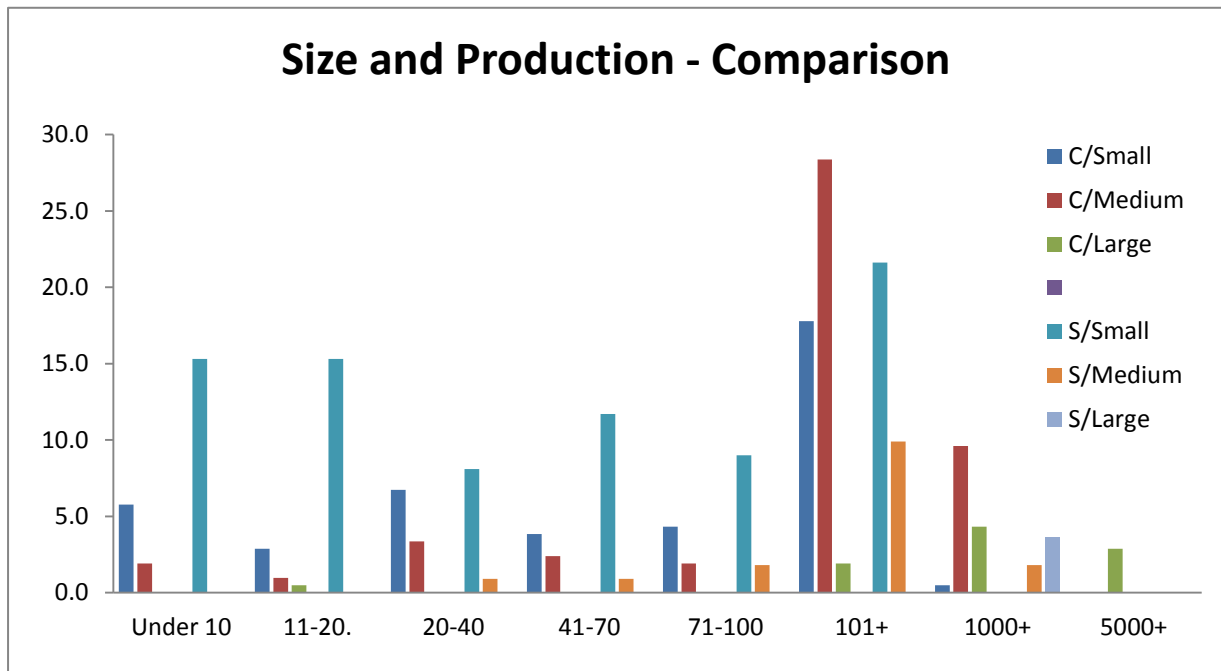
Figure 6: Size and Production - Comparison

5.2.3 Where are they based and how old are they?

The publishers in the Catalan network are based in a variety of different locations across Catalonia.

Figure 7: Catalonia

The 247 publishers included in the network are located across 38 different locations in Catalonia. However, only eleven, less than 30% of these locations, are home to more than 1 publishing house. The geographic spread and distribution of publishing houses is therefore relatively diffuse, with points of very dense, clustered activity and then loose individual enterprises spread out.

This is very common to industrial organisation in small nations as well as large and hubs of activity are expected to be situated primarily around urban centres. This is true in the Catalan network with 185 (75%) nodes in the network located within the limits of Barcelona city municipality.
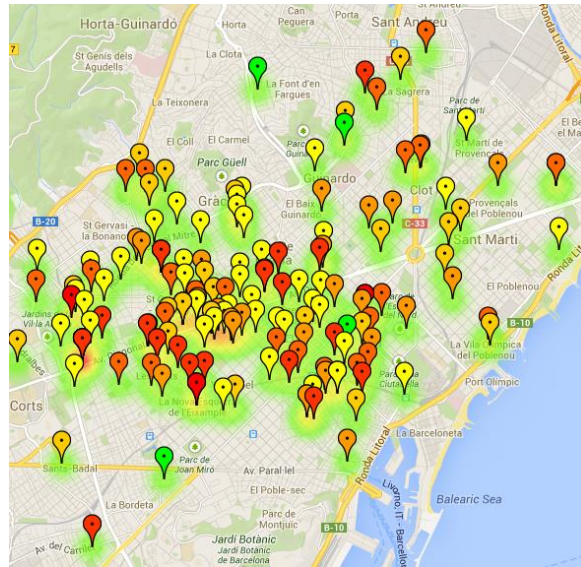
Figure 8: Barcelona

This proportion increases when factoring in all of the locations which are not denominated as a contingent part of the greater city of Barcelona, but which are in fact located within the wider province of Barcelona, which would be equivalent to the locations included as part of Greater London. As an estimate, if those locations falling within the county of Barcelona are included then another 6, totalling 191 or 77% of the publishing within this database occurs in this confined area, representing a core cluster.

Figure 9: Barcelones

Beyond Barcelona this disparity in concentration between urban and peripheral locations is consistent across Catalonia, relative to the smaller size of other urban centres. The other areas where concentrations of well-publicised activity occur correspond with the other larger urban centres in Catalonia, particularly Girona (Figure 10) with four, and also Tarragona (three) and Lleida (two), respectively the bases for Arola Editors and Pages Editors.
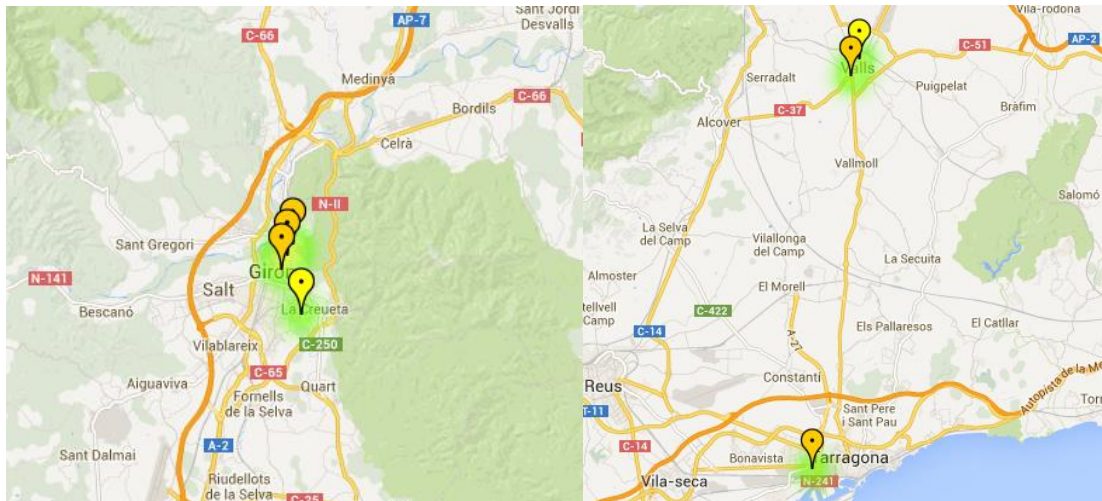
Figure 10: Girona and the Camp de Tarragona

However, there is also a growth in activity in certain rural areas which suggests expansion out from urban centres. An example is the growth of activity in Valls (Figure 10) in Tarragona in the Alt Camp province. Despite its relatively small size it is now home to significant Catalan enterprises including Cossetània which began in 1996 and Ediciones Noufront which began as DSM Ediciones in 2003. One possible explanation is the increasing accessibility permitted through digital media and internet use, and the opportunities this technology provides publishers, who are no longer dependent on the same level of proximity to other enterprises and suppliers and the social network itself.

Publishers are also located across Scotland, but with certain points of density as corresponding with the urban/peripheral evolution of commercial centres. Publishers are located across 42 different locations in Scotland (Figure 11).
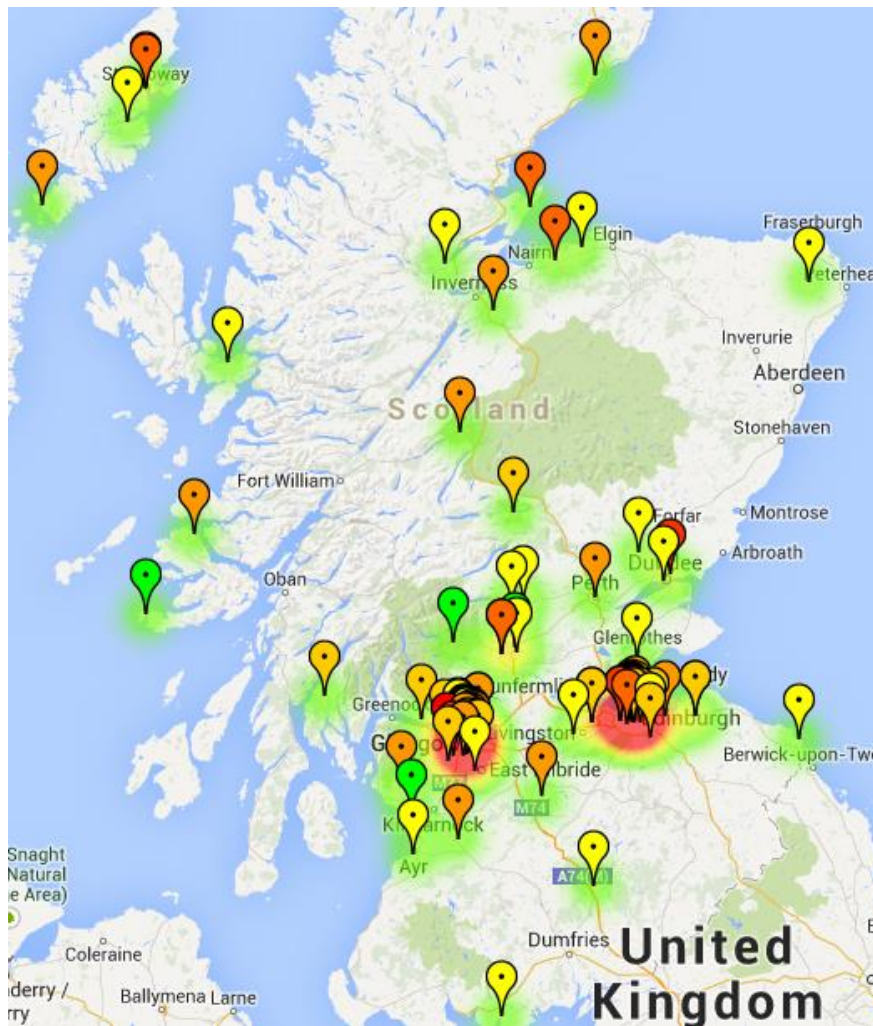
Figure 11: Scotland

Eight locations are home to more than one publisher and in terms of the proportion of this network, which can be understood as around a 5th or just fewer than 20%. In terms of the urban clustering within this network, it is split between the two central belt Scottish cities; Glasgow and Edinburgh. As partially explained by the historical context of the cluster's growth, their density is not as great as that of Barcelona in Catalonia, although they remain by far and away the primary centres of publishing within Scotland. In this network 25 publishers are registered in Glasgow (Figure 12) and 34 in Edinburgh (Figure 12), which is traditionally and historically the larger publishing centre. Together this represents half the total publishers in Scotland, around 50%, a much smaller percentile in relation to the rest of the network when compared with the Catalan network.
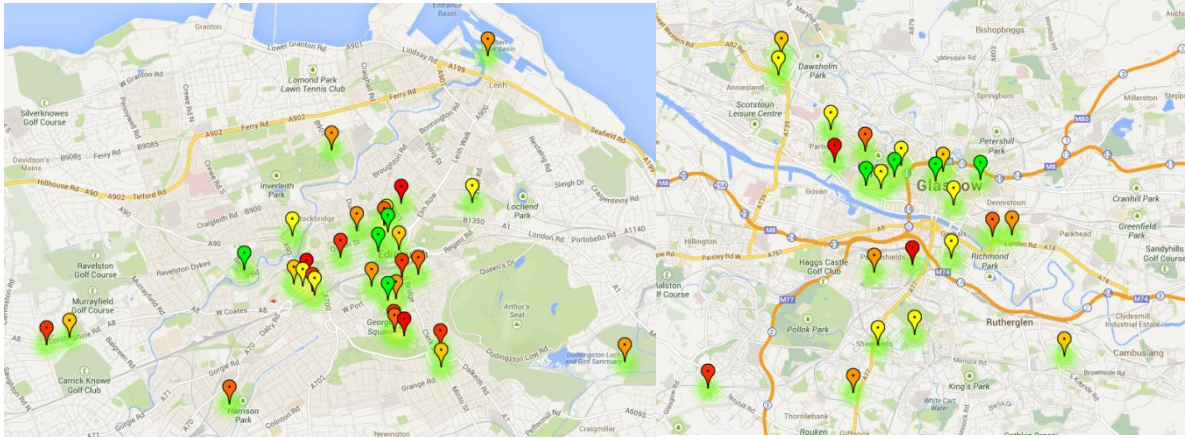
Figure 12: Edinburgh and Glasgow

However, if you look the whole of Scotland's larger central belt (Figure 13), the most populous part of the country, which includes both major cities and stretches from Dundee to Ayr, then 80% of the sample are located across 21 different locations within this area.
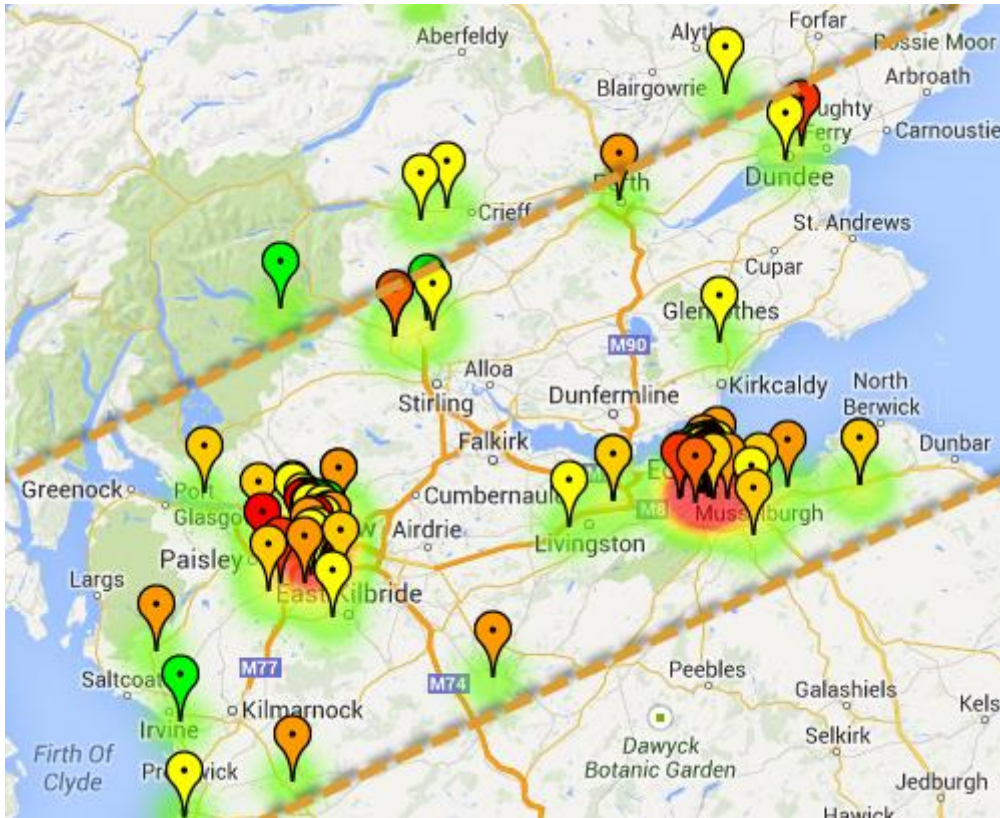
Figure 13: Larger Central Belt

Stornoway is the only location outside of this area that is home to more than one publisher. However, two areas on the map demonstrate a greater amount of clustered activity; the outlying areas around Inverness (Figure 14), the municipal capital of the Highlands, and also the Western Isles (Figure 14) where Stornoway is located. It is home to Stòrlann and Acair, two of the largest Gaelic Publishers.

Figure 14: Inverness and The Western Isles

Owing to these more rural micro-clusters on the map Scotland is less dense in urban areas than Catalonia. In particular the disparity seems to come about in relation to Gaelic publishers which are small but multiple and situated in remote locations as dictated by the disparate population of Gaelic speakers in Scotland.

Despite having a smaller network with fewer enterprises, the Scottish network is spread across more locations than the Catalan network. Its urban concentration is not so intensely packed as the Catalan. In the case of the Catalan network it essentially appears as a major cluster based in or around the Barcelona hub and then a separate and very small and diffuse amount of peripheral activity, perhaps increasing in line with the rise of digital technologies but remaining firmly the minority. Scotland in contrast is far more varied and built up in its peripheral locations, which may in part be due to the split of Gaelic speaking populations and their dissemination across the nation, in outlying areas. In this sense it is interesting to see how far linguistic distribution has dictated the segmentation of the publishing field in geographic and demographic terms.

Another interesting point of analysis within the context of the network, which aids in the diachronic contextualisation of this overall thesis, is the spectrum of age of the publishing house present in these networks. By considering the date the houses

were founded it may be possible to glean an idea of the overall configuration of remaining publishing houses in terms of what eras spawned growth.

	Post 2000		1990s		1980s		1950-1979		1900-1949		Pre-1900	
	no.	%	no.	%	no.	%	no.	%	no.	%	no.	%
Catalonia	84	35.1	41	17.1	38	15.8	46	19.2	28	11.7	3	1.2
Scotland	38	36.5	18	17.3	22	21.1	11	10.5	8	7.6	7	6.7

Figure 15: Comparative Table of Era's enterprises were founded in

In the Catalan tally it is particularly interesting that 46 publishing houses were founded during the period of dictatorship when Catalan language and its circulation was prohibited. It is telling that in fact there were more publishers founded in this period in Catalonia than in Scotland. However, although it seem obvious to assume this represents a form of cultural resistance during the period, it should be noted that of all 46 only two publishers produced books purely in Catalan and one of those was founded in 1979, after Franco's death but before the passing of the Law of Linguistic Normalisation. This trend stretches further back; from 1900 to 1979 only three Catalan only publishers were founded. The one publisher that was founded during Franco's living dictatorship was Editorial Portic, a reference publisher that was incorporated in Group Enciclopèdia Catalana in 1996.

In the Scottish context, since devolution six publishers have been founded that publish in either Gaelic or Scots which includes Grace Note Publications, whose remit is to support Scotland's indigenous languages. In the 1990s and 1980s only three Gaelic or Scots publishers were founded, so the number has doubled since devolution. There is only one active publisher producing Gaelic books founded prior to 1950, The Saltire Society, a charity organisation. This is indicative of the lack of infrastructure to support print culture in the early half of the century and prior to the foundation of the Gaelic Books Council.

Most publishers that are still in existence, relative to the total size of the field, were founded after the millennium which, in light of the composition of these fields, suggests that publishers have a short lifespan at the bottom end of 'the Long tail' (Anderson 2004, Oxford Reference 2013).

As a comparison the maps in Figures 6-16 are also indicative of the age of publishers. The shade of colour of the tags on the maps indicate the age of each publishing house from darkest red indicating the oldest enterprises through to bright yellow indicating those established after the Millennium. Green tags indicate that the enterprise's founding date is unknown. In both Catalonia and Barcelona there only a few enterprises located in the periphery, outside the urban centres, that were founded prior to 1950, lending weight to the argument that the technologies of recent times have facilitated a gradual expansion outwards, allowing more evenly distributed activity to begin to occur which facilitates publishing that may be influenced by more local concerns.

5.2.4 The Distribution of Specialisms and Market Coverage

In terms of the variety of publishing undertaken in each nation, certain comparisons and disparities are obvious. Looking at them comparatively, a publisher's specialism and target market might be assumed to correlate with one another. Within the Catalan database the 3 types of publishing covered by the greatest percentage of publishers are Guides and Reference Texts (published by 45%), non-fiction (44%) and fiction at (43%). It is fair to assume that fiction and non-fiction would naturally represent the primary specialisms in any national market as they comprise the majority of material sold by commercial mainstream bookstores and other booksellers. The category of manuals and guides is represented by more publishers than the former categories, almost half of the total publishers in the database, and 40% of the producers of guides and manuals do so in Catalan; however, only 7% publish in only Catalan so most also produce in Castilian. This indicates a high level of demand within the Catalan and Castilian language market for manual and DIY works. Part of the spread of this type of publishing might be accounted for by the large and lucrative export market Catalan publishers can benefit from by producing works for the Latin American market. It represents less risk in commissioning for a foreign market to produce such works which have an expected general audience of

enthusiasts whether niche or mainstream, and can be expected to reach a wider audience. Academic texts are published by 36% of publishers and children's books by 33%. Between the seven major specialisms of academic, reference, non-fiction, children's, fiction, educational and poetry publishing, five of the categories are represented by between 30% and 50% of publishers. This demonstrates a remarkably proportionate stratification of publishing activities which, according to these figures, seems balanced between the large numbers of publishers working in Catalonia. Unsurprisingly poetry is less represented in the database, covered by 11% of publishers, as is typical globally, where poetry is characteristically a niche production for a much smaller market. The more surprising figure is that educational publishing is only undertaken by 15% of publishers, a lower figure than might be expected in a small nation where local and bilingual educational demands need to be met. However, of this number, the proportion that publishes in Catalan is 92%, so this 15% largely represents the Catalan proportion of the field and market, with eleven publishing in only Catalan, with no consideration for the Castilian market and only three publishers in the database publishing only Castilian educational materials. It is lower in relation to other specialisms because many of the total number of publishers in Catalonia are bound up commercially in export activities which pertain to the Latin American market and Catalan educational publishing cannot interact there. Additionally, historically Madrid has been the centre of educational and institutional publishing in Spain whilst Barcelona is the greater centre for trade publishing. This interpretation is confirmed by statements made in interview with Segimon Borràs, Director of the Gremi d'Editors.

In Scotland the top three specialisms are also non-fiction (52%), more than a quarter of which is constituted by historical non-fiction, fiction (30%) and manuals and guides (36%). However, the discrepancy between non-fiction and fiction is relatively larger. Non-fiction is the dominant publishing specialism in the Scottish database which ties in with previous examinations of the Scottish market that suggest that there is a large demand within the nation for historical and non-fiction materials, even of local interest (McCleery, Gunn & Sinclair 2008, Boswell 2012).

As in the case of Catalonia, the larger number of manual and guide publishers might be attributed to the opportunity for engaging in the international export market for English language materials. Publishers in small nations with dual linguistic identities

that pertain to global linguistic cultures could be interpreted as identifying this specialism as a means of accessing the international publishing field, perhaps moving beyond the boundaries of the national market which is limited by aesthetic literary tastes and niche demands. However, Academic publishing (14%) and Children's publishing (13%) are less well-represented compared with the Catalan database. This may be because these specialist areas are already heavily covered by larger publishers in London, the US and other Anglophone clusters meaning there is perception of limited space for Scottish publishers to fit into these less location-specific markets. Interestingly, 16% of the market is education and 11% do poetry, which is comparable with Catalonia, suggesting these areas might represent typical facets of demand in small nations more generally, relating to institutional, national and niche tastes and requirements. Overall the Scottish stratification of publishing specialisms is much less consolidated and balanced than the Catalan Network. This may have to do with Catalonia's dominance of publishing in Spain, allowing it a degree of self-control in its organisation compared to the Scottish market, where opportunities must be sought out under the shadow of a large and dominant conglomerate Anglophone publishing market.
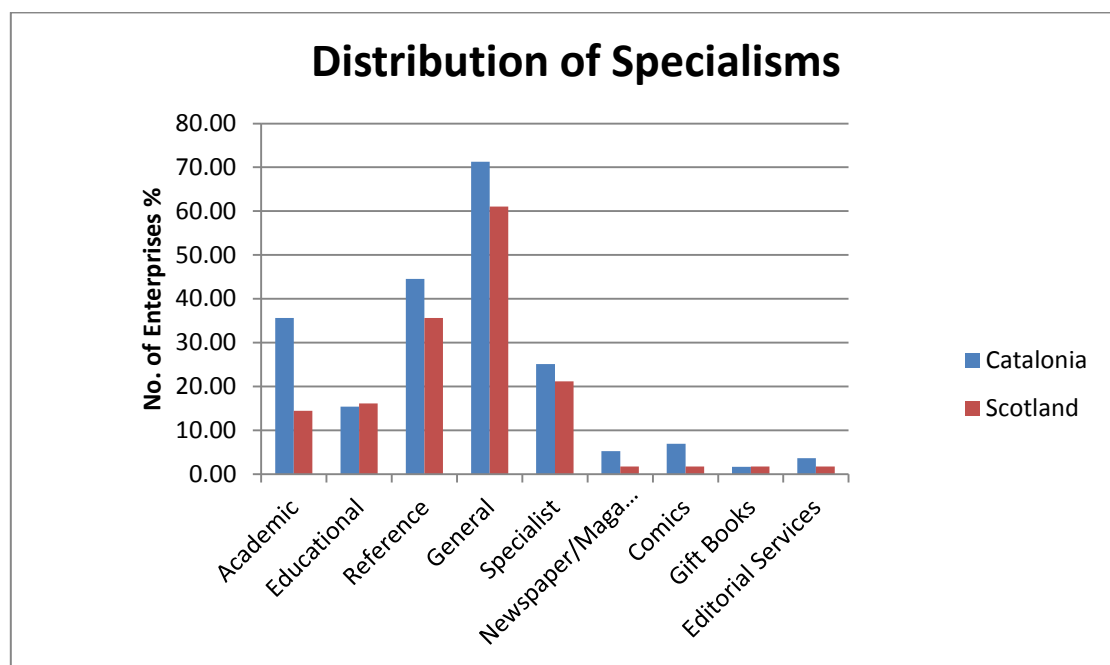
Figure 16: Distribution of Specialisms

In the Catalan database, the 'General' market is targeted by 65% of enterprises. 10% of publishers only target the Catalan language 'General' market, whilst 25% are 'General' publishers only in Castilian. The 'Higher Education' is targeted by 29%, despite being a specialism for 36% of nodes. The 7% discrepancy could be accounted for by academic publishers who target professional, medicinal or law markets. The 'Children's' market is targeted by 30% and 'Specialist/Technical' by 35%. This figure correlates effectively with the 3rd of Catalan nodes that specialise in technical reference materials because although the entire specialism is represented by 45% a number of these nodes will target the general market with maps and other non-technical reference materials. 16% are educational which is in line with the specialist proportion of publishers producing for this market. The 'Special Education' market is targeted by 15.8% of publishers.

However, the tourist market is only targeted by 5% which is low in a country which is also a popular tourist destination. However, the justification for this might have to do with the level of quality control in Spanish publishing, the low literacy rate which means 'pulp' publishing has less market interest and therefore value, and perhaps the fact that only Castilian language tourist materials would bear a sizeable market, and these may be produced in other parts of Spain which more readily serve the national and international tourist market; locations such as Andalucía (Anadon et al, 2011).

In Scotland 61% of publishers in the network produce materials targeting the 'General' market, and 10% target the Gaelic only 'General' market, which might be a larger proportion than would be expected. This is because in the Scottish case there are a number of publishers who produce texts in both English and Gaelic but are focused on a Gaelic readership, such as Acair, and they have been included in this. The educational market is targeted by 8.5% and the Higher education market is targeted by 11%. This is unexpected because it might be reasonably supposed that there would be a greater focus on producing materials designed for the national market, as school qualifications in Scotland are different to those in the rest of the UK, whilst at HE level many corporate academic publishers dominate the market, making it more competitive. However, the representation of academic publishing as a specialism against the number of publishers targeting its direct market is proportionally equivalent to this category in the Catalan database, with the same

small disparity set aside for those targeting the professional markets, whether medical or legal. It suggests a proportion of academic publishing is always targeted at wider markets. Additionally, whilst education may be a more region-specific market, this also means it is also more limited from an international perspective.

19% of publishers publish for the 'Tourist' market, which is demonstrative of the level of cultural commodification in Scotland. This is particularly a phenomenon for publishers in urban centres producing for the mass of tourists over the Scottish summer festival periods. The 'Children's' market is covered by 17% of nodes and the parental market by 4.3%. Three other markets of reasonable interest are the Specialist' market (25%) and 'Special Education' (20%). This a sizeable portion for a niche market and particularly demonstrates the strength of the Gaelic learners market, which falls under this category and is indicative of the potential for growth in future Gaelic readership. Also of note, 13% target the local market which potentially validates the high percentage of nodes specialising in history.

Figure 17: Target Markets

In line with the breakdown of the different specialisms of publishing undertaken in Catalonia, which seem reasonable and relatively evenly distributed between all the publishers in the field, there is also an equivalent representation across each of the major markets. In Scotland the distribution is less precise, with the 'General' market being predictably sizeable. However, this is followed by the 'Specialist' market and the 'Special Education' market. While other markets may seem uncommonly lower in comparison, there appears to be relatively vibrant activity in the tourist market.

5.2.8 The Sale of Foreign Rights and Export/Import Activity

Another indicator of activity within the global and national fields is the issue of rights, an increasingly important part of many publishers' business strategy, whether small or large enterprise. Interaction at international book fairs and the sale and/or purchase of foreign rights opens up the boundaries between the international dissemination of national works and often defines the cultural character of works which transcend their domestic market. In terms of the identity of publishers, the titles on their list and the cultures from which they originate, whether domestic and not sold internationally, national but distributed internationally or foreign and imported, indicate in large part the market focus of any publisher. This is therefore practical data for analysing the variety and configuration of publishing activities as a whole in these two nations.

In the Catalan database it was possible to account for 87% (214) of the total field's sale of foreign rights activity. Out of the publishers for whom it is possible to establish a 'rights identity', 70 or 33% of those accounted for are listed as not being involved in the sale of foreign rights. However, 144 (67%) publishers do sell foreign rights. In the case of those who do not sell foreign rights, this category primarily corresponds to publishers whose lists, either entirely or for the most part, are comprised of foreign works which they have imported. It cannot, therefore, be assumed that that those not selling foreign rights are not active in the rights market. However, there are also directions of traffic between the interaction of publishing fields that are national and international, and in the case of those not selling rights and translating work, they can be understood as traffic from the international into the national, effectively a globalising process within the literary field.

The higher proportion of publishers able to interact in the rights market indicates that the Catalan publishing field is very open to a global cultural dissemination. Despite the limitations of the small Catalan language market, within the firmly established Castilian language segment the database depicts a field of publishers very much engaged with the world literary field, as opposed to focused on the domestic market and unengaged (as might be assumed of smaller nations' fields, such as the Czech Republic in Eastern Europe). This is highlighted by 54 (25%) of the publishers in the field and over a third of those recorded as selling rights, being active in the Hispanic American market. This is not to say that those publishers who are selling foreign rights within the list have no relationship with the national/cultural actions of publishers focused on the domestic. In fact these publishers represent the intrinsic link between the national level of actors within the publishing field and the migration of the national biblio-culture into the transnational and/or international markets. If the publishers have rights to sell they are actively participating in the commissioning and development of texts at a national level that are then transferred into the international, although it must be acknowledged that the texts they commission can equally be conceived beyond the national level at their inception. However, those publishers not selling foreign rights, (where not also importing or translating works) can be interpreted as underpinning the domestic publishing field. In most cases publishers more active within the international field can be interpreted as also active within the domestic field, as whether importing or commissioning they are creating texts and disseminating them domestically. As a more generalised example of this the *Harry Potter* series of books by J.K. Rowling can be understood as an international phenomenon, but played a crucial role as a text within the English publishing field. Stieg Larsson's *Millenium* trilogy, acclaimed at international level has encouraged the commissioning of other Scandinavian crime fiction (Schumpeter 2012) which whether authentically of the field or not, encourages the development of writers and a commissioning within the field at a domestic level and this is how the fields interact.

For those not engaging in rights sales market, exporting their works may be an alternative sales channel. However, this element of the analysis quantifies the export market by looking at the number of publishers distributing to the locations rather than analysing the relative value of these markets, because the purpose of this evaluation

is to identify cultural connections of importance to the identity of the field. Out of the 225 nodes in the Catalan database for whom it was possible to gather information, 43% (96 publishers) do not provide export information. Over half the nodes have the capacity to distribute abroad and this is facilitated by the nation's Castilian publishing activity. 25%, which is 59 publishers or just under half those that do export distribute to Mexico and 20%, just over a third of those that actually export distribute to Argentina. In total 45% of all the enterprises in the database export to the international Hispanic market, 79% of all export activity. Outside of this the most represented export destination is the US (14% or a quarter of the exporters), with its own domestic Hispanic population. No other destinations are targeted by more than 10% of the nodes. Portugal is the most targeted European nation at 6.2% of the total sample.

In terms of importing in Catalonia, out of the 229 for which it was possible to acquire this segment of data, 160 houses (70%) do import foreign works whilst 66 (30%) in the list are counted as not importing, of which 40 (18%) do not at all and 26 (12%) do not because it is not applicable to their strategy, varying as a comparable figure to the numbers of those who do and don't sell foreign rights. This is understandable because those companies where importing is not undertaken or is not applicable may employ a publishing model that never interacts with the international rights market. 160 publishers, 70% of those accounted for under importing, is a high figure but this is understandable when considering the large corporate presence in the field which includes enterprises acting at an international level. Also, as other recent studies regarding trends in bestselling literature across European and world markets have suggested (Kovac and Wischenbart 2009, Kovac and Wischenbart 2010) the demands of domestic markets are increasingly dictated by international westernised markets. As such it is not strange to see Spanish and Catalan publishers translating other world literatures and texts for a Spanish audience, particularly those large producers who export for Latin America. Many of the products are imported and/or translated from Anglophone authors who benefit from a strong presence within the international bestseller field (Kovac and Wischenbart 2009).

In the Scottish field international engagement for the most part is underrepresented and relatively insignificant. In terms of foreign rights sales it was possible to account

for 112 publishers, 95.7% of the total field. However, 68%, 76 of those accounted for are listed as not being involved in the sale of foreign rights.

Similarly 60% (66 nodes out of 110) do not export. Out of those that do export the Anglophone market is understandably the primary target with 41% of exports going to the US, 43% to Ireland, 48% to Australia and 20% to South Africa. So in total 73% of the export activity in the database is targeted at the Anglophone market, which is comparable with the level of Catalan activity directed at the Hispanic market. Surprisingly however, only 11% target Canada despite it having a large population of Scots emigrants (Scottish Government, 2009). Outside the Anglophone market the most significant point is that 30% export to China, clearly a developing foreign market for English language materials. This suggests that Scottish publishers are looking to developing markets for future international activity.

Import and translation activity is much the same with 89 nodes, 76% of the database, not importing or translating. This suggests most houses are developing domestic materials, whether for a domestic or international market. This indicates the rate of internally developed cultural products is relatively high in the Scottish field. The fact that this correlates with low levels of foreign right selling and export activity suggests these figures are representative of the isolation of the publishing field and there may be less focus on globalised materials when producing texts for the domestic Scottish market. Of those who do translate there are also a number who effectively translate internally within the domestic field by specialising in ancient texts in Scots or Gaelic reinforcing the interest in the local historical market within the Scottish field.
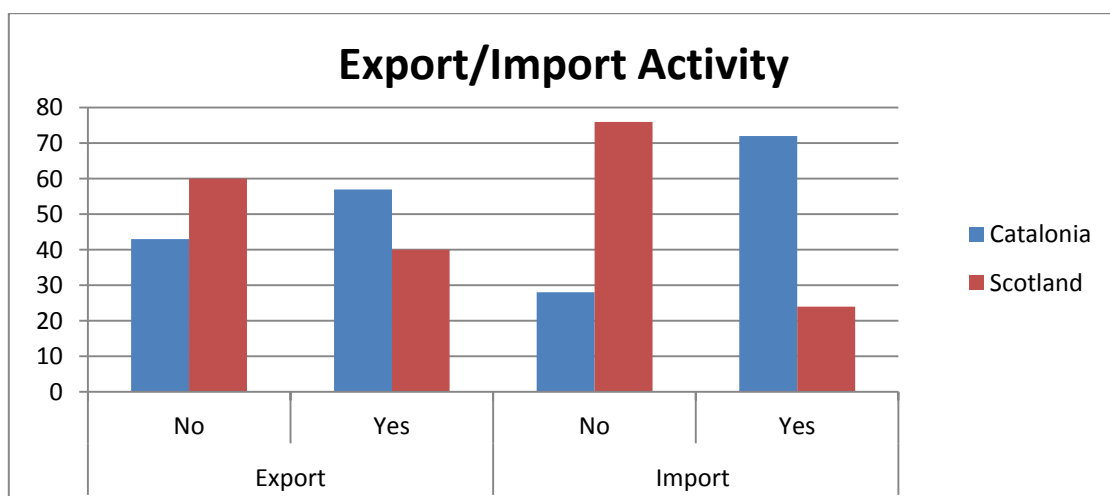
Figure 18: Comparative Export and Import activity in each nation

It seems that the Catalan field imports and translates many more works than the Scottish field, though this may not be entirely representative as many English language titles in the Scottish field are imported from foreign Anglophone cultures. However, this is nothing to contradict the evidence that Spanish and Catalan publishers appear in many cases to focus all or at least part of their business strategies on the translation and importation of foreign works, whether they are large publishers such as Planeta or small rural houses such as Arola. Comparatively the Scottish field is less active internationally, except for its concentration on China a growing export market with potentially high value for future production. This is also a possible explanation for why a greater focus is placed on the tourist market in Scotland, selling commoditised culture to foreigners from domestic spaces.

5.2.10 Domestic Co-operation

The type and scale of collaboration occurring within each nation is indicative of the extent to which conscious networks are formed and how far a balance is struck in the field between cohesive organisation of the sector and a loose agglomeration of unrelated activity. In the Catalan database 20% of the publishers (48) did not indicate any kind of collaborative activity with other enterprises or organisations within the network. However, only 7% collaborate in any way with other publishers. There is also no single node of distinguished importance and there is little inter-publisher cooperation, although 9% work within a coalition of publishers. Out of that 9%, 76% are part of Grup 62, an important and prominent coalition within the field.In terms of trade body membership 69% (171) are part of the Gremi d'Editors.

Regarding co-operation with Catalan online distribution channels 18% (45) of the surveyed enterprises in the field are available through Catalan Internet-based platforms. 69% of this portion use Llibres.cat and 93% of the 45 are part of edi.cat. The majority of independent Catalan ebook production is distributed via this initiative as an alternative to Amazon and other major international ebook retailers where Catalan language works struggle for visibility competing against international bestsellers.

The Scottish field is very different because 35% (40) of the nodes do not collaborate at all but 23% (26) do work with other publishers. This is a larger proportion than in

the Catalan case. However, it is equally the case that there is no single node of distinguished importance. Regarding non-trade collaboration 28% (32) work with other institutions, suggesting a high level of on cultural bodies. This is perhaps understandable given that 12% of the nodes represent the publishing wing of a wider enterprise. Only 36% (41) are part of a trade body, a much smaller proportion. Broken down further, 34 are members of Publishing Scotland and 11 are members of the Gaelic Books Council. This is not the total number of enterprises that hold memberships with each of these organisations but as already explained certain enterprises were not included in this database because they were not representative of the types of publishing organisations being included in this sample, or because further information could not be sourced. However, as a proportion of the total field 36% is still representative of the proportion of Scottish publishers with this form of domestic affiliation. The number of publishers using independent online distribution platforms is unsurprisingly small at 4%, because most publishers in the field publish in English and have less concern with visibility on international platforms. This figure is demonstrative of the two nations' difference from a linguistic context and the effect of disproportionate linguistic representation in digital spaces.
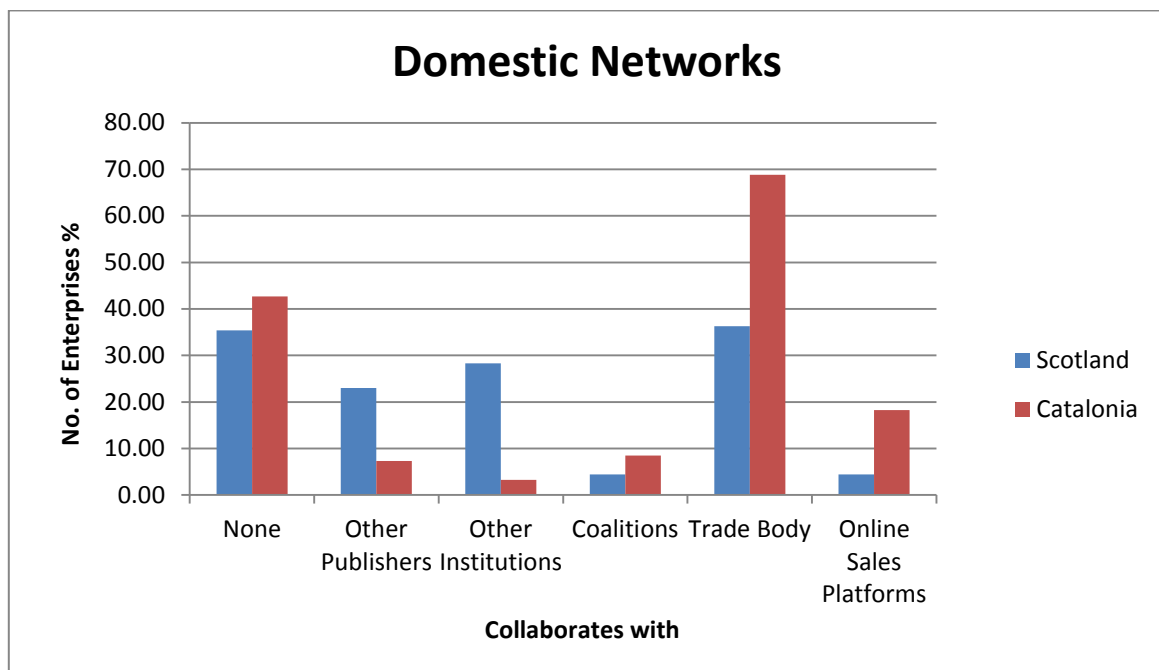
Figure 19: Domestic Networks

In terms of comparison it is evident that in Catalonia fewer publishers directly interact with one another and a greater number remain entirely independent. However, a

significantly larger number of publishers do maintain membership of the main trade body. This suggests that in Catalonia the sectors structuration is filtered from the top down, administering a large variety of activity occurring separately whilst coordinated from afar by a strong institutional support mechanism, whilst in Scotland the smaller, remote nature of the total network of publishers seems to encourage a greater level of interaction between publishers and also with other institutions.

5.2.11 The Distributors and the Network in each Nation

Comparison and analysis of the distribution network or infrastructure is a difficult thing to provide because of the dissimilar way in which the distribution process is systematised in each nation. In part, the reason for this difference can be understood socio-culturally or in political terms, as despite each nation's similarities in demographic terms, Spain is a federal state in contrast with the more centralised Great Britain, and the system of distributors in Spain is organised and divided up between each autonomous community region. Therefore the contrast lies particularly in the number of distributors both available within the overall network and also in terms of the number of distributors employed by each individual publishing house.

In regards to Catalan publishing and distribution 72 nodes, 30% of the field do not use wholesale distributors at all, nor do they have their own integrated distribution service, but instead handle their distribution directly. There are 142 distributors used in total by the publishers in the network database. These are distributed throughout the autonomies of Spain, so whilst a publisher may have a distribution deal with one particular distributor in Catalonia they may have to use a completely different distributor to reach the market in Andalucía. In some cases the distributors across different autonomous community regions are professionally related, or otherwise maintain a coalition or collaborative status, but in other cases a publisher may have to deal with an array of unrelated distributors. It is common for the publishers within the database to list their employed distributors and use a number of distributors simultaneously within the domestic market; anywhere from outsourcing to only 1, to 5 on average, to 16. There are a number of widely used distributors who control the majority of distribution in their respective areas. In total there are 21 distributors that are each used by more than 10 enterprises within the database. The largest ones, used by over 30 publishers each, are Troquel (in the Canaries), used by 15% (38),

Azeta (in Andalucía) used by 14% (34), Gea (in Valencia) used by 16% (39) and Ícaro used by 32 (13%). Planeta's integrated distribution service is used by 26 which represents 10.5% and Modesto Alonso and Palma Distribuciones are also each used by 25 companies which represent 10% of the total network. However, it should also be noted that 22 of the 26 using Planeta, 85% of them, are in fact Planeta imprints of the group. Aside from this none of the other distributors in the list are used by more than 10% of the publishers in the database, demonstrating how diffuse this part of the network remains. It should also be noted that 47% (115) of the publishers in the database do also appear to distribute directly, and also 43 (17.5%) have their own integrated distribution service, although half those again are represented by Planeta.

In Scotland a far smaller range of wholesale distributors are used, only 34, and many of the distributors filling out the distribution network are based in England or other parts of the UK such as Gardner's and Macmillan Distribution used by 4 or 3.5% each. Booksource is the primary Scottish distributor. It is used by 29 publishers, 25% of the field. The next most significant Scottish distribution service is provided by Lomond books, used by 7.8%. Three publishers (2.5%) are also affiliated with Harper Collins 3rd Party distribution. However, these are the only consolidated distributors with other entries in the list being used by only one or two publishers. Scotland lacks the developed distribution network that exists in Spain, so direct distribution is more common, and represents 61% of the database, 71 publishers. Out of this 52 publishers distribute directly and do not use any 3rd party distributor, 44% of the total sample.

There are certain considerations in terms of benefits and disadvantages with both systems. The small number in Scotland allows for a tighter control and streamlined interaction with booksellers using a common source, but the lack of a diverse network of distributors downplays competitiveness and allows for a bottleneck in control over the book delivery process, whereas in Catalonia, and across Spain, the network is complicated and diffuse and publishers have suggested that greater integration and coordination would be beneficial. This is difficult to organise as a collaborative project. However, the wide distribution network ensures greater access across Spain's book markets and to a limited extent helps guard against a monopolising system of selectivity in the access to booksellers and vice versa.

5.2.13 Do they accept unsolicited manuscripts?

The acceptance of unsolicited manuscripts is indicative of the extent to which a publisher is open to the risk and development of unproven products. However, care must be taken to also consider issues such as the type of publishers that accept unsolicited work, the size, scale of production, capacity to market, and whether this makes a difference in the affect their production is able to have on cultural and linguistic circulation.

In the Catalan database out of the 198 for whom it was possible to find relevant data, 63.5%, 126 publishers, do not accept unsolicited manuscripts. Out of that, 54 (33%) are not applicable. This is in line with the analytical assumption that given the large number of medium sized to large and corporate/global exporters, there might be a smaller number of publishers open to unsolicited and untested works for the market. However, it seems that whilst it is true that the largest and transnational publishers may not accept unsolicited manuscripts, publishers of medium size publishing works of Spanish origin are generally open to them as are some imprints of the largest publisher, Grupo Planeta, despite being of a scale which would usually not be inclined towards this publishing strategy. This suggests that larger publishers of a medium capacity and repute are more open to publishing untested authors, which can be a positive reinforcement of the local literary and linguistic fields, although the figure for those accepting such manuscripts still remains only 35% (70), just over a third of the total field.

The not applicable category is an important sub-segment to represent, because it indicates that rather than not being open to this strategy, a relatively large proportion may not be in a position to accept unsolicited manuscripts due to business model or backlist. This includes a large number of publishers within Catalonia who only publish fiction and non-fiction in translation, particularly publishers of classics, old and modern from the Anglophone world.

Another issue is that it was only possible to gather data for 80% of the total sample. In many cases it is unclear or unknown whether unsolicited manuscripts will be accepted or not. Of all the publishers in the database, 49 give no clear indication of whether or not they can accept such materials, whilst not representing a clear enough business identity to suggest their preference. Often whilst having detailed

websites and online information, Catalan publishers' contact details are less obvious and they are disinclined for the most part to provide clear guidelines as to how to submit, if accepted at all. It seems that there is a less rigorous philosophy towards regulation of submitting manuscripts. A final consideration may be that due to lower levels of literacy and interest in books, the rate of submissions within Catalonia is perhaps lower than in Anglophone nations and therefore there is less concern about its regulation.

Scotland's case is quite distinct from that of Catalonia. It was possible to gather information about a greater proportion of the field, with only 3 publishers remaining unaccounted for. Out of 114, 58 (51%) do accept unsolicited manuscripts and 56 (49%) do not. Of those that do not, 6, only 5.2% of the sample, were categorised as not applicable. In Scotland a much greater number of the publishers accept unsolicited manuscripts. This indicates there is a more amenable attitude towards unproven materials within the Scottish field, which in large part is composed of more small publishers who might be expected to be more inclined towards the strategy. This is the crucial differentiation between the Catalan and Scottish fields in this context.

5.2.14 Sales Channels

The sales channels employed by the publishers in each database are important to examine because they give an indication not only of the routes to market available, but how saturated those markets are. It can give an indication of what systems are being employed, particularly in regard to new digital technologies, whilst demonstrating comparatively any potential differences in sales philosophy between the two nations.

In the Catalan network survey the most common route to market is sales via internet stores. 227 (92%) of the publishing nodes made their books available via online retailers, most commonly Amazon, but also through the large Spanish superstore, Corte Ingles, online bookshop and a number of other independent or associated online outlets designed and deployed specifically for the Iberian and Latin American book markets.

Wholesale distribution is employed by 68% of the sample, 169 enterprises. This might be a surprising figure considering the large distribution network, divided between the different autonomous community regions with regional delegations for each area's booksellers. Although this is over half the field represented in the database it might reasonably be expected that a larger number would be involved as this represents the majority of traditional bookselling, but increasingly with online sales and the presence of medium to larger size publishers in Catalonia it might be that a number of the enterprises have their own distribution services, at both the high-volume end of the scale, such as Planeta, and very small companies which find it easier to operate independently rather than use third parties.

214 (85%) publishers sell their books through independent bookstores, and 17.7% of that portion sell through specialist bookstores, whilst only 163 (66%) sell through major retail bookstores. There is overlap here, not a suggestion that those who sell through one channel do not sell through the other, but the relatively wide disparity might also in part be accounted for by the large amount of specialist materials produced in Catalonia which would not be suitable major retailers.

64% (159) of the publishers' websites maintain a 'virtual store' capability for direct selling. This suggests that there is a relatively strong culture for direct purchases and emphasises the importance of personal websites as a sales route in the Catalan market. This might also have to do with the lack of Hispanic presence in the development of 3rd party large online sellers such as Amazon.

No other sales routes are of particular note; on demand, subscription and catalogue sales being used infrequently by varied publishers. A number of publishers produce for the newsstand market, which is also the sales channel for their products, particularly serialised works sold weekly and monthly, such as collectable sets. This represents a segment that does not exist in Scotland, which does not sell in the same manner via street newsstands. It stands as a major cultural distinction between the two nations. However, given the vast number of kiosks throughout Catalonia and the rest of Spain it might be expected that a large number of publishers would target this sales channel. However, the picture that emerges from the database is that this channel is relatively monopolised. Only five enterprises, 2% of the total sample,

employ this route. The major producer for this market, the Panini Group, is a large multinational making competition a difficult prospect.

In Scotland the significant results are as follows; 81 (69%) publishers sell through virtual shops on their websites, and 63 (54%) sell through online outlets whilst 68 (58%) use wholesalers. 31 (26%) sell through major bookstores and chains, 65 (55%) sell through independent bookstores. Also, 21 (18%) provide subscription based sales, covering a significant library and online database segment, and 11 (9.5%) provide on demand bespoke products for the customer.

It is surprising that personalised virtual shops are used more widely than third party online retailers considering the ease with which Anglophone publishers can sell via online marketplaces like Amazon. However, considering the level of targeting towards specialist markets in Scotland it is perhaps not surprising that the majority of publishers, those of small specialist nature, see their own website as a more practical and direct means of reaching their audience without becoming lost in the open library listings of large internet retailers. Despite this, the database also demonstrates that all internet-based sales are a proportionately important route to market.

As with the Catalan database more publishers go through the specialist and small bookstore route than selling via major retailers, but again what this perhaps points to is the specialised nature of the market for the works of a majority of small Scottish publishers.

Wholesale distribution is proportionately underrepresented compared with Catalonia. However, the smaller infrastructure for distribution in Scotland may account for the underrepresentation of this sales channel. The distribution infrastructures in the two nations are very different, with the Catalan and overall Hispanic organisation appearing to be highly systematised but complex, a suggestion corroborated in later interviews.
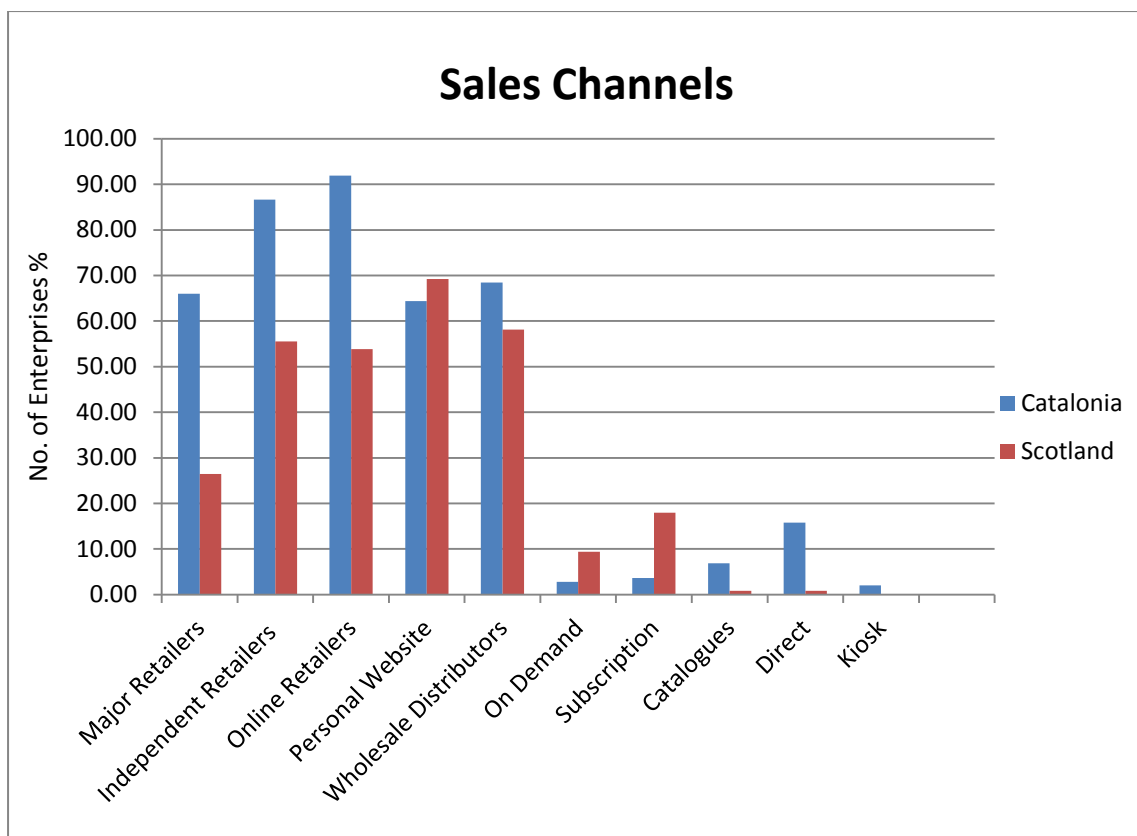
Sales Channels

Figure 20: Sales Channels

5.2.15 Ebooks and Digital Development

In regards to ebooks a number of important pieces of information can be derived from the database. This may demonstrate how much influence digital developments are having in each nation indicating the proportion producing ebooks and engaging the digital market, what kinds of publishers are most involved in this and in what ways digital products are being produced and deployed.

In Catalonia ebook production and distribution does not seem widespread, potentially due to the problems with digital infrastructures available in Spain, already touched upon briefly in the literature review. However, the Catalan language's internet presence is high relative to the population of natural speakers (BBC 2012, W3Tech 2013). In the database 134 (55%) out of the 242 publishers accounted for do not produce ebooks. This is over half indicating that the digital infrastructure for book publication is not strong. However, 99 publishers (40%) are confirmed to produce some kind of digital or non-print based product. Of this 72 (29.5%) produce ebooks which given the large size of the field suggests that many publishers are at

least beginning to look towards the digital market. What stands out is that 25 publishers (10% of the sample) make products for online access, as PDFs or other digital formats, accessible from individual computers, tablets, smartphones and other digital devices. This suggests that although ebooks are not widely produced, there is demand for a plethora of different digital products, in line with the relatively high Catalan internet presence compared with their cultural demographics.

In Scotland 71 (61%) do not produce any digital products whilst 46 (39%) do in some capacity. There is less overall digital activity in this field than in Catalonia, although the balance is similar, which suggests, considering the strength of the Anglophone ebook market, that Scotland is not taking full advantage of the capacity for digital development. An alternative interpretation is that Scottish publishing enterprises may not be able to afford the necessary investment to put into quality digital development so avoid the medium rather than invest poorly. However, a number of the more mainstream and medium sized publishers are investing in digital development and certain Scottish independents and particularly Canongate have been at the vanguard of innovation in the sector. Out of the 39% producing digital products 63% of those (29 or a quarter of the total sample) are producing ebooks. As might be expected, a smaller number of publishers (11 or 9.5% of the sample) produce digital content for access online, as web pages or through library databases. Comparatively speaking the pictures are proportionately similar in Catalonia and Scotland, but given the differences in scale and available investment it might reasonably be expected that Catalonia with its greater wealth and targeted export market would invest more in digital infrastructure. The greater exposure of the Anglophone world to digital media and the modern historical engagement of media industries with digital developments in Scotland may offer part explanation for the proximity of the two nations in these regards.
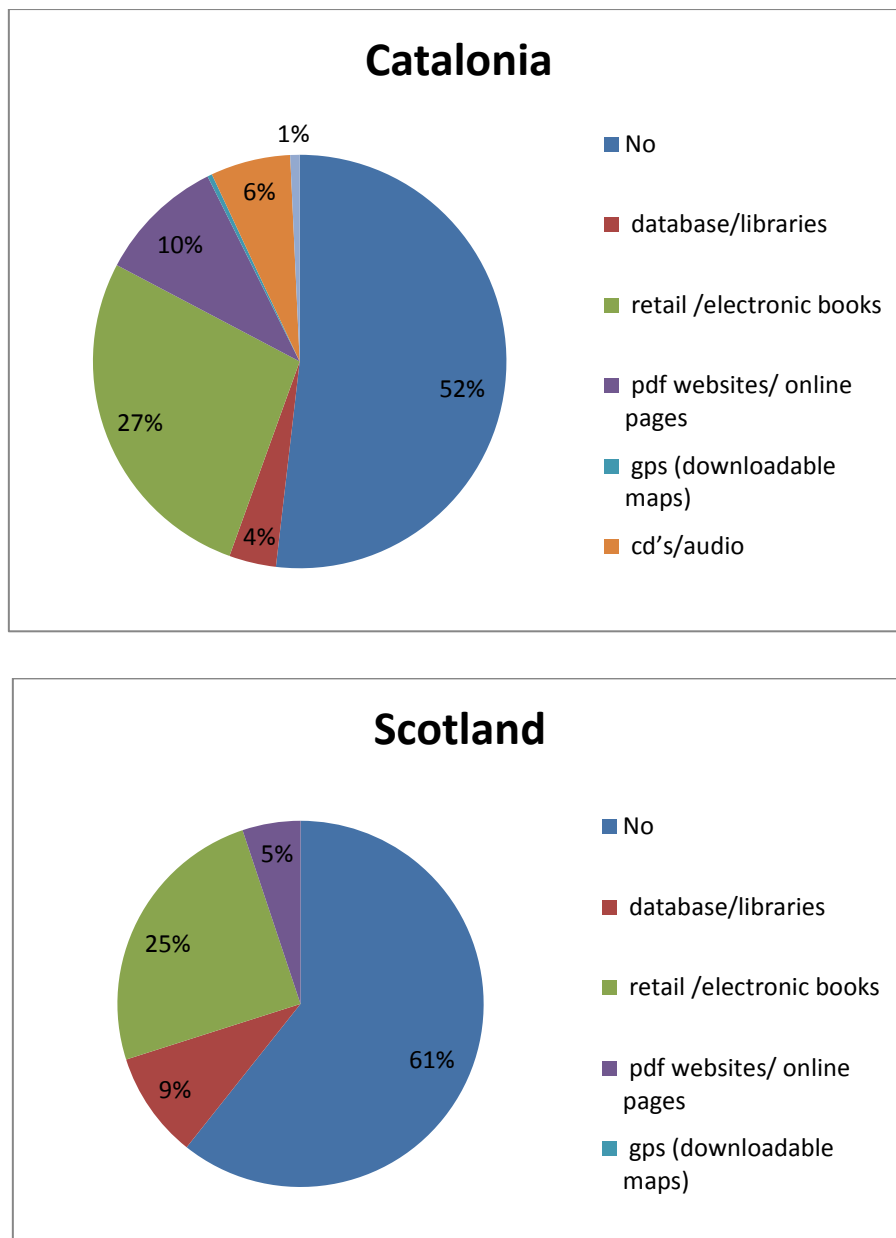
Figure 21: Digital Productivity in Catalonia and in Scotland

5.2.18 Linguistic Breakdown of the Field

The linguistic breakdown of the networks is important in this analysis. In the case of Scotland, English is the language used by the vast majority of publishers (113 nodes or 96%) and 90 publishers (80% of the sample) produce books only in English. Then there is some Scots (16 or 13.5%) publishing and a little more Gaelic (20 or 17%). In the majority of cases the publishers of Gaelic and Scots simultaneously publish in English, the only viable means of generating income from the market. However, there are three purely Gaelic publishers, 2.5% of the sample. The only pure

publisher in Scots is the Scottish Text Society. There is, however, one publisher who only publishes in Scots and Gaelic, Grace Note Publications. Their mission is to publish books and audio resources in these languages in order to preserve Scottish indigenous language.

There do not appear to be other linguistic cultures published in any recognisable capacity in Scotland, beyond the nationally employed languages of English, Scots and Gaelic.

In the case of Catalonia the comparative breakdown plays out very differently with a large variety of other world languages being represented by domestic publishers, beyond the nationally spoken languages of Catalan and Castilian. However, the only statistic of note within this context is that titles in Galician and Basque, Spain's other alternative linguistic cultures, are produced by 2.3% of the sample.

In terms of the split between Catalan language publications and Castilian there are a larger number of publishers who publish in Castilian (213 or 86%) than Catalan (163 or 66%). However, these figures constitute overlaps with publishers that publish both in Catalan and Castilian. The number of publishers that produce solely in Castilian is 84 or 34% and in Catalan is 34 or 14%. This seems to be a reasonably proportionate breakdown which provides a reasonable quota of representation for the Catalan language market.

Comparatively the linguistic representation in each nation is understandably distinct, given the mainstreamed, bilingual status of Catalan compared with Gaelic. That 4/5ths of the field in Scotland only publish in English is indicative of the sectors embedded integration into the Anglophone market, whilst in the Catalan field what is interesting is that those enterprises only publishing in one language or the other comprise nearly half the field, against those publishing in both languages, indicating that there is a more even distribution between the different levels of linguistic market representation.
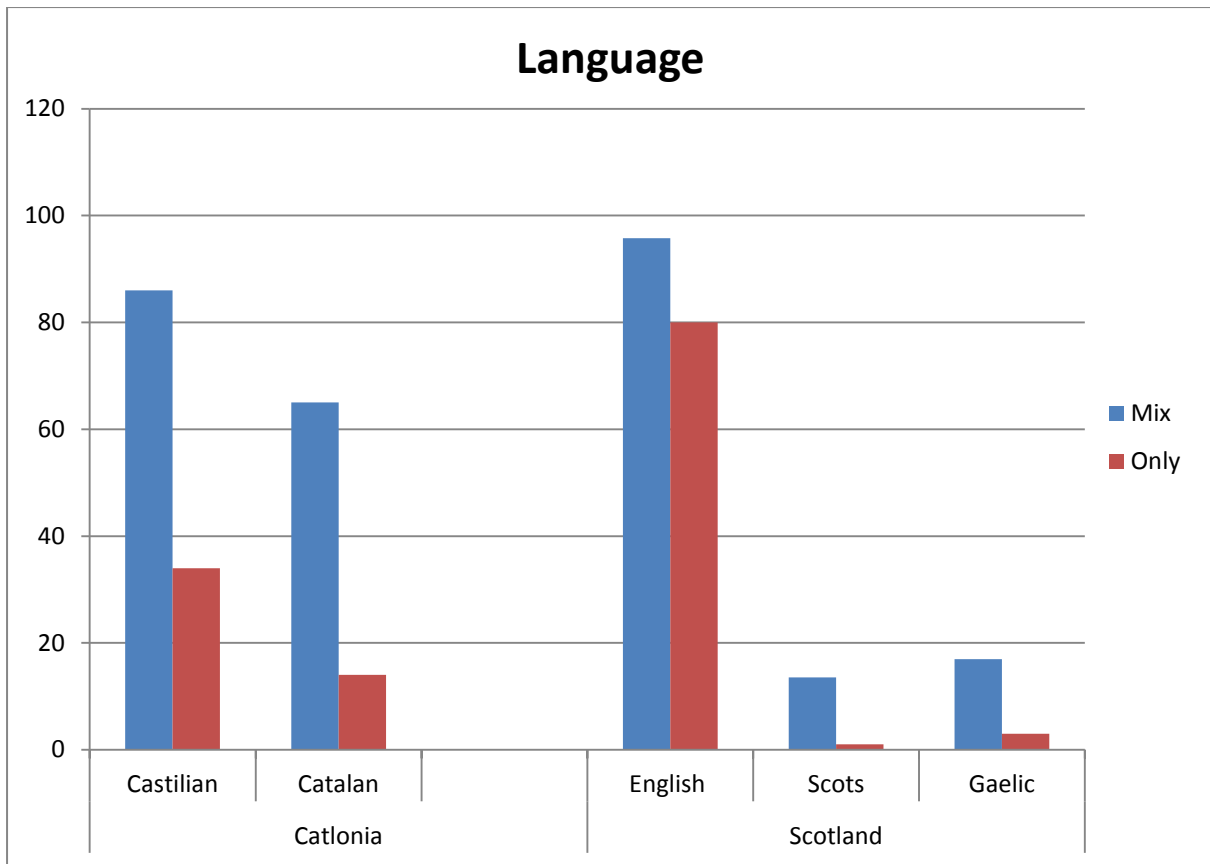
Figure 22: Linguistic Breakdown

Chapter 6 – Case Studies and Key Issues

6.1 Company Profiles and Cases

6.1.1 Explanation of Company Profiles

This research distinguishes itself from previous socio-industrial studies of these publishing sectors by providing a comparative representation of their processes in action. This comparative element is elaborated throughout this chapter, first through a series of typological case studies presented side by side, and then in the second part through an analysis of key issues with extended conversations involving a synthesis of interview material accrued during the primary research phase. Observations drawn from the analysis of the publishing network spread sheet and maps will be expanded by adding further qualitative insight through the use of comparative case studies of a number of selected publishing enterprises in each nation. The case studies are organised comparatively to take examples from each nation. These can be analysed in terms of their respective relativity to each other, allowing for an overall evaluation of how archetypes may be similar or different in each location, providing a view of how far distinct features can be extrapolated as either peculiar to the national/international composition of each nation and to what extent some of these features may be inherent to an overall standard model of publishing activity across small nations of this type elsewhere.

For the sake of comparison a publisher has been chosen from each nation in the following categories; Independent Commercial Publishing, Large Reference and Academic Groups, Peripheral Independent Commercial Publishers, Specialist Publishers Local globally active publishers working particularly with Translations and Institutional Support Bodies

As far as possible the case studies will be used in these groups and significant points relating to the previously mentioned topics and themes will be offered as a series of reconstructed dialogues agglomerating the key information from the case studies in the section that follows the comparative cases.

6.1.2 Independent Commercial Publishing

This paradigm refers to independent publishers whose size and scale befits a national publisher, with a market that is primarily domestic but with a purview and interest in international sales. The crucial differentiation of this model from the one that follows is to do with location of an identity within the network. In this case, publishers were selected for their relationships with their respective urban clusters.

Cossetània

Cossetània was created in 1990 by Jordi Ferré and Josep M Oliver. It is slightly incongruent with the urban paradigm since it is located in Valls, outside of Barcelona, which would normally qualify as the periphery. However, for the purposes of analysis its publishing strategies place it in the urban camp. It has a pioneering interest in digital publishing and an active sectorial involvement. Jordi Ferré is currently president of the Association of Catalan Language Publishers. He is a native of Valls and established Cossetània after recognising that it had become possible by the 1990s to start-up a publishing enterprise without the restrictions seemingly imposed by its location. Jordi Ferré is a crucial personnel asset for the company and a founding developer of edi.cat, an online sales platform for the distribution of Catalan ebooks produced by Catalan publishers.

Cossetània became active by 1994 and its first volume was published in 1996. Ten years on its catalogue counted over 500 titles across some 50 different collections. It has produced over 1000 titles to date and employs around ten staff at any time.

It has been prominent in the development of Catalan language publishing, generating early success with a volume of Catalan language cook books, at a time when such books were only available in Castilian, given the limited value of the domestic readership and the majority of the population's bilingual status.

It is notable as an innovator of business models, and in 2006 expanded with the creation of imprint Lectio Ediciones which is inverting the norm of the traditional business structure of a Catalan publisher by taking its successful Catalan language materials and translating them for the Castilian wider domestic market. Hitherto the usual strategy was for a company to simply translate Castilian texts into Catalan (Brull 2007).

Cossetània is at the vanguard of national publishing, encouraging active domestic cultural development, which can also be repurposed for a wider market, searching out the transnational value of its intellectual property, looking beyond its borders.

Its key strategy is to look for new, small niches to safely compete and achieve equilibrium by focusing on what it can do that other publishers are not. The company started from this base, having identified that in the 1990s there was a market gap in gastronomy in the Catalan language market. Today the market may seem saturated but at that stage Ferré realised very few publishers produced local niche texts. Cossetània's entrance into the market allowed readers of cookbooks to use recipes produced in their own language. Next came excursion books for tourism. Cossetània claim to have the only backlist of tourist guides edited in Catalan. However, it had to research and develop the market to make that line profitable, because whilst tourist guides are an important genre within the industry for the overall Hispanic sector, no-one then produced them in Catalan. Ferré's view is that by producing such texts in Catalan, Cossetània was also bringing additional value to the Catalan culture by facilitating people's ability to travel, guided by information in their own language rather than requiring an intermediary language. This strategy of searching out gaps is common and necessary within publishing and Ferré acknowledges that this is the standard in fiction publishing. The difficulty is finding quality and potentially profitable authors within these niches which offer greater opportunity for visibility and innovation. In this way Cossetània grapples with the challenge of globalisation as niches allow them space irrespective of multinational presence.

Black and White

Black and White is located in Edinburgh. It was founded by Campbell Brown in 1999, publishes an average of 35-45 titles per annum and has a backlist spanning classic literature, true crime, teen fiction, children's and non-fiction genres. It employs six permanent staff and uses a number of designers and various freelance editorial specialists.

Black and White was set up whilst Campbell Brown was running another list which is now smaller, featuring a combination of walking guides, which were his starting point in the industry, then reprints and classics. He established the company because he

observed that there was a market demand for non-fiction and felt that as a company Black and White could supply it and then move beyond it. Initially the motivation was mostly non-fiction within the Scottish field but over time the company began breaching this boundary and started moving further afield.

It worked as a part-time project but as the business has grown it has established itself as one of the larger sized Edinburgh trade publishers, behind the big three independents; Birlinn, Canongate and Mainstream. Brown maintains that his attitude and strategy has not really changed since starting out. His only real development has been adding to the list to build a stronger core, using non-fiction as the bulk of what it does and using this as a platform to launch new fiction, some children's and other varied publications.

Black and White has also acted as a support base for the development of significantly cultural publishing activities, not least its collaboration with Itchy Coo, a publishing imprint dedicated to the production of Scots language materials, primarily but not exclusively in the form of children's books. This project can be understood and analysed primarily in terms of cultural benefit and it is here that cultural productivity and business growth can be observed interacting. Itchy Coo has been subsidised separately, primarily through the Scottish Arts Council with initial funding from the National Lottery to produce resources through which to "work with teachers and young people on developing appreciation of and confidence in their Scots usage." (Fitt, Mitchelson & Robertson, 2011, p.3) Black and White's involvement has been to act as producer, managing publication production costs and benefitting the initiative by sharing its sales network. However, the education, outreach and strategic liaison elements of the Itchy Coo project, crucial to developing and sustaining the market base, ended along with its funding in March 2011.   The creators of the imprint, Matthew Fitt and James Robertson (2011) felt that at this point a positive change in attitude towards the Scots language had taken place within Scottish education. This is also indicative of the struggle to maintain cultural projects in the globalised environment, and is evidence of the importance of not overstating the beneficial opportunities afforded through collaboration with English language cultural production connection.

Brown feels that Black and White's publishing ethos and strategy has not really changed since starting out. In his view the development has been adding to the list to build a stronger core, using non-fiction as the bulk of what they do whilst using this as a platform to launch some new fiction, some children's and other varied publications. The company's present focus is also on a programme of digitising its extensive backlist. This is reflective of Brown's cautious attitude towards digital publishing; a format he is careful not to assume is inherently beneficial. His approach is gradual but progressive. Along with digitising the back catalogue Black and White has slowly begun simultaneously producing new titles in both print and ebook format.

Comparisons

The two publishers take a similar approach to their activities, both grounded in an appreciation of the gaps which the market offers. However, it is possible to discern a distinction in the outcomes of the two company business philosophies. Where Cossetània is focused on the dissemination of cultural products to an interior market which is undersupplied, with the intention of filling the gaps the wider international sector has left open, Black and White sees gaps as springboards into the wider international market for non-fiction materials.

6.1.3 Large Reference and Academic Groups

Enciclopèdia Catalana

Enciclopèdia Catalana is primarily a reference and educational publishing group of Catalan origin, headquartered in Barcelona. It takes its name from the popular Catalan encyclopaedia, Gran Enciclopèdia Catalana, its flagship product. The encyclopaedia project was launched by the publishing house Edicions 62 in 1965 at the instigation of Max Cahner and was eventually published in 1968 (Llanas 2007). Since its foundation the organisation has grown and now is a flagship imprint of the wider Grup Enciclopèdia Catalana, a foundation which counts thousands of books in its backlist, compiled from over a dozen imprints. Enciclopèdia Catalana's own backlist spans the reference and educational genres. The group, as the name suggests, has also grown to encompass other major imprints through a combination of original setups and acquisitions, and through its mutual shareholdings in Edicions 62. As a group the organisation employs hundreds of staff, employing 60 at

Enciclopèdia Catalana alone. Grup Enciclopèdia Catalana is atypical because it does not have private shareholders. Its status as a foundation has freed it from corporate manoeuvring and placed it in an advanced situation as a large-scale operation capable of collaborating successfully with major domestic institutions including the Generalitat.

As a consequence the enterprise has a more cultural and less mercantile vision, although Albert Pèlach, the current director, is ideologically in support of a commercial vision as well. He admits that it is harder as a cultural enterprise because it has to focus on making the materials more profitable. The reference sector in which Enciclopèdia Catalana works can be broken down into three segments; Catalan language educational, textbook and large reference works.

Historically the Catalan language educational sector has been dominated by the independent company Vicens Vives. Enciclopèdia Catalana was a latecomer when it moved into this market in the 1990s. According to Pèlach, relative to the markets in which it interacts Enciclopèdia Catalana should be designated a 'medium' sized publisher rather than a 'large' publisher. Considering the scale of its operations, this statement indicates the group's ambitions to conduct business at the highest levels of domestic and international trade, taking major multinationals alongside Vicens Vives as its primary competitors.

This also reflects the difficult organisation of the textbook sector, the second segment of the reference sector. Castilian publishers headquartered in Madrid remain the leaders in this segment. The three largest textbook publishers; Santillana, Grupo SM, and Anaya, grew to strength in the 1970s during the Franco era when educational programs were developed at the Ministry of Education. The sector became highly politicised and those publishers had direct access and early opportunity to participate in the design of school curriculums. Once Franco died they realised the need to adapt and to have more viability in the Catalan language so they created Catalan imprints and replicated their model. They remain the leaders of the market. Enciclopèdia Catalana, and others such as Vicens Vives, struggle to grow beyond being medium sized competitors in a market that is unusually dominated by companies with a Castilian background.

The large works reference sector is the third segment of the wider Reference publishing sector in Catalonia. The encyclopaedia is a symbol of the Catalan identity and Enciclopèdia Catalana has therefore emerged as strong leader in this field since the 1980s, the era of linguistic normalisation.

Enciclopèdia Catalana also competes and dominates in the direct sales market, a very small sector, alongside Planeta and Oceano. In this sector the market share of Catalan is 50% more, whereas in general literature the market share of Catalan sales against Castilian language sales is closer to 20:80. This gives Enciclopèdia Catalana a market advantage in this sector and the company performs well. Pèlach maintains that this is because its products are important and it is a good example to others, helping demonstrate that the market share can be more than 20% for Catalan language texts.

Edinburgh University Press

The establishment of Edinburgh University Press, a publishing imprint for the University, was first proposed in 1942, but it was not until after the Second World War that the proposal was implemented, with the first titles published in 1948 (McCleery 2007).

According to Archie Turnbull (1973, p.26, cited in McCleery 2007) it was set up with the object of publishing 'commercially un-remunerative research work' produced within and beyond the University, with costs subsidised and losses recovered by the issue of scholarly works and textbooks with an immediate and constant market. The justification, according to Turnbull, was that other such projects had demonstrated that a well-orchestrated press could inspire and improve the intellectual activity and results of its contingent University.

Edinburgh University Press's rise to become the premier university press in Scotland was sparked by three events during the 1950s and 1960s; The decision to establish the imprint as a vital channel for Scottish historical scholarship, the positive expansion of higher education in the 1960s which encouraged expansion of press activities and the undertaking of long term development of specific series, and the appointment of Archie Turnbull as press secretary in 1962. McCleery (2007) argues this to be the most significant factor, since Turnbull represented the epitome of the

'key publishing figurehead' for this enterprise whose main and much needed qualities were 'professionalism and enthusiasm'.

The Scottish identity is inherent in the early publications and development of Edinburgh University Press and although its outlook has grown with an international focus, Scottish scholarship has remained at the core of its activities, the key aspect indicative of any Scottish identifier it can lay claim to.

These factors privileged Edinburgh University Press within Scotland, although Aberdeen University Press attempted to establish itself as a major competitor in the 1980s. Its parent group Maxwell Communications Corporation collapsed in the wake of its founders' death and in 1992 Aberdeen University Press went into liquidation, leaving Edinburgh University Press as a sole market competitor within the Scottish field. This encouraged Edinburgh University Press' emergence into the international field. Managing Director, Timothy Wright maintains that Edinburgh University Press is at the very least a British University Press and would prefer to consider itself a University Press within the international field, with its location in Edinburgh as its primary Scottish identifier.

Edinburgh University Press' identity began to move in this direction towards the end of the last century with a strategy of greater business incorporation. In 1988 it bought the Polygon imprint, sold to Birlinn in 2002 so that it could refocus on the core academic list. The incorporation also instigated greater financial discipline with the Press' status-changing from departmental to wholly owned subsidiary in 1992, then limited company in 1994, finally becoming a charity in 2004 ref (McCleery 2007). With the combination of financial and strategic publication moves, streamlining its core business and reducing its costs, the Press became profitable (McCleery 2007). Timothy Wright, the current Managing Director, has attempted to expand this profitable strategy further into the international arena by encouraging co-publication agreements and trade deals with a number of foreign presses, chiefly in the United States, and particularly in the digital field where EUP can benefit from publication aggregations.

Comparisons

There is a distinct configuration in the structures of these publishers. Language is at the core of this distinction. Grup Enciclopèdia Catalana's emphasis has always been on dissemination and reinforcement of Catalan language materials, where Edinburgh University Press' first priority has historically been to the representation of the university itself, whose primary connection to culture is the benefit of the brand derived from the University's own reputation. The other major factor which distinguishes them is the business structure and the direction of their professionalisation. Initially, although focused towards different kind of markets, the direction of these companies was equivalent in many ways. However, as business development has encouraged Edinburgh University Press to search out widening markets, its activity within a global language market has encouraged internationalisation at a level which, though not unavailable to Enciclopèdia Catalana, cannot in its case represent its total function.

6.1.4 Peripheral Independent Commercial Publishers

Arola Editors

Arola Editors has published around 600 titles to date, of which about 300 are from local authors and about local themes.

Arola's approach is focused on generating cultural markets by providing materials that encourage local cultural development. Its owners believe that if this is not encouraged culture recedes, but it can grow if provided with materials that stimulate local imagination and creativity. In terms of its positioning, Arola operates at the level of the sub-national, within the periphery. Where for Catalan publishers of urban positioning, the wider Castilian enterprises represent cultural competition, for Arola, Catalan publishers from Barcelona represent the cultural competition, and it is their domination of local markets which Arola strives against.

Arola's focus on local authors and themes has achieved a level of loyalty with the local market and local authors. This has earned Arola a position of privilege as a peripheral publisher for Tarragona. The business strategy is centred on a concept of niche publishing, but it is specifically tied to location rather than genre.

The company also concentrates on more commercial products which relate to the local market, produced to high publishing standards including excursion guides of high quality and a series of collections of poetry set alongside photography. By producing the initial titles at premium quality, even if not profitable, they help generate a returning, renewable market. Such publications lead into additional products and projects which ultimately do maintain profitability. The poetry collections are an example of being able to develop slowly growing markets which offer a reward of sustainability. This is centred on developing and consolidating collections.

However, in order to balance this strategy in a sustainable manner, the company's local focus only constitutes around half of the total business model. Co-founder Alfred Arola acknowledges that if they only published for the local without a view to beyond, they would not be able to exist, so its approach is more or less 50% the local demarcation and the other 50% with a more universal market, essentially Catalan language, without leaving behind Castilian which they also focus on to a small degree.

However, Arola finds Catalan publications in general tend to stretch over a large number of genre markets so it can be difficult to find a niche, particularly in the narrative market, which is the largest in terms of sale of bestsellers, and dominated by publishers located in Barcelona. Arola therefore concentrates on discovering alternative, under-represented commercial markets and have successfully moved into specialisms such as theatrical works (Alfonso 2008). They focus on national authors in the Catalan language but do not disregard authors of wider interest beyond this framework.

The combination of tactics, has allowed the company to balance its growth and output and also invest in books which lose money but allows it to continue to engage in this market feedback-loop.

By maintaining its peripheral location, the company has proximity to what is being written and what is going on locally, overlooked by global markets. Despite this Alfred Arola also concedes that the concern with profitability across the various production lines has necessarily increased in the last few years, in line with the financial crisis.

An example of the company productions is a series published for the autonomous administration of Barcelona, a collection of translations co-produced with the translation faculty. This concentrated on translating authors and interesting books from foreign countries and cultures into Catalan but ignoring English authors who are well-represented in translation already. The unique aspect to this project lies in the accompanying audio CD, which has a piece being read in its original language. Alfred Arola feels this goes far beyond what is done with most translations, and allows the company to work toward innovation whilst strategically ensuring that its niche strategy is not solely entrenched in Tarragona and its environs.

Sandstone Press

Sandstone Press started as one person, Robert Davidson, although as he puts it 'It has grown to be bigger than any one person'. In 2000 Davidson came out of his job as a civil engineer with enough money to pay off his home and survive. Before retiring he had already become involved in the Highlands literary field. He is a writer, and at the time of his retirement had a show being performed at the Highland festival. He had also been acting as editor of the literary magazine Northwords for the past three years. He decided not to seek another job and continue writing instead but wanted to do more. He was confident from previous experience that, despite the higher risk, a private company limited by shares rather than a non-risk taking non-profit company was the way to proceed.

The company was setup in October 2002. He confirms that initial investors, who he invited to join him in the setup and have since all departed, left with a small amount of profit. The justification for starting the company was initially to act as a vehicle to extend Davidson's activities. However, as it has grown the motivation has changed. Davidson is now at a point where he does not see himself writing another book and may not even edit further works because the management of the 'Sandstone Press' project is 'utterly time consuming.' His focus now is on accruing income that will afford additional employees and work space as the company grows.

Sandstone Press first published poetry pamphlets under the Northwords label. As editor of the magazine Davidson could let his company exploit this brand (Hebblethwaite 2012). Then it moved into adult literacy publishing. This proved a major development for the company, a 'mission' which inspired an expansion of the

172

list and evolving business strategy. Sandstone has now withdrawn from this market due to rising costs and competition, particularly from major publisher Random House.

The company then went into non-fiction and eventually fiction, both of which are now becoming more rationalised and recognisable as lines.

 Davidson maintains that his ambition has always been to act as an independent, international publishing house in Dingwall, Scotland with a view to being located in the Highlands, employing there and contributing to the highland economy. This is a distinct approach to the issue of identity from that of other Scottish publishers, those located within the urban centre who (while acknowledging their location within Scotland and potentially equivalent consequences of this location such as employment and economic contribution) seem less concerned with fusing their location with market ambitions. In Davidson's formulation of his company identity he is forthright in his aspirations as an international publisher, one who can distribute to an internationally ready market, but he demonstrates a confidence in the applicability of locally available materials and writers to these markets. While he courts international writers also, recently having worked with Jørn Lier Horst, a Danish author, he sees no disparity in the relationship between his local environment, the influence on the design and identity of Sandstone, and the wider global identity it has to operate within. It is, however, interesting that from the perspective of the local, Davidson's assimilation of local identity does not lie at the distinctly national level, that of Scottish identity, but instead rests at the sublevel of 'Highlands' and while the company interacts beyond the Highlands, the reality of the company's local 'concern' is how it can contribute locally. Its international ambitions as a publisher based in the Highlands but acting globally are reflected in its digital strategy. Robert Davidson was one of the first publishers to attempt ebook publication after the millennium. At that time the market, he feels, was not ready. However, he remains an enthusiast and confident of the gradual acceptance of digital books, leading to a tipping point where he envisions the print following the digital. His concern is making sure that when this happens Sandstone Press is in a position to capitalise.

Comparisons

This concern with local contribution is the distinction which highlights the peripheral identification of Arola Editors and Sandstone Press. In this configuration of publishers operating in the periphery, their business identity and field connections occur at the sub-national local level, in Arola's case Tarragona and the Vall de l'Ebra and in Sandstone's the Highlands. However, beyond this similarity in their origins, the crucial differentiation between the two seems to be the international ambitions of Sandstone Press. It seeks to develop its identity, rooted as a beginning in the Highlands, outwards into the international arena and market. Arola meanwhile, whilst not being closed to international opportunities when they are readily available, seeks consolidation of the market in its local area.

6.1.5 Specialist Publishers

In this section, three publishing enterprises are compared and analysed, each a different type of specialist; a Technical publisher from Catalonia and a Religious and Educational publisher from Scotland. The educational publisher has been selected from Scotland because in Catalonia the educational market is largely dependent on Madrid based publishers. This is a comparable situation to Scotland but on a different scale and it was not possible to interview the only major independent educational publisher, Vicens Vives. Saint Andrew Press was selected as a religious publisher because of its long and ever evolving history, which offers insight into the process of globalisation within a specialist market and Marcombo was taken as the technical publisher because it was important in the case of Catalonia to represent family business, which is a key element of the industry as a whole and its development, and it was possible with Marcombo to interview a third generation director.

Marcombo

Marcombo has 65 years of history as a technical publisher. It was established by the present director, Jeroni Boixareu's grandfather and has been managed by each subsequent generation. It employs 12 members of continual staff, averages 65 titles per annum and in 2011 generated 1.730 million euros in turnover. Bookshops are

the primary channel for sales but it also distributes books online and has a healthy trade in export and import.

The Boixareu family, through the company, are also the proprietors of 'Libros Hispano-Americano', a technical bookstore located beneath the premises of the company's office, on the Gran Via de les Cortes Catalanes, a main road running right through the centre of Barcelona, opposite Barcelona University's Faculty of Mathematics. Location is crucial to the deployment of this store, which was bought by the first generation Boixareu in 1950. He purchased the enterprise because the publishing business had proven successful and with his accrued capital he felt ownership of a bookshop would prove useful. It has become an important channel for the publisher, not primarily as a quantitative point of sale, because it has 250-300 other distributors at any one time, but because at a qualitative level it provides Marcombo with interesting and valuable sales information about the technical book market. Jeroni Boixareu says "It's a way of remaining informed about what sells the most, what the competition is publishing and so on."

The company's digital structure is growing gradually. Internet sales, including through the website, represented around 50 to 60 thousand euros of total turnover in 2011/2012 and Jeroni Boixareu is confident that this is a growing part of the business structure.

In addition to selling in Catalonia, in Spain and abroad to largely Hispanic nations through the Marcombo brand, it also works on co-editions and publishing deals with foreign and international publishers. In Mexico in particular they have a co-publication deal with Alfaomega, a local publisher that prints Marcombo's texts at a cheaper price and pays Marcombo for the rights.

Saint Andrew Press

Saint Andrew Press was founded in 1954. It started with William Barclay, a Scottish theologian who went on to sell 17 million copies of his books worldwide. He was also a minister of the Church of Scotland and the Church administration needed a way to disseminate his work. These publications were initially managed by the communications board which quickly realised it wasn't enough and set up Saint Andrew Press as a publishing house.

The business structure continued in this fashion until the 1980s when church membership started falling and the economics of its management changed. At that point Saint Andrew Press began publishing other books and materials by other authors as well as the Barclay texts, as a means of making the company into a more rounded publishing enterprise.

Since the point at which the business structure moved beyond simply managing the backlist of William Barclay's publications, it has always been the policy of the Press to try to publish books that are in the same vein as his writing; accessible, functional and always well researched texts that present 'a bit of a challenge' to their readers without expecting the audience to have relevant qualifications in order to understand them. No matter the subject, the publishing program has always been meant to reflect this ethos. Ann Crawford, the present-day director of Saint Andrew Press has commented that from the earliest days of this approach there has been a tendency to publish not only religious books but also books of a Scottish nature that may not have a particular religious focus, though all published titles must be in keeping with the Church's sensibilities. As a result there have been a number of well-received, successful books that generated additional funds, which for a time beyond the 1980s helped sustain the success of Saint Andrew Press.

However, in 2000, when Ann Crawford joined the enterprise, the company was at low ebb. Despite a couple of successes including Jamie Stewart's *Glasgow Bible,* the company had become quiet in its activities. Since then it has been Crawford's task to raise the Press' profile and publish a broad range of books, but still always with Barclay at the core. His texts remain a huge part of the enterprise's business today.

Ultimately in 2010, the falling attendances of churchgoers created huge financial pressures on the Church, meaning it had to rethink its ideas on where expenditure should be focused. Saint Andrew Press became a victim of the necessary cutbacks at this point. The Church felt it couldn't continue to concentrate funds towards this enterprise. As a compromise, the Scottish office has been closed and the staff downsized leaving Ann Crawford as the sole employee of Saint Andrew Press. Her role is to act in a commissioning capacity for Scottish books whilst production, marketing and distribution are now wholly outsourced to the English, Norwich based

company Hymns Ancient and Modern. This compromise was seen as the only way of continuing with Saint Andrew Press as a publishing enterprise, the only alternative being the closure of its publishing operations.

Bright Red Publishing

Bright Red Publishing was founded in 2008 by the former management team from Leckie & Leckie, including John MacPherson. In this sense the history of the team running Bright Red stretches back further as the independent company was born out of another successful Scottish educational publishing enterprise. John MacPherson worked at Leckie and Leckie from 2002 until 2007, ultimately as commissioning editor, when it was a successful independent Scottish educational publisher. During this period, Leckie and Leckie's fortunes declined and the company went through a variety of mergers and acquisitions, in the end becoming part of Harper Collins.

During this time MacPherson and his colleagues became frustrated by the constant reshuffling and sense of being run remotely from London. They felt they could do more by being on the ground in Scotland but were unable to do so as long as the turnover the company was generating from the Scottish market was being siphoned into other segments of the parent company rather than reinvested. Aware that major curriculum changes were about to be enacted in Scotland they believed it was a good time to start a new project where they could dictate their own publishing terms whilst remaining located where they were.

The original intention was to buy out Leckie and Leckie rather than form a new business from the ground up and they attempted unsuccessfully to do this twice before the company became part of Harper Collins. Consequently they established a new independent company instead.

MacPherson describes Bright Red as a lifestyle business that cannot be expected to generate major immediate profits, but that offers remuneration over the space of a long career of development, and its placement within the market reflects this. With Bright Red, it has become easier to control finance and make decisions with foresight, driving investment in the necessary direction without consideration for the separate publishing lines of a wider business. However, the owners also acknowledge feeling pressure to avoid unnecessary risk. . Bright Red has also been

able to benefit from the innate knowledge and experience the founders accrued whilst at Leckie and Leckie, because they were able to analyse this experience and identify gaps in the market which were not already filled, aware that the quality of Leckie and Leckie's productions were very high and difficult to challenge. But Bright Red won the Scottish past paper tender, only a year after its founders had left their previous company.

The Scottish educational publishing field has become denser but the company's position is growing increasingly strong. Bright Red Publishing won educational publisher of the year at the independent publisher awards two years in a row, in 2010 and 2011. Five years from its birth it has also established itself as one of the top three educational publishers of Scottish origin and the only one which is actually headquartered in Scotland. The other two large educational publishers are conglomerate imprints; Hodder Gibson which is part of Hachette, and Leckie and Leckie which is now owned by Harper Collins. Beyond this the field comprises a variety of small independent publishers that each produces for its own specific subject groups, and a degree of international presence from publishers including Nelson Thornes which owns the Dutch conglomerate Wolters Kluwers, and Pearson, the English parent company of Penguin, which offers certain products for bigger subjects.

Comparisons

Many of the paradigms which dictate the balance between cultural productivity and business optimisation appear to be inverted in the case of specialist publishing. Whilst each of these specialist enterprises is focused on different markets they share a concern with maintaining a level of profitability in line with the expectations and demand, all the while with an eye on exploiting gaps so that they have the opportunity to produce occasional materials of cultural and personal interest to the enterprise, moments of innovative production within a structure that generally espouses a tried-and-tested approach. However, each specialist naturally maintains its own particularities nuanced by the markets it works in. In the case of Marcombo it is exploiting the international to develop quality local products, for Saint Andrew Press it is using the backlist as a way of broadening the range and concentrating on

sustainability in a limited market, and in the case of Bright Red it is to enhance differentiation to overcome the economy of scale in an already saturated market.

6.1.6 Translation

Acantilado/Quaderns Crema

Quaderns Crema is a Catalan language publishing imprint which specialises in the translation of international literary fiction, both classic and contemporary. It was founded in 1979 by Jaume Vallcorba, a Spanish philologist and former professor of literature. Over the years the imprint has grown to include a backlist of almost a thousand titles. In 1999, with Quaderns Crema established as successful, sustainable enterprise, Vallcorba began Acantilado, a sister imprint specialising in the same focus as Quaderns Crema but translating into Castilian in place of Catalan. The focus on translation with both of these imprints stems from Vallcorba's belief in supporting and stimulating cultural growth through the dissemination of quality literature.

When he created Acantilado, his Castilian language imprint, Jaume Vallcorba's intention was to provide a 'space for reflection' on translations of classic and important contemporary novels by providing a brand. He feels that this is how Acantilado has been recognised and why it has worked. Earlier when he created Quaderns Crema, Vallcorba concedes that he was trying to achieve something else, although still with the idea of creating a distinct mark in mind. However, the intention was also in part to establish the tradition of literature in Catalan which also had value whilst simultaneously offering translations of international literature. In addition, with Quaderns Crema's focus on Catalan literature, Vallcorba felt he could provide a platform for new authors. His experience is that classics in general terms have never sold very much, nor translations. However, original authors do sell if permitted a platform alongside strong company. The lines he developed for the Quaderns Crema imprint were designed in such a way as to complement the ideal of the brand which is so crucial to Vallcorba's business strategy.

Vallcorba is of the opinion that within the context of Spain, which does not have a high literacy rate and readership compared with other nations, Catalonia has a larger public market for reading and feels that the success of Quaderns Crema in the

contemporary era, with some major sales successes with more than one author, has helped contribute to the development of this public.

Vagabond Voices

Vagabond Voices was set up in 2008 to produce contemporary translated fiction. Allan Cameron, a translator who has worked on 23 previous books, founded it because he felt that the quality of translated literature in the English language market could and should be better, although he acknowledges it is a difficult publishing medium which he entered without considerable planning.

Cameron has previously had two of his own novels published through Luath Press. He sent Luath the manuscript for his next book, *In Praise of the Garrulous,* and the publisher read through three chapters and liked it but wanted illustrations and ultimately other changes to the text. Cameron decided he did not want to do that and this inspired him to publish the book himself.

He set up a publishing company and immediately made an application to the European Union for a publishing grant. He first published his own book which did well thanks to a recommendation from Terry Eagleton. It was followed by an Italian translation with a large amount of funding from Italy. Then Allan Massie, an already acclaimed Scottish journalist and novelist of genre fiction, offered Allan Cameron a literary novel, *Surviving,* that he had been unable to publish anywhere else because it did not follow the style of his other works. On publication through Vagabond Voices it also did well.

Cameron concedes that his experience with these first three books made the enterprise seem straightforward, but subsequent publications have fared less well and been produced at a loss until recently.

 Consequently he has had to adapt his publishing strategies. . His experience has shown him that translated novels are not working at this moment so he is trying to get other business areas developed, such as a line of polemical publications, and use those to subsidise the production of translated works.

He has discovered in the process that there are many other successful published authors of genre fiction who cannot get their literary novels published as he encountered with Allan Massie's. Much of his strategy now is focused on searching out such authors and their works, to bring these literary texts to public attention whilst benefitting from their already established brands and reputations.

Cameron has also changed his model from his initial ambivalent stance over design and branding. He regrets his first book of aphorisms for this reason as he felt this book was excellent but badly packaged. It only sold around 100 copies. Since then he has brought out another book of aphorisms, beautifully packaged, and it sold 500 in a month and has been reprinted. This experience taught him that packaging is vital. "You can't do justice to the text unless you package it as the modern reader wants." He has come to understand that the aesthetic element of the product, both inside and outside, are paramount to the present day market, something he did not believe when he first went into the enterprise. He relies now on outsourced help to design the books. Initially he wanted to focus on investing all effort into quality of text, not aesthetics, but it has become clear that this is not viable. In order to do the writers justice he feels he has to accept this and incorporate this aesthetic alongside his deep editing process.

Vagabond Voices is designed now to address what Cameron sees as the neglect of the literary novel But in the present book publishing climate he feels it is not ultimately a lucrative niche in which to work in because it is reliant on a small market of 'high volume readers', people who read 80 books a year or more, particularly if they travel a lot.

Comparisons

The issues that draw these two publishers together are the concern with providing quality in the content of the literature, irrespective of the cultural origination, and a focus on how branding and representation help in shaping and growing a market. Both companies maintain a business strategy which assumes a philosophy that new authors of quality will sell, especially compared with general translations, if they are provided a space alongside established and classic authors with 'quality' brands. Whilst the spread of linguistic diversity is not central to these companies' strategies,

they share an awareness and concern for how linguistic hegemony can debase the quality of readership and they seek to address this by targeting products in a combative stance against the pedestal of the mass-market, rather than isolating themselves from this stance.

6.1.7 Support Bodies

Gaelic Books Council

The Gaelic Books Council was first established as a type of department within the Gaelic and Celtic Studies Department at Glasgow University. It was created in direct response to the revitalisation of the language and a particular interest in Gaelic poetry and Gaelic literature which developed in the late 1960s. It was first established as a sales and marketing arm of the University Department, to extend the reach of Gaelic books. It had a mobile van for sales which went all over the Highlands and Islands bringing and selling books to the Gaelic speaking population, providing a service to the linguistic culture across the north of Scotland and the central belt.

In 1992 it broke away from the University and established itself as a charitable company unlimited by guarantee, taking up premises in the west end of Glasgow. It founded a retail bookshop whilst continuing its mobile sales methods. These mobile sales only ceased with the advent of internet access and online sales. This digital development was fundamental in addressing the broader issue of geographical access to Gaelic books for Gaelic speakers.

The Gaelic Books Council has also always had a presence at major Gaelic events. For example the organisation takes a stand to the Highland Games and will be there for a week, sell hundreds of books and make hundreds of pounds sterling because at these events there is a concentration of Gaelic speakers.

The organisation's principal function is to promote and support Gaelic writers, publishers and the market for Gaelic literature both countrywide and worldwide through the Gaelic diaspora. It supports publishers and writers through its grant giving powers. A main concern in its on-going activities is sustaining a harmonious working relationship with writers and publishers.

It is a public body, jointly funded by what was the Scottish Arts Council, now Creative Scotland, and Bòrd na Gàidhlig. The funding is roughly evenly split between the two organisations and The Gaelic Books Council receives a total annual budget which in terms of grants is at present £391,900. In comparison with other small nation public bodies that support publishing, such as in Catalonia or the Welsh Books Council in the UK which receives £8 million, this annual budget is relatively small and limits the Council's capacity for action. Therefore efficient financial management is crucial to sustained effectiveness and it is this area that has hampered some elements of its performance in the past. In more recent years progress has been made and since Rosemary Ward took over as director from Ian MacDonald, one of the original founders, there is renewed focus on this side of development. She feels that considering the initiatives the Council is spearheading and the advances it has made in a relatively short space of time, it is now offering good value for money for the investment it receives.

The organisation is run by five full time members of staff of which two are responsible for managing and administering grants and supporting the training of writers.

Gremi d'Editors

The Gremi d'Editors de Catalonia is the representative of the collective of publishing professionals in the autonomous community region of Catalonia.

It was established in 1977 by an assembly of 61 publishers in the wake of Franco's death and proposals for legal steps to adapt to the new political situation. The following year The Association of Catalan Language Publishers was set up as a branch of the Gremi, solely responsible for Catalan language businesses rather than all those publishing businesses headquartered in Catalonia. (Llanas, 2007, pp.157)

The organisation is an associative guild, of which there are many others in Spain, each located in its own respective autonomous community region. The guild also acts as a lobby for publishing issues at domestic and international level.

Its principal objective is representing, managing, promoting and defending the common interests of its members with full autonomy and realising all the activities and operations, commercial or otherwise, and all kinds of services and collective

activities that interest the majority of its members, although in no case for profit. It is comprised of professionals involved in the activity of publishing.

The guild's board of directors', currently 23 members elected by the organisation's General Assembly, delegates executive functions to a number of governing sub-committees with duties which pertain to domestic trade, foreign trade, economic affairs, finance and tax issues, intellectual property, new technologies, textbook development, training, and consulting, each brought together and managed by a general secretary.

It is actively involved in the relevant policy discussions and decisions of the Catalan autonomous government. However, it is also part of the Federation of Spanish Publishing Guilds, and as a consequence of the vitality and dominance of the Barcelona publishing cluster, it constitutes approximately 45% of the Federation's total representation. Through its own actions and those as part of the wider Federation it maintains a permanent relationship with the Spanish governmental Ministries of Education and Culture, Industry and Commerce. It offers consultation and participates in the elaboration of legislative projects and programmes of action. In addition it contributes as part of the European Federation of Publishers and the International Union of Publishers. It presents itself as a very international organisation, involved in both domestic and foreign development.

Within Spain its active priorities, in terms of industrial reform, are the restructuring of the Intellectual Property Law, educational reform, taxation of publishing products and internationalisation programs that work in unison with the Spanish Institute for Foreign Trade.

At the European level, it is presently involved in coordinated work with associations from other countries to unify the VAT rate of digital publishing products and services, with that of paper publication products. It is also engaged in efforts to combat the effect of piracy on the industry and to achieve a legal framework for intellectual property adapted to contemporary circumstances.

Comparisons

These organisations are counterpart representatives of publishing trade in small nations. They are comparable through their early emphasis on mobility to reach

disparate, underdeveloped markets. In the age of digital development, this has become consolidated and they focus on the orchestration of trade improvement at policy level. Increasing movement towards further professionalisation, specifically through financial business optimisation can be observed improving and extending their mandates, although the Gremi began this process from the outset whereas the Gaelic Books Council has only gradually evolved in this way. The origins of their development in part explain this differentiation as it is the move from an academic and cultural reinforcement to a political one that seems in both cases to have underpinned their professionalisation, with Scottish political devolution occurring at a later phase than in Catalonia. However, the Gaelic Books Council has experienced a prolonged period of evolution because political suppression of the culture is not comparable to that which was experienced in Catalonia.

6.2 Conversations on Key Issues

The following dialogues section consists of four sub-chapters, each with a separate concern and sub-headed sections derived from the points raised in interview. Rather than create individual large case studies, dialogue ensues on particular issues, creating discourse on small nation publishing. By outlining some of the details of projects by the publishers interviewed it is possible to create a microcosmic picture of concerns that dictate the field environment in which each interviewee and the respective enterprise operates.

6.2.1 Cultural Issues

6.2.1.1 Culture vs. Commerce

To begin this series of critical enquiries it is important to understand how different publishers position themselves in relation to the cultural fields in which they operate. The equilibrium that has to be managed by satisfying demands of narrower national or even more local tastes whilst maximising potential for profitability, which is greatest at the level of the global mass-market, was a crucial concern for the publishers in these interviews.

Jordi Ferré, the founder of *Cossetània,* stressed that his effort is always to seek equilibrium. He considered his publishing house a cultural agent, with dual responsibilities towards society, in the form of moral responsibility to participate in the growth and diffusion of Catalan culture, and pragmatic obligations to prove profitable and worthwhile to its staff and the business. "The two concepts come tied together. How can you distinguish them? The moment you start a publishing house you know that you have to make money and you know that you are a cultural agent." He considered the 'name' or brand of the company, crucial to its identity, as the gestalt of considerations towards both culture and profit. It is a reference to the imagery of the company's character and also has a monetary value. The brand is the symbol of cumulative cultural and economic growth achieved by a company. It represents accrued prestige. "The two [concerns] come linked together, there isn't a first and a second."

Alfred Arola, of Arola Editors*,* was convinced that it is possible to emphasise cultural output over profitability, provided a sustainable niche is found and developed. He

saw his publishing house's collection of dramatic works as the most important in Catalonia and believed it successfully cornered the market because, despite the difficulty of selling and generating profits from this genre, these texts are culturally desirable. He felt that if publishers lost their proximity to the consumer, there could be an uneven balance with regard to generating profits, but if they focused on proving that more complex products have value, then once consumed, the public would demand more. The ideal is the concept of market generation. He cited poetry as an example of this, explaining that, if popularly recognised, it could be used to influence music with lyrics that have commercial mass-market appeal. The public would then demand more and he saw this as the publisher's means to generating culture.

Jeroni Boixareu, General Director of Marcombo, acknowledged that his business, a specialist in technical and reference books, does not have the same level of concern for profits as others. In his view "publishing is one of those sectors where the maximisation issue is not as important." Nevertheless the family's history in the business has shown through experience that profitability cannot be ignored. He admitted, "honestly, my priority as a manager is to obtain maximum profits." However, sometimes his company has taken on publishing projects conscious that profits will not be optimum. This has happened for a variety of reasons. He clarified that sometimes it was of benefit to add prestige to the brand, echoing the sentiments of Jordi Ferré. It can also have commercial value if associated with culturally reputable projects. He saw this as the essence of an entrepreneurial philosophy. On other occasions Marcombo has undertaken projects simply because the subject appeals. "In our case which is more scientific and technical works, if I think it is interesting to this genre and market [that] I publish it." He confirmed that there is also a political element to this because many of the books falling into this category are published in Catalan. These do not make money but the spur for their publication has been patriotism. "I did them because I wanted these books to be available on the market in Catalan and other publishers weren't doing this." Typically such books have been produced to a high quality and deal with new, zeitgeist subject-matter. Before the financial crisis he also maximised profitability by publishing vanity books but he cautioned that it is now significantly more difficult to do this.

Jaume Vallcorba, owner and director of Quaderns Crema and Acantilado, emphasised that publishers could also gain satisfaction through what he described as being of "an intellectual order, an order of cultural intervention". He stated "it is difficult [….] I wouldn't be involved in this industry if it weren't for those other intangible benefits." However, he also strongly acknowledged that publishers must generate profits.

In the Scottish field, Campbell Brown, Managing Director of Black and White Publishing, said that he first puts in place a core product, "strong enough to sustain the business," then adds material for other markets. "We have […] the number of titles we're looking to produce for the market, which can vary depending on what is available and what we want to do." He admitted that he tends to consider providing books for cultural reasons as an afterthought to the decision to publish, which is primarily based on business strategy. "To be honest, it's peripheral […] you wouldn't make a commercial decision on that solely, However, if that all works then so much the better because I think there is a real need to have Scottish products, things of Scottish interest." He qualified this by suggesting the UK book market could viably be seen disassembled further into the English, Scottish, the Welsh and the Northern Irish markets, each with a distinct identity. He maintained that differentiation is possible and cited *Itchy Coo,* the Scot's language children's imprint with which Black and White collaborated. "I think we can bring material to [the Scottish market] which is culturally important like the Itchy Coo list, for example, which has been a huge success. It has shown us just how strong that element is."

Saint Andrew Press does not have the same commercial focus as a traditional trade publishing house because it is the publishing wing of the Church of Scotland. Ann Crawford, the Director and Commissioning Editor, explained that from an institutional perspective, Saint Andrew Press has managed the balance between business and cultural productivity within the bounds of a clearly defined structure as an enterprise of the Church. Consequently there are certain limitations to its potential. Titles that seem culturally viable and of benefit to the company cannot be justified within the bounds of the Church remit, and that business mandate is the limiting factor to expansion. Crawford insisted that the Church has remained open to expansion and has attempted to overcome limitations whenever possible. "Over all the years [the Church board has] been very willing to work on things that aren't obviously part of

their remit." Following the restructure and downsizing of the enterprise, Saint Andrew Press has been run as an imprint of the English enterprise Hymns Ancient and Modern and since then, whenever she has taken a proposal to colleagues in London the ultimate question has been whether it will make money. If not, then the Press could not afford to publish it.

However, she claimed the Church's primary concern has always been the value the books offer and whether they will be acceptable to its members. Equally, the Church does not fund production and requires each proposal to be self-sustaining. Saint Andrew Press therefore has two strict criteria to fulfil; profitability and relevance. This makes it difficult to gamble on titles so cultural profitability is secondary to business and institutional concerns. However, Crawford was confident about the possibility of publishing works which fulfil these criteria and have inherent cultural value. She argued that the key is diligence and attentive commissioning. "I think it's like walking a tightrope, if you go too far down the making money side then they would question whether this was a suitable thing for a Church to be doing, but if you're not making money then, never mind any of that, make sure you make the money, […] the trick is to plough a middle course, never get into a situation where you are losing money."

This issue of balance was also presented to interviewees from supportive trade organisations. Rosemary Ward, Director of The Gaelic Books Council, said that, as a mediating institution which also buys and sells books, it is crucial for them to make sure they balance buying and selling practices. Business prerogatives are fundamental. She explained, "We enjoy 35% discount from publishers. When my predecessor was selling to fairs he would give them this discount but also pay for distribution." Since taking over the directorship in 2011 Ward's primary focus has consequently been business rationalisation. She felt that in the past any Gaelic speaker interested in writing had to be published, and that was enough. That no longer happens because the organisation and Gaelic publishers have become more conscious of the ever-changing market. The Gaelic Books Council regularly conducts surveys amongst readers to find out what they want. Ward ultimately considered a business mentality focused on marketability to be better for culture, believing the two processes can go hand in hand. She saw definite opportunities to target the children's market in particular with literature to complement that offered in schools. At the moment there is insufficient material available for schools, libraries

189

and other supportive institutions, the lack indicating the growth in Gaelic publishing. The biggest obstacle is that the market is too small for larger print runs that would provide economies of scale.

6.2.1.2 Defining and Differentiating Local and Global culture

Most publishers are concerned with profitability and many also produce materials which contribute to cultural identity. This section is concerned with the way that differentiation dictates their strategies. Intent, conscious or otherwise, is an important variable involving the cultural market targeted, whether the market is oriented globally or locally, at the national or subnational level. Language is an important and immediate marker of this differentiation. In Catalonia it is more obvious given the divided but coexistent status of Catalan and Castilian linguistic culture is more evenly distributed. One way of interpreting linguistic cultural differentiation is by examining readership.

Albert Pèlach, Director of Grup Enciclopèdia Catalana, proposed that the Catalan reader is "perhaps more demanding". He suggested that Catalan readers' comparatively heightened interest in reading may be due to a number of factors. The Spanish industrial revolution began in Catalonia and politically and culturally, Catalonia has been traditionally more open to European ideas. Historically Catalonia has been more 'avant-garde' than the rest of Spain, creating a Catalan bourgeoisie that pushed national progress. It had more publishers and a burgeoning demand for books, greater in Catalonia, than in the hands of the ruling class, in wider Spain He claimed today there is also a wider network of bookshops and direct lines, along with libraries in Catalonia. Its readership is also more inclined towards quality literature than mainstream Spain. "[Catalonia] doesn't have a much higher reading rate than Spain, or at least Madrid, but the 60% that do read in Catalonia are more particular, in my opinion." He acknowledged that not everyone shares this opinion and admitted that he and Jaume Vallcorba, director of Acantilado and Quaderns Crema, regularly argue this point. For Pèlach the 40% of non-readers was the more vexing figure. It represented something failing culturally for him. "I think after the Franco era [….], readership hasn't developed enough, with immigrant populations […] kept out of participating in […] what is Catalan. This 40% is frustrating because what is failing is the cultural level. [It is] low, because of poor education, a lack of home libraries, etc.

This isn't just a political failure. Part of it has to be a social reflection and [….] a social failing."

Another consideration is whether location is an element in differentiation. Geographic size and distribution is acknowledged as a determining factor in small-nation status and it is valuable to investigate the extent to which physical positioning affects differentiation in production. Robert Davidson, founder of Sandstone Press from the Highlands, did not consider locational identity important in his fiction lists because it was not the primary selling point for the market. "When you go into a bookshop and browse for a title, do you care if it's Scottish? No, probably not. [What matters is the] author's name, then cover, then genre." He conceded that good books by first-time authors have been offered to Sandstone and he has turned them down because in his experience no one reads a first-time novelist. He added that this is different in respect to Scottish 'Heritage' titles but contended that Birlinn, one of Edinburgh's big three independent publishers, has this market cornered. It is easier, or at least different, with non-fiction. He suspected that an author, for example Ron Macmillan, might be difficult to sell to the market but Shetland as a subject is not. Non-fiction can be sold on the basis of subject, while fiction comes down to the author. So the focus of Sandstone Press has been on getting stronger names and winning prizes to build recognition.

It also emerged through these interviews that not all publishers in small nations are confronted with the dilemma of navigating a schism between local and global identification. Timothy Wright, Managing Director of Edinburgh University Press maintained that academic publishing from Scotland and other Anglophone cultures is, by its very nature, global because in many countries English is the language of teaching at undergraduate, postgraduate and research level. English language texts can be sold worldwide. He revealed some 60% of Edinburgh University Press' business is overseas and 25% of its entire book business is in the US. Having an international strategy in place is key and mirroring that is publishing in subjects with international scope. Edinburgh University Press is focused on the humanities and social sciences with some linguistics for the domestic market. Areas such as film studies, Islamic studies, and literature are international. One of the company's objectives is to increase the number of US authors in these areas, supplementing

what is now a small pool of international authors. This will involve editors in wider international travel. Wright labelled Edinburgh University Press a UK publisher that is located in Scotland rather than a Scottish publisher. He said the greatest benefit his company derives from association with a Scottish cultural identity is its name. Edinburgh is widely known internationally. The company is attempting to exploit its brand abroad so that it is recognised as easily as UK academic publishers, Oxford and Cambridge University Press. Another element of the business is the company's list in Scottish history, which sells well domestically and internationally. Wright felt there may be an international assumption that proximity to culture equates to authority in the case of Edinburgh University Press. This could be interpreted as an example of 'globalisation' of cultural products.

However, this global level of activity is not necessarily the same in other forms of specialist publishing. In the educational sector, where cultural curriculums vary, the issue of differentiation is more important as a means of confronting competition. In Scotland over the last ten to twelve years many competitors have emerged in the educational market and gaps have become limited. John MacPherson, owner and director of Bright Red Publishing, supposed that the way a publisher approaches material must be the major differentiation in his company's field. He alleged that when he worked at Leckie and Leckie quality declined when money became scarce. Bright Red has addressed this same problem by redefining its approach, developing an engaging, accessible and modern quality between authors, print and production. He agreed that location in Scotland is an asset if moulded to the brand correctly. Bright Red has its own local distribution base, in Kirkcaldy, to distribute books directly and ensure effective customer service. It is difficult to appreciate the company's success in terms of percentage share of the market because its primary competitors, Hodder and Leckie and Leckie, are imprints which are part of much larger groups. Determining how much revenue for secondary educational materials alone comes from them appears to be all but impossible but MacPherson suggested that the Scottish market for secondary educational materials (classroom and revision resources) is somewhere between £8-15 million pounds sterling, including digital sales. He was confident that Bright Red has gained a reasonable portion.

Another problem that arose in investigating how far these publishers identify themselves with a local, national or international identity is the influence on authors. It can be argued that cultural identities dictate that authors presented as being representative of a particular culture have automatically been influenced by predecessors from foreign cultures. Allan Cameron, founder of *Vagabond Voices*, stressed that authors from different cultures have historically influenced each other, intersecting cultural values in a form of cosmopolitan literary dialogue. He cited the relationship between Charles Dickens and Russian literature, and H.G. Wells's influence on Yevgeny Zamyaten, who in turn influenced George Orwell and Aldous Huxley, to demonstrate that when discussing literature it can be limiting to talk of national characteristics. As a professional translator he observed the importance of having an understanding of the value of national and local cultural representation and pejorative sensibility towards global cultural interchange.

Echoing these sentiments but setting the issue of nationalism against interculturalism in cultural exchange, Jaume Vallcorba, of Quaderns Crema, commented "I'm not intercultural, I'm very European, but it's not a nationalist sentiment, a territorial one. For me Dostoevsky is just as close as Llull." Vallcorba understood that the role of the publisher as a dynamic of culture is to publish authors of quality wherever they may be from. Limiting the enterprise to materials generated within the domestic, national, personal environment espouses a totalitarian ideal and is not the way to act as a cultural facilitator.

The issue of establishing a defined and differentiated identity for the minority linguistic cultures within each nation was also discussed with interviewees from trade organisations. Segimon Borràs, General Secretary of the Gremi d'Editors, highlighted the fact that historically the Catalan publishing cluster favours production in both Castilian and Catalan, atypical of comparable European linguistic cultures, such as Scotland. However, he admitted that there is an inherent contradiction in this. Whilst the cluster favours Catalan language publishing, many also publish in Castilian. They coexist in the same market, producing in Catalan while making a place for their editorial productions in another language. The very fact of being Catalan can thereby create a crisis of identity. Publishers may be torn between their cultural background and practical commercial decisions based on the nature of their lists. However, Borràs held that this interplay of interests cannot respond to purely

mercantile concerns. In this sense the split identity ultimately drives the emphasis on differentiation for many Catalan publishers.

In the Gaelic linguistic culture, the process of normalising and integrating the language in an everyday fashion into the literary supply of extant Gaelic communities is a predominant concern. Rosemary Ward urged that Gaelic will never be mainstreamed as long as big English institutional agencies fail to recognise that they also have a responsibility to provide support. Bòrd na Gàidhlig, one of the Gaelic Books Council's principal funders, has insisted that these public bodies develop and publish Gaelic language projects, irrespective of their linguistic base, to illustrate support for the revitalisation of Gaelic. At present most public bodies redirect any loosely Gaelic projects to Gaelic bodies, irrespective of the nature of the proposal. Much of the momentum generated in the process of normalisation is traditionally sustained by individuals who play an iconic leadership role. Ward cited Sorley Maclean's publications as a commercial example and emphasised the role of individuals such as Derek Thomson and John Storey in establishing a literary culture by creating Gael literary magazines. The other factor needed to mainstream and define Gaelic's literary culture is a more professional infusion to ensure quality, echoing Alfred Arola's sentiments about how to sustain a small but loyal market. Ward explained that at present anyone writing in Gaelic is virtually assured of publication. She made no apologies for commissioning purely for creative development. "We [the Council] feel [….] we have to nurture growth of new literature and I make no apologies for us pretty much covering the author for the work, for their creative and intellectual property and also the guarantee against negative share. They get more money irrespective of how many books are sold […] We're never going to have enough Gaelic writers that we've got too many […] I'd love to have competition where they are proactively in a position to go to a reader and say, 'can you assess this work and do you think it is good enough for us to send into Acair or the Books Council." Nevertheless she showed concern that there is insufficient critical analysis. "We've maybe allowed Gaelic writers to write their own hobbyhorses." This is where she felt increasing marketability offers a degree of opportunity and stringent networking and collaboration would also help. She sensed that many Gaelic speakers may feel they have a story to tell but lack writing

confidence. If the Council could maintain an updated database of everyone working in the field it would also help in the management of future productivity.

6.2.1.3 Developing and Debasing Culture

A third point of consideration is how far publishers see themselves as precariously balanced between business and cultural concerns and whether it threatens to debase the nature of each culture, already touched on in the two previous sections. As outlined by some interviewees, the increased expansion of global bestseller markets is pertinent in this regard.

Alfred Arola was particularly concerned by this. He felt that globalisation presents a threat to cultural demand because global mediums make people devalue their own culture. He insisted that during the era of Franco and just following his death, people in Catalonia would go to the bookshop eager to read a new book on Salvador Dalí or by a well-known writer, because they wanted to consume their own national culture which had been prohibited for 40 years. He lamented that this attitude has been lost and that the public is more interested in queuing to read Stieg Larsson, and don't know and won't read local authors. He was also concerned that the public perception seems to be that it is not worth reading local authors because, by virtue of their limited recognition, they are presumed to be second-rate. This is simply because authors are not marketed, not represented on television and other media formats. In the contemporary market visibility and celebrity is a greater sales point than quality writing. From the perspective of the cultural influence on writers this is not perceived to be as detrimental as it is to the market because, irrespective of cultural clashes, there are always wider international influences. That is how culture is generated. Arola summed this up saying "Castilians [may] want Catalans to be Castilian but they are more likely to end up all being English, because there is always a mixing of cultural elements."

Another important consideration is the extent to which cultural support should be offered to sustain cultural enterprise, to combat the effects of pejorative or generalised and inaccurate cultural representations. Rosemary Ward reasoned that it is wrong to allow the endeavours of cultural producers to become subsumed by budgetary issues on the part of support organisations. She cited the supportive acquisition of Itchy Coo by Black and White as an example of institutional failing. She

claimed this is devolution of responsibility. Ward supported the greater incorporation of minority works into mainstream publishing, citing the Scottish Book Trust's 'Book Bug' initiative as an example of where this was ignored. Book Bug is a national project under which every child born in Scotland receives two copies of a book to generate interest in reading and encourage parents to read more to their children. Ward suggested Gaelic language titles have been poorly misrepresented in the shortlist of books. "The Book Bug initiative does now run Gaelic titles in some areas but only because it gets specific funding from Bòrd na Gàidhlig […] the lack of joined up thinking in the same government that managed to deliver a national Gaelic plan. Why can they not establish all these links?" She elaborated that she has no problem with a national agency saying it will have a targeted approach and start with a certain area, but she felt not to mention Gaelic at all absolved it of responsibility to the language, and forces others to make up for that deficit.

6.2.2 Linguistic Issues

6.2.2.1 Language and Identity

In the case of small nations with an element of linguistic cultural distinction the first question to be investigated in establishing the configuration of identity through publishing is how important the role of language is in sustaining that sense of identity.

Jordi Ferré (Cossetània) recognised that a nation can identify itself through a variety of concepts, not only language. However, he was also strongly of the opinion that in Catalonia language is very much associated with national identity and nationalist sentiment. "It is difficult, [we can't] think that we'd be a nation without that. You rapidly connect it with that." He conceded that this is not a universal maxim; there are Catalans who have an ingrained sense of Catalan national identity but their mother language, their habitual language of communication, is Castilian. In his view this is a reality that has confronted the Catalan culture from the end of the twentieth century. The issue is that despite the re-emergence of Catalan nationalism, Castilian and bilingualism are also now rooted into the cultural identity. He acknowledged the linguistic element of national sentiment in Catalonia and suggested that 'attacks' on Catalan national sentiment are often directed as attacks on the language "because

this is a fragile part". He commented that when the transition to democracy was made in the late 1970s and 1980s there was no industry for Catalan language publishing. There was trepidation and concern over whether there was any market for Catalan texts. He now feels the cultural aspect has evolved and publishing in Catalan has become significant. He pointed out that in Spain more than 10,000 books are published every year, whilst in Catalonia more than 3,500 Catalan titles a year are published, significant for a language with 8 million nationals. Segimon Borràs corroborated this view, saying the role of language is fundamental in the maintenance of Catalan identity; "In large part we say the language marks culture. In other words, it is probably one of the most important identifiers of Catalan culture."

In the context of linguistic issues, it is also important to discuss the necessity of print culture, as opposed to oral tradition, in preserving minor linguistic identities during these interviews. According to Rosemary Ward, oral tradition has been hugely important to Gaelic culture and served a purpose for generations of Gaels who were largely illiterate. The older generation would speak fluently but often could not read it, so oral tradition preserved the identity through a lost generation. However, the emergence of bilingual education and its encouragement from seminal Gael academics, in particular Derek Thompson, encouraged a resurgence and desire to develop a literary culture and now the hopes of a future generation of Gaelic speakers rest in print culture development.

6.2.2.2 Language and Educational Publishing in Catalonia

In the educational realm the issue of language is of particular interest as there may be opportunities to underpin minority language publishing through teaching initiatives and institutional demand, providing a supportive base for smaller publishers. Ferré agreed with this. He claimed educational publishing has been less difficult since the Law of Linguistic Normalisation, as Catalan became the driving language of primary education in Catalonia and the industry benefitted from catering for a new demand for textbooks which until then barely existed.

However, Segimon Borràs was more sceptical. He pointed out that when teaching in Catalan began there were already extant Castilian publishers in Catalonia active in the educational field and eager to target this new market. Companies such as Grupo Santillana, Grupo Anaya and Grupo SM and their imprints took advantage of their

scale to publish books in Catalan aimed at the schools. The Castilian publishers run Catalan imprints with political and cultural sensitivity. In Borràs opinion argument over rivalry with the Castilian sector is illogical but what is certain is that the typologies of the publisher in Madrid and the one in Catalonia are distinct. In Madrid production is focused around Educational, Legal and Academic materials, as suggested through the earlier analysis of the Catalan database, which requires a form of contact with the administration. In Catalonia, he contended that the concentration is on commercial publishing that depends on the market. That does not mean there are no commercial publishers in Madrid and other types in Catalonia rather that each location dominates in specialisms. He did agree that Catalonia is home to publishing houses with a great and sustained tradition in textbook publication including Vicens Vives, Teide, Edebe, Casalls, and newer enterprises which have become established in tandem with contemporary educational reforms, such as GEC. However, he argued against the idea that this creates a situation of control, in which it is difficult for Catalan publishers to compete. Instead, he saw it as a question of pure commercial decision. "For each educational publisher, behind its books there is an educational project and educational projects usually have colour, and each has it colour and it is the teacher that decides which colour of material to adopt and use or not use. But it's not a question I don't think of Spanish publisher or not Spanish publisher."

Rosemary Ward says that although in the early days there was a need for grants from government to safeguard the growth of Gaelic, once it gained momentum things should have started to become mainstream. Local authorities providing Gaelic education should have been required to pay for it.   Instead the Gaelic Books Council must provide support. She warned there should be a clear commitment from the Government to ensure Gaelic education is funded properly but was quick to add, "That's not to say that they are going to start saying things like 20% of your funding has to go on so and so. It's just being aware that you have a responsibility to Gaelic and that is one of the Government priorities". She cited Stòrlann as an example. It was established in 1999 by the Scottish Government to develop print materials for schools, given specific funding, both from government and local authorities, Stòrlann had the remit for curriculum, and the Gaelic Books Council was not to be involved other than to redirect people to Stòrlann if they were approached with a Gaelic

project. In Ward's view, as producers of culture, Stòrlann must not lose sight of Gaelic materials for the young. She also suggested the adult learners market is an area publishers might pay greater attention to. Many elderly Gaelic speakers remain illiterate in the language, and to date Sandstone has cornered this market.

The Gaelic Book's Council has collaborated with Stòrlann and an entrepreneurial company called Giglets for a childrens' book venture. It has already succeeded in the English language market producing a series of abridged versions of out-of copyright classics with modern day language called SmartReads (Giglets, 2013). The Gaelic Books Council has collaborated with Giglets and Sandstone to provide simplified translations of classic fiction, making the texts more accessible for the younger Gaelic generation. "We will not be printing them. Schools will be given, through a unique partnership, a PDF file so if they want to print it they can, but we will not be commercially producing them, because we'd be competing in the very market we're trying to serve. You need to say it's available as this, and that's how it will be done. It's purely for schools use."

6.2.2.3 The Industrial benefit of publishing in Castilian and English

Despite the minority language presence in each of these nations, the majority of publications produced are published in the more widely spoken international languages. However, it is important to consider this activity from both poles of the arguments, in favour and against, to be able to judge the respective merits of multilingual publishing in small nations. According to Jordi Ferré (Cossetània), despite the grievances between the Catalans and their perceived subjugation at the hands of Castilian culture, the Catalan publishing industry's position as an important global cluster has permitted companies that publish in Castilian to create Catalan language imprints. The relative dominance of the cluster in exporting Castilian texts to Latin America has helped in a way that he feels may not have been possible in other locations, so the often resented presence of Castilian, the bilingualism of the nation has made it possible to create a more viable business structure for minority language publishing. There are many companies in the cluster that have both lines of editions.

Nevertheless, Ferré admitted he feels frustrated when Cossetània has had to sell the Castilian rights for an idea created in-house and successfully marketed in Catalan.

He stressed that the small market for the Catalan language obligates Catalan publishers to think deeply about what type of products should be sold. They have to be proactive with ideas. Not all will work in the commercial environment so, for every new idea Cossetània has had, it has considered how it might also work for a wider market. Knowing how to use intellectual property and rights is also a question of business optimisation. "On the one hand it is true that there is a publishing business sector in Catalonia which has a worldwide potential, [….] because it exports a lot [….] in Castilian, but this has meant many publishers have also gambled on Catalan language publications." He said it is important to understand that these business decisions are not always made with cultural productivity as the primary consideration. Certain Castilian publishers have created Catalan language imprints simply as a way of expanding revenue streams but Catalan publishers also produce Castilian texts, as Cossetània is doing with its Lectio imprint. He explained it is difficult to do illustrated books with photos such as cookbooks because this would prove too expensive aimed solely at the Catalan market, so Cossetània does a co-edition with itself keeping the entire format the same but translating the text into Castilian and effectively lowering costs. "In this way we can make an illustrated cookbook in Catalan otherwise it would not be possible. [….] this also [helps] with authors. Authors that are known in Cataluña will also get a bit of the Spanish market." Ferré summarised the value of Lectio as three-fold; it helps make possible Catalan products which otherwise would be printed, it derives profit from products which have not worked in the Catalan market, and it provides a wider public and more money for authors who work on limited themes.

Conversely, Albert Pèlach argued that when a Catalan publishing company wants to do things in Castilian it does not know how to do it well, and vice-versa; the Castilian publisher does not understand the Catalan market because it is a smaller niche, and more specialised, or perhaps because authors prefer the specialist publishers. He held that "all literature has an important percentage of its market in authors of its own language, and those prefer to work with local publishers". He claimed that although Planeta and other large publishing companies such as Random House Mondadori have Catalan language imprints, not one is a market leader in Catalan language materials. Edicions 62 is the market leader in commercial fiction/non-fiction and Grup Enciclopèdia Catalana and its imprints lead in the reference market. Then

come other Catalan independents such as Edicions Proa, La Campana and Quaderns Crema and finally comes Random House's Catalan imprint, Rosa Del Vents, covering a very small niche of the market, so small that the imprint only take risks on bestsellers. "Normally […] the publisher that has the quota of the Catalan market is not a Castilian language publisher". He admitted that although Grup Enciclopèdia Catalana has done things in Castilian these have proven very difficult, albeit he could not elaborate why. He felt they simply did not know how. He also claimed that there is an under-representation of Catalan in fiction because authors are aware they can make a better living from writing in Castilian than Catalan, citing Carlos Ruiz Zafón and Javier Cercas as immediate examples.

Jeroni Boixareu suggested more cautiously that there is a balance involved in producing Castilian language texts because it affords the opportunity for personalised projects. He pointed out a small shelf in his office, filled with high quality Catalan language technical manuals and explained that he paid for their production through sales of Marcombo's Castilian language backlist. He felt that if it were not for the success of their Castilian language products he would not be able to offset the production costs and would be generating losses. "The Castilian market works well. It's wide, extensive […] and with people in Latin America reading more and more […] it's where we make our business [profitable]. In the last year approximately 50% of worldwide Castilian production came from Catalonia. The publishing industry in Catalonia wouldn't be the same without Castilian. That's the way it is." In the case of Marcombo, Boixareu listed, in order, Mexico, Colombia, Argentina, Venezuela, Peru and Chile as the most important markets outside of Spain. He claimed Spain accounts for around 70% of Marcombo's turnover with Latin America covering the other 30%, but he asserted that at larger publishing houses the Latin American proportion is even more important. "As a general rule, the bigger the house the more weight Latin America carries." Boixareu concluded that it is becoming more difficult every day to produce technical works in Catalan. "There really isn't a business for this in Catalan, almost no business." Marcombo has had only five or six Catalan titles which have proved profitably worthwhile out of a back catalogue of 400 titles.

As for the benefits of operating in a field with a bilingual market, Jaume Vallcorba explained that he began *Acantilado*, his Castilian language imprint, in 1999 because

he saw that high school orders of his Quaderns Crema Catalan language texts had decreased somewhat. "We could and were losing some authors who were selling lots of copies." He cited Ferran Torrent as an example; a notably successful contemporary Catalan writer originally published by Quaderns Crema, who having won a literary prize in the early nineties, sold 70,000 copies of his (then) latest book and was subsequently contracted by another publisher. Additionally Vallcorba realised there were books he wanted to publish and couldn't in Catalan, so he decided to do them in Castilian. Vallcorba claimed that prior to the financial Crisis, which has changed the entrepreneurial spirit across all sectors of industry, despite the inherent difficulty of successfully publishing literary translations it was still possible to come out quite well. "You could search out spaces that were available, in literature [there were] good prices on some things." However, the financial crisis has inflated the price to purchase rights and the situation has changed significantly. Vallcorba countered Pèlach on the non-viability of cross-pollinating the linguistic markets by saying that he has never found any distinct difficulty publishing in the Castilian market since he began *Acantilado*. For him creating and giving shape to the brand is the fundamental issue and he maintained that as long as he can create an environment where his published books "create dialogue with one another", he can overcome the limitations of his sector.

Alfred Arola had a more balanced opinion on the issue of cross-pollination. In his view it is dependent on the type of publisher. Echoing Pèlach, he argued that if Planeta does this it is because it is good business. "They are not concerned with cultural rationales but they know that to compete in the local world is also important. They see competition in sales numbers, and they know there is a public for Catalan works." Segimon Borràs also argued in favour of balance and believed that although publishing in Catalonia has been able to contribute to some extent to the maintenance of the language, publishing in Catalan has only been able to continue because a cluster already existed for publishing in Castilian. There has been publishing in Catalan from the beginning of the language and the beginning of printing, but he proposed that publishing has always gone ahead of linguistic normalisation. When publishing began in Catalonia, during the Gutenberg era, there was printing not only in Catalan but in Castilian, French, German and Italian. There has therefore always been an international language production.

The Scottish context is somewhat different as the base population is not bilingual. Consequently Gaelic publishers cannot rely readily on a widely distributed domestic market. Equally the English-language base is not the dominant publishing cluster in the UK because it faces overwhelming competition from the wider Anglophone market. Consequently two issues for consideration are how Scottish Anglophone books are differentiated from those of the English publishing cluster, and whether they can and should be published at all. There is also the question of where and how English-language Scottish publishers locate and define their markets. Allan Cameron remarked "the thing is that *Vagabond Voices'* books are cosmopolitan books. They are going for niche markets which should be distributed right across the English speaking world, and are." However, he accepted most of his company's books sell primarily in Scotland. He insisted "Waterstones in England will not touch them so they go into Waterstones in Scotland" and explained he finds this inability to cross the border frustrating because he feels the list needs to sell in the other markets. "We have […] now got an American distributor […] and I have a sales agent for most of the 'old' European Union. If I could get someone for Eastern Europe I'd be delighted. I think our books would go down well there, I think they'd read more. But I have to find the right people." In his view Vagabond Voices sells more in Scotland due to word of mouth and because review coverage is primarily in Scotland. "We do get the odd thing in *The Guardian*, very rarely, and then *The Spectator* occasionally, but very minor stuff. It's difficult to get that kind of coverage; most of the coverage is here." He also pointed out his writers are better known because they are local and mentioned Allan Massie, a self-professed 'British' writer who still sells better in his native Scotland.

The situation for Gaelic publishers is very different. They do not have an international market or the same opportunity for connection and interaction with English language publishers as their Catalan language counterparts do with the Castilian market. However, Rosemary Ward was very positive about the potential for Gaelic collaboration with publishers working in the English-language market. Her attitude was not of competition with them but of seeing them as opportunities. She argued that, particularly in the children's market, collaboration bolsters success. Acair's co-editions have been borne out of healthy working relationships with Walker, Osborne and other major children's publishers. Acair have taken their books, translated them

and made them available in Gaelic. Heinemann, the big curriculum content publisher for education, has a 'phenomenal' working relationship with Stòrlann, and Ward asserted, "We're actually now in a position where we as education publishers are bringing on a new product, they're actually negotiating using the Gaelic rights, let's go for a co-edition, the economy is there, one in Gaelic, one in English, and it's all made ready at the same time". Her concern was about making better use of the available materials to permit the Gaelic Books Council and associated publishers to push the market. She would like to be secure in the knowledge that Gaelic publishers could effectively produce 12 new children's picture books in any given year as a result of collaboration with the English language publishers.

6.2.2.4 Language, the International Market and Globalisation

Another perspective broached with the interviewees, and touched upon in the previous section, is the opportunity for publishers working with minority languages to interact in international publishing markets. Jordi Ferré believed that global markets could open up to products with a specifically local flavour but which have a global market. However, he conceded that language places a limit on this. "Catalan is not widely spoken. But if you have good ideas you can extend production." He explained that the Associació d'Editors en Llengua Catalana (of which he is presently president) is trying to persuade people to sell their ideas to other publishers from all over the world. His view is that in the end publishers are selling ideas, and content and that should work for the Spanish market the same as it works for the French and so on. He argued that people are already selling products of ideas originated in Catalonia to other parts of the world. He stressed that, wherever the seller may be from, in an internationally fair market no nationality has more advantage than a Catalan publisher. "It is not easy selling to other languages but we've done some things, because realistically we are a consumer culture of rights but we are [….] working towards [expansion] and going to the fairs of Bologna, Frankfurt and London to work on these kinds of ideas."

Others also agreed that a global and international business strategy is crucial in supporting development of minority language publishing. Albert Pèlach reiterated that the key to success in the limited Catalan language market is being open to international products that can be appropriate to Catalonia and translation is

important. "Technically we are in a low time for bestsellers but recently they are on the increase again. These phenomena are certainly stronger today than they were in the past." The global publishing market must be understood as a two-way road and it is this interaction that connects the effects of the local and global trade with each other. As such it is also important to discuss international publishing enterprises operating in minority language markets. Pèlach pointed out that until recently corporate publishers would only contract a Castilian translation for the latest global bestsellers. This has changed in recent years but only because now they see it as an additional niche, an extra linguistic window for exploitation.

Segimon Borràs' view was that the positions of the local and the global are inextricable. He acknowledged that the industrial revolution changed the editorial world. The historic Catalan publishing firms such as Salvat and Montaner I Simon could see clearly that to print industrially they needed a bigger market. The Catalan market alone was not big enough and not even the domestic Spanish market was sufficient. So they began to publish in Castilian because they saw advantages in the Latin American market to permit a degree of industrial expansion. Borràs was also pragmatic about authors' decisions to write in whatever language they prefer. Certain authors with bestseller success are Catalan but write in Castilian. There are others who write in Catalan. Either position makes sense to him. His greater interest was with a more recent phenomenon of authors who publish in Castilian but simultaneously release the same work in Catalan. In his view it demonstrates that the titles are achieving success in both language markets, but he was uncertain whether this is a positive or negative from a cultural perspective. It may have increased sales of general Catalan fiction but the question arises of public perception of the originating language.

Within the English-language market, globalisation is a process which increasingly helps Anglophone products penetrate foreign language markets. However, there is not a corresponding increase in the flow of translated literature in English, which would expand market demand and breadth. Allan Cameron, who as a translator and may be said to have a vested interest, commented that in certain ways he is against the dominance of English in Europe. There are many Europeans whose second language is English and he felt that if they want to read a novel from a particular country, for example Lithuania, they should be able to find it in the English-language

translation. He believed it unlikely that they would be able to because of the lack of translation activity from other linguistic cultures into English. He was more confident that they would find it in Italian, then French, then German. He claimed that Italy has a 25% translation niche in publishing. Nevertheless he accepted the strong business rationale for having translation into English, because there is a massive market in the language. For Cameron, translating foreign works is a way to counteract the one-way trafficking of Anglophone literature in the global market and what he considers to be an increasingly culturally homogenising process. "We have one-way traffic globalisation; the benefits of its potential are not being fed in," he says. He also stressed that publishers in Anglophone publishing houses can and should be more experimental. He acknowledged this is easier for a company like Vagabond Voices in part because it can get costs lower and is located out of the city. He also felt that it is important for his company to get material into translation. So far one of his own books, 'The Berlusconi Bonus,' has been translated into Italian and he has published Allan Massie's novel 'Surviving' in French. He also said he wants to work with foreign publishers and Catalan literature is one route he would like explore, partly because he is aware there are big grants available for this, but also because he understands there to be a wealth of literature available within the culture.

Ann Crawford suggested there seems to be a partial problem with Scottish identity when presented to an international market. She has encountered difficulty selling texts to the English rather than Scottish market and explained that one book Saint Andrew Press republishes every year, called *'Pray Now',* was originally published around 1995 with a cover which featured Church of Scotland prayers. Subsequent publications have made no reference to the Church of Scotland but every time she goes to a sales conference she is told by representatives that the title would sell much better if it didn't have Scotland on the cover. Even though any reference to its Scottish identity has been long since removed, there is still an assumption of its sole applicability to that market. She said this is not confined to the English market and claimed that often, if she goes with a book to sell to an American or an Australian publisher, once she gets across the fact that the product is by a Scottish person writing about Scottish experiences the reaction is immediately one of 'fascination' combined with rejection because the notion is that the writing must be specifically for a Scottish market.

This places Scottish publishers in the position of always having to take a risk presenting a title with an even remotely cultural theme to an international market. The products isolate themselves by seeming to suggest that they are not for a foreign market. Crawford agreed that this barrier has been overcome on many occasions but maintained that it is a constant consideration when commissioning a book by a Scottish person on a more universal subject where Scottish examples are employed. "I always have to explain to Scottish authors that there is nothing wrong with being Scottish and there is nothing wrong with making it clear in the books by using Scottish examples but you must remember the person reading it might be in Auckland and qualify things. Don't just say 'I went to East Kilbride' or so on, so it's not off-putting to Scots but is contextualised for other markets." This seems to negate the idea that book fairs present an opportunity for small nations to showcase their culture. She agreed that trade organisations such as Publishing Scotland should go to them with a consolidated stand to emphasise the Scottish presence of publishers as a networked group. "I fear that we don't make enough of a splash about ourselves and we need to be out there making sure that people understand what we are and what we do."

Rosemary Ward found the disorganisation of trade bodies and confusion over relative jurisdictions of support for Gaelic a concern. She argued that this is because total oversight is lacking. English is so predominant that even national agencies lack knowledge and awareness of details as basic as the number of Gaelic speakers in Scotland. She emphasised it is crucial to act at Government level for the messages to filter down and also suggested proper education channels need to be opened so that "we don't dumb down our own culture." To this end she was also interested in collaboration further afield, to develop Gaelic-European relationships. She said she has now begun dialogue with Allan Cameron to identify quality material that can be translated into Gaelic with the ultimate goal of seeing translations from Gaelic into English rather than the other way around.

6.2.3 Global and Local Issues

6.2.3.1 The Effect of Globalisation

The third interlinking issue under examination throughout this overarching dialogue is that of globalisation and the consequent effect it has on the development of culture, with consideration for global linguistic diaspora and its relationship with small nations. This involves industrial considerations of how globalisation affects the development and dissemination of texts. A concern is how global enterprise channels encroach on developed local markets and whether this is ultimately a detrimental process for smaller enterprises The question is whether globalising processes can ultimately be interpreted in base terms of positive or negative, or whether the complex variety of forces at work synthesise a more interdependent system, changing the nature of the market and the industry at both a local and global level,

For Jordi Ferré personal proximity to smaller publishers is the element which provides the differentiation necessary to facilitate coexistence between globalising and localising cultural enterprises. His view was that, for all the globalising activity and concentration of companies that occur in the world of publishing, there will always be space for specialised, personal publishing because it is impossible for a global company to use up all the niches that exist. "It is a little bit like wars, no? An army wins wars but it doesn't necessarily win all the battles." He reasoned that a small publishing house has certain advantages, just as it has disadvantages, over large publishing houses. The first is that "like a guerrilla it is very quick, can act rapidly and change fast". Small publishers can also offer a very personal treatment to writers, who can feel encouraged by this. Ultimately Ferré remained unconcerned by large corporations because he felt there will always be space for personal projects.

Alfred Arola's view was more pessimistic. Yet his concern had less to do with competition than the form of culture, and through it the market that this competition engenders. His concern with globalisation was that its concentration around particular locations and its 'homogenising' effect mean there are numerous people who are extremely intelligent but cannot connect with the commercial networks of culture and who consequently go unrepresented; "Their voice remains silent". He

also saw globalisation as standardising everything. Ultimately he suggested the cultural effect of globalisation is not simply homogenisation of culture but the debasement of culture, where in order to reach the widest market quality, complexity and the distinction of any textual product is simplified to the basest level of language. He suggested that what sell most are the simplest materials, which do not expand on already generalised knowledge. He called them open rather than closed products. They do not feed the local creativity which extends narrative culture. As such, a responsibility but also opportunity for a local publisher is to expand and create markets and feed the local public with material that expands their interests. Arola argued that the real problem with this debasement of culture is that it does not allow a market space for the emergence of artists (within any context) who can be appreciated by a public and later become definers of a cultural representation of their societies. He cited Picasso and Lorca, claiming they could not come to the fore in any market today and might never have developed in the way they did because they would not have been stimulated to become what they were.

Jeroni Boixareu separated the issue by incorporating the linguistic factor into his argument. He distinguished the effect of globalisation on Catalan language publishers from those Castilian language publishers producing for the international market and ultimately concluded that for local culture it is a negative. For Catalan publishers, he agreed that from a positive perspective it is possible to sell rights of Catalan works but warned this is a complicated process which requires its own specialist skillset. "You have to know how to do the change, to impel translations and all that. You have to work at internationalisation, it requires investment and isn't easy, and undoubtedly the size of the house is important because if (a publisher] can't afford [the necessary] investment it is a problem." He saw globalisation as good for larger Catalan language publishers but not the smaller ones. For Marcombo, whose market is primarily Castilian, he argued globalisation works well. "We have the intention of internationalising ourselves over the next couple of years. None of this is confirmed but we intend to translate a couple of our works into English."

The issue of translation was seen by Boixareu as an imperative crucial strategy in globalisation. Marcombo at present has very few works translated to foreign languages but he explained the company was the first to have book contracts for a sale of rights in translation into Chinese and Korean. "That's new, that's to the Asian

market so new opportunities are opening up thanks to globalisation." However, he also appreciated that for small or medium-sized publishers proper deployment of this business strategy requires setting up a department for sale of rights and contracting new staff. In practice it is a route available only to publishers who can afford and sustain the investment required. As to Marcombo, he said "for now I am carrying it but I do see it as positive. For smaller publishers no, it's a problem". Boixareu did see his family business under threat. In his view, family businesses have advantages but also disadvantages and the advantages thirty years ago were greater than those now. "However, I do feel that for the medium and small the advantages are still greater than the disadvantages. I think you reach a level of turnover and movement where you have to professionalise management and other economic parameters, but there is a lower medium/low level, where you have to undertake multiple jobs internally, where the family structure works well." He was conscious that if Marcombo continues to grow over the next five years then it will reach the level he spoke of with relation to similar publishing companies. "When you reach a certain level of turnover you have to refine the model to stay competitive […] at the level of 3/4/5 million euros, you have to professionalise." However, he also accepted that in Catalonia family businesses have a "a very ingrained system" which holds up better than others during times of economic crisis such as exist today.

Jaume Vallcorba was less sceptical about the detrimental effects of globalisation on small business structures. He contended that it is possible to remain as an independent in a little gap between multinationals because they are "very slow and cumbersome and aren't so aware of the things happening on the ground. As an independent you can react rapidly". However, the difficulty for him was distribution and commercialisation because multinationals have the power to make deals with bookshops where independents do not. In his view, a related and greater problem was that points of sale are increasingly coming under the control of chains less by individual organisations. He suggested the issue has implications of scale which pose a threat for the industry worldwide, not just small nations.

Borràs saw globalising processes as challenges which bring opportunities, linking them with the changes developing through digitisation. But he shared Arola's view of the homogenising effect stating "It's true that globalisation leads to a simplification, a certain impoverishment of ideas and a concentration of demand for a small range of

products, not just in the book world but in all industries. The fact is that every day more sales are concentrated on fewer titles, the major part of the sales. That is true, and it is […] a challenge for cultural diversity."

Seeing these perspectives in the context of Scotland is slightly difficult because the situations of Catalan and Gaelic are not entirely interchangeable, and the predomination of English as a Western language with a strong digital presence on globalised sales platforms may make the opportunities seem more immediate in the Scottish case. But the other side to this might be that, as a less dominant publishing field in a slightly larger market, the competition is also increased. The question must be asked, however, if there is at the very least an opportunity for an alternative business model for Scottish publishers.

Campbell Brown said that at Black and White opportunities brought about by increasing globalisation have already offered solutions, in the form of alternative revenue streams. The company is focusing on book selling rights and exporting. "We do bits of both as far as non-fiction is concerned. There are markets for some of our books in the US and Canada, the English speaking markets." Rights sales are a less secure option with non-fiction because whilst there are some opportunities, this rights market is unpredictable. "You can sell something in Mexico or Brazil; somewhere you really didn't expect to sell, but that is just a bonus really." However, with new fiction the rights sales are "a growing part of the business". Brown remained quietly hopeful that globalisation will help small business models, but also cautiously sceptical. "The jury's out at the moment," he said; "Internationalisation has been interesting, it seems to have gathered pace, [and I'd like to] see where digital takes it." He also commented that the Scottish market has been in flux. Over approximately the last ten years many conglomerates have set up branches in Scotland, including Penguin, owned by Pearsons, the Hachette Group and Random House, owned by Bertelsmann. This has brought a slightly different perspective to publishing in the nation. However, Brown also recognised that many of these endeavours proved ultimately short-lived. "It's been interesting seeing people dip their toe in the water in Scotland to see what they can do," he says "[they], have some success doing it, but ultimately most of them have retreated." He has also seen the number of comparably-sized independent publishers reduced through takeovers and organisational changes, leaving the independent sector in Scotland

quite small. Here he was referring to trade publishing of a certain size, indicating there is a large amount of other publishing activity.

Robert Davidson asserted that Sandstone Press "runs at [these opportunities] with our arms open". The company has imported books from Norway, Australia, Canada and the US, and wants to "continue with Jon B Horst's Norwegian books". However, working on new translations is not affordable and he regretted they will probably not be able to continue. He explained, "It's a rare book that sells a thousand copies, that's the truth. We beat that, better than most". To cover the £8000 translation fee for such books, the company needs to sell between 20,000 and –30,000 copies. Those sales levels only come from authors with established reputation and popularity, such as Henning Mankell. This places too much strain on the company's business returns as a whole so, despite any potential that a new writer may have for developing a large English-language readership at a later stage, Sandstone is leaving translation behind and concentrating on English-language imports from Australia, Canada and the US. "This year we've done three… [3] In the coming year we will probably double the number of imports for 2013 but no foreign language translations." Davidson stressed that whatever the ideals and philosophies of his company, his primary consideration has to be economic.

On the issues of agglomeration and sale of rights and their respective merits vis-à-vis industrial and cultural development, Timothy Wright stated that such development has been a reality for some time and will continue. He commented that this has not been particularly beneficial to the work of Edinburgh University Press. "In academic publishing we don't really have rights issues. Most of the texts are open. There are UK rights, US rights, and they're a broken market so are free for everyone." He believed that in Scotland generally an issue in trade and commercial publishing is that the field is too boxed in. He avoided the term 'nationalist' believing it incorrect, instead employing the word 'introverted' to describe it, and said "It needs to get out more," suggesting publishers of materials with a Scottish flavour need to reach "those markets beyond the border not being fully explored", because the Scottish market is small. He also suggested those with stakes in the academic publishing field do not seem to realise this. There are some extant independent Scottish bookshops but they must compete with Amazon which has no boundaries so

expansion beyond the border is essential for academic publishing. In, the case of Edinburgh University Press he stressed that it has always been a matter of "selling wherever it can globally", which he felt "can only be a good thing for Edinburgh and Scotland".

The educational sector functions somewhat differently, in part because of differences in national teaching curriculums. However, Bright Red does export its texts to the United States of America, Singapore, Hong Kong, Australia and some to Continental Europe. John MacPherson stated that they have also recently signed a distribution deal in the Middle East. Part of this export business, particularly in the East, has come about primarily as a consequence of the Scottish Qualification Authority's presence in these markets. According to Macpherson "they are desperate to get into the world market. They don't want to be limited by Scotland. So [they promote themselves in] China, the Far East, Africa, wherever they can push their services."

Having already secured the contract for its past paper production, Bright Red is able to sell its books wherever the SQA sells qualifications. Highlighting the US as a case example of how its books travel, MacPherson explained Bright Red received a request for samples, then further contact that their books were liked despite not fitting the course curriculum, complimenting them for their colourfulness and legibility. The next step up was for the company to repurpose the materials. This is central to Bright Red's understanding and strategy within the export and import market, and which he considered vital for stable educational publishing. He said it is at the point of repurposing where the act of educational publishing becomes 'interesting'. It helps develop brand loyalty and counteract the negative effects of lazy distribution. He pointed out that there are many GCSE books available in the Scottish market, in part because independent schools offer them, but also, he feels, "because […] you can push them into the Scottish stores and people will pick them up because it says 'history' and the parents know no better". He emphasised that anyone wanting to break into such a market must repurpose carefully and warned of the painstaking nature of this work. He confided that ten years ago Leckie and Leckie did this with Letts' books coming up into Scotland and the effort was enormous and inefficient. It is pragmatic for large companies with assets to want to

reuse them rather than spending on new material, while repurposing takes considerable time constraints and manpower resources.

On digitisation and how access to global networks affects the day-to-day running of Bright Red, MacPherson commented "things like an ebook, that's a big job so we couldn't go to one of the universities, we'd have to go somewhere else and right now that is India, or the Far East". For digital production global reach allows publishers to search out sources for economic optimisation. "You have to shop around," he claimed. "[Publishers] wouldn't be printing in Europe right now because the euro is so bad, so they might be in the Middle East or even further away. The euro to the pound is almost 1:1, [if it goes the other way….] there might be more people turning towards Europe." It is a case of being aware of the global implications of economic activity and monitoring exchange rates for opportunities to capitalise.

Ann Crawford approached her consideration of the relative merits of globalisation from a variety of perspectives. When the Church of Scotland decided to downsize Saint Andrew Press, a number of options were considered but they chose to outsource operations to Hymns Ancient and Modern with its offices in London and Norwich. She now works in collaboration with the London office which handles the editorial and marketing side of Saint Andrew Press. "We've ended up in a situation where […] everything apart from commissioning comes from London and we get the benefits of the economy of scale. Hymns Ancient and Modern is quite large and has a number of imprints. My job is to stay in Scotland and commission books that are suitable." From a positive perspective the downsizing facilitated continuation of an otherwise unsustainable venture operating at the local level with a non-Scottish company contributing to the maintenance of a uniquely Scottish publishing project. It demonstrates a form of globalising process which does not inherently change the nature of the cultural product.

Although Saint Andrew Press is now run by a company based outside its cultural origin it continues to commission works which fulfil its remit, in as far as these works can be understood to have value at Scottish cultural level. The negative effect was the loss of Scottish jobs and redefinition of the business structure. Crawford also mentioned Chambers, a company she previously worked for, as another example. She lamented the sale of Chambers from a cultural perspective but understood the

business motivations for acquisitions of this nature. From her perspective such historical events have changed the landscape of Scotland's larger well-known and established publishing houses but the economic reality is that if the system is not working, as she regretted she could see it was not at Chambers, change is necessary. She felt that the world system now encourages global integration because at a certain level of small company achievement it becomes an imperative dictated by economies of scale. It may be able to resist the incorporative advances of multinational companies whilst it is able to sustain its scale but when this balance is tripped, brought about either by its own micro or other macro factors, then the business is vulnerable. Publishing is an aggressive and opportunistic field and there is a degree of disjoint between its activity at the lower local/national/rural level where companies have space; the market opportunities, their specialisms and their growth. It is the interface between these levels which in her view reaches the make or break point for companies such as Saint Andrew Press and Chambers.

Rosemary Ward explained distribution to other countries is one of the Gaelic Book Council's key functions. "We do have a wide Gaelic readership across the Gaelic diaspora." She felt that the challenge for her institution is to integrate Gaelic publishing activity into a more international sphere, in effect another process of globalisation. Her intention is to become involved with international collaborations, and she asserted that this is slowly becoming a greater possibility. She mentioned a recent project by a German researcher from Bonn University who created and self-distributed a German-Gaelic dictionary without institutional funding and aid, as a means of testing sustainability. She saw this as confirmation that it is possible to collaborate internationally. "We may need English as a stepping stone but it does show the opportunity for collaboration with other minority languages. If they've had theirs translated into English, let us have the English synopsis and translate it into Gaelic." The next step for her is to identify good international opportunities and potential European funding.

6.2.3.2 Local and Global Development, Peripheries and Clusters

There is also a question of positioning in globalised clusters, typically based around urban centres where international trade has historically been developed. However, this 'playing field' is being levelled by the communicative synergies facilitated by the

215

digital landscape. From this, questions arise about the typology of and composition of the field in terms of those publishers located in urban peripheries and those without them.

Jordi Ferré believed that digital technology may be the solution to breaking free of the clustered agglomeration of enterprise which has historically dictated Barcelona's dominion over publishing in Catalonia. New technologies help change this trend. "[There are] publishers that are not located in Barcelona. We developed in this way once new technologies permitted this." Thirty years ago, when the publishing industry was initially revitalised by Catalonia's renewed autonomy, he felt it was very difficult to start a publishing company in a place like Valls. New technology was the key to making location less of a concern. Although Cossetània is based in Valls it has collaborators in Girona, Tarragona, and other locations and works with them without the detrimental necessity of constant travel and wasted time. "We see them very little or almost never because communication is done electronically." Corroborating Bright Red's point, Cossetània is able to be selective about where it prints its books, be it China, the Basque country or anywhere most cost-effective. Ferré gave no sense of territorial battle with the Barcelona cluster and had no argument with Barcelona's dominance. He emphasised "there is not a single Catalan who doesn't feel proud of their capital". However, he did feel cultural balance is important and, to preserve it projects must come out from across Catalonia as a whole, not just the metropolitan centres. "It's important that the country understands that it is all the same where the nucleus of a publishing company is, but it is also important that a country be territorially balanced." He also felt that one of the advantages of being in the periphery is the cheaper rental space and the cheaper cost of any publishing endeavour. The disadvantage is that companies based in the periphery are farther from the centre of decision-making and communication. However, Ferré believed technological advances have addressed these issues

He did connect the strength of the Barcelona cluster to more generalised debate about Catalan nationalism. Ferré argued political independence would not affect the composition of the cluster. He envisaged "a situation similar to that of the European project, [exporting] products from Spain to France and France to Spain, and it would be the same concept." Many powerful Barcelona publishing enterprises have international connections particularly in Latin America (especially Mexico and

216

Argentina), so expanding international networks should not be a problem. "Companies have to adapt themselves to the political situation of each country. I think the Catalan publishing cluster is so powerful that the political situation has nothing necessarily to do with it."

Arola Editors is virtually the only editorial company of Tarragona city and only comparable with Cossetània within the whole 'Terra del Ebra' region of Catalonia. The population of the Camp de Tarragona area is 521,235 (Idescat 2013) so Alfred Arola emphasised that although it is close to Barcelona, the area has a very singular identity, which at times seems like a 'second–level' of the periphery. He observed that Barcelona is perceived as such a powerful centre that it can at times be presented as if nothing else exists beyond it in Catalonia. However, there is a whole socio-cultural movement based around Tarragona. Arola noted that topics and themes which are of no interest in Barcelona, Girona, Madrid, Valencia, have their own local public and hold great interest for his local market. This does not solely apply to commercial and literary fiction but other more practical areas such as gastronomy, football, and nature. He considered Arola Editors a publisher of these public interests and doing so works well for his company.

He also believed the risks of local ventures are less. He accepted gambling on one product or one big author may do well for some, but a publisher who sells only 10,000 copies may find his big author wants greater sales and goes elsewhere. He has then invested in an unsustainable line, and profitability is lost. Arola is focused on managing scale in a sustainable manner, and an important part of this is accepting its smaller size but then developing its identity so the brand is known. Arola admitted he would love production runs of 50,000 a time, but it is not his model. He prefers to focus on achieving a loyal market for the company's products, and ensuring that any local market which can be established for a product line is not left orphaned because the company cannot sustain it. His company's geographic location is an advantage because it enables him to get cultural feedback. He did not suggest giant margins for profits can be made on such books, but did suggest this kind of cultural growth is sustainable.

Jeroni Boixareu on the other hand, argued another side to Arola and Ferré's argument. As publishing requires little space or a particular location it is normal for

the industry to concentrate around a primary urban centre where communication with foreigners and development of trade networks is easiest. "If you need larger spaces you go outside, but as that isn't so necessary for publishing you can be in Barcelona. I know lots of small publishers that are in the city and lots outside as well. The larger ones are all in Barcelona." However, it is not so much operating costs, but issues of network and connection to other operators within the infrastructure of publishing, such as authors and printers, which make location within Barcelona easier. This may in part relate specifically to the technical trade market in which Marcombo operates. Clearly the type of publishing is a primary determinant in how far each enterprise's cultural identity is reflected in their business concerns. "On occasion I've thought of moving out of Barcelona," Boixareu said, "but […] everything is here. We visit the schools here, the bookshops here. I'm not a centralist but at industrial level it is practical being here. Maybe if I was born in Vic I would do that but it's just a practical consideration."

Segimon Borràs acknowledged that in the past it was not practical to maintain a publishing house outside urban centres of production because it was difficult to find printers and correctors. Today it is less of a problem and explains why there is a decentralisation from the city, as well as wider Catalonia where there are centres of production in Lerida, Girona, Valls, and Tarragona, indeed the whole of Spain. "Before there were two big centres, Madrid and Barcelona and that was it, with smaller operations in Bilbao, Valencia and Sevilla. Now there are Publishing Guilds in every autonomous community region. They might only have 1% of production but they are everywhere." There are also more start-up enterprises in the periphery today. Ten to fifteen years ago the large publishers in other Catalan urban centres outside Barcelona, such as Pagès in Lerida, Cossetània in Valls and Angle in Manresa, did not exist.

The Scottish situation is comparable in terms of peripheral v. urban location, but with the Scottish periphery an even greater sense of segregation might be assumed given the less developed physical transport networks and more rural isolation of the countryside north of the central belt. However, Robert Davidson maintained that, despite initial reservations, his company's location in the Highlands is what distinguishes it. "When we kicked off I felt we would be disadvantaged because [….people said] 'it can't be done from there'. I have not found that." In terms of the

general issue of localisation and its reflection on cultural identity, he speculated that rather than assuming one identity statement comes at the expense of others, identities can accumulate. "It's like particle physics […] you can be Scottish and British and World all at the same time, it's all true, even if they don't exactly mix well. We've had no such problems in Scotland, no such problems with Faber in England. Once Faber starts presenting our books across England that barrier is down." He mused that, with the exception of Canongate, Sandstone is probably the least Scottish of Scottish publishers, saying, "We just don't especially push that. Agents and authors continually come to us and say there is a Scottish link or a Highlands link so this will be of interest to you and we say 'no, contemporary quality reading, that's what we do." He also thought that with the advent of the internet and digital sale of products, the Highland Scotland location and marker is becoming an advantage to the company. "When we do have premises and staff, our overheads will grow hugely but not as much as they would in the centre of Edinburgh, or in the centre of London. I hope that practical advantage will remain with us, as well as the aura which forms around the company when we have success."

Ann Crawford recognised it must be frustrating for publishers in the periphery because distance can prohibit participation in centrally organised events, except at greater expense and time. However, she saw no kind of conscious industrial schism existing between the two positions, but rather that being positioned differently may mean the ideology towards their activities may be configured differently. "I don't feel they are different from us, but I do think that they have a different perspective they can usefully bring to the overall discussion about Scottish publishing." She acknowledged that it is easier to collaborate with other publishers in the same areas, simply as a matter of proximity. However, she also said this is increasingly less, and she also collaborates in London and more distant locations.

6.2.3.3. National Identity – Minor vs. Major

The definition of nationalist typologies in each nation and how they are manifested through publishing is a major concern in developing an understanding of the cultural imperatives. With some interviews it became clear that what might seem to be theoretical attitudes entail very real effects, which significantly impact on the composition of these cultural fields.

Jaume Vallcorba expressed what he feels are potential pitfalls of deliberative nationalist business motivation. He explained that **"**the moment it was decided that it was important to create a national industry (in Catalonia), in that same minute I think everything began to fall apart". His view was that once the publishers decided it was an imperative to have all kinds of books published in Catalan for no reason other than to keep up equal representation and 'combat' Castilian cultural products, heavy subsidies became the order of the day, to the detriment of the industry and the culture. He pointed out that with Quaderns Crema he never sought subsidies, nor accepted them. He believed the industry should respond to market demand. Subsidisation, he said, brought with it a host of bad translations which he felt discouraged much of the developing book buying audience. "They (publishing houses) began to publish many very bad authors, because it was worthwhile. Subsidies provided a level of money." The result, as he sexplained it, was that public confidence in new authors slumped. He found it 'relatively easy' to promote a new writer in the 1970s and 1980s whereas now it is extremely difficult. After autonomy Catalonia felt it necessary to publish as many Catalan books as possible. "Such nationalist ideology espouses a form of super-production which is damaging to the market because it relegates quality." He mentioned the case of Quim Monzó, a popular Catalan writer but unknown until Quaderns Crema promoted him, giving him visibility. Readership of his books exploded.   Then another publisher brought out a work by another writer and promoted them as the next Monzó. Although he claimed no-one remembers this "fake" Monzo's work today, the comparison reflected badly on the real writer.   Vallcorba said "this kind of activity begins to debilitate the confidence of the reading public".

 As an extension of this preoccupation with virtual enforcement of a false market, Vallcorba was also of the opinion that although the 'Dia de Sant Jordi,' St George's Day which is now also the Catalan national Book Day is impressive, psychologically it encourages people to buy all their books for the year at one time, discouraging a constant market. He also believed that the 'Dia de Sant Jordi' has become an event where primarily bestsellers are sold and increasingly interest has consolidated around a specific few titles.

However, Segimon Borràs had a somewhat different view. He pointed out that the festival flowered at the time of linguistic normalisation fed by patriotism and political

intent and now it is so successful it should be appreciated in the overall context. He accepted that there are those who buy a book on Dia de Sant Jordi and then buy nothing else for the rest of the year, but he also argued that these people might be unlikely to buy any at all without the stimulus of the festival. He also argued it is not peculiar to Catalonia, the festival covers the whole of Spain and book festivals are common around the world. However, he accepted that a day devoted to the promotion of books can have a negative effect on the local book trade given the dominance of large publishers at these events. What is important, he felt, is the relativity of everyone's increased sales. "Everybody sells more, including those [other products] that aren't part of Sant Jordi. I'm the commercial director of *Encyclopaedia Catalana*. Usually at Sant Jodi people buy a novel to give as a gift, but [….] more of these 24-volume editions of the encyclopaedia are sold as well. It's not the bestseller of the day, but more are sold. Whatever the type of book, at least a little more is sold. […] The four largest publishers […] take the largest slices of the cake […] but they are also the ones that sell more when it isn't Sant Jordi. The opportunity is the same for everyone. Any advantage they have, they would have had anyway." Borràs believed that book fairs take books out onto the streets so the public sees them. It moves books beyond having to go into a bookshop. He said "in Mediterranean countries sometimes it seems like entering into a bookshop for people conjures up a form of reverential fear. So you have to get it onto the street, and Sant Jordi gets ALL of it onto the street."

Within the Scottish field, where the predominant cultural nationalism lacks the same linguistic imperative, it was important to consider how far national identity and location could be understood as assets to brand and business identity. Asked how far Black and White could be considered a Scottish publisher, Campbell Brown commented that he would like to be both a publisher based in Scotland and a Scottish publisher because he feels the company works and fits into both these categories. The distinction, as he understood it, is that a Scottish publisher produces Scottish works for the Scottish market whilst a publisher in Scotland is based in the country with an international purview. Brown said Black and White is trying to fulfil both of those remits. "The main thing is [to] keep our core list going. That's the fundamental part of our business, and the developing, effectively a separate part of the business. That's the game at the moment, for the last few years and I hope to

build it further." He claimed there is a strong Scottish theme running through all the company's products but accepted that all Scottish publishers face the problem that materials produced for the Scottish market do not seem to travel well. "For example if you take the true crime, London true crime travels UK wide and internationally even though it is still local true crime. Scottish true crime doesn't travel the other way. That's just the way the market works." Nevertheless he saw domestic advantage when dealing with anything of Scottish content or for a Scottish market. He maintained that authors will recognise this and are often more comfortable with a Scottish publisher. There are advantages for a publisher such as Black and White which has very good communications with the book trade. Equally, the author may feel more confident that the company will work at publicising the title rather than considering it an addition to a very large list, "particularly if it's a good book and a front-list title, which it could not be for a much bigger publisher".

Robert Davidson talked of an 'invisible containment' as a stimulant to the Scottish market. He said that initially Sandstone Press found the Scottish border represented a very real market boundary. "It was Scottish. We found the Border, forming a border, very real early on. I would send books down to fairs, Scottish ones but which might as easily have been Birmingham or anywhere, and they would say 'what is this of interest to us?' which I found astounding. I have books here located in California etc. Why should Scotland be different?" However, he also believed the market for Sandstone's books is changing. The company has overcome the barrier and its books are now being sold by Faber, demonstrating again the transcultural potential facilitated by new digital enterprise. The challenge he felt he had to overcome was to learn that "no matter how good you are at publishing […] your selling has to be good too." It is only Sandstone's third year producing fiction titles and it has international authors, from Bangkok and Kuala Lumpur, as well as local ones. This demonstrates the changing of its publishing program and market nowadays, although it has not moved away from its base. It is international and domestic at the same time.

Davidson maintained that the issue of identity, in cultural terms, has not been overthought. "Development has been 50% design, 50% organic." The ability to adapt is important. He stated that Sandstone is a cultural entity but overall development is less-designed than it might seem. "The nonfiction we're doing is largely outdoor,

Highlands outdoor. When you think of what Highlands is, culturally, you think of Gaelic. We do a bit of Gaelic publishing and want to do more. You think of kilts and castles, battles and that sort of heritage, but there is also the environment, the mountain environment for sport, and the ecology, which we're strong on. That has taken us down the particular route with our non-fiction titles." He suggested that dominant in the crafting of cultural significance for Sandstone is "the search for quality, wherever we find it, [this] is the way of extending the culture rather than looking into the minor; the details of language, say Scots or Gaelic, or the local. Not that those things are wrong, but it is the search for quality, for thought and feelings." This is why he did not see the cultural potential of any creative industry as being restricted inside national contexts. He believed any kind of nationalist pretension is a trap. "Highland Scotland already fits into the rest of the world, don't worry about that. We go for high quality." He pointed out the company's two logos. The first is 'Sandstone Press', the second 'Highland Scotland'. "That's our identity statement. It's a location, not a limitation." However, the primary logo on the back cover has the strapline 'Contemporary Quality Reading' which Davidson explained is what the company actually does. Originally it had a strapline 'Scottish Literary Publishing House' but this was changed as a strategic move. "We are deliberately moving away from that world where the writer is most important to one where the reader is most important. When you do that you shed some of the identity restrictions. Sandstone Press does not have a religion; it does not have nationalism. It has a nationality in that its located in Scotland, the contracts are in Scots' law and it feeds into the Scottish economy, and we are a registered Scottish company. But we don't have an ideology. Any author might be quite strong on one, two, or three of these, and that is where the conversation rests."

Allan Cameron stated, on the issue of identity, "I think as a publisher I am going more towards being a Scottish publisher than I originally intended, because picking up discarded literary novels in Scotland has proved quite a good workplace". He underlined the importance of focusing on things that are relevant to the Scottish public, but that have an international outreach. He argued that a writer does not have a national awareness, other than the language in which he or she is published, but a publisher can mediate what comes in through its relevance or value to the society "if it fits into the cultural context of that particular nation, because a publisher, [….]

223

should be trying to lead, to decide what might be relevant […] and also trigger debate in society". This is to some extent an opposite understanding of the roles of writers and publishers to that expressed by Davidson.

Ann Crawford's view was that it is unwise to concentrate on cultural or national markets because that can be a limiting and uncertain business strategy. She felt that it is possible to provide texts with cultural value but targeted at a wider market. She saw two options, the route of cultural commodification targeted at a parochial market where it is possible to succeed if focused on cutting out competition and cornering the market, or the national sector where the market is more competitive and segmented. This, she asserted, is the more dangerous route, entailing the greater risk. However, she actually believed in a third option, targeting the books across a wider field. She explained that she is often looking at six or seven specific markets to evaluate a commission. "If I only published for the Church most of the books would fail massively, whereas […] I publish for a much more diverse group, namely the rest of Scottish society, wider UK society and international society, both secular and Christian […] and try to make every book fit, apply to all the markets." She said she thinks the same principle applies to thinking about Scottish books and Scottish culture in general.

In terms of how far she considered herself an intrinsically Scottish publisher, she agreed Scotland has a very strong identity but she did not notice that her national identity leans her towards making Scottish-based decisions from a trade perspective. She did, however, state that she notices when she goes to meetings in London. "I hear myself using the word Scottish an awful lot, and I can hear my Scottish voice. I think it's inherent in what you are doing. I definitely do think I am a Scottish publisher and I think that way about other Scottish publishers too. […] There is a Scottish publishing culture, and everyone knows each other, which isn't the case in England or other larger publishing nations. […] It's pretty much impossible to not know everybody in Scotland. So there is definitely an identity but it is necessary to translate that in a commercially viable way." She also suggested that something that seems to be appreciated by those outside the Scottish publishing field is what she calls the 'intrinsic Scottish feel' of particular titles. She continued, "quite often when I go to England and present a title I say something like 'It has a strong Scottish content but is understandable beyond Scotland', quite often I hear the words 'this is

a fantastic proposal' and it's because they are thinking this is something that could not have come from another part of the organisation". She believed even if the works are not fundamentally about Scotland they have an element of "Scottishness" that cannot be replicated by anyone else and cited an older title, Jamie Stewart's *Glasgow Bible,* as an example of this. She also thought the smaller scale of the Scottish publishing market gives rise to high quality print production and other differences. "If you look at the Christian market you can tell when the books aren't Scottish, [….] because they have a cover that is more insipid, it tends to have certain types of motifs on it. The type of paper used is generally of slightly lower quality, and there's a layout as well that's […] certainly it's not Scottish." Nevertheless she admitted that it is easier to identify what is not Scottish than to define exactly what it is that represents Scottish identity.

Rosemary Ward insisted she is apolitical but in terms of the Gaelic Books Council felt a perception from nationalists on the Board that the last election was going to be great for Gaelic, but she has seen no post-election tangible evidence of that. She felt Government should be encouraging Scotland's rich cultural heritage but instead sees only an outward exposition of debased tartanry; bagpipes and shortbread. On this issue, Robert Davidson believed Gaelic is actually contentious, with attitudes towards the language being as divisive as they are unifying. The fact that many people are quite hostile to the language is something, he feels, which separates the Scottish identity from places like Catalonia where the language has been employed as an element of cultural resistance. He questioned whether resistance to the English language in Scotland would have the same force if English was not called 'English'. Like Ward he removed the activities of his company from any political context. "We are entirely involved in cultural development."

6.2.3.4 Independent vs. Corporate – benefits of locating locally or globally

Another dualism alongside the global/local and urban/peripheral is the corporate structure of independent business against the globalising phenomenon of agglomeration into multinationals.

Albert Pèlach used the background to the Catalan language publisher Edicions 62 to illustrate his view of the issue. Edicions 62 was once an important literary publisher in Catalan but financial problems led to it being repossessed and split between

Planeta and Grup Enciclopèdia Catalana   Edicions 62 now has imprints in Castilian including Ediciones Peninsula but Pèlach claimed they have not been successful. He argued it has not proven simple within Catalonia for publishers from either side of the divide to cross-over, whether they are small Catalan publishers trying to break into the Castilian language market or major corporate publishers putting out Catalan language imprints as an alternative revenue stream.   He cited Planeta and also Random House Mondadori's Rosa Del Vents imprints as evidence. "Planeta [,,,] has gone on buying imprints and back in the day bought 'Columna'. The perception is that 'Columna' lost market ranking through this, so […] either Castilian language publishers can't do this or specialisation is necessary. There is little cross-competency." More generally in terms of the power of multinational enterprises to dominate world markets he continued "my colleague at Planeta who is responsible for Edicions 62 is Catalan, Nevertheless he directs Spanish commerce for Spain and Latin America […] Planeta is the publisher that earns most money in Spanish, not just because it is the largest but also they do it better than Random House and a few others.   Although scale matters it is not the be-all and end-all.   These are multinationals but less successful. [Planeta] is Catalan but manages Spanish business, and knows how to do it."

Segimon Borràs disagreed with Pèlach.   He did not feel there is an issue of competence. For him it was about the will and desire to act in these markets. He argued that what is essential to success in the smaller linguistic-cultural market are resources and 'voluntad,' which he describes as a combination of desire and passion.   He reinterpreted Pèlach's argument pointing out that Edicions 62 in fact leads the Catalan language market and a third of this company is owned and directed by Planeta, which, despite being multinational, was set up and is run as a family business. This gives it the necessary determination.   Random House Mondadori is a multinational owned by Bertelsmann. It has a Catalan imprint that he argued has failed because it lacks cultural affiliation and the 'voluntad' is missing. "It doesn't interest them; it's not that they are not able. […] Salvat is owned by Hachette. Since Hachette took over it does almost nothing in Catalan. When it was the Salvat family it had important production in Catalan, although not as much as in Castilian. What I'm saying, although I know it is not very scientific but it is

observable, is that it is not a question of whether they are big or small, it's an issue of will."

In Scotland the multinational presence comes mostly from the earlier absorption of many of its most renowned independent publishing houses. Most Scottish publishers, even when interacting in the international field, remain close to their markets, and acknowledge it as beneficial to their business structures and brand. John MacPherson observed that for his company the benefit of being in Scotland is proximity to the field. Over the years educational publishers such as Leckie and Leckie, Thomas Nelson, Oliver Boyd, Robert Gibson, and Chambers were all bought out by London companies, and eventually disappeared. Being on the ground has meant Bright Red has been able to forge direct relationships with the right people, including the Scottish Qualifications Authority, Education Scotland, deputy heads or head teachers. It can also focus on developing material purpose-built for the Scottish market whereas large non-national companies tend to repurpose materials from elsewhere for the sake of business efficiency. "It's generally done badly," MacPherson said, "It doesn't work in the Scottish market or any markets [it's] republished for, unless lots of money is spent on it." Spending money to repurpose, he explained, defeats the point of supposed cost-effectiveness. "Being in Scotland gives an advantage. […] With [multinationals] a lot of the design and production work will be done in central offices down South. Naturally they are not as close to the market as we can be so onsite. We are a bit more limited in terms of investment and the like but closer to the market than competitors." He saw he ability to recognise and target niche opportunities as another benefit of being located within its local market. Bright Red's digital strategy is about producing something for Scotland but with an eye on the possibilities of expansion. "If it works well in Scotland it gives us the chance to take it elsewhere. You can be light on your feet and develop interesting things." Larger companies, he claimed, tend to develop huge interactive products but once they are produced they cannot be custom-redesigned for a particular market. By default the products are created for the larger English market, "everywhere from the Caribbean to the Far East".

Ann Crawford discussed coping with the consequences of the Saint Andrew Press acquisition. Commissioning takes a long time but she did not feel the impact has been as big as might have been expected because Hymns Ancient & Modern has

not sought to amalgamate in the same way as other companies, where normally companies taken over lose their identities and become absorbed. Part of the agreement with the Saint Andrew Press arrangement was that the Scottish company would retain its identity. Its primary purpose is still to publish for the Church of Scotland. Before the takeover when she wanted to publish a project she would discuss it with her team in Edinburgh then take it to the Church publishing committee and if it was agreeable the project would go ahead. Now she takes it to colleagues in London. "I look at their proposals and they look at mine, and we ask each other very rigorous questions. […] If we get through that process […] I go to the Church and get approval as well." The Church needs to be certain the book is 'suitable' for the imprint. She admitted the process is convoluted and difficult, and she is still developing a system to make it work. So far the biggest problem lies in the difference of perspective but she resolved that the resolution lies in teamwork and partnerships. There are both pros and cons to the new system. "For example", she said, "I'm looking for someone to write the introduction to a book, and I now know quite a number of English religious writers that I wouldn't have known […] previously. I can approach them and get a wider audience for Saint Andrew Press' books." The positive benefit of this globalising process is the outward growth of the company and the ease with which it can expand the market for its products beyond national boundaries. Other benefits are the additional resources afforded though the acquisition, such as dedicated teams for marketing and access to other press resources for publicity purposes. The downsides have come with redundancies, not only the loss of immediate staff but the relationships the previous team had with authors in Scotland. Many of them were accustomed to the earlier staff which provided a very personal support service. She now has to develop new relationships.

6.2.4 Industrial Issues

6.2.4.1 Funding and Support

A fundamental concern for interviewees was the availability of adequate support structures both in terms of available funds and development of policies to bolster the market. As an example, Jordi Ferré believed that trade bodies and publishing guilds need to help more than through financial means, to ensure products work to create markets. He commented, "In the 70s and 80s there were no Catalan books so it was

important to help production. Now we have books so don't have to focus on production. What we need help with is the creation of policies to augment the market, in other words sell more." Before this however, he argued that it is necessary to normalise the Catalan language. "It is a minority language, and the types of Catalan publications available are indicative of this. We have to enforce a positive, wider dissemination without creating a system which means Catalan has to be helped." He felt that emphasis has to be placed on helping initiatives which allow the market to work. Arola explained that his company takes a pragmatic view of funding and develops strategies to avoid dependency on outside support. Just as with all Catalan publishers Arola receives support for Catalan language works. His company attempts to 'subsidise' itself by producing 'made-to-order' books that are commissioned by groups and organisations, with a guaranteed large order on completion. However, this line of business has decreased since the financial crisis. Jeroni Boixareu, involved in technical publishing, receives support only for a few titles, and for only a small amount. "Even in the areas of special cultural interest where we fit in quite well, we have not received support," he claimed. "It's almost always been this way but it's become tighter in the last four or five years."

However, Jaume Vallcorba was particularly sceptical of the benefit of indulgent support, whether embodied by funding or promotion. He maintained that creative industries which are heavily subsidised, such as Catalan language publishing, have lost much of their influence, precisely because the support system has encouraged inertia within publishing houses. "They have slept a lot in this world of funding. I have always maintained that subsidisation is a danger." He believed it is preferable to develop a public audience and consolidate around it. He argued that he has contributed to creating part of the public audience that exists in Catalonia, citing Quaderns Crema's early book sales, pointing out "[they were] very good for a long time. […] The dynamics of subsidisation for the competition changed things." He also pointed out that one early benefit for his company in the Franco era came from translations into Catalan which did better than translations into Castilian. That, he claimed, was because the translations were done by skilled poets or writers who undertook the work, not motivated by personal gain but rather "personal taste and admiration".

Vallcorba felt that Catalonia's national vision encourages a cultural and political ideal that it is necessary to have literary prizes to underpin certain authors' achievements. In Franco's time, prizes were used to give visibility to unknown authors. By the end of the 1990s these prizes, rather than helping unknowns, were being given specifically to the well-known authors. The prize givers, he commented, began to look for authors who could, on the one hand, build the prize's reputation and on the other sell many copies.   This ethos privileged larger publishing houses and bestselling authors. In general such prizes were financed with public or semi-public money. "When I realised they were going to search out all my authors with a certain success to win these [prizes], and in some cases [saw] they accepted them, […] I thought why work like a crazy man for some other publisher's prizes, which […] I'm paying for as well?" He found this disheartening and believes the over-saturation of available prizes in Catalonia means the moral and ethical value of the prizes have been greatly diminished. There remain a handful that have value and he admitted his publishing house has benefitted from. He did not consider this peculiar of Catalan or even small-nation publishing but a trap which threatens the industry in general. "This can happen in other places, it can occur with the Castilian market. Whatever the case, the Planeta prize is paid for by an owner […] what irritates me are the prizes paid for with our own money."

In Scotland, attitudes towards the extant supporting trade and public bodies and the types of funding and investment available are equally mixed. Publishing Scotland is the primary body promoting publishing in Scotland. Timothy Wright despite having had issues with the organisation in the past has also chaired it and admitted during his interview that he thinks it does have a role to play in support terms. This is especially so now that he has seen it beginning to integrate with other publishing bodies in the UK, such as the Independent Publishers Guild, which has over 500 members (IPG 2013) compared with Publishing Scotland's approximate 60 (Publishing Scotland 2013, Publishing Scotland 2011).   The UK Publishers Association is now working much more closely with the IPG which strengthens the network further. He suggested that in the past Publishing Scotland appeared to be introverted, perhaps seeing itself as solely for Scottish Publishers, which is limiting and, he argued, potentially restricts "seeing what is out there for Scottish publishers". He mentioned the Scottish Government's literature working group, of which he was a

participant saying a number of recommendations were put forward for Scottish publishers at that time, including setting up a rights academy, but they were all rejected.   He attributed that to political actions at the time of the last Scottish election. "That's fine, that's the politics, but […] there were experienced people on it who thought it was an opportunity to get things moving."   On the issue of the Creative Scotland initiative he said "I think the jury is still out personally. […] In fairness what it does for Scottish publishing I have no idea. It finances Publishing Scotland." He admitted, however, that as an independent and the largest academic publisher in Scotland, EUP has little to do with Creative Scotland. "It doesn't affect us but I'm not sure how it can help publishers." The problem for Wright is its structure. The name Creative Scotland suggests that its concerns are cross-industrial and non-specific and as a consequence he was worried that it lacks the specialisation needed to support each creative industry. "I think it worked better when there was the Scottish Arts Council. It had a literary committee, it had its problems but at least you knew how things were addressed."

Robert Davidson however, felt that support from Creative Scotland has been invaluable to Sandstone Press. "It's not without its tensions here and there but I think the work we are doing, the success we have had is seen as something desirable." He related that for three years Creative Scotland has provided excellent financial support to him and his company but admitted this modus operandi cannot continue indefinitely because, at some point, Sandstone has to become a properly self-sustaining entity through trade. Nevertheless his recent successes are a positive sign of development in this direction. He added, "Creative Scotland, more than the Scottish Arts Council [….] is about arts business as something where people do think about the money, bringing that business aspect. We've been doing that from the start." He continued that Sandstone also received support ten years ago from Ross and Cromarty Enterprise, which no longer exists, but was also valuable "coming when it did". He acknowledged that the company has received a lot of small investments over the years during periods of economic slump, but has had nothing from the Highlands and Islands Enterprise, his local area funding group. He was aggrieved about this because he feels Sandstone Press has brought attention to the Highlands. However, Highlands and Islands Enterprise did fund some outside consultancy for him, but he felt it was redundant, and not what Sandstone needed.

He emphasised that the enterprise's function is to encourage and support business, and in the case of Sandstone what it needs are funds.

John MacPherson explained that funding does not tend to go to educational enterprises but Bright Red has taken advantage of Creative Scotland's Go and See fund (Engage 2013) through Publishing Scotland. He said the body also has a digital fund of which Bright Red may take advantage. He has also found that Scottish Enterprise, a more general start-up business body, will support Scottish businesses of a certain size, status, ambition, and they have proved helpful. "If they are into digital, renewable or export, those are the big things. We are a pipeline growth business for Scottish enterprise; they are keen for us to develop and take on staff and grow in that direction." MacPherson also believed business models have been forced to change. Five years ago, each July booksellers such as W.H. Smith's, Waterstones or Borders would go to publishers with mass book orders which would see them through the summer season. From a business perspective that is ideal because the huge summer order shored up the company's cash flow and enabled them to get through Christmas when suppliers' receipts and other expenses came in. That no longer happens. Today with the closures and downturn in the bookselling business the bookstores that are left work on consignment, buying only what they need. A small publisher is now more likely to get payments throughout the year and if the business's cash flow does not adapt to avoid spikes it can derail the financial balance. He recognised that online book buying is increasingly significant but indicated its sales are unable to cover the losses generated by the changes among the major bookselling chains. Overall, however, he remained cautiously optimistic, saying, "The present is a time of great chance but also of great obstacles to overcome in order to be able to take advantage of the system".

Rosemary Ward explained that the Gaelic Book Council is streamlining its funding procedures. More than 50% of grant funding currently goes on grants and commissions to writers and publishers. The Council has already outlined a commission policy on its website, pointing out that there is a degree of flexibility in the way it can offer grants. Up until recently many small publishers were not certain they could even go to the Council for support and if they did procedures for handling the request were arbitrary, with no weighting given if a project was a completely

Gaelic publication or only a bilingual print, or one predominantly Gaelic but with an English synopsis. The new system carries a weighting and publishers have been given a clearer idea of the level of funding for either the commissioning of the work or the print run the work will merit. ward stressed she is aware of the real fragility among some Gaelic publishers and accepted that commissioning can overrun or editing take more time, and the Council now tries to take every small publisher on a case-by-case basis when handling those in difficulty with financing. She also expressed the desire to bring together all of the national funding bodies because of the lack of co-ordination in their policies and processes. "It irritates me when a Gaelic writer goes to a national agency and they say 'I'd like you to fund me for' and they reply 'the Gaelic Book Council should be doing that, we fund them, go to them. […] There are agencies who will redirect them to us and say they don't do Gaelic. If somebody comes forward with a really good idea irrespective of whether they see themselves as Gaelic I think they should be supporting them. That's about mainstreaming Gaelic." She confided that the government and its cultural agencies sometimes lack joined-up thinking. There isn't triangulation. They want to support the language but to achieve this need to be clear and exact with other funding agencies. Creative Scotland supports Gaelic but she sensed it could do more considering its available budget. As the only literary body for Gaelic she argued they do not but should be receiving a fairer share. "The Irish Gaelic Council gets a 40% increase to their funding but we are on standstill funding. There are issues there that do concern me and I realise we are all competing for a limited pot but I still think there has to be some kind of acknowledgment of the disparity." She also suggested this same argument applies to support for Scots' language publishing.

From the statements of Wright, Davidson and MacPherson together with Ward's comments about The Gaelic Books Council and its relationship with other bodies, it appears that within the Scottish field the confusing matrix of support bodies and funds that cross over different remits at times prove problematic for the enterprises they are intended to support. Asked how dependent Gaelic Publishers are on funding, subsidy and support institutions, Ward replied that they are totally dependent. She did not feel they could exist without subsidy and explained that in order to address the issue of funding and subsidy dependency she is attempting to establish a situation where Bòrd na Gàidhlig fund the Gaelic Books Council who then

filter out this funding. She explained that although they previously funded Acair as well, they are trying to reduce the number of agencies that they are seen to be funding. What she would like is a situation where they provide Acair's funding through the Gaelic Books Council who third party grants it for them. This allows them to say they have fewer inquiries on their books whilst leaving Acair in a relatively secure position since they are guaranteed to get funding as long as the Gaelic Books Council receives it from Bòrd na Gàidhlig. However, none of the other publishers have that safety net. Ideally Ward wants to try to move away from this notion of title by title awards.

She affirmed that Gaelic publishers seem to have embraced the quarterly grant funding and procedures that they have put in place but she is also interested in developing the idea of block grants, to provide certain Gaelic publishers with a commissioning grant for up to a certain number of future titles. This would give these publishers the ability to go out and source their writers secure in the knowledge that if that material comes through and it is of superior quality then they will be guaranteed a case grant for its publication as well. "That's the position I want to try to move to slowly, book by book, to shore up the more fragile publishers and give them a degree of autonomy and security that they haven't had up until now and if the day ever comes that we do find ourselves achieving efficiencies […] I'd like to look at the possibility of start-up funding for new publishers, to really safeguard those ones in existence now and try to give them stability they desperately need." However, she was also acutely aware that many of the established Gaelic publishers are towards the upper end of the age spectrum so they also need to look at bringing in new projects and people, a new generation to take forward Gaelic publishing. She acknowledged the Gaelic Books Council needs to look at new start up grants to encourage young entrepreneurs who have an interest. Equally, rather than giving them a grant, in some cases what might be possible as an alternative is to provide support for other activities. Many Gaelic publishers don't have in-house capacity and don't have a visible presence at literary fairs. The Gaelic Books Council can attend with their own banners and those of publishers such as Acair, and pop-up stands because these publishers don't have the resources for it. The Gaelic Books Council is trying to provide it as another service, much in the way that Publishing Scotland have done.

Discussing prizes as another means of support, Ward felt that, counter to the feelings of prize saturation in Catalonia, the development of effective prizes could be crucial for the Gaelic language base. She pointed out that the annual literary award they have developed is going from strength to strength and it is initiatives like this which are making Gaelic more mainstream because they raise awareness as they grow. "We need to send the message that we value innovation and new ideas in Gaelic publishing, and it's a £5000 prize […] with the agreement that if by the time the award is announced they haven't had the piece published then we will assist that publication."

6.2.4.2 Digitisation

Another major topic for interviewees was digitisation and how it is changing the ability of publishers to integrate more directly into wider markets, navigating between the local and global in a way which was previously impossible.

Whilst Jordi Ferré acknowledged the potential advantages afforded by the internet and continuing process of digitisation, he also considered there to be a number of risks. He saw the greatest digital threat in Spain as piracy which he believed is devaluing culture. Reminiscent of other global commentators reflections on states of electronic colonialism (Lee 2008, Alam 2012) Ferré was also concerned about electronic competition over the last decade where the big operators controlling sales channels will be "the principle motor of the market", be it Amazon, Apple or Google. If such global entities control the sales channels for all textual materials, the smaller linguistic cultures, Catalan amongst them, will suffer from what he termed a problem of visualisation of the Catalan language "because we will be on platforms that are so big that Catalan is barely visible […] where promotional work will become very difficult." Initiatives such as his edi.cat website are attempts to create localised platforms that specialise in Catalan language material, hoping to improve this visibility, but their potential success remains difficult to gauge. "It's a challenge to make our language visible in this new landscape. It may be that it is possible to produce a platform of reference to discover and archive Catalan books so if I want to search for a book I can go there." He maintained that the positive benefit of the technology and the internet space is that it is infinite and can facilitate the public's ability to search and producers' methods to position themselves within a market. The

Catalan community has a large linguistic presence on the internet and he suggested if it is not possible to generate visibility through Amazon or similar channels then other independent options for interacting with the already present internet activity have to be considered. "We will have to use our imagination, there are projects being worked on, and with the internet everything develops and changes very fast. I'm sure we will configure in five or ten years a reality which is very distinct, but at the moment the digital book is a very small part of business." Nevertheless Ferré presented Cossetània as a digital pioneer. Three years ago the company created the edi.cat portal, in collaboration with publishers Angulo and Bromera, to try to keep pace with emerging digital trends. Regarding digital books, Ferré commented, "We are trying to publish new releases simultaneously, digitally and on paper, and we have taken advantage of institutional support to digitise our backlist". He felt it important to ensure that Cossetània had a progressive digital strategy in place as early as possible so that the company is ready to adapt to further changes. "You have to be proactive. It is only by being inside the system that you can observe how it moves. We are inside. We know the problems […] and that obligates us to debate constantly what will happen in the world of the ebook [and] internet."

Other publishers located outside the urban clusters also took a pragmatic attitude towards the opportunities presented by digitisation. Alfred Arola recognised that digitisation is not always suitable to his business model and could be detrimental if not used appropriately. He claimed to neither want nor need to engage in digital growth because his aim is not to compete with all the publishers across the world. His market is small and he will concentrate on working with the public he has already established. He said he does not want to change his focus simply to make extra sales. To him this would be selling the identity of the work that he does, and he considered it 'almost prostituting' his culture. Bringing this argument back to cultural development he argued that Catalan emerged effectively because of proximity and compactness. "That is culture, about being close, not distant and searching to spread it." He was not against technology, but stressed that one must know how to use it or it can be misused and he freely admitted that he is not skilled with this medium so felt it best for him to avoid it. Equally he did not believe that the internet is a threat to established writers or publishers. In his view publishing is about searching out information of interest and making it available whether it is online or on

paper. His concern with digitisation went hand-in-hand with his view of globalisation. "What it does, and what it threatens is standardisation, just like globalisation." While the internet makes it possible for more voices to be heard, he asserted that people mistakenly talk about the concept as a single idea. "Digitisation is […] not one thing, it is many. Some are good and some not, and the important thing is being able to be aware of the parts that work for you."

Albert Pèlach concurred with the idea that digitisation presents as many risks as opportunities. He felt publishers at the moment need to focus on projects that offer quick returns and mentioned the 'un par un' project; a digital course product which he argued has proven a disaster. He explained that his company invested in it, to his regret. He described Grup Enciclopèdia Catalana as a pioneer in the local digital field, and expressed his hope that when the market picks up it will be in pole position. Nevertheless he admitted that if he were making decisions now he would not have poured money into digital investment. His investment was made before the economic crisis hit, and no one foresaw what was about to happen. He warned that small publishers should avoid the risk of becoming mired in digital investment, believing they should instead put available money into new content, rather than digitising existing material. He did feel that in the reference market, digital spaces can become a valuable medium. "I don't know if it will be lucrative but in terms of what GEC produces book-wise I think it will prove an important medium to which reference texts will migrate. We're trying to do many things, for instance placing the Catalan encyclopaedia on Kindle and elsewhere." He acknowledged that his concerns about the potential of digital products are orientated from a commercial rather than cultural perspective. From a cultural perspective he saw some benefits but these also interrelated with a commercial consideration. For instance GEC has been working on a free-access system with limited subscription advantages as a model for its online dictionary and encyclopaedia. The initiative, publicly launched in April 2013, has been backed by the Generalitat, with the Department of Education providing the support, under a funding time-limit of three years, so the commercial consideration is to make this cultural product self-sustaining. It is a portal for public subscription, working on a freemium basis and has elected not to use advertising because GEC finds it intrusive, particularly for the educational sector.

Jeroni Boixareu's scepticism came from his concern that digitisation will reduce the market for books. "We will sell less in paper, and the sales in digital will not be more profitable than in paper." However, he accepted that digitisation will make internationalisation easier because publishers who produce in a foreign language will be able to put it directly onto sales platforms such as Amazon, and it will cost less to reach foreign markets. However, he also pointed out that this works both ways. "It breaks the frontiers, in both directions, they can also do it to here but […] it facilitates it."

Jaume Vallcorba was concerned because he feels that the role of the publisher has more to do with putting a brand on books than getting those books onto the market. "That's the historic role of publishing in Europe," he argued, "To give shape." He argued the internet can never do this because it is an infinite landscape, and an infinite landscape can never be seen. It has to be 'placed within a frame' or else it does not exist. It is not tangible. "Without this branding," he stressed "I think things don't work. They can't be recognised." Beyond the philosophical concerns, he accepted that electronic publishing is becoming the standard. He also saw advantages for reference book publishing. The problems are profit and cost. He argued that it costs the same to edit in the two formats, but the margin for return is much lower and suggested publishers will have to sell many more copies to make back their money, at potentially unrealistic levels. "I think the margin for profits will decrease greatly." He was also concerned about piracy in concert with Jordi Ferré. "In Spain today the proportion of pirated books is 50%. I think stricter laws against piracy are necessary."

Segimon Borràs maintained that there are no differences between the opportunities and challenges that digitisation presents for Catalan language and Castilian publishers. New technologies permit publishers to put greater value on publications and attend to much more diversified demand and local values. He reasoned, "Zafón novels will always sell more than unknown local writers but the technology and the costs permit it. Alongside great success from a bestseller it is possible to publish local work, and with more possibilities than ever before. That is good." He explained in the past a publisher would make 1,000 copies of a local work and distribute them in bookshops in two or three points of sale in the local area and would be unlikely to sell out for another 15 years. However, with today's print-on-demand, it is possible to

make a first edition run of 300 to be bought by the people in the surrounding areas but the run can be continued for tourists or alternative market only making fifteen copies per year. Publishers can also have an archive on the internet and allow the distribution of the books one by one in a bookshop. Borràs envisaged further opportunities to access material from a local area, such as local recipes, by downloading them cheaply onto a mobile phone. This adds a new sales channel for the local, who know how to search them out. He was confident that ebooks are here to stay as "young people's habits move towards it". The newer problem is that the technology is growing faster than laws and rules to regulate it. He would like to see international activity to provide such regulations but he understood the international political problems involved. Ultimately he concluded that new technologies empower the global but simultaneously facilitate the local.   He asserted that it is not possible to talk about the threats posed by digitisation uniquely in terms of the nations. It is not intrinsically a problem for the Catalan cluster. It facilitates the local but it also disconnects it from the idea of publishing with national character.

Views on digitisation in Scotland are also varied, and a sense of strategic caution is inherent in each of the conversations. Campbell Brown was not certain that digitisation is necessarily good for all business. "The digital landscape is difficult to second guess, where it's going, what will happen, in theory there are lots of opportunities." He suspected that as a start-up it would prove quite difficult to make the most of the options offered by digitisation, although he accepted that with creativity, intelligence and good fortune there are definite opportunities which did not exist in the past. He said that at Black and White he is already working on digital development. "It's been slower than we had originally planned, partly because we tend to wait and see how the wind's blowing before we leap into anything." The company already has much of its relevant backlist digitised. New titles are released simultaneously in print and digital. He admitted it is a long process involving clearing up questions of rights to material.

Robert Davidson on the other hand had a positive outlook. He appreciated being able to communicate with people in distant locations, connecting internationally, and from an economic perspective the benefit of being able to print anywhere in the world. He mentioned Sandstone Press was the first publishing house in Scotland to publish ebooks because he felt it important to engage from the outset, commenting

"internationalism is an absolute requirement to grasp the internet". He explained that initially he concentrated on building a website. Sandstone then produced an arts magazine online called *Sandstone Review* which allowed Davidson to keep in touch with authors and develop projects. He then commissioned novellas from several authors, including Gaelic work, and poetry translation. Using a local designer to produce images made into PDF's he then sold this material using PayPal. He felt this was an artistic success and the materials have all come out in hard copy since. However, he also admitted it was a commercial failure. "I visualised people downloading them and reading them on their laptops on trains." At that time he felt ebooks would not work until there was a piece of hardware that could look and sell like a book. It now exists and ebook sales are now an increasing amount of Sandstone's income although at the moment only to the extent of covering costs. Davidson had faith that ebooks will win out in time. "For a story, a novel you don't want to keep forever, you can have it instantly, at 2/3rds the cost, eventually that price will come down, and you'll be perfectly satisfied reading on modern reading devices, [and] you'll have more shelf space." For the moment he stressed that what he called 'beautiful books' will continue to win in demand, citing materials that can provide photographs, drawings, hardback bindings and so on. But he had a firm belief that the hardware will develop, so that these 'beautiful pictures' will also appear on reading devices. "What I suspect […] will happen is that it will come to the stage where it is the ebook that is designed and the hardcopy that will follow, and that will be the tipping point. That's[where [….] investment [….] and reading [….] will be in the future." Once this tip happens he indicated that he suspects ebooks will develop rapidly because research and development money will go into them, rather than hard copy. In terms of adapting his model of publishing, he remained optimistic. "This is the art of publishing. You've got to publish good books, just keep publishing great books."

It is also important to be aware that the value of digitisation varies across genres and specialisms of publishing and cannot be discussed in the same terms across each. Timothy Wright in the academic sector acknowledged that EUP has benefitted by deciding not to invest in its own e-platform. Considering its output of 114 new titles a year he pointed out that such investment was clearly uneconomic. However, academic and public libraries, the major market for academic books, want volume

and content and EUP decided to link up with the extant platforms of Oxford and Cambridge University Press. Wright agreed that the digital space breaks down market boundaries because it is not limited by its accessibility to other institutions. "I think the 'e' side is absolutely international, and the Scottish context for it is meaningless because a lot of the small publishers sell their books quite creatively, getting out there, making apps etc. but it's really in international markets." However, he imparted uncertainty about whether ebooks have changed, or will change the academic market, noting that EUP's print sales continue to hold up well. He stated that feedback from EUP's initiative Edinburgh Scholarship Online is that there have been developments in the United States, especially one involving a partnership deal between Oxford, Edinburgh and Cambridge with four libraries in the New York area. Interestingly, as part of the deal on the e-Package, these libraries also want one copy of the print titles as well. He likened the current digital debate to ten years ago when many were saying that print was dead. "We have to remember that in academic publishing at least, probably, around 10% of sales are E-based and we spend around 90% of our time talking about it. Our core business is still in print." In recent months EUP has been working with another 15 e-aggregators. "People are taking our content and spinning it out into market." He advised that the company is trying to be relatively cautious but also concentrating investment in it, including people and resources.

John MacPherson explained that Bright Red have not done much digital work but have commissioned titles with a digital element aimed at mobile web technology, hosted elsewhere, for 2013 (Bright Red 2013). "It will be virtual learning environments to that extent; […] augment the book for tasks, cross curricular stuff, homework, worksheets. It'll be a depository. The book will deliver about 60-70% of content and the rest is up to the teachers and students to pick and choose from."

One possible benefit in this realm upon which he would not elaborate more extensively due to confidentiality issues was a technology opportunity Bright Red has, to work with Scottish universities. It involves universities projects to develop and collaborate on products and take them to market. "This is exciting because that kind of thing is investment heavy and we're not the type of company that can get that

investment easily. It gives us chance to take advantage and it gives them the chance to give their [computing] students experience, work with enterprise and bring something to market." This initiative represents a progressive cultural policy, helping independent Scottish companies work with independent Scottish universities to bring out digital products for a new Scottish curriculum. Unlike EUP, Bright Red is choosing to go about digital development in its own way, rather than trying to benefit from other people's platforms. "Hodder are hot on digital, Pearson does a lot of digital stuff. We are more interested in doing our own thing. We produce very good material in content and how we get that across to students and teachers via our partners is entirely up to us." He indicated that the company would rather be guided by independent instinct and feedback on how people are using the material on the ground and in classroom rather than look at what others have done. For educational publishers separate digital considerations have to be acknowledged. He explained that schools are difficult to get into digitally because of all the different firewalls and other security procedures.

Allan Cameron touched on how appropriate digitisation is for small publishing models. Vagabond Voices is small, but nevertheless publishes ebooks.   Cameron said he has no problem with the technology and feels that ebooks are positive because they bring in a little extra business. He said that he sees this activity increasing for five or six years then decreasing because he is sceptical that ebooks will take over from print. "I think it will go up to 30% then back down and settle at around 20%."   He envisioned Vagabond Voices market as high-volume readers, "people who read 80 books a year or more, particularly if they travel a lot". The benefit, in his view, is that e-readers augment portability. "They [high volume readers] love [ebooks] and buy them in large amounts. You get extra business from that because I think they probably buy even more books than they can read, it is so easy to download them." In terms of the industrial benefits of the internet, Cameron thought it may be useful for sourcing new texts for translation but felt reliable readers are a greater necessity.

For Ann Crawford the most positive value of digitisation lies in the opportunity for greater synergy and collaboration between companies. She mentioned BooksoniX, a web-based booklist management service which uses the ONIX for books XML format

for storing and sharing bibliographic data, as an initiative in which she would have liked to become involved. Initially this was not possible for Saint Andrew Press as its critical mass of books was not quite big enough to justify the cost of membership. However, the company's collaboration with Hymns Ancient and Modern has increased the mass of texts being sold together, so they have agreed to implement the web-based booklist management service which will enable Saint Andrew Press titles to reach a new and much wider variety of audiences. She confirmed there seems to be a Christian market for ebooks and that, for her, the excitement of digitisation is the way it opens up unknown market routes. "It seems to me that there are innumerable additional markets there, not just in terms of platforms but also in terms of chopping up a book and selling it in different ways […] the options are massive." However, one general concern was the ease with which digitisation enables anyone to become involved in publishing activity. Crawford spent time as a student, studying publishing using moveable type and other pre-digital technologies, and she feared that some of the people becoming involved do not always develop grounding in the print production and editorial side. She commented, "Many don't know how to edit books well, how to decide what is a good book and what's a bad book, how to think about libel, all the things that are important to publishing a book. There's still personal skills you must learn […] I feel very strongly that it is not just a free-for-all for everybody. You still have to have the skills." Whilst it is certainly possible to be autodidactic in the publishing field, it is also crucial to acknowledge that it is a specialised trade with its own skillset which one must learn, and it can take a lifetime to master. There is a risk in the ease with which anyone can digitally publish, that not everyone publishes to a standard that can maintain the quality the market for print titles has heretofore dictated.

That said it is also true that traditional publishers must come to terms with new modes and methods enabled by the digital sphere, and see it as opportunity. Crawford acknowledged this. "Some areas […] are not so clear to me about the digital aspects of publishing […] For example sometimes I wonder if [certain books] could be a commercial success by cutting out the conventional printing and see if it works [but] I have asked people and nobody knows for sure. […] I think it opens up whole new ways about how you commission a book." However, from Crawford's perspective digitisation and the digital realm have provided a crucial lynchpin in

sustaining her enterprise's publishing activities. "The situation I am in now could not have happened 5 years ago. It is only because of all this technology."

In the Gaelic literature market, the project to co-publish digital editions of classic stories of English literature with the Ayrshire-based publisher Giglets excited Rosemary Ward. "For adult learners," she commented, "Think of the confidence it gives them as at the back of their mind they think 'ok Sherlock Holmes, I know this story', and they're following it and it's completely in Gaelic. No glossary, no English synopsis." Ward argued that the children benefit from a familiar and engaging format and the adult learners can understand it because they see the value of having a different media for access. The Gaelic Books Council has agreed to create 12 ebooks in total, in e-format with full animation, a useful side-product of the capacities of the digital format. As the texts have already been created by Giglets the only production work required was their translation into Gaelic. The schools receive them free of charge for use on smartphones, computer and whiteboard platforms and the learners market can buy them for 99p from iTunes. Nine of these books are listed as now available on the Giglets website (2013).

Ward felt that the Gaelic market has embraced digital produces. She also highlighted that Gaelic readers are loyal and willing to take up new offerings. "These are people who in my day we called yuppies. The young academics and students, new graduates, young professionals. They've probably got the greatest access […] it's amazing though, actually all the people go for them […] the retirees are saying 'oh I read on my iPad, my retirement present' and so on, and suddenly they have everything at their fingertips. I'd say they are making it their own. They are availing themselves of the technology." Another opportunity lies in out-of copyright, out-of-print materials such as the Gaelic Bible. She explained Bòrd na Gàidhlig, amongst others, is funding a rewrite of the text to make it apply to new orthographic rules. However, it is a long arduous task, so the Bible Society is digitising it to simplify future processes. She also acknowledged the opportunity to look at print-on-demand and for Gaelic publishers the importance of an attractive website. "You need to give people who are isolated access to blogs and webcasts of this stuff. You have to give everybody access. These are the things I'd like to be happening." She pointed to the Gaelic Books Council's efforts as an example for Gaelic publishers. "We now have a Facebook page so we can promote things on that the minute something comes out,

and we've got Twitter. We are making use of social media networks to help us broaden the impact of Gaelic books".

6.2.4.3 The Global Financial Crisis

The common concern for the industry highlighted in the interviews is the financial crisis that has been running since 2008. For Catalan publishers, given the state of the Spanish economy, the Crisis is of vital importance and binds national concerns to greater global economic movements. However, many interviewees differentiated between general concerns over the outcome for the industry as a whole, and the more specific cultural threats that place the Catalan language sector in dilemma. Albert Pèlach's main concern was that the Catalan sector will emerge debilitated from the Crisis, for example in the textbook market already dominated by Castilian. If this market slumps he believed Catalan publishers will suffer most. He explained that in times of economic pressure a concentration of market occurs. "Larger enterprises take the opportunity to buy up small vulnerable publishers because the small ones have the least chance." But in the wider context he maintained that all of the Catalan publishers are under threat because the Crisis goes hand-in-hand with digitisation. "We are [….] making a digital transformation in textbooks, and reference works, and [….] putting in large levels of investment for very little economic return. And right now isn't a time for massive investment, money is expensive and scarce."

Arola also believed the Crisis is the greatest threat. He argued it will have a devastating effect on culture because this is the first thing in which publishers curb investment. His view was that, if publishers do not invest in culture, they will not develop society to allow for growth and development of identity. However, for Jaume Vallcorba the greater threat to the Catalan language industry was not the Crisis but the more generalised social issue of the education system. He commented that currently education in Catalonia "pushes children away from reading and writing." His problem was a pedagogic issue to do with computers and their introduction widely into the Catalan education system which have moved children's learning in schools from a textual to a visual basis, as he felt has occurred worldwide. He argued that without words images have no contextual meaning and he demonstrated distaste for the digital world which compromises the way people read. He believed that now there is a much greater sense of disenchantment and a general decline in

readership. "This is a little bit the case everywhere I think, because in hard times reading is defiance. After that I think it is the decrease in the reading public, with numbers which seem to dwindle." Jeroni Boixareu also addressed the Crisis and the way it has affected funding. "Nowadays," he complained, "the areas that provide funding will only hand out money for projects they are certain will succeed and generate profits". That makes it increasingly difficult for small publishers to take a risk on a new project.

In Scotland the economic situation may not be as perilous as in Catalonia but it has undoubtedly had a severe effect on many publishing companies, making investment a challenge for those smaller and developing enterprises in each field. The concern for publishers also mostly revolved around the monetisation of their direct markets. The problem is centred on the macroeconomic environment rather than specific environmental challenges. John MacPherson described how bank support for start-ups has dropped away. There are few overdrafts or easy ways of getting funding. Initially Bright Red received a big loan, from the Small Firms Loan Guarantee scheme which was available at the time, as well as investment from the owners. However, he asserted their plans were ambitious and the money did not last long. Then came the economic crisis and Bright Red, like so many other businesses, was informed it would not be given an overdraft by the bank. He confided "You just have to hang tight; we're in a position now where we don't need that big chunk of cash." He also encouraged other small publishing independents to place extra emphasis on intelligent and creative resourcing. "Traditional publishers' margins of about 5% are no good for large conglomerate groups that demand 20%. So the room for the small publisher out there is less and less and finance reflects that. Corporates [….] will probably find finance quite easy, small Indies will find it quite difficult. Private investors are looking for [more than] a 5% margin, that doesn't happen in educational publishing."

Robert Davidson assured that Sandstone Press is attempting to address the challenges he sees ahead right now. "It will take at least a year and a half or two years to do," he explained. "We are already an international publisher based in Highlands Scotland, but […] we have to be monetised in a different way from

present. We have to take the company's activities successfully across the gain line year on year and do it with every book, and hit the bigger markets as well."

In terms of competing in the academic market, which he already described as a very separate and different entity, Timothy Wright argued that his challenges are his lists. "We are competing with the best authors for their books." Wright thought EUP is sustainable and has been for some considerable time. "It took the sensible decision some years ago to move out of the (university) department where it was haemorrhaging money and turned into a standalone business. That focused the minds of various people." It then brought in Wright, who previously worked at Pearson, and a number of other people from corporate backgrounds who were used to running business. He felt that prior to this EUP just enjoyed publishing books and the business side was irrelevant. "We wouldn't get away with that now because in the current climate we walk the tightrope of producing scholarly material but also it's a business." He also commented that Dundee (academic press) is at the crossroads of this kind of development. "To establish it as a business you really need to take it away from being a department of the university, turn it in to a wholly owned subsidiary, and invest in it." However, he did not believe that right now is an appropriate economic time. Counteracting forces of business profitability and idealism confound university presses. "Universities like having [them] and even in the current climate they are prepared to invest in it and not have it make money if they feel it is to the benefit of [the university]."

Ann Crawford felt that the industry is in a transitional period. "The whole business of the trade", she emphasised, "the physical trade, the shop. It used to be a matter of making sure the shops were interested in the book you were going to publish and they would stock it and hey presto you would have a success". However, now there are insufficient booksellers to do that. Those that remain have demanded enormous discounts, from publishers, partly motivated by opportunism and partly by necessity. She acknowledged the customer base is also discovering that if people go to a bookshop they get a limited choice; if they go to Amazon they get the whole or much bigger choice, and the discount. However, she did not see this as an inescapably problematic situation. "It gives us the chance if we target things in the right way to reach a wide market and improve our backlist sales because bookshops used to sell

backlists and now they are increasingly unlikely to." The question for her was whether that means that printed books have a shorter shelf-life.

In the case of Gaelic publishing Rosemary Ward quoted the identification of new sources of funding as among several challenges. Another was the fragility of Gaelic publishers, accepting that this too can relate back to finance. Yet another was that, due to the small Gaelic market, the Council is being approached with projects of low or inappropriate value which are assumed to be worthwhile simply because of the lack of better available literature. "That's a challenge," she said. "Making sure we don't get drawn into this miasma of mediocrity." She stressed that Gaelic publishers must produce texts that are better than everything that's printed in English, or they will never compete in the mainstream. Again the financial factor is inescapable. "We have such limited funds we must make sure the best use is made of them. [….] We can't often afford to take risks, but have to in some places." At some stage she would love to reach the stage that the Gaelic market could have a range of pulp fiction but acknowledges that is in the distant future. Meanwhile maintaining quality is an imperative. She did not want Gaelic publishers to fall into the same trap as the Gaelic BBC channel which ultimately began producing what she lamented is, in her view, dumbed-down material. She also wanted to professionalise them and drive out inefficiencies identified before her arrival. One example was the loyalty club established by her predecessor. When it was begun, members were given a card entitling them to a lifetime discount of 15% off every book. "Now," she commented, "we can't sustain that". Everyone on the Council's database has been contacted and asked to convert to an annual subscription, paid by standing order. She confided that at least 500 of the 2,000 people on database have re-joined and renewed their membership.

6.2.4.4 Networks and Collaboration

From this industrial perspective it is also important to consider the degree to which these individual enterprises can be interpreted as actively collaborating to distinguish between conscious and unconscious efforts to act as a network of industry within the field and those examples of the cumulative effect of individual and separate initiatives. Within each of the national cases there are examples of this, and also arguments which are supportive of its potential benefits in the context of small

nations, whilst it is also clear that the issue is complicated by the level of competition brought about by their limited markets.

Within the Catalan field Albert Pèlach claimed that there is very little collaborative activity because there is little infrastructure or too many inefficiencies. He argued that the available synergies at all levels are not exploited and insufficiently employed. He believed some separation from non-commercial concerns would be necessary. "The bookshops and the figure of the 'shopkeeper' are the typical image of Catalan commerce. It is true many bookshops are seen as cultural entities but in the end [they] are commercial enterprises. There is a view of the publishing industry as cultural, but it is primarily commercial." As an example of collaborative activity Grup Enciclopèdia Catalana, through Grup 62, established a collaborative distribution enterprise called Àgora in 2008 (Grup 62 ND). Pèlach said he hopes it will become a great Catalan distributor. "It ought to come to represent around 70% of the supply of Catalan books in bookstores." He explained that in the past the Catalan distribution system has been based on a one-publisher, one-distributor basis. Àgora breaks the mould because there are commercial enterprises in it. Bookshops can request a product from it, one from here and one from there, and Àgora compiles the packets and sends them to bookshop. But publishers distrust competitors, and he was concerned by the problems this creates, admitting, "We are designed to collaborate but [....] the infrastructure for collaboration is small, and the sector in general is very inefficient". He also alleged that in times of economic pressure enterprises become resistant to each other. "Catalan language publishers and booksellers, who are small and vulnerable at these times, shut off from one another."

On the other hand Jeroni Boixareu said that Marcombo is active at guild level, and the company has good relationships with other colleagues. "If there are places you can help you do." He suggested this is normal; he helps in anything he is asked to but has also received help. As for collaborative ethic, he explained Marcombo occasionally does co-editions at industrial level. "I have done some with Altamar, UOC (Catalan Open University), and my father did collaborations with the UPC." These were co-editions where the companies shared costs, branding and profits, in order to carry out projects which Marcombo could not have done alone. In certain circumstances this collaboration is to do with prestige. "The OPC and the UOC, their reputation is low so they wanted to work with us for greater brand recognition. It

doesn't work badly for us." In terms of using the local production companies, Marcombo is more commercially pragmatic. "My decisions are based on price and quality. […] I print from all over." Marcombo has printed in Bilbao, Sevilla, Barcelona, Madrid, occasionally Zaragoza and sometimes abroad in Mexico. Comparably, Jaume Vallcorba maintained that the greatest benefit in developing the Catalan language publishing sector has been the historically large infrastructure which has developed around Castilian language publishing. However, the problem, as Pèlach's suggested, is the complex distribution network. "Years ago I proposed a common logistic platform, [similar to that which Àgora, now has]. I thought it was a good idea but I think it wasn't taken up because of mistrust amongst publishers, and authors about how much they were selling. This made it impossible."

In the Scottish field the question of division between the urban and the periphery is further compounded by the relative geographic isolation of some publishers. The urban/periphery issue is pertinent but problems of physical accessibility also impact upon collaboration. This issue is diminishing since the advent of increased digital communication. Campbell Brown noted division between enterprises agglomerating in urban areas and in the periphery but added that people "do start up businesses all over the place, particularly now, because it's much easier to do." He confirmed networking inside the urban field is helpful for any trade publisher. The exchange of information and collaboration in the past two years has proven important for Black and White, despite the reticence which comes with competition. "It's always slightly tricky when there is commercial rivalry as well but we usually manage to work through it somehow. Mostly we've collaborated in […] dealing with supermarkets." He commented that Publishing Scotland used to be strong in representing publishers to booksellers but the departure of companies including Birlinn in a diminishing field has weakened the trade committee. "It was very good as a cohesive unit, all publishers represented but that has taken a backseat. Actually what we've done is replace that with Publishing Scotland for some projects, because we have to. There is a commercial imperative."

However, Robert Davidson set, as an example of collaboration, the deal between Sandstone Press, a periphery publisher, and Canongate in the urban sector for a new edition of the Man-Booker prize nominated *The Testament of Jessie Lamb.* He

received offers from three major publishers wanting the book but two wanted to buy the rights whereas Canongate accepted partnership. "We didn't want to be a publisher who has a success and then just cashes in on it because we are too small; we wanted to take it as far as we could go," Davidson commented. He highlighted Canongate's new cover design for the novel, which emphasises the young feminine context of the story compared to Sandstones' bleaker apocalyptic design, as an example of how he believes the partnership will bring the best of both worlds for the title. The collaboration was easy with meetings at Publishing Scotland events and communication by phone and email. While he admitted to being cautious about the process for fear of losing control of the product, he implied he has no regrets. Both publishers are under the common umbrella of the Independent Alliance formed by Faber and Faber. This initiative was established a decade ago as a selling device so sales representatives could go into shops with a much bigger list. There is a similar digital initiative called Faber Factory Plus which Davidson has used to expand his network, meeting other Factory Plus customers online or by phone. However, he also stressed the importance of adopting an appropriate level of collaboration in such projects. "Independence is everything."

Timothy Wright remained stoic about opportunities to collaborate rather than compete with his major UK competitors. "You either try to compete against them, which is not really viable, or you give in to them." He compared this with Waterstones which now sells Amazon's Kindle reader in-store, following nine months of criticism of the online company. He saw this as an example of a company realising that within this particular field and at this time it is better to collaborate and benefit than compete. "I'm sure that's the right thing to do." However, he also accepted local collaboration is difficult for Edinburgh University Press as an isolated academic publisher within the Scottish field, so at an international level collaboration is crucial to the company. It has already signed with JSTOR in the US to put EUP books on its platform as well. Internationally it also collaborates with a network of overseas agents on sales, and it has a connection with Columbia University Press which distributes its print products in the US. It has a similar arrangement in Singapore with Taylor Francis. Wright envisaged e-business developing alongside print and sourcing problems could be remedied through collaboration. "I think the publishing industry in general is about collaboration, more than any other industry people do

tend to work together for improvement." John MacPherson also felt that companies cannot afford to be completely isolated. "Larger companies have approached us to try and collaborate in the Scottish market [….] we'd be mad not to have those talks even though it might not come to anything." He also acknowledged the value of book fairs, even within an educational context where materials may not be transferrable and therefore have any sale value. "You meet people from all over who can do things more efficiently abroad." He has found this especially in discovering new opportunities for foreign digital printing. "We'd love to keep using printers and everything in Scotland, but if it's more cost-effective elsewhere you have to use that."

Although she considered it a very complicated relationship, Ann Crawford agreed publishers in Scotland have a culture of support among each other. She did not say enterprises come together on a daily or even sporadic basis to compare notes, and she assumed most feel cautious about revealing structural and strategic information. However, she did maintain there is much to be said for collaboration. She believed that overall Scottish publishers have a lot of competition, which is changing progressively, from all types of media across all sort of other production as well and publishers must be careful that the skills that go into a good book are not lost. That is why she argued Publishing Scotland needs to be in contact with other publishing organisations across Europe to help establish international regulations. She also interpreted Publishing Scotland as offering another opportunity through its network members' scheme which is designed to bring people who do things on the periphery into the whole. She suggested that as the size and scale of Scottish publishing grows, there could be interplay of influences on each other which might inadvertently increase the homogenisation of the whole sector.

Rosemary Ward explained that the Gaelic Books Council has a training imperative and undertaking to bring together all Gaelic writers and all Gaelic publishers at least once a year for a conference or training seminar. It provides both practical and creative opportunities for them to develop their skills, and engage with one another through other events such as conferences. She also mentioned the Edinburgh international book fair bookshop as an example of network and field consolidation. It places all the Gaelic books onto one bookshelf so they are all in one place irrespective of publisher and this looks emblematic. She suggested Gaelic publishing is almost too small for competition. The Gaelic Book Council also has national

steering groups for literature and education which brings all Gaelic publishers together twice a year to share annual publication proposals. All can see what is being developed and where any gaps may lie. The Council can then try to source a commission if it thinks there is a real shortage in any area. She felt this is one of the strengths of collaboration at this level. However, all of these publishers are free "to go off and they do their own thing" and do not require Council authority.

Ward wanted to unify the Gaelic network through a database of what she called 'virtual quality assurance'. Acknowledging the cottage-industry nature of Gaelic publishing, organised through a distant and separated collection of translators, editors, script assessors and others, all working from their backyards, it would enable cohesive collaboration between the entire network. At the same time the financial issue could also be addressed with a new payment structure addressing the varying pay rates for all the freelancers in her network. It would also address production 'bottlenecks'. The Council could act as a broker, where a publisher approaches them with a project they could recommend appropriate and available freelancers for the job, and alternative backups. However, there are insufficient resources to develop the database so Ward explained she is developing a working model herself, using money she has saved for the Council through increased business efficiencies, but it requires more investment to carry to market.

Chapter 7 Conclusions

Ultimately globalisation can be seen in these nations interacting with localisation to produce an overall field which is supportive of the cultural endeavours that preserve national identity.

7.1 Summary of Findings

The analytical framework of this research, presented on page 118, suggests that, in order to differentiate and subsequently assume an appropriate business strategy as either primarily a national-cultural endeavour or an international enterprise, publishing enterprises in these fields must weigh their business strategies appropriately, with a greater emphasis placed on business optimisation or cultural representation depending on the extent to which the enterprise's market is primarily domestic or international. The suggestion is that there is an inherent conflict between the two positions but the framework is designed to indicate the connection between these two ideological poles, dualisms which reinforce one another. Crucial to the understanding of cultural business ideology in these cases is the position of balance which publishers maintain between this supposed dichotomy.

Culture vs. Commerce

For many publishers in these small nations this conflict is an illusory issue. As businesses, they recognise the primacy of business concerns. However, a majority also see the duality of these two ideological emphases as less mutually exclusive than might be assumed as indicated in chapter 6.2.1.1. In the majority of cases, whether more or less concerned with the role of cultural generation, the publishers surveyed and interviewed put the core business in place first, developing this as a strong enough base to sustain the business, and then add in material for other markets. In this order of development the concern for culture is an after-effect of sustainability, as suggested by Campbell Brown on page 182. However, it should also be stressed that in many cases these developments occur in tandem, due to the nature of scheduling concerns in the act of publishing.

Branding - The Missing Link

It appears that the typical attitude of most publishers in small nations is one of quiet confidence in the fact that business efficacy and contribution to culture can, if managed adequately, work hand in hand. Many feel the crucial link in this interplay is the use of branding. The brand is a symbol of cumulative cultural and economic growth achieved by a company. Both Jordi Ferré and Robert Davidson explicitly support this suggestion in chapter 6, postulated in theoretical terms in chapter 4.2.3. It represents accrued prestige. Mass-market and bestseller titles are supported by a brand which, in turn, can acquire additional prestige through the publication of culturally significant but less widely circulated materials.

The benefit of location and identification with national culture is an extension of this facility. The advantage of location is often based on the prestige of association with that name. In the case of publishers whose identity statement may in part feature a reference to their location, it is the national or international recognition of that location that builds and supports the brand. However, Ann Crawford on page 200 indicates that this has to be managed carefully as this form of soft identity recognition can prove equally detrimental and limiting in foreign markets if the targeting is not purposeful.

Proximity to Market

It appears that some small nation publishers do find it possible to corner, develop and sustain a local niche market as long as scale and focus is directed appropriately. Alfred Arola on page 181 suggests proximity is the key in maintaining this focus, as the ideal is the generation of local cultural markets. The business strategy requires a slower, more progressive approach to underpinning the local market by first developing a few products which, once consumed, can build on demand. These publishers argue that local market generation equates to cultural generation. Seen this way both the UK and Spanish book markets can be seen disassembled viably into markets covering the different nations and nationalisms which make up these states, each with a distinct identity allowing for greater degrees of differentiation at the level of the subnational. The effect of cluster here as depicted on the maps from pages 125-132 also becomes crucial in contemplating why there is a concentration

of historic productivity which seems to emphasise the vitality of certain markets over others.

It is difficult to succeed as a small publisher at local cultural level dealing with new authors of fiction; non-fiction can be sold on the basis of the subject of the work, but for fiction for small and cultural publishers, the name must be the brand to convince the market to buy. In the cases examined in this thesis another aspect of this, relating to the development of the brand is winning prizes for prestige. However, the Catalan case, where this process has become ingrained as reported in the review of the literature on page 72 and supported by Jaume Vallcorba on page 224, suggests that this process can subvert genuine indications of cultural demand in favour of commercialisation, promoting and supporting mass-market and ultimately international market books, or at another level, recognised as a more negative identity influencing culturally parochial materials.

Profitability

Despite this interrelation it is true that publishers do not have exactly equivalent levels of concern for maximisation of profits when compared with one another. It depends primarily on two factors; i) the level of market in which the publisher interacts and ii) the type of publishing. Publishers in the surveyed sectors seem to feel that within the publishing industry maximisation of profits is not as important as in other, non-cultural, industries. Although profitability is crucial to sustainability many enterprises will also afford themselves the opportunity to work with materials for a variety of other reasons including undertaking projects simply because they like the subjects and want to publish them on a cultural level. Throughout chapter 6.2 the responses of Jeroni Boixareu, Ann Crawford, Jaume Vallcorba, Allan Cameron, Alfred Arola and Robert Davidson attest to this and it is supported by the distribution of specialisms surveyed in each nation as indicated in chapter 5.2.4.

There can also be a political element. In some cases a degree of patriotism has been involved in the decision to publish materials which would not obviously be profitable. However, these instances were less common as an intrinsically non-profit orientated example of cultural production. When they do occur, typically the concern is with producing a premium quality product focused on niche national or local issues

which can find a definite, if limited, market. The financial crisis is proving the greatest threat to this mode of publishing because it endangers the ability of small publishers to take risks, limiting the diversity of their publication planning.

However, when discussing fiction and the quality of literature most publishers felt it can be very limiting to talk about the national identity and characteristics of a work. The consensus is largely that the role of the publisher as a dynamic of culture is to publish authors of quality wherever they may be from. Limiting the enterprise to materials generated within the domestic, national, personal environment is not the way to act as a cultural producer. Some also argued that applying a nationalistic identity to the character of an individual work is complicated because all cultural identities interchange with each other in literature, through the influence and dissemination of texts internationally. Writers who are presented as being representative of a particular culture have often been influenced by predecessors from foreign cultures. This view is particularly corroborated by publishers focusing on translation, Vallcorba and Cameron on page 187. The typology of certain publishers also dictates their lack of cultural concern, or their wider market scope. For instance Timothy Wright asserts on page 185 that academic publishing from Scotland and other Anglophone cultures is by its very nature global, but it necessitates development within subject groups of a global reach.

Differentiation

Part of the differentiation of national markets is necessarily based on the typology of the readers market in each area. For example there is an argument postulated by Albert Pèlach on page 184 that Catalan readers consume more literature than the rest of Spain but also that the readers in this market have more particular tastes, diversifying demand in Catalonia to a greater extent. Although there is argument on the nature of such differentiations, an appreciation of historical processes in the development of the industry, as illustrated in chapter 4.1, is crucial to understanding the established markets. The difference in Catalan readers and their comparatively heightened interest in reading could be a consequence of a number of interrelated steps in their cultural development.

The increased penetration of global bestseller markets has had a noticeable effect on the type of readership and market in these small nations, as elaborated in chapter 5, but it is unclear from the responses in this research whether that is to be taken as a negative or positive influence. Following the framework it is clear that both the local and international markets feed into one another and in the eyes of some this denigrates the quality of the productions. However, it also bolsters business productivity and circulation which helps businesses invest in growth and thereby establish new lines of production, and the benefit of this can be seen in the sustainability and cultural influence of enterprises in both cases. However, in other more specialised contexts where the readership does not dictate demand [as suggested by John Macpherson on page 186 the way the publisher approaches the material becomes the major differentiation and Educational publishing in small nations is a good example of this as competition is an issue.

Difficulties

However, one of the difficulties for small and medium publishing businesses operating in larger linguistic markets is in evaluating the market percentage that multinational enterprises have in their imprints. No breakdowns are available and this complicates the system of market analysis for the smaller publishers. Chapter 6.2.1.3 suggests publishers feel that globalisation threatens cultural demand because global mediums tend to standardise their texts and make them available to widest possible readership, which encourages people to devalue their own culture. This, in turn, has a negative effect on the market by changing, and arguably degrading, the nature of its demand. So within the context of the publishing field and its contribution to culture the negative effect of globalisation is on the market, not on the writing that comes out of locations, which remains vital.

Language and Identity

A nation can identify itself through a variety of concepts, and it is not necessary that the language has to be the primary one. The selected nations are representative given that in Catalonia language is the primary determinant where in Scotland it is not. In Chapter 5.2.18 it is indicated that in Catalonia, Castilian is rooted. Despite the assertion by most Catalan publishers that their language is the primary indicator

of identity, it is not the greatest factor in establishing the stability of the Catalan publishing field. As suggested by Jordi Ferré on pages 190-191, often attacks on the culture are directed as attacks on the language precisely because it is a crucial but fragile portion of their identity make-up.

In educational publishing the Law of Linguistic Normalisation should make it less difficult to enforce the culture. However, the educational sector is dominated by companies such as Santillana based in Madrid, so the Castilian hegemony still prevails, from the business perspective. Some publishers argue that the presence of Castilian and bilingualism in Catalonia has made it possible to create a more viable business structure for minority language publishing. It affords the opportunity for personalised projects by offsetting the production costs and accepting the generated losses. Many publishers from both linguistic traditions also sustain dual language production lines as a way of expanding revenue streams and capitalising on both markets. However, the primary impetus is commercial, not cultural. Most publishers seemed to feel that the deployment of intellectual properties and rights is a question of business optimisation. In Catalonia, although there is some argument from Albert Pèlach, in chapter 6.2.2.3 the consensus seems to be that it is possible for publishers to succeed within the Castilian sector. Willpower and the intent to succeed are seen as key, along with the company giving shape to its brand. In Scotland however, there is less crossover competition, as there are so few publishers of Gaelic and Scots.

Acting Globally

The analysis of chapter 5.2.9 suggests that in both small nations the greatest benefit of the linguistic hegemony is the ability to act within much larger export markets for distribution and sale of rights. Linguistic distinction does facilitate differentiation in the market. It can be seen in both the national markets for Catalan and Gaelic books. The benefit of working within the global language base is that books can be sold anywhere. However, publishers of a certain size do encounter a real if invisible boundary for their books despite this linguistic homogeneity. This is a consequence of other factors, again relating to the issue of the relationship between cultural identity and brand, where the cultural identification with certain nations can limit the marketability of a text in the eyes of buyers. Proximity allows more direct access to

media and promotional opportunities. It is also harder in a non-domestic environment to utilise word-of-mouth publicity. Some publishers concede products with a specifically local flavour can be open to global markets. This is argued by Robert Davidson, and supported by the comments of Rosemary Ward and Segimon Borràs in chapter 6.2.2.4. To encourage small publishers to target international expansion, local funding bodies concentrate on promoting and offering incentives for the repurposing, distribution and sale of their properties abroad.

The attitude of many publishers in these small nations is that it is important to take advantage of globalisation because it offers a wider field for profitability for publishing companies; the power to sell their ideas and products to other languages. However, this is also a two-way stream and most feel that they also stand to benefit from a wider field of potential products for translation, which opens up the market, despite the homogenising effect of the bestseller market. Again, this point indicates that the greatest damage brought about by the homogenising effect of globalisation is towards those works interacting at the level of the national and international. The local, a sub-level, can act in a self-contained fashion provided it is nurtured, as argued by Alfred Arola on page 211.

Translation could present an opportunity for smaller publishers. English and Spanish are two of the most widely spoken second languages in the world according to UNESCO (BBC 2013b) and gateway languages for foreign readers. As the market stands, Allan Cameron argues in chapter 6.2.2.4 that relatively little foreign literature is translated into English or Spanish when compared with other European languages, such as Italian. This is a market wasted. At present readers need a different European language to find out what is being produced in other cultures. He reinforces this argument on page 200 by indicating that smaller publishers may be able to exploit foreign cultural grants and funds by looking at this business strategy.

However, working on new translated materials appears not to be affordable for some publishers, and where it has been attempted as a strategy it has, in a number of cases, become a redundant segment of the business. This has less to do with the market for the materials than the costs of production, particularly the translation fee, for smaller businesses which cannot afford the necessary initial investment.

This interaction between the local and the international is being increasingly facilitated by the incremental development of digital technologies, as suggested by the analysis in chapter 5.2.15 and chapter 6.2.4.2. For digital production the global reach allows publishers to search out economic optimisation. These opportunities are more cost effective and do not need extra manpower to achieve, since relationships can be managed and maintained entirely online. It is a case of being aware of the global implications of economic activity and monitoring for opportunities to capitalise.

Smaller Businesses and the International Stage

There will always be space for specialised, personal publishing because it is impossible for a company, no matter its size, to use up all the niches that exist. A small publishing house has certain advantages over large publishing houses in that it can act rapidly and change fast. It can also offer a very personal treatment and encouragement to writers. However, the concentration of globalising processes around particular locations and the homogenising effect means that a wide number of intelligent people cannot connect with culture of the commercial networks. Their thoughts consequently go unrepresented. Globalisation has opened up opportunities for some small nation publishers in the shape of alternative revenue streams from exports or sale of rights, demonstrated in chapter 5.2.8. As discussed in chapter 6.2.3.1 rights sales for non-fiction are seen as often unpredictable but new fiction does offer possibilities for expanding revenues in the rights sales sector. However, it is important to appreciate that rights sales involve a complicated process which requires its own specialist skillset and its own level of professional investment.

Most of the publishers interviewed in chapter 6 felt that the industry is now in a transitional stage which will dictate the future structure of the system. Internationalisation seems to have gathered pace and the concern now is how digitisation will mould this process. Although it is common to see increasing numbers of multinational imprints setting up in these small nations, as indicated in chapter 5.2.2, their encroachment on the local and national market should not be overestimated given that many of these endeavours prove ultimately short-lived or fruitless. Some publishers will conclude that globalisation is damaging to local culture, with regards to those enterprises publishing in the minority language.

However, the problem is also dependent on the type of publisher. The argument is that globalisation only offers advantages for publishers of some scale, whilst the smallest subset of enterprises in the sector remain closed out, and unless secure in the containment of their own local market will find it increasingly hard to find a niche in the markets at national and international level. The difficulty for small independents that have found a gap to target and exploit is in distribution, as discussed on page 243-244. The multinationals have the weight to make deals with bookshops where independents do not.

The greatest concerns for these small publishers still relate to the same wider global industrial concerns of all publishers, for example the effect of deep discounting. This is indicative of the interplay between the international and national markets, demonstrating the link between them and the difficulty of extricating the issues singular to the small nation configuration. Regarding the gradual historical downfall of the once dominant family business structures in these nations, as discussed in chapter 4.1, the suggestion is that family businesses have some advantages, but far fewer than they did thirty years ago. It is not impossible for medium sized family businesses to maintain their position as they become international but professionalisation of management and other economic parameters is recommended. There is a lower level where the family structure works because of the in-house capacity for them to do multiple jobs, but at a certain level of turnover the model must be adapted to stay competitive. However, there is also a suggestion that within the constraints of the economic crisis many extant family run publishing enterprises are holding up better than others.

The City and the Country

Publishing does not require a particular location and it is normal that, from a historical perspective, industry concentrates around a primary urban centre because this is where it becomes easiest to communicate and develop trade networks. However, in recent times new technology has made location less of a concern for development and allowed small publishers to break free of the clusters around city locations. This may signal the beginnings of a very different sectorial organisation and distribution of enterprise in the future, as can be seen in the analysis of the maps in chapter 5.2.3.

The idea that there is a territorial battle between urban and peripheral publishers, however, seems to be an illusory assumption according to the responses in chapter 6.2.3.2. Publishers concede that from a cultural perspective balance is important and, in order to preserve this, projects must come from across the general environs, and not just the metropolitan centres. Others feel the status is beneficial for companies in the periphery. The advantage of the periphery is that rental spaces are cheaper and general costs in the city are higher. Any sense of territorial battle has more to do with the concept of approximate competition than with a specifically urban versus peripheral dichotomy, as in the case of the Tarragona based publisher who feels more directly in competition with publishers in Barcelona than in Madrid.

As already suggested in the subsection on proximity, what is important for small publishers is that they manage their scale by accepting their smaller size and branding themselves towards local identity and a culturally developed market. However, it is worth acknowledging that this may be easier in the periphery because local interaction and market loyalty is more difficult to develop in the urban clusters where there is a larger pool of voices for to be heard. As suggested by Robert Davidson's comments on page 212, many peripheral publishers seem to agree that their location is what distinguishes them. But rather than assuming one identity statement comes at the expense of others, identities can accumulate and build on one another so that the location of the publisher can become a starting point for a wider evolution of identity.

National Identity

There is some split in opinion between the virtues of being a national publisher as opposed to a publisher from a particular nation. The distinction, as Campbell Brown states on page 215, is that a national publisher produces works for the national market whilst the latter is a publisher based in the small nation with an international purview. Purely from the perspective of business optimisation the latter seems to be the more commonly targeted brand identity amongst these small nation publishers. Where it is not the preferred identity it appears to correlate with a market focus which is not focused on the international. For these types of publisher, cut off from the global and interacting at the level of the local, there is a domestic advantage when dealing with anything that is of national content or for a national market. Authors will

recognise their books as such and are often more comfortable working with these producers. It seems that foreign markets, even when they share a common language, will interpret a product which has a national character as only being of interest to its own national market. Again the facilities afforded by digital technologies are helping to challenge this perception, as online business initiatives and coalitions, such as Faber Factory in the UK, help break this barrier. More often than not, in practical terms, the nationality of these publishers is only expressed within the context of their status, legally, economically and geographically.

There is some disagreement between publishers over their role in supplying identity to texts in chapter 6.2.3.3. On page 217, Davidson holds that the role lies with the authors in their linguistic written expression and that the publisher as producer and disseminator is removed from this role, whilst Cameron feels that other than through a linguistic expression of identity the author has no national awareness. In this interpretation it is the publisher that takes on the role of mediating what comes in by virtue of its relevance or value to the culture. However, it should also be stressed that, in line with Bourdieu's insistence on subconscious habit within the field of practice (Jenkins 1993), for most the issue of identity, in cultural terms, has not been overthought, remaining largely an organic process in the natural evolution of business identity. From the perspective of political consequence most seem to feel that in reality political independence would not affect the composition of these clusters. They would remain independently established and successful. However, a crucial aspect in determining the possibilities for an independent publishing sector is the capacity to create allegiances with other countries.

Funding and Supporting a Natural Cultural Market

There is also a sense that the purposeful act of publishing national content for the sake of making sure the national culture is represented is falsely beneficial, non-scalable and ultimately destabilises the market by flooding it with texts which are not of sufficiently high quality to stimulate increased demand. This argument is supported by Jaume Vallcorba on page 223. One problem is that it is encouraged and in turn encourages greater levels of subsidisation without a consideration for the market. This is why markets must be allowed to develop organically. Other comparable initiatives to stimulate cultural productivity where there is no buyer base

are seen as equally detrimental to organic growth, including the establishment of multiple prizes, the development of celebratory events and fairs. It is not that these types of support do not benefit publishers. They help in promoting a book culture but must be employed alongside sustainable business strategies or they create the impression of a market which cannot exist without them. They become self-perpetuating and costly methods which do not lead to business growth.

Funding and support institutions can aid more than through financial means by helping develop markets, ensuring that products work in the market by creating policies which augment it and enforcing a positive dissemination. As argued in chapter 6.2.4.1 emphasis has to be placed on helping those initiatives which allow the market to work. Taking advantage of increasing globalisation, these same institutions can also begin to integrate with other publishing bodies in their wider national sphere, to search out new opportunities and collaborations. This integration can prove difficult because fear of absorption and agglomeration is prevalent within the industry, but if they are encouraged in a mutually supportive manner they could offer a more sustainable means of promoting a diverse array of international and local textual products. Again introversion is a problem in overcoming the barriers to these kinds of collaboration as the remits which dictate the jurisdictions of such culturally supportive institutions often contribute to the development of the invisible barriers already mentioned which define the limits or boundaries within which smaller publishers must act. The organisations may see themselves as only concerned with Gaelic, or Catalan, or Castilian or Scots publishing and as such are closed off to projects which might offer expansion beyond the boundaries of these identities. Confusion over the jurisdiction of different institutions has also created inefficiencies which have proven to be a major grievance for small publishers who are sent back and forth between these bodies when they approach them with a proposal or enquiry.

Post-Crisis Challenges

However, as discussed in chapter 6.2.4.3, publishers in these nations also acknowledged that their difficult relationship with support institutions, particularly when seeking investment, has been damaged further in recent years by the effect of the financial crisis. Equally, banks will not provide money to small publishing

businesses. So for small independents extra emphasis has to be placed on intelligent and creative resourcing. The model of how the publishing business operates in terms of financial planning has changed since the crisis. Where once mass summer orders from booksellers would see the publisher through their season, now buyers work on consignment, so businesses are receiving payments at intervals throughout the year and cash flow has to be managed in a different and more diligent manner in order to avoid disrupting the financial balance.

Networks and Collaboration

Within the urban field discussed in chapter 5.2.10 there seems to be a degree of networking which can be helpful especially in sales with the currently difficult market. Exchange of information and collaboration has proven very important to these publishers in recent times, despite the reticence which comes with competition. The consensus is that trade bodies and committees can help in the development and maintenance of successful collaborative networks but they are reliant on the support and cooperation of the contingent enterprises, and if any individual enterprise chooses to depart then this weakens the strength of the body. The difficulty is that in moments of crisis, as now, enterprises enter phases of resistance which can have very negative effects. Publishers and booksellers, who are small and vulnerable at these times, tend to shut off from each other. In terms of a sales network the impression is that in Catalonia there is very little activity because of a minimal infrastructure and inefficiency. The available synergies at all levels are not exploited and employed enough. Some separation from non-commercial concerns is necessary to improve this.

The other difficulty with collaboration, indicated in chapter 6.2.4.4, is recognising the limit of when to collaborate and at what point to compete. However, for specialist enterprises such as academic publishers, this circumstance is reversed. As the market for their field is too small at the national level, they have to act internationally to make their backlist economically viable. Collaboration becomes absolutely crucial to maximise the potential of their distribution in an international field. However, this also suggests that for a national cultural market to be stimulated a network needs to exist. Enterprises acting in isolation cannot create a field and therefore need to search out the closest one available, which may be the international field. However,

in trade publishing, companies of different scales can interact very successfully and in both fields commercial partnerships are demonstrating the potential benefits of co-publication models. The caveat is that publishers agree it is important to retain financial independence and a distinct brand identity. There is less concern over loyalty in terms of using nationally based enterprises in the production chain and no publishers would deny the economic opportunities of using foreign printers to support this segment of the industry, as John Macpherson argues on page 246. These decisions are motivated from a commercial perspective by price and quality.

Digitisation

Many publishers have taken the decision to not invest in their own e-platform, because the investment required is huge. Instead, publishers working in specialised markets are collaborating, as is pointed out by Wright on page 245, and have been able to benefit by linking up with already extant platforms. Many feel going down a non-exclusive route is best because it allows the ability to gauge the respective merits of multiple platforms. Otherwise digitisation programmes would prove more problematic for small publishers because they do require a lot of in-house resources. It takes up a great deal of time, in terms of files, getting files to printers, getting the files to the aggregators, then to the platforms, and all this work has to go on alongside print projects, not in place of it.

However, publishers appear to remain positive about the potential inherent in ebook production, although they remain split in their opinions as to its potential to dominate over print. The main opportunity is that digitisation will make internationalisation more easy because those works that publishers want to produce in a foreign language can be put directly onto sales platforms so it will not cost as much to reach foreign markets. However, this works both ways meaning that foreign producers can reach the domestic market as well, breaking down boundaries and potentially increasing competition. In reality what this does is expand the individual national fields into one single homogenous global one, with a series of self-contained local fields acting within it at the level of the sub-national.

Despite this, in chapter 6.2.4.2 it is acknowledged that some publishers expressed a concern that digitisation will reduce the market for books. However, their argument is

based on an assumption that sales in digital format will not be more profitable than in paper. This is a questionable speculation. Whist it is true that the pricing for digital sales are smaller, digital distribution removes the printing cost overhead. Many concerns also stem from the necessity of investment at present, to develop sustainable digital programmes. The belief is that in the current financial climate it is too risky for small and even medium publishers to take steps towards development of a production line which is not yet stabilised in global terms. The real issue here is timing rather than the technology itself. Equally these concerns are orientated from a commercial rather than cultural perspective. From a cultural perspective some benefits are clear but these also interrelate with a commercial consideration.

However, the advantages presented by digitisation also vary from one type of publishing specialism to the next, with each also posing its own inherently distinct challenges. For example, within the educational sector, the stringencies imposed by school and institutional internet security systems have to be worked around, and each school is different from the next. The view of certain publishers who have refrained from engaging in digital programmes is one of rationalised caution in that you have to know how to use it or it can be misused. Most publishers remain concerned about piracy, although the issue is more pronounced within the Catalan field than in the Scottish, as Vallcorba's comments demonstrate on page 232. There is also an issue of electronic competition and Tom MacPhail's (1987) theoretical assertions about the culturally dominating effect of repetition of mass media messages on the mind can be reinterpreted here to the effect of linguistic visibility online. Initiatives are typically undertaken in small nations to challenge this and create increased visibility for smaller linguistic cultures by creating localised platforms that are comparable to the international distribution platforms for ebooks.

7.2 Comparative Evaluation of Research Questions

The Catalan field is over twice the size of the Scottish, in terms of its composition. This size can be attributed to the domination of the Barcelona cluster in Hispanic publishing. The Scottish field is actually distributed more widely across the country than the Catalan which proportionately has less rural activity. In Catalonia there is a much wider field of medium sized enterprises against a lower proportion of small enterprises, which dominate the Scottish field, and on average these Catalan

publishers have consolidated their backlists to greater extent. In Scotland there is a greater distribution of productivity at the low end of the scale. However, whilst there is a smaller presence of publishing groups in the Scotland, the distribution of entirely independent, individual enterprise is not markedly different. The greatest difference is that amidst the largest publishing enterprises in Scotland there are a large proportion of Charity or Foundation organisations which is indicative of the importance of an institutional support network for publishing in this nation.

Both nations demonstrate clustered activity around urban centres, but the Scottish field is more evenly distributed across the entire geographic area outside of this. However, in both nations most of this expansion is a contemporary phenomenon. Publishing activity in each minority national language has also increased from 1980 onwards, corresponding with historic periods of national and cultural reinforcement in Catalonia and Scotland. However, thanks to its bilingual status, the integration of the language into the cultural composition of the national identity is deeply rooted in Catalonia whilst in Scotland it only represents a small proportion of activity and this dictates the extent of the available market but also the size of competition within it. Language plays a vital part in underpinning the success of the Catalan cluster, but it is clear that the international publishing status of the nation is a consequence of their dominance in Castilian markets. Therefore it is not simply more consolidated as a consequence of bilingualism but is instead a product of historical determinants. What is important is that many publishers in the field have been able to capitalise on this circumstance to reinforce local, cultural productivity.

In Scotland distinction from the wider Anglophone market in support of the local is achieved by publishing subject matter which delineates the boundary, with non-fiction and particularly local historical non-fiction proving particularly popular. However, relative to their proportions, the distribution of specialisms in Catalonia is fairly even with that of Scotland. The greatest difference is the greater degree of cultural commodification evident in the Scottish field, as targeted at the tourist market, again reflecting a focus on subject matter as the means of distinguishing and commercialising cultural identity.

Publishers in these nations do not appear to overtly feel that they actively play a role in contributing to national ideology. Any contribution to this is at the unconscious

level of the field's composition. For many, globalisation offers opportunities for expansion or even consolidation of their local market base. In this way the two levels, though separate, become inextricable as part of a wider field of cultural intercourse. Publishers' primary concern in each nation is with the sustainability of their enterprise and this dictates that business comes before culture as a philosophy. However, these factors are not mutually exclusive, and in the case of many publishers targeting the local level of the field, the cultural impetus becomes a facet of business optimisation. Equally enterprises interacting at the international level recognise the opportunities inherent in diversifying their revenue streams and have developed imprints targeting the local level which seem to compete at a cultural level, and this appears to outweigh concerns that this feedback loop contributes to increasing homogenisation of markets rather than diversification.

In the eyes of the active enterprises there is no conscious distinction or sense of competition between companies working in urban centres and the periphery. However, rurality to some extent engenders local, cultural publishing as befits the local market for the books of many of the publishers located in the periphery. There is also an indication that modern technologies are increasing expansion out into the periphery, and the consequence of this development could be to increase the proportion of local, cultural influences on the type of publishing being undertaken, but as digitisation also facilitates engagement with international markets, it may also lead to the levels of local and international becoming increasingly interwoven in these small nations.

However, digital infrastructures require a great deal of investment and in the present financial climate many of the enterprises are unable to supply this. They are also more averse to the risk inherent in adopting unproven digital strategies and as a consequence there is the threat of a deepening divide between the largest enterprises, of the international level, and those smaller publishers still categorised as medium sized who attempt to interact at this level but cannot compete. The smallest publishers interacting at the level of the local sustain themselves removing their business focus from this area of competition. The crisis poses the greatest threat to those publishers categorised as of medium size and navigating between the local and international levels of creative industry, which compose the majority of the field in Catalonia and a large part of the Scottish due to the dominant requirement of

publishing in English. These publishers represent the bottom end of the long tail and struggle to compete for a small portion of the markets they target. This consideration is common to global creative industry, rather than a distinct facet of the small nation, but the opportunities identified to overcome this challenge can be interpreted as benefits of the small nation; namely the proximity which can facilitate collaboration more readily than in larger industrial networks and allows producers to remain informed about their direct markets and responsive to their demands.

The supportive organisations and cultural policy in place become important at this point in underpinning development to minimise the effect of this divide by provisioning funds to these enterprises. However, the consensus is that it is not enough to act as a jurisdictional dispenser. A greater degree of focus on measuring potential is required so that support leads to sustainability, rather than equitable strategies of dividing funds up equally and inefficiently. The other indication is that a greater level of coordination between these organisations will facilitate this process as in both nations the suggestion is that clarification and communication of function is needed for producers to reap the maximum benefits from the structures in place.

7.3 Suggestions for expanding the scope of the research

The purpose of this thesis has been to investigate and define boundaries to the national cultural identity encapsulated in creative industry. Within this attempt the greatest overall limitation is that the scope of the thesis is so large that the total variables and factors for defining the totality of this thesis reach far beyond the capacity of a thesis of this length and breadth. Therefore the grander aim of this research has diminished into examining a facet a corner which can be interpreted as a microcosm of the overall search, focused on the publishers own perspectives of their activity and interaction within the field and their interpretations of their enterprise's role in culture, its relation to globalisation and activity beyond the bounds of its immediate culture; how its role is changed by the major technological development of the contemporary era and the key industrial factors which limit and dictate the rules of publishing activities and strategies. There are a great number of other factors and elements for various perspectives which can be added to this investigation to grow its scope to be more than one microcosm and these variables, including Digitisation, Specialist Publishing, Cultural Policy and Nationalist Print

Discourse, and Book Fairs and the globalisation of Small Nations Rights Markets, form the core of what could be suggested as the further research potential of this thesis, perhaps forming the base of a career long search for greater definition of this dialectical investigation into the role of creative industry in identity formation.

It is important to stress the particularity of each small nation case and therefore, as suggested in the limitations section, before applying the general conclusions of this research to other similar cases a base analysis of those nations must be carried out, through a review of the literature which will identify alternative variables for the analytical framework as appropriate to the context of the individual nation. However, through this, the process of analysis applied in this thesis can be reinterpreted to conduct further research across any number of other small nations, and is particularly suited to further European studies.

The other area of particular interest which proved to be beyond the scope of this thesis but would add to its context is an overview and analysis of the reception of the texts produced by the publishers. However, as the division between the perspective of production and reception has a clear point of separation, the consideration of reader reception has been left out of this research and is suggested as a potential opportunity for continued investigation through a later, separate and focused study.

Bibliography

4motors (2006) 'Four Motors for Europe', Available at: http://www.4motors.eu/ [accessed 20th November 2011]

Abel, R (1996) 'The internationalization of the US book trade: the world's rediscovery of America', *Logos,* Volume VII:I, pp. 50–60

Adorno, T (1975) *Culture Industry reconsidered.* From New German Critique, 6, Fall 1975, 12-19 translated by Anson G. Rabinbach, Simon Fraser University, Available at: http://www.sfu.ca/~andrewf/Culture_industry_reconsidered.shtml [accessed 4th March 2012]

Alam, R (2012) 'The Digital Stage of Colonialism', The Oxonian Globalist, May 8th 2012, Available at: http://toglobalist.org/2012/05/the-digital-stage-of-colonialism/ [accessed 3rd March 2013]

Alfonso, E (2008). *Deu Anys D'Arola Editors*. Tarragona: Arola Editors

Anadon, C, Neves Dias, J, Toribio, M, Minguela, R and Funes Aguilera, R (2011) 'The Andalucia Tourism Cluster', Harvard Business School [Online], Available at: http://www.isc.hbs.edu/pdf/Student_Projects/Spain_%28Andalucia%29_Tourism_2011.pdf [accessed 3rd March 2013]

Ancien, D, Boyle, M and Kitchin, R (2009) *The Scottish Diaspora and Diaspora Strategy: Insights and Lessons from Ireland*, The Scottish Government Social research, Available at: http://eprints.nuim.ie/2172/1/RK_0081838.pdf [accessed 3rd June 2013]

Anderson, B (1983) *Imagined Communities.* London: Verso

Anderson, R D (1983) *Education and Opportunity in Victorian Scotland*. Oxford: Clarendon Press

Anderson, C (2004) 'The Long Tail', Wired Magazine, Issue 12:10 [Online] Available at: http://www.wired.com/wired/archive/12.10/tail.html [Accessed 2nd February 2011]

Anonymous (2008) 'How much is enough?', The Economist, Available at: http://www.economist.com/node/12501023 [accessed 25th November 2011]

Anonymous (2009) *Cambra del llibre de Catalunya: Comerc exterior llibre: dades 2009.* Barcelona: Gremi d'Editors

Anonymous (2008) 'For Latin American Companies, Data Theft Poses a Serious Threat', Universia Knowledge@Wharton, Available at:

http://www.wharton.universia.net/index.cfm?fa=viewfeature&id=1560&language=engl ish [accessed 3rd August 2011]

Anonymous (2011) Comercio Interior del Libro en Cataluna 2010: Informe, Barcelona: Gremi d'Editors

Anonymous (2013) Usage of Content Languages for Websites, W3Techs, Available at: http://w3techs.com/technologies/overview/content_language/all [accessed on 3rd March 2013]

Ara.cat (2013). 'Jordi Ferré, nou president de l'Associació d'Editors en Llengua Catalana', Ara, 10th March 2011, Available at: http://www.ara.cat/cultura/Jordi_Ferre_0_441556757.html [accessed 25th March 2012]

Arnason, J P (1990). 'Nationalism, Globalization and Modernity', In Featherstone, M (ed.) *Global Culture*, London: Sage, pp.207-236

Balcells, A (1996) *Catalan Nationalism*. London: Macmillan Press Ltd

Barbería, J L (2012) 'Reformamos la Constitución?', El País, Available at: http://sociedad.elpais.com/sociedad/2012/09/30/actualidad/1349028022_631925.ht ml [accessed on 5th December 2012]

Barcelona (2013) *Catalan Identity*. Barcelona. Com, Available at: http://www.barcelona.com/barcelona_city_guide/references_marks/traditions/catalan _identity [accessed 2nd February 2013]

Barnes, R (2013) 'Basque and Catalan Nationalism: An Evolution', Fair Observer, Available at: http://www.fairobserver.com/article/basque-and-catalan-nationalism-evolution [accessed 20th March 2013]

BBC (2012) 'Catalonia Profile', BBC.co.uk, Available at: http://www.bbc.co.uk/news/world-europe-20345073 [accessed on 5th December 2012]

BBC (2013b) Languages, [Online] Available at: http://www.bbc.co.uk/languages/guide/languages.shtml [accessed 3r March 2013]

BBC News (1999) UK Scots 'anti-English' survey, 28 June 1999, Available at: http://news.bbc.co.uk/1/hi/uk/379935.stm [accessed on 3rd November 2011]

BBC News (2000) 'Pirate web threat to music industry', 5th April 2000, Available at: http://news.bbc.co.uk/1/hi/business/702134.stm [accessed 3rd August 2011]

BBC News (2012) Catalonia election: Separatists win Majority. 26th November 2012 [Online] Available at: http://www.bbc.co.uk/news/world-europe-20482719 [accessed 3rd February 2013]

BBC News (2013e) Spain unemployment hits record high. 25th April 2013 [Online] Available at: http://www.bbc.co.uk/news/business-22290422 [accessed 23rd May 2013]

Benjamin, W (1936) *The Work of Art in the Age of Mechanical Reproduction*. Marxists.org, Available at: http://www.marxists.org/reference/subject/philosophy/works/ge/benjamin.htm [accessed 4th March 2012]

Bevan, J (2002) 'Scotland' In Barnard, J & McKenzie, D F (eds.) *The Cambridge History of the Book in Britain: Volume IV 1557–1695*. Cambridge: Cambridge University Press, pp. 687–700

Boswell, Daniel (2012), 'Brave Words' A comparative study of Small Nation publishing: The cases of Scotland and Catalonia, In Boswell, D, Tzadik, E and O'Shea, R (eds.) *Interculturalism, Meaning and Identity*, Inter-Disciplinary Press, Available at: https://www.interdisciplinarypress.net/online-store/ebooks/diversity-and-recognition/interculturalism-meaning-and-identity

Bourdieu, P (1977) *Outline of a Theory of Practice*. Cambridge: Cambridge University Press

Bourdieu, P (1979) 'Classes and Classification', Marxists.org, Available at: http://www.marxists.org/reference/subject/philosophy/works/fr/bourdieu.htm (accessed 23rd November 2011)

Bourdieu, P (1986). 'The forms of Capital', In Richardson, J (ed.) *Handbook of Theory and Research for the Sociology of Education*, New York: Greenwood, pp. 241-258

Bourdieu, P (1990) *The Logic of Practice*. Cambridge: Polity Press

Bourdieu, P (2004) 'The Field of Cultural Production' In Finkelstein, D & McCleery, A (eds.) *The Book History Reader*. London: Routledge, pp. 77-99

Boyce, C and Neale, P (2006) *A Guide for Designing and Conducting In-Depth Interviews for Evaluation Input,* Pathfinder International Tool Series Monitoring and Evaluation – 2, Carolina Population Center, Available at: http://www.cpc.unc.edu/measure/training/materials/data-quality-portuguese/m_e_tool_series_indepth_interviews.pdf (accessed 3rd February 2012)

Breuilly, J (1995) *Nationalism and the State.* Manchester: Manchester University Press

Bridle, J (2010). 'What Publishers Today Can Learn from Allen Lane: Fearlessness', *Publishing Perspectives*, 28th April 2010, Available at: http://publishingperspectives.com/2010/04/what-publishers-today-can-learn-from-allen-lane-fearlessness/ [accessed 3rd August 2011]

Bright Red Publishing (2013) New N5 Digital Zone, Available at: http://www.brightredpublishing.co.uk/orderingfortrade.aspx [accessed on 3rd March 2013]

Brull, J L (2007) Publishing in Catalan in the Camp de Tarragona', In *Kesse* Volume XLI, Available at: http://eprints.rclis.org/10490/1/angles.pdf [accessed on 2nd February 2012]

Bunkley, N (2008) 'Joseph Juran, 103, Pioneer in Quality Control, Dies', The New York Times, Available at: http://www.nytimes.com/2008/03/03/business/03juran.html [accessed 2nd February 2013]

Canongate (2013) 'About Canongate', Available at: www.canongate.net [Accessed 3rd March 2012]

Catalan Institute for Cultural Industries (2010) *L'ICIC i les industries culturals en xifres.* Barcelona: Generalitat de Catalunya

Cheape, H (2004). 'Gaelic Genesis', *Scottish Book Collector* 7:9, pp.15-23.

Clark, T N and Lipset, S M (2001). 'Are Social Classes Dying?' In Clark, T N and Lipset, S M (eds.) *The breakdown of class politics: a debate on post-industrial stratification*, Baltimore: The Johns Hopkins University Press, pp.39-54

Conversi, D (1997). *The Basques, the Catalans and Spain*. London: Hurst & Company

Conversi, D. (2002) 'Immigration and statelessness: Political participation of immigrants and their Descendents in Catalan and Basque Mobilization (1959-1978)', Paper prepared for the ECPR Joint Session Turin, Italy 22 - 27 March 2002, [Online] Available at:
http://www.google.co.uk/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0CDkQ FjAA&url=http%3A%2F%2Fciteseerx.ist.psu.edu%2Fviewdoc%2Fdownload%3Fdoi %3D10.1.1.134.4395%26rep%3Drep1%26type%3Dpdf&ei=ormxUf7WG66d0wWLtI GIDA&usg=AFQjCNFMAlhxedCIq9slElgXdg2dCgUZyA&sig2=ICHrevM6f-I9um1uCOsASw&bvm=bv.47534661,d.d2k [accessed 8th August 2011]

Cooney, S M (2004), 'Chambers, Robert (1802-1871)', *Oxford Dictionary of National Biography*, Oxford: Oxford University Press; [online] Available at: http://www.oxforddnb.com/view/article/58384 [accessed 3rd March 2012]

Corkill, D (1996). 'Multiple national identities, immigration and racism in Spain and Portugal', In Jenkins, B and Sofos (eds.), S A *Nation & Identity in Contemporary Europe*. London: Routledge, pp.155-169.

Coser, L A, Kadushin, C and Powell, W W (1982) *Book: The Culture and Commerce of Publishing*. New York: Basic Books

Couartou, A (1998). 'Publishing in the Languages of Spain: Present and Future Trends' *WESS Newsletter* 21.2: [Online] Available at: http://www.dartmouth.edu/~wessweb/nl/Spring98/SpainS98.html [accessed on 3rd August 2011]

Cox, R A V (2007) 'The Gaelic Book' In McCleery, A & Finkelstein, D (eds.) *The Edinburgh History of the Book in Scotland: Volume IV Professionalism and Diversity 1880-200*. Edinburgh: Edinburgh University Press, pp. 277-294

Cramb, A (2012) Scots receive £1,600 more per head in state spending than English', The Telegraph, 1st November 2012 Available at: http://www.telegraph.co.uk/news/uknews/scotland/9647948/Scots-receive-1600-more-per-head-in-state-spending-than-English.html [accessed on 3rd July 2012]

Curtis, R (1998) *This Business of Publishing: An Insider's View of Current Trends and Tactics*. New York: Allworth Press

Curwen, P J (1981) *The UK Publishing Industry*. Oxford: Pergamon

de Bellaigue, E (1995) 'Mergers, acquisitions and takeovers in publishing: why they go on, and on, and will go on', *Logos*, Volume VI:I, pp. 6–15

de Kruif, J (2005). 'Poetry as a Commodity; The practical application of Network analysis', In van Delft, M, de Glas, F and Salman, J (eds.) *New Perspectives in Book History*, Zutphen: Walburg Pers, pp.117-136

Department of Social Research (2010). *Public attitudes towards the Scots language*. Edinburgh: Scottish Government

Doctorow, C (2008) *Content*. San Francisco: Tachyon Publications

Engage in the visual arts (2013) *Go and See*, Available at: http://www.engage.org/go-see.aspx [accessed 15th December 2012]

Feather, J (1985) *The Provincial Book Trade in Eighteenth-century England*. Cambridge: Cambridge University Press

Feather, J (2006) *A History of British Publishing*. Second Edition. Abingdon: Routledge.

Federación de Gremios de Editores de España (2011). *Comercio Interior del Libro en España 2010.* Madrid

Ferrer, L (2012) 'The diverse growth of 18th-century Catalonia: Proto-industrialisation?', Catalan Historical Review Volume V:67-84, Barcelona: Institut d'Estudis Catalans [Online] Available at: http://revistes.iec.cat/index.php/CHR/article/viewFile/64987/pdf_352 [accessed 3rd December 2012]

Finkelstein, D (2005) 'History of Scottish Publishing: Pioneers and Early Successes', Books from Scotland.com, Available at: http://www.booksfromscotland.com/Features/Articles-and-Essays/History-of-Scottish-Publishing [accessed 3rd March 2012]

Finkelstein , D & McCleery, A (2005) *Theorizing the History of the Book: An Introduction to Book History*. Abingdon: Routledge

Finn, G (1999) Scots reveal anti-English sentiment, The Independent, 29 June 1999, Available at: http://www.independent.co.uk/news/scots-reveal-antienglish-sentiment-1103161.html [accessed on 3rd November 2011]

Fitt, M, Robertson, J and Mitchelson, M (2011). The Story of Itchy Coo: Evaluation Report 2001-2011, *Itchy Coo.com* [Online], Available at: http://www.ichy-coo.com/resources/ [accessed 3rd March 2012]

Fraquet, R (1994). 'Nuevas politicas de comunicacion para nuevos escenarios tecnologicos', In Pares i Maicas, M (ed.) *Cultura i Comunicacio social: America llatina i Europa Ibérica*, Barcelona: Generalitat de Catalunya, pp. 259-262

Hatton, L, Pourvand, K (2012) The UK Economy, Civitas.org, 23rd August 2012, [Online] Available at: http://www.civitas.org.uk/economy/UKeconomyfactsheet.pdf [accessed 3rd June 2013]

Hastings, A (1997). 'The Construction of Nationhood' In Spencer, P and Wollman, H, *Nations and Nationalism: A Reader*. Edinburgh: Edinburgh University Press, pp.32-39

Hearn, J (2002). 'Identity, class and civil society in Scotland's neo-nationalism', *Nations and Nationalism* 8:1, pp.15-30

Hebblethwaite, D (2012) 'Q&A: Robert Davidson of Sandstone Press', Follow the Thread, May 10, 2012 , Available at: http://davidhblog.wordpress.com/2012/05/10/qa-robert-davidson-of-sandstone-press/ [accessed on 3rd August 2012]

Hesmondhalgh, D (2007). *The Cultural Industries*. London: Sage

Holland-Smith, L (2010). 'Japanese publishers team up for online content sale', The London Book Fair 2010, Available at: www.londonbookfair.co.uk *[accessed on 28th August 2011]*

Gagnon, A G, Guibernau, M and Rocher, F. (2003) 'The Conditions of Diversity in Multinational Democracies' In Gagnon, A G, Guibernau, M and Rocher, F. *The Conditions of Diversity in Multinational Democracies*. Montreal: The Institute for Research on Public Policy, pp. 1-9

Gellner, E (2006). *Nations and Nationalism*. Oxford: Blackwell

Generalitat de Catalunya (2008). *Pla de digitalizacio de la cultura a Catalunya*. Barcelona: Generalitat de Catalunya

Generalitat de Catalunya (2012). 'Lengua Catalana', Available at: http://www20.gencat.cat/portal/site/Llengcat [accessed on 3rd March 2012]

Generalitat de Catalunya (2013a). *Statute of Autonomy of 1979*. Available at: http://www.gencat.cat/generalitat/eng/estatut1979/ [accessed 2nd February 2013]

Generalitat de Catalunya (2013b). *The War of the Spanish Succession*. Available at: http://www20.gencat.cat/portal/site/culturacatalana/menuitem.be2bc4cc4c5aec88f94 a9710b0c0e1a0/?vgnextoid=970d5c43da896210VgnVCM1000000b0c1e0aRCRD&v gnextchannel=970d5c43da896210VgnVCM1000000b0c1e0aRCRD&vgnextfmt=deta ll2&contentid=226e3c084ded7210VgnVCM1000008d0c1e0aRCRD&newLang=en_G B [accessed 2nd February 2013]

Generalitat de Catalunya (2013c). *Historical Origins*. Available at: http://www.gencat.cat/generalitat/eng/guia/antecedents/ [accessed 20th November 2011]

Generalitat de Catalunya (2013d). *Invest in Catalonia*. Available at: http://www.investincatalonia.com/en/investincatalonia/ [accessed 3rd April 2012]

Generalitat de Catalunya (2013e) Catalonia: Overview, [Online] Available at: http://www.gencat.cat/catalunya/eng/ [accessed 3rd March 2013]

Gifreu, J (1994). 'Els mitjans i la construccio d'identitat', In Pares i Maicas, M (ed.) *Cultura i Comunicacio social: America llatina i Europa Ibérica*, Barcelona: Generalitat de Catalunya, pp. 263-266

Giglets (2013). *Giglets Gaidhlig*. Available at: http://www.giglets.net/gaidhlig [accessed 8th August 2012]

Global Finance (2013) Spain Country Report', [Online] Available at: http://www.gfmag.com/gdp-data-country-reports/175-spain-gdp-country-report.html#axzz2VRNFWG3o [accessed 3rd March 2013]

Goring, R, Andrew, H, Bold, V, Fitt, M, Gorman, R, Hadfield, J, Massie, A, Nicoll, A, Paterson, D and Wright, T (2010) *Literature Working Group Policy*. Edinburgh: The Scottish Government

Government UK (2013) 'Devolution Settlement: Scotland', Available at: https://www.gov.uk/devolution-settlement-scotland [accessed 20th March 2013]

Granell, F (2000). Europe's Evolving Economic Identity: Spain's role', *Mediterranean Politics* 5.2, pp.64-75

Gray, A (2000). 'Answers to Several Questionnaires', Alastair Gray.co.uk [Online] Available at: http://www.alasdairgray.co.uk/q_01.htm [accessed on 3rd August 2011]

Gremi d'Editors de Catalunya (2010), *Comercio Interior del Libro en Cataluña 2010.* Barcelona: Generalitat de Catalunya

Gremi d'Editors de Catalunya (2012) 'Editorials Gremi'. Available at: http://www.gremieditorscat.es/Biblioteca/Cerques.asp [accessed on 3rd March 2012]

Grup 62 (ND) Comercial I distribucio, Available at: http://www.grup62.cat/www/grup62/ca/distribucio-venda.html [accessed on 3rd March 2013]

Gubrium, J F and Holstein, J A (2002) *Handbook of Interview Research: Context and Method.* London: Sage

ICIC (2011) Catalan Institute for Cultural Industries 2011, Available at: http://www20.gencat.cat/docs/CulturaDepartament/ICIC/Documents/Arxiu%20ICIC/ICIC_fulleto_2011_angles.pdf [accessed 23 February 2013]

Idescat (2013) 'Institut d'Estadistica de Catalunya', Generalitat de Catalunya, Available at: http://www.idescat.cat/en/ [accessed on 3rd December 2011]

Independent Publishers Guild (2013) About the IPG, Available at: http://www.ipg.uk.com/?id=-1161 [accessed on 5th April 2013

ITU (2013) Global ICT developments. [Online] Available at: http://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx [accessed 3rd June 2013]

Jenkins, R (1993). *Pierre Bourdieu: Key Sociologists*. London: Routledge

Jick, T D (1979) 'Mixing Qualitative and Quantitative Methods: Triangulation in Action' Administrative Science Quarterly, Volume XXIV:IV, pp.602-611 [Online] Available at: http://isites.harvard.edu/fs/docs/icb.topic832692.files/Session%201%20-%20Jan%2024/Jick_1979_Triangulation.pdf (Accessed 3rd January 2012)

Jones, G (2004). 'Minority-Language Audiovisual Media in Europe', Presented at the First Congress on Basque Journalism, Bilbao, Mercator Media Centre [Online], *University of Aberystwyth*, Available at: http://www.aber.ac.uk/mercator/images/Bilbao.pdf [accessed on 3rd August 2011]

Jones, P (2010). 'Row breaks out in Scotland over publishing report', The Bookseller, 17th February 2010, Available at: http://www.thebookseller.com/news/row-breaks-out-scotland-over-publishing-report.html [accessed on 20th August 2011]

Kaldor, M (2004). 'Nationalism and Globalisation', *Nations and Nationalism* 10:1, pp.161-177

Keating, M (2001). *Nations against the State*. Basingstoke: Palgrave

Keel, R O (2013) 'Structural Functionalism', University of Missouri-St.Louis, Available at: http://www.umsl.edu/~keelr/3210/3210_lectures/structural_functionalism.html#credits [accessed 3rd March 2013]

Kidman, A (2006). Authors warned of digitisation threat. ZDNet [Online] Available at: http://www.zdnet.com/authors-warned-of-digitisation-threat-1139241730/ [accessed on 3rd August 2011]

Kirsh, K (2013) 'The 80/20 Rule Revisited', The Huffington Post, Available at: http://www.huffingtonpost.com/ken-kirsh/the-8020-rule-revisited_b_3269964.html [accessed 3rd June 2013]

Knapp, M (2007). 'A Controversial Homage to Catalonia: Commerce Replaces Politics at the Frankfurt Book Fair', *Der Spiegel* (no publication date), Available at: http://www.spiegel.de/international/germany/a-controversial-homage-to-catalonia-commerce-replaces-politics-at-the-frankfurt-book-fair-a-510291.html [accessed 20th August 2010]

Kovac, M and Wischenbart, R (2009) End of the English (British?) Empire? Or Something Else? Publishing Research Quarterly, Volume XXV, pp. 118-127

Kovac, M and Wischenbart, R (2010) Diversity Report 2010, Wischenbart Consulting, Available at: http://www.wischenbart.com/upload/Diversity-Report_2010.pdf [accessed 23 June 2012]

Lane Fox, M (2010). 'The data which shows the digital divide', *The Guardian: Datablog* (no publication date), Available at: http://www.guardian.co.uk/news/datablog/2010/jul/12/digital-divide-martha-lane-fox [accessed on 20th August 2010]

Lee, K (2008) Globalization, Electronic Empire, and the Virtual Geography of Korea's Information and Telecommunication Infrastructure, The International Communication Gazette 70:1, pp5-22, Available at: http://ro.uow.edu.au/cgi/viewcontent.cgi?article=1245&context=artspapers [accessed on March 3rd 2013]

Li, T (2013) 'Borders: Where do they come from and what do they mean?', Institute For Advanced Development Studies, Available at: http://inesad.edu.bo/developmentroast/2013/03/borders-where-do-they-come-from-and-what-do-they-mean/ [accessed 3rd June 2013]

Llanas, M (2007). *Six Centuries of Publishing in Catalonia*. Vic: Eumo Editorial

Locke, D (2004). 'Mobile Phones - Convergence - Opportunities and Threats', In Jones, S (ed.) *Encyclopedia of New Media,* London:Sage

Loughlin, J and Keating, M (2003). 'Culture, identity and development in European minority nations and regions', In Gagnon, A G, Guibernau, M and Rocher, F (eds.) *The Conditions of Diversity in Multinational Democracies*, Montreal: The Institute for Research on Public Policy, pp.153-167

Macleod, A (2003) Anti-English prejudice rife in Scotland, survey finds, The Times, 6th October 2003, Available at: http://www.thetimes.co.uk/tto/news/uk/article1912197.ece [accessed on 3rd November 2011]

Mann, A J (2000) *The Scottish Book Trade 1500–1720: Print Commerce and Print Control in Early Modern Scotland*. East Linton: Tuckwell Press Ltd.

Mann, M (1997). 'Has Globalization Ended the Rise and Rise of the Nation-State?' In Spencer, P and Wollman, H (eds.) *Nations and Nationalism: A Reader,* Edinburgh: Edinburgh University Press, pp.279-300

Marvin, G (2013) 'Record Breaking Quarter: Digital Ad Revenues Cross $10 Billion mark for the first time', Marketing Land, 16th April 2013, Available at: http://marketingland.com/record-breaking-quarte-digital-ad-revenues-cross-10-billion-mark-first-time-40138 [accessed 3rd June 2013]

Mason, J (2004) Semistructured Interview', Sage Research Methods [Online] Available at: http://srmo.sagepub.com/view/the-sage-encyclopedia-of-social-science-research-methods/n909.xml [accessed 5th February 2012]

McCall, J (2003). 'Shades of Empire: The role of book publishing in developing national identity', *LOGOS* 14:3, pp.131-134

McCleery, A (2005) 'Defining Characters', Textualities.net [online] Available at: http://textualities.net/alistair-mccleery/defining-characters/ (Accessed: 23rd March 2012)

McCleery, A (2007) 'Jamie Byng, Publisher' In McCleery, A & Finkelstein, D (eds.) *The Edinburgh History of the Book in Scotland: Volume IV Professionalism and Diversity 1880-200*. Edinburgh: Edinburgh University Press, pp.199-201

McCleery, A (2007) 'Edinburgh University Press' In McCleery, A & Finkelstein, D (eds.) *The Edinburgh History of the Book in Scotland: Volume IV Professionalism and Diversity 1880-200*. Edinburgh: Edinburgh University Press, pp.319-321

McCleery, A (2009). *Small Nation Publishing: The 2009 COLICO Lecture*. Edinburgh: Merchiston Publishing

McCleery, A, Sinclair, M and Mark C Graham (2004). *Review of Publishing 2004*. Edinburgh: Scottish Arts Council

McCleery, A, Sinclair, M and Gunn, L. (2008) 'Publishing in Scotland: Reviewing the Fragile Revival', *Publishing Research Quarterly* 24.2, pp.87-97.

McCown, T (2010) 'It's not globalization its Corporate Imperialism', Examiner.com [Online] Available at: http://www.examiner.com/article/its-not-globalization-its-corporate-imperialism [accessed 2nd February 2013]

McCracken, E (2009). 'Edinburgh publisher leads the way in digital books revolution', *Herald Scotland*, 10th January 2009, Available at: http://www.heraldscotland.com/edinburgh-publisher-leads-the-way-in-digital-books-revolution-1.826479 [accessed on 8th August 2011]

McCrone, D (2001). *Understanding Scotland*. New York: Routledge

McCrone, G (1975). *The Economics of Nationalism Re-examined*. Edinburgh: Scottish Economic Planning Department

McPhail, T (1987) *Electronic Colonialism: The Future of International Broadcasting and Communication.* London: Sage

McGowan, I (1997). 'Scottish publishing: Its rise, decline and fragile revival', *LOGOS* 8:4, pp.212-217

Meiklem, J (2008). 'New Gaelic channel 'set up to fail', *Herald Scotland*, 20th September 2008, Available at: http://www.heraldscotland.com/new-gaelic-channel-set-up-to-fail-1.826886 [accessed 20th July 2011]

Minder, R (2012) Catalan Leader boldly Grasps a Separatist Lever, New York Times Online, 5th October 2012, Available at: http://www.nytimes.com/2012/10/06/world/europe/in-catalonia-spain-artur-mas-threatens-to-secede.html?pagewanted=all&_r=0 [accessed 3rd February 2013]

Montaqim, A (2012) 'Global e-commerce sales will top $1.25 trillion by 2013', Internet Retailer, 14th June 2012, Available at: http://www.internetretailer.com/2012/06/14/global-e-commerce-sales-will-top-125-trillion-2013 [accessed 3rd June 2013]

Moore, M (1997). 'On National Self-determination', In Spencer, P and Wollman, H (eds.) *Nations and Nationalism: A Reader,* Edinburgh: Edinburgh University Press, pp.221-236.

Morrell, K (2013) 'Globalization', Kevin Morrell.org, Available at: http://www.kevinmorrell.org.uk/globalization.htm [accessed 2nd Feb 2013]

Nairn, T (2003). *The break-up of Britain: crisis and neo-nationalism.* Edinburgh: Big Thinking

Nairn, T (2008). 'Globalisation and nationalism: the new deal', Open Democracy, 7th March 2008, Available at: http://www.opendemocracy.net/article/globalisation/institutions_government/nationalism_the_new_deal [accessed on 20th August 2011]

Naito, Y (2010). 'Rise of the ebook presents major challenges for future of the publishing industry', The Mainichi Daily News, 3rd May 2010, Available at: http://newsonjapan.com/html/newsdesk/article/81294.php [accessed on 3rd August 2011]

National Records of Scotland (NRS) (2012) Mid-2011 Population Estimates Scotland, 31 May 2012, [Online] Available at: http://www.gro-scotland.gov.uk/files2/stats/population-estimates/mid-2011/mid-2011-population-estimates.pdf [accessed 3rd June 2013]

National Records of Scotland (NRS) (2013) 2011 Census: First Results on Population and Household Estimates for Scotland, [Online] Available at: http://www.scotlandscensus.gov.uk/documents/censusresults/release1b/rel1bsb.pdf [accessed 3rd June 2013]

Neilan, C (2009a). "Digital skills gap now 'critical' for publishers." The Bookseller, 16th August 2009, Available at: http://www.thebookseller.com/news/digital-skills-gap-now-critical-publishers.html [accessed on 3rd June 2011]

Neilan, C (2009b) "Chambers Harrap Edinburgh base to close." The Bookseller, 15th September 2009, Available at: http://www.thebookseller.com/news/chambers-harrap-edinburgh-base-close.html [accessed on 3rd June 2011]

Ofcom (2011) Global TV revenues, [Online] Available at: http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr11/international/3.02 [accessed 3rd June 2013]

Office for National Statistics (ONS) (2013) Population, Available at: http://www.ons.gov.uk/ons/taxonomy/index.html?nscl=Population [accessed 3rd June 2013]

Olesen, P (2008) 'Non-State Nationalism within the European Union: A case study of nationalism in Catalonia and Scotland, and its relation to the debate on the future of nationalism within the European Union', Aalborg Universitet: Projektbiblioteket, Available at: http://projekter.aau.dk/projekter/files/14405764/Peter_Olesen_020608.pdf [accessed 3rd June 2013]

Ortiz, F (2013) Spain's population falls as immigrants flee the crisis, Reuters.com, 22 April 2013, Available at: http://www.reuters.com/article/2013/04/22/us-spain-population-idUSBRE93L0J620130422 [accessed 3rd June 2013]

Oxford Reference (2013) 'Glocalization', Oxford University Press, Available at: http://www.oxfordreference.com/view/10.1093/oi/authority.20110803095855473?rskey=6y6IGN&result=2&q= [accessed 3rd June 2013]

Oxford Reference (2013b) The Long Tail, Available at: http://www.oxfordreference.com/view/10.1093/oi/authority.20110803100114247 [accessed 3rd March 2013]

Parliament UK (ND) 'Act of Union 1707', Available at: http://www.parliament.uk/about/living-heritage/evolutionofparliament/legislativescrutiny/act-of-union-1707/ [accessed 3rd March 2012]

Parliament UK (b) (ND) 'Parliamentary Sovereignty', Available at: http://www.parliament.uk/about/how/sovereignty/ [accessed 3rd March 2012]

Pes i Guixa, A (1998). *Catalunya a l'aldea global: cap un catalanisme transnacional*. Barcelona: Thassàlia

Pickering, M (2008). *Research methods for cultural studies*. Edinburgh: Edinburgh University Press

Pongsiri, N (2012) Corporate imperialism and the nano age of colonialism', The Nation [Online] Available at: http://www.nationmultimedia.com/opinion/Corporate-imperialism-and-the-nano-age-of-colonial-30189168.html [accessed 2nd February 2013]

Prescott, D (2005). "Publishers as instruments of nationalism." *LOGOS* 16.2: 86-89.

Publishing Scotland (2011). *Publishing Scotland Yearbook 2011*. Edinburgh: Publishing Scotland

Publishing Scotland (2013) Publisher Members, Available at: http://www.publishingscotland.org/what-we-do/members/publisher-members/ [accessed on 5th April 2013]

Publishing Scotland (2013) Review of Publishing 2010-2011, Available at: http://www.publishingscotland.org/media/121855/ps_review_2010_and_2011_am_web_version2.pdf [accessed on 3rd June 2013]

Radway, J (2004) 'A Feeling for Books: The Book of the Month Club, Literary Taste and Middle-Class Desire' In Finkelstein, D & McCleery, A (eds.) *The Book History Reader*. London: Routledge, pp. 359-371

Richards, M (1998) *A Time of Silence: Civil War and the Culture of Repression in Franco's Spain, 1936-1945*. Cambridge: Cambridge University Press

Rose, J (2002) *The Intellectual life of the British Working Classes*. London: Yale University Press

Rose, M (2004) 'Literary Property Determined' In Finkelstein, D & McCleery, A (eds.) *The Book History Reader*. London: Routledge, pp.231-240

Rovira, T and del Carmen Ribe, M (1972) *Bibliografía histórica del libro infantil en Catalán*. Madrid: Asociacion Nacional de Bibliotecarios, Archiveros y Arqueologos

Schiffrin, A (2000) *The Business of Books: How International Conglomerates took over Publishing and Changed the way we Read*. London: Verso

Schumpeter (2012) Those Bloody Scandinavians, The Economist [Online] Available at: http://www.economist.com/node/21561109 [accessed 3rd March 2013]

Scotland.org (2013) Population of Scotland, [Online] Available at: http://www.scotland.org/about-scotland/the-scottish-people/population-of-scotland [accessed 3rd March 2013]

Scott, J (2000) *Social Network Analysis: A Handbook*. London: Sage

Scottish Enterprise (2013) The Financial services industry in Scotland, Available at: http://www.scottish-enterprise.com/your-sector/financial-services/overview.aspx [accessed 3rd June 2013]

Seale, C (2004) *Researching Society and Culture*. London: Sage

SEPA (2013) 'Land', Scottish Environment Protection Agency, [Online], Available at: http://www.sepa.org.uk/land.aspx [accessed 3rd June 2013]

Serra, E (2007). *Digitisation Projects of the Biblioteca de Catalunya*. Barcelona: EBLIDA

Sher, R B (1998) 'Corporatism and consensus in the later eighteenth-century book trade: the Edinburgh Booksellers' Society in comparative perspective', *Book History*, Volume I, pp. 32–93

Sher, R B (2006) *The Enlightenment and the Book: Scottish Authors & Their Publishers in Eighteenth Century Britain, Ireland & America*. Chicago: The University of Chicago Press

Smith, A D (1986). *The Ethnic Origins of Nations*. Oxford: Blackwell

Smith, A D (1990). 'Towards a Global Culture?' In Featherstone, M (ed.) *Global Culture*, London: Sage, pp.171-191.

Snyder, L L (1982). *Global Mini-Nationalisms*. London: Greenwood Press

Spencer, P and Wollman, H (1998). 'Good and bad nationalisms: a critique of dualism', *Journal of Political Ideologies* 3:3, pp.255-274

Strinati, D (1995) *An Introduction to Theories of Popular Culture*. London: Routledge

Survation (2012) Europe: Awareness and Attitudes, 5th June 2012, [Online] Available at: http://survation.com/wp-content/uploads/2013/06/Europe-Poll-Data-Tables.pdf [accessed on 3rd June 2013]

Tapscott, D (2013) 'The New Digital Age: Review by Don Tapscott', The Star.com, Available at:
http://www.thestar.com/news/insight/2013/04/26/the_new_digital_age_review_by_don_tapscott.html [accessed 3rd June 2013]

Taylor, B (ND). 'Scottish Devolution: 1979 Remembered', BBC Scotland. Available at:
http://www.bbc.co.uk/news/special/politics97/devolution/scotland/briefing/scotbrief1.shtml#1979 [accessed 3rd June 2013]

The Catalan Institute for the Cultural Industries (2007) *The Publishing Sector in Catalonia*. Barcelona: Generalitat de Catalunya

The Economist (2010) 'Zapatero's balancing act' 6th August 2010 [Online] Available at: http://www.economist.com/node/16706403 [accessed on 3rd August 2011]
The Scottish Government (2009) 'The Characteristics of Each Diaspora', Available at: http://www.scotland.gov.uk/Publications/2009/05/28141101/6 [accessed on 3rd March 2013]

The Scottish Government (2012) 'History of Devolution', Available at: http://www.scotland.gov.uk/About/Factfile/18060/11550 [accessed 3rd March 2012]

The Scottish Government (2013) 'Key Economy Statistics', [Online] Available at: http://www.scotland.gov.uk/Topics/Statistics/Browse/Economy [accessed 3rd March 2013]

The Scottish Government (2013f) Four Enterprise areas for Scotland , 17 January 2012, Available at:
http://www.scotland.gov.uk/News/Releases/2012/01/Employment17012012 [accessed on 3rd June 2013]

Tiryakian, E and Nevitte, N (1985). 'Nationalism and Modernity', In Tiryakian, E and Rogawski, R (eds.) *New nationalisms of the Developed West*, London: Allen & Unwin, pp. 57-86.

Tomlinson, J (2006). 'Globalization', (Presented at UNNC Research Seminar Series 2006-2007 University of Nottingham Ningbo China), StudyMode.com, May 2011, Available at: http://www.studymode.com/essays/Globalization-704576.html [accessed on 15th August 2011]

University of Reading (ND) *Records of A & C Black*, Available at: http://www.reading.ac.uk/special-collections/collections/sc-black.aspx [accessed 3rd March 2013]

Van Jacob, S and Vose, R (2010). A Report on Catalan language publishing. *Publishing Research Quarterly*, Volume 26, pp.129-143

Ventura, N (1993). 'Public library networks in Catalonia: an update: Library Network of the Diputacio de Barcelona', In International Federation of Library Associations and Institutions '93, [Online] Available at:
http://www.google.co.uk/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0CDIQ FjAA&url=http%3A%2F%2Fwww.raco.cat%2Findex.php%2FItem%2Farticle%2Fdow nload%2F40293%2F40663&ei=n8axUZCnMsbC0QXrpYCIBQ&usg=AFQjCNEognir Kw47TTGTduo7x4fqOCZ4Ug&sig2=ZTY3kyLT6bym82z_xZ3-- Q&bvm=bv.47534661,d.d2k [accessed on 4th August 2008]

Vilaros, T M (1999). 'A cultural mapping of Catalonia', In Gies, D T (ed.) *Modern Spanish Culture,* Cambridge: Cambridge University Press, pp.37-53

Wallerstein, I (1990) 'Culture as the Ideological Battleground of the Modern World-System' In Featherstone, M (eds.) Global Culture. London: Sage Publications, pp. 31-55

Waters, M (1995). *Globalization (Key Ideas Series).* London: Routledge

Webber, J and Strubell i Trueta, M (1991). *The Catalan Language: Progress towards normalisation.* Sheffield: Sheffield Academic Press Ltd

Weber, V (ND). Scottish, English, British, European Identities: A Literature Review. The University of Edinburgh - Sociology: Youth and European Identity, Available at: http://www.sociology.ed.ac.uk/youth/docs/v_webers_lit_rev.pdf [accessed 3rd June 2013]

WIPO (ND) 'Spanish Constitution of 1978', World Intellectual Property Organization, Available at: http://www.wipo.int/wipolex/en/text.jsp?file_id=185360 [accessed 3rd March 2012]

Wischenbart, Rudiger (2010). 'The Global Ranking of the Publishing Industry 2010', *Livres Hebdo*, June 2010. Available at:
http://www.wischenbart.com/publishing/index.htm [accessed 4 December 2011]

Appendices

I. Interview Guides

8.1 - List of Interviews

Name	Organisation	Country	Date of Interview
Alfred Arola	Arola Editors	Tarragona - Catalonia	29/02/2012
Jordi Ferré	Cossetània Edicions	Valls - Catalonia	14/02/2012
Segimon Borràs	Gremi d'Editors	Barcelona – Catalonia	27/03/2012
Albert Pèlach	Grup Enciclopèdia Catalana	Barcelona – Catalonia	27/02/2012
Jeroni Boixareu	Marcombo Ediciones Técnicas	Barcelona – Catalonia	23/02/2012
Jaume Vallcorba	Acantilado/Quaderns Crema	Barcelona – Catalonia	05/03/2012
Ann Crawford	Saint Andrew Press	Edinburgh - Scotland	31/05/2012
John MacPherson	Bright Red Publishing	Edinburgh - Scotland	16/05/2012
Robert Davidson	Sandstone Press	Dingwall - Scotland	10/05/2012
Timothy Wright	Edinburgh University Press	Edinburgh - Scotland	24/05/2012
Allan Cameron	Vagabond Voices	Glasgow - Scotland	27/06/2012
Rosemary Ward	Gaelic Books Council	Glasgow - Scotland	23/05/2012
Campbell Brown	Black and White Publishing	Edinburgh - Scotland	03/07/2012

8.2 - Interview Questions

Core Questions	Interviewees
Cultural Productivity	
• What is your company's commercial strategy and business model and to what extent does it maintain the balance between cultural productivity and profit maximisation?	Jaume Vallcorba, Jordi Ferré, Jeroni Boixareu, Alfred Arola, Albert Pèlach, Ann Crawford, Campbell Brown, Timothy Wright, Robert Davidson
• Could you tell me a little about your company? Why was it started, where does its focus lie and what are your aspirations and business goals? Have these aims changed over the years and if so, in what ways and why?	Rosemary Ward, Allan Cameron, Ann Crawford, John MacPherson, Campbell Brown
Language	
• What role doe the language play in the sustainability of national identity and the continued success of the cluster within the publishing industry of the wider state?	Segimon Borràs, Jaume Vallcorba, Jordi Ferré, Albert Pèlach, Alfred Arola
• What are the greatest threats to the growth and development of publishing houses in the nation, both in terms of those publishing in the minority national language and in the globalised national language?	Segimon Borràs, Jaume Vallcorba, Albert Pèlach
• What do you think signifies the national flavour of your work? How is this identity reflected in your commercial activities?	John MacPherson, Campbell Brown, Timothy Wright, Robert Davidson
Globalisation/Glocalisation	
• Do you think globalising processes are beneficial or detrimental to the nation's	Jaume Vallcorba, Jordi Ferré, Jeroni Boixareu, Albert Pèlach, Alfred Arola, Allan Cameron, Ann Crawford, Campbell Brown,

publishing cluster, and, through this, the production of local culture?	Timothy Wright, Robert Davidson
• What opportunities are there for national publishers in the contemporary publishing sector? And how about the greatest challenges?	Allan Cameron, Ann Crawford, Timothy Wright
• What are the greatest threats facing independent publishing enterprises within the national publishing cluster? How do you overcome these challenges at your company?	Segimon Borràs, Alfred Arola, Campbell Brown
• To what extent would you consider yourself a national publisher and in what ways do you see the national publishing sector differentiated from the wider state/international language market within which it operates?	Allan Cameron, Ann Crawford, John MacPherson, Campbell Brown
Urban/Peripheral location	
• To what extent do you think the national publishing cluster can be understood as an interconnected network? And what does the cluster owe its success to?	Jaume Vallcorba, Jordi Ferré, Jeroni Boixareu, Albert Pèlach, Alfred Arola, Robert Davidson, Timothy Wright
• What do you think of the concentration of publishing activity within urban centres? Does this have any negative or positive effect on you as a publisher in the periphery?	Segimon Borràs, Alfred Arola, Robert Davidson
Digitisation	
• What opportunities, if any, does digitisation present for the	Segimon Borràs, Jaume Vallcorba, Jordi Ferré, Jeroni Boixareu, Albert Pèlach, Alfred Arola, Allan Cameron, Ann Crawford,

development and protection of the industry and cultural production in small nations?	Campbell Brown, Timothy Wright, Robert Davidson
Specialised Questions	Interviewee(s)
Cultural Productivity	
• Has the publishing field in in the nation changed very much since you began working in the industry and if so, in what ways?	Ann Crawford
• In a larger publishing enterprise such as your company what factors are crucial to the sustainability of business on this scale?	Albert Pèlach
• As a cultural organisation, how do you go about your aims and cultural directive?	Rosemary Ward
• Do you think that the Saint George's Day book fairs are a valuable opportunity for cultural reconditioning? On the one hand the festival represents a chance to sell books and reinforce cultural connections but on the other hand, for some publishers it seems as though it encourages a social psychology where that day is the one day of the year to buy a book, limiting the market.	Segimon Borràs
Language	

• Can the national publishing sector be differentiated from the wider international language market within which it operates, given that the primary publication language is the same?	Campbell Brown
• As the language cannot do so what distinguishes your national identity?	Robert Davidson
• How do you compensate for linguistic competition with the wider national producers and maintain a share of the market and what do you think is important to achieving this?	Robert Davidson
• What are the main opportunities and threats to producing and selling (commercial/technical/ educational/literary) texts in the minority national language? And in the globalised national language in wider national and international markets?	Segimon Borràs, Jeroni Boixareu
• Have cultural/national considerations been a factor in your publishing projects?	Campbell Brown, Timothy Wright
• Do you think cultural interaction is an important endeavour in maintaining the value and vitality of book publishing in smaller European Book markets?	Allan Cameron
• What are the challenges and opportunities for publishing Gaelic language novels today?	Robert Davidson
• Is Gaelic publishing viable and what are the main challenges and threats?	Rosemary Ward

• How would you define the Gaelic market and readership?	Rosemary Ward
• How inter-connected is the Gaelic publishing field? Is it composed of isolated actors or is it very interactive, a kind of network? Is there any division between urban/rural, highlands/lowlands producers?	Rosemary Ward
• What effect does the dominant demand for English language works in Scotland have on the Gaelic markets and how important, if at all, is the role played by English language publishers in Gaelic production?	Rosemary Ward
• Can you tell me about the historical development of Gaelic publishing and whether key figures were crucial in its development? How important has the dissemination of books and writing been in the preservation of culture?	Rosemary Ward
• Do you agree with the view postulated by some other interviewees that it is not possible to find cross market success publishing in both national languages, and whether yes or no, what is your reason?	Segimon Borràs
• The number of copies produced in Catalan per annum has diminished by 12% over the last 6 years. Why do you think this is?	Segimon Borràs

• The percentage of titles produced in Catalan in 2010 is less than in previous years, but in terms of quantity it is more or less equivalent. Therefore it appears as though the number of Castilian titles is increasing year on year. Why do you think this is, particularly at a time when it might be assumed that financial crisis is affecting production levels?	Segimon Borràs
• However, whilst receipts/billing for Catalan titles has diminished compared to previous years, this decrease is not as drastic as that of Castilian language titles. It seems as though the percentage of the market for Catalan titles has experienced an increase in the last year, is this part of the same process?	Segimon Borràs
• Catalan language book sales generated 239 million euros in 2010, 98% of which was sold within Catalonia (217 million). Does the remaining percentage of sales pertain to other Catalan speaking territories?	Segimon Borràs
Urban/Peripheral location	
• Do you think there is an urban/periphery divide between publishers in the nation?	Robert Davidson, Ann Crawford
• As a Publisher based in the capital/urban centre, what do you think about the concentration of publishing activity within the urban centre?	Jeroni Boixareu
• Has there been any indication in recent years that new publishing	Segimon Borràs

enterprises are basing their headquarters more and more in the periphery? If not, why do you think that publishers elect to remain in the urban centres?	
Collaboration and Support Structures	
• Do you interact within the national publishing fields, through collaboration or otherwise, with other publishers and related institutions?	John MacPherson
• Do you feel cultural policy is supportive of national development? At an industrial level is the support structure put in place for publishers from the nation sufficient and satisfactory in developing this facet of culture?	Timothy Wright, Robert Davidson
• Do you think there is very much collaboration between agents that make up the chain of production	Timothy Wright
• Do you find that interactivity is encouraged at government level, or is it more up to you as a publisher to develop these relationships as and when necessary?	Timothy Wright
• Are you dependent on support structures at a national level and does this affect your capacity to act as a producer of national culture?	Timothy Wright, Robert Davidson
• Why have you chosen to collaborate with another national company to produce a reprint edition?	Robert Davidson
Educational and Academic	

• How did you get involved in educational publishing? What are the main challenges within the educational sector in the nation? Is it an isolated market or are there many opportunities?	John MacPherson
• What effect if any is digital development having on educational publishing, both at your company and beyond?	John MacPherson
• What is the key to business strategy in academic publishing, and what effect does placement within a small nation have on this?	Timothy Wright
• The sale of dictionaries and encyclopaedias has diminished more than other genres in the last 6 years, from 23.7 million to 17.6 million euros. Can you speculate why?	Segimon Borràs
• Catalan language University texts are traditionally hard to market and sell, but sales have increased more since 2009 than any other category. Can you speculate as to why?	Segimon Borràs
• Most Catalan language texts are produced for the educational market, but other interviewees have suggested the main producers are Castilian publishing groups such as Santillana. Is this the case and what do you think about the domination of this market by non-Catalan enterprises?	Segimon Borràs
Digitisation	
• How are digital sales in the nation	Segimon Borràs

developing?	

II. Database research

8.3 - Database Questions

1. Name of Publisher (Address, Website, Contact email)
2. How many people are currently employed by your company?
3. How many titles do you publish annually on average?
4. What is the bracket of your annual revenue on average?
5. In what type(s) of publishing would you say your company specialises?
6. In which languages do you publish titles?
7. What year was your company founded?
8. What markets do you target?
9. Are you affiliated with or a subgroup/imprint of another publisher? If so please specify   If not affiliated, do you collaborate with any other publishers? If so please explain which publisher(s) and in what way?
10. Do you export and if so to which countries (and/or through which publishers/distributors?
11. Do you import/translate foreign works? If so from where?
12. Do you accept unsolicited manuscripts?
13. What are the primary distribution channels for your books?
14. Do you publish e-books, and if so what platforms do you use for digital distribution?
15. Do you receive any subsidisation/funding and if so from where and for what?

8.4 - Coding Key for Database

CATEGORY	CODE
	PUBLISHING IDENTITY
No. of Employees	1. 1-2 2. 3-5 3. 6-10 4. 11-20 5. 21 - 50 6. 51-100 7. 101+

Titles to Date	1. To Date
	    1. Under 10
	    2. 10-20
	    3. 21-40
	    4. 41-70
	    5. 71-100
	    6. 101+
	    7. 1000+
	    8. 5000+
	2. Books to Order
	    1. Not Applicable (No Book Backlist)

Titles per Annum	1. Under 10 2. 10-20 3. 21-40 4. 41-70 5. 71-100 6. 101+

Specialisms	1. Academic
	    1. Journal
	    2. Medical
	    3. Legal
	2. Educational
	    1. Pedagogy
	3. Reference Guides
	    1. Maps and Travel
	    2. Professional, Technical and Business Management
	    3. Dictionaries and Encyclopaedias
	
	4. General
	    1. Non-Fiction
	        1. Sports
	        2. Music
	        3. History
	    2. Fiction
	    3. Children
	    4. Poetry
	5. Specialist
	    1. Books to Order
	    2. Art (Architecture, Design, Fashion, Art, Graphic Design, Photography)
	    3. Health, Remedy and Self-Help
	    4. Tourism and Postcards
	    5. Religious
	    6. Spirituality
	    7. Special/Facsimile Editions
	    8. Maritime
	    9. Collectable

	10. Illustrated Books
	11. Food and Cooking
	12. Animals
	13. Drama, Play Scripts and Sheet Music
	  6. Newspapers/Magazines
	    1. Specialist
	  7. Comics
	  8. Gift Books and Cards
	  9. Specialised Editorial Services

Languages	1. Catalan 2. Castilian 3. English 4. German 5. French 6. Italian 7. Portuguese 8. Galician 9. Latin 10. Basque 11. Russian 12. Chinese 13. Japanese 14. Dutch 15. Polish 16. Arabic 17. Hebrew 18. Scots 19. Gaelic
Date Founded	1. 2000 Onwards 2. 1990-1990 3. 1980-1989 4. 1950-1979 5. 1900-1949 6. Pre-1900
	CONNECTIONS

Target Markets	1. General
	    1. Only Catalan
	    2. Only Castilian
	    3. Only Gaelic
	    4. Only Scots
	    5. Only English
	2. Higher Education
	3. Libraries
	4. Education
	    1. Teachers
	5. Parents
	6. Tourists
	7. Special Education
	8. Children/Juvenile
	    1. Teen
	9. Specialist/Technical
	    1. Professional
	10. Local Market

Imprint (Catalonia)	1. Independent 2. Imprint/Association 1. Publisher Groups

		1. Planeta Group
		2. Oceano Group
		3. Panini Group
		4. Ars XXI Group
		5. Random House
		6. RBA Group
		7. Hachette Group (Lagardere)
		8. Cultura 03 Group
		9. Zeta Group
		10. Wolters Kluwer
		11. Everest Group
		12. Elsevier
		13. Santillana Group
		14. Robinbook
		15. Herder Verlag
		16. Mauri Spagnol Publishing
		17. SM Group
		18. Mayo Group
		19. Deleted (Domestic)
		20. Omega Publications
		21. Pagès Publishing
		22. Paidotribo Group
		23. Urano Publications
		24. Bromera/Algar Publishing
		25. Vicens Vives
		26. Casals Group
		27. Edebe Group
		28. Edhasa Group
		29. GEC
		30. Experiencia Group
		31. Prensa Iberica Publishing
		32. Zendrera Zariquiey Group
		33. Ediciones 62

2. Publishing Wing of Enterprise or Institution
    1. Rosa Sensat Teachers Association
    2. Polytechnic University of Catalonia
    3. Girona University
    4. Barcelona Centre of Pastoral Care
    5. Vic University
    6. Resource and Investigation Institute for Reform and Education (IRIF)
    7. ACV Global
    8. Centre for Musical Education
    9. El Tinter Press
    10. Institute for Catalan Studies

3. Educational and Cultural Charity or Foundation
    1. Bank of Architects Foundation
    2. Enciclopèdia Catalana

4. Publisher connected to Magazine and/or Bookseller
    1. Bosch Bookstore
    2. Claret Bookstore
    3. Gigamesh Bookstore
    4. Altair Bookstore and Magazine
    5. Hispano-Americana Bookstore

5. Part of a Corporation Dealing in Commodities beyond Books
    1. Thomson Reuters
    2. Santa & Cole

3. Company/Service related to Publishing Nodes
    1. VLex
    2. BCN multimedia

	3. PUNTEX 4. Tibidabo Publications 5. WhyWorry	

Imprint (Scotland)	1. Independent
	2. Imprint/Association
	    1. Publisher Groups
	        1. Cambridge Education
	        2. Harper Collins
	        3. DC Thomson Group
	            1. DC Thomson/Geddes & Grosset
	        4. Wiley Blackwell
	        5. Bloomsbury
	        6. Hachette Group (Lagardere)
	    2. Publishing Wing of Enterprise or Institution
	    3. Educational and Cultural Charity or Foundation
	    4. Publisher connected to Magazine and/or Bookseller
	    5. Part of a Corporation Dealing in Commodities beyond Books
	        1. Thomson Reuters
	3. Company/Service related to Publishing Nodes	

Business Affiliation (Catalonia)	1. No
	2. Collaboration
	    1. Deleted (Institute)
	    2. Rudolph Steiner Publishing
	    3. Corimbo Publishing
	    4. Parsifal Publishing
	    5. Octaedro
	    6. Magenta
	    7. Paidotribo Group
	    8. Ea! (COAM)
	    9. Poligrafa Publications
	    10. Index Books
	    11. Loft Publications
	    12. MaoMao Publications
	    13. Monsa Publications
	    14. Paisea
	    15. Juventud Publishing
	    16. Icari Publishing
	    17. Planeta
	        1. Editorial Destino
	    18. Co-editions with Foreign Publishers
	    19. Feltrinelli
	    20. Tamesis
	    21. Lit Verlag
	    22. DVD Publications
	    23. Glenat
	    24. Oceano Group
	    25. Emece Group
	    26. MC Publications
	    27. Victionary
	    28. Lonely Planet
	    29. Pamiela Etxea
	    30. Virus Publishing
	3. Other institution
	    1. Rudolph Steiner Foundation
	    2. The Royal Society of Great Britain
	    3. Rosa Sensat Teachers Association
	    4. Barcelona University Institute for Educational Science
	    5. Prestigious American and European Cultural Institutions and Museums
	    6. Barcelona Centre of Pastoral Care	

	7. Rovira I Virgili University
	8. Girona University
	9. Deleted (institute)
	4. Coalition
	1. Group 62
	2. 36l (Vicens Vives, Abacus, Cultura 03 Group)
	3. Octaedro Publishing Group
	4. Deleted (SM Group)
	5. Deleted (Prensa ibérica Publishing)
	6. Bookselling Cooperative
	7. Proyecto Contexto Publishers
	8. Deleted (Bromera Group)
	5. Trade bodies
	1. Gremi d'Editors
	2. Cultural Institutions
	3. DILVE
	4. CEDRO
	5. GEMC
	6. Online Platforms
	1. Leqtor
	2. Digital Books.pro
	3. AMABook
	4. Llibres.cat
	5. Libranda
	6. Edi.cat
Business Affiliation (Scotland)	1. No
	2. Work with other Publishers
	1. Waverley Books
	2. Koo Press
	3. Kettillonia
	4. Happenstance
	5. Canongate
	6. Stòrlann
	7. Itchy Coo (Defunct)
	8. Sandstone Press
	9. Dundee University Press
	10. Faber and Faber
	11. Birlinn
	12. Barrington Stoke
	13. Boydel & brewer
	14. Cambridge University Press
	15. Oxford University Press
	16. Hymns Ancient and Modern
	17. DC Thompson
	18. International University Press (Generic)
	19. Random House
	20. Wipf & stock
	21. Reed Elsevier
	3. Other institution
	4. Coalition
	1. Saltway
	5. Trade bodies
	1. Publishing Scotland
	2. Gaelic Book Council
	3. Inell/AQUNES
	6. Online Platform
	1. Faber Factory
Exporting	1. None
	2. Yes
	1. International

1. EDISA
2. EDUFISA Limited
3. Desarrollos Culturales Costarricenses (DCC) S.A

4. Puerto Rico
   1. Boriken libros INC
   2. Biblo-Informática 2000
   3. Aparicio Distributors Inc.
   4. MS Books

5. Guatemala
   1. Sophos
   2. Artemis Edinter
   3. Dellare
   4. Edoca

6. El Salvador
   1. La Ceiba

7. Honduras

6. South America

   1. Argentina
      1. Panoplia
      2. Waldhunter
      3. Proeme S.L
      4. Continente Editions
      5. Ediciones del Aguazul S.A.
      6. SD distribuciones
      7. La Revisteria
      8. Robinbook S.A.
      9. Del Nuevo Extremo

   2. Bolivia

   3. Paraguay
      1. Ediciones Técnicas Paraguayas

   4. Brazil
      1. Livraria Leonardo da Vinci
      2. Pujol I Amado

   5. Peru
      1. A.B. Representaciones Generales
      2. V&D Perú
      3. Distribuciones Mediterraneo SAC
      4. Melanio Rosas Cuevas
      5. Pla
      6. Oceano (Peru)

   6. Colombia
      1. Plaza & Janés S.A.
      2. Promolibro
      3. El Libro Universal
      4. Alfaomega (Colombia) S.A.
      5. Siglo del Hombre
      6. Distribuciones Intermilenio
      7. Alianza Distribuidora de Colombia LTDA**.**
      8. Urano Editions
      9. Deleted (Repeated Distributor)
      10. Pla
      11. Monserrate Editions
      12. Ciceron Editores
      13. Editorial Hispano-Andina
      14. Grupo Penta Distribuidores S.A.S.

   7. Chile
      1. Fernández de Castro Ltd.
      2. Cuarto Propio
      3. Liberalia Ediciones Limitada
      4. Urano Editions

5. Karma Books
8. Ecuador
    1. Eculiber S.A.
    2. Libri Mundi
    3. MR. Books
    4. Quito
    5. Pla
    6. Libreria Papiros Codices CIA. LTC
    7. Oceano (Ecuador)
9. Uruguay
    1. Aletea S.A.
    2. Trecho S.A.
    3. Gussi Books
    4. Oceano (Uruguay)
10. Venezuela
    1. Fundación Distribuidora Venezolana del Libro
    2. Euroamericana de Ediciones
    3. Oceano (Venezuela)
    4. Ma Non Troppo C.A
7. The Caribbean
    1. The Dominican Republic
        1. Centro Cuesta Nacional
        2. Unilibros
8. Europe
    1. Ireland
        1. Deleted (Ireland-based)
    2. France
        1. Libreria Catalana
        2. Larbaflo
    3. Romania
    4. Portugal
        1. Omniserviços
        2. J.Garraio & Ca. LDA
        3. BDMania
    5. Lithuania
    6. Italy
        1. Casalini Libri S.P.A.
        2. Pan Distribuzione
        3. Star Shop Distribuzione
    7. Germany
        1. Close Up
        2. Missing Link
    8. United Kingdom
        1. Prestel Publishing Ltd.
        2. Macmillan
        3. Diamond Comics
    9. Austria
    10. Belgium
        1. Brusel
    11. Finland
    12. Netherlands
        1. Strips in Vooraad
        2. Docete
    13. Luxembourg
    14. Russia
    15. Greece
    16. Scandinavia
        1. Hartung Press (Denmark)
    17. Czech Republic
        1. Fotion S.R.O

	18. Faroe Islands
	19. Deep Books (Europe)
	20. Craeren BVBA (Europe)
	  9. Africa
	     1. South Africa
	        1. Rudolf Steiner Publications SA
	        2. Penguin SA
	        3. Struik Christain Media
	        4. Faradawn
	        5. Everybodies books
	     2. Morocco
	     3. Deleted (African Distributor)
	     4. Tula Publishing Ltd (African Distributor)
	  10. The Middle East
	     1. Turkey
	     2. Israel
	     3. Bounce
	  11. Asia
	     1. China
	        1. Hong Kong
	           1. Transglobal Publishers Service Ltd
	           2. Fields & Associate
	           3. Asia Publishers Service Ltd
	     2. India
	        1. Bounce!
	        2. Random House India
	     3. Japan
	     4. Korea
	        1. Asia Publishers Services Ltd
	     5. Taiwan
	     6. Southeast Asia/Malaysia
	     7. Sri Lanka
	     8. Malaysia
	        1. Pansing Marketing
	     9. Deleted (Asian Distributor)
	     10. Ashton International Marketing
	  12. Australasia
	     1. Australia
	        1. Footprint Books
	        2. Peribo Property Limited
	        3. Deleted (Australian Distributor)
	        4. Deleted (Australian Distributor)
	        5. Koorang
	        6. CLC Australia
	        7. Brimby Books
	        8. Willow Canlell
	        9. Macmillan
	        10. Allen & Unwin
	     2. New Zealand
	        1. Ceres Book
	        2. Soul Distributor
	        3. Pleroma Christian Supplier
	        4. South Pacific Book Distributers
	     3. New South Books
	     4. Random House
	     5. Turpin Distribution

Rights Sales (Foreign)	1. None
	2. Yes
	     1. North America
	     2. South America/Latin America

		3. The Caribbean
		4. Europe
		    1. Germany
		    2. Sweden
		    3. Catalonia
		       1. ING
		    4. Italy
		    5. Spain
		5. Africa
		6. The Middle East
		7. Asia
		    1. India
		    2. China
		    3. Japan
		8. Australasia
		3. Unspecified

Importing (Rights and Translation)		1. No
		    1. Not Applicable
		2. Yes
		    1. North America
		       1. Canada
		       2. USA
		    2. South America
		       1. Argentina
		    3. The Caribbean
		    4. Europe
		       1. Norway
		       2. Greece
		       3. Germany
		       4. Sweden
		       5. Holland
		       6. UK
		          1. Floris Books
		       7. Italy
		       8. Belgium
		       9. France
		       10. Austria
		       11. Russia
		       12. Portugal
		    5. Africa
		       1. Malawi
		    6. The Middle East
		       1. Israel
		    7. Asia
		       1. Japan
		       2. India
		    8. Australasia

Translation (Domestic)		1. No
		2. Yes
		    1. Castilian into Catalan
		    2. Catalan into Castilian
		    3. Basque
		    4. Galician
		    5. English into Gaelic
		    6. English into Scots
		    7. Gaelic into English
		    8. Gaelic into Scots
		    9. Irish
		    10. Welsh

	11. Ancient

Unsolicited Manuscripts	1. No
	    1. Not Applicable
	2. Yes
	    1. Special Submission (Academic Journals, Publications and Articles)

Domestic Distribution (Catalonia)	1. Self-Distribution
	    1. Digital
	2. Wholesale Distributer
	    1. Enlaces Editoriales
	    2. Logista
	    3. Grialibros Galicia
	    4. Berriak Comercial de Editoriales S.L.
	    5. Distrifer
	    6. ALBA Distribuciones
	    7. C.A.L. Málaga
	    8. Cimadevilla
	    9. Palma Distribuciones
	    10. Troquel
	    11. Exclusivas Graons Llibres
	    12. Benvil S.L.
	    13. Ícaro
	    14. Andres Garcia S.L.
	    15. Panopilia
	    16. UDL libros
	    17. Azeta
	    18. Lidiza S.L.
	    19. Modesto Alonso Estravis S.L.
	    20. Difusió General de Llibreria S.L.
	    21. M.A.D.E. Marketing y Distribución
	    22. Unicornio Música y Letras S.L.
	    23. Arcadia Libros
	    24. Logística Editorial del Noroeste S.L.
	        1. Logística de Ciudad Real
	    25. FI-REX 21 S. L.
	    26. Rodriguez Santos
	    27. Fernández Ladrea
	    28. J.A. Morcillo
	    29. Logi-Nogara Libros
	    30. FIREX ARC/Likarlan
	    31. Disfer Libros
	    32. Barataria
	    33. Librosur
	    34. Gea Llibres
	    35. Bitarte Liburu Zerbiatzuak
	    36. Gaia Libros S.L.
	    37. Àgora Solucions Logístiques, S.L.
	    38. Pórtico Librerías S.A.
	    39. Distriforma
	    40. Cano Librería
	    41. Lyra Distribucions
	    42. La Tierra Libros
	    43. Índalo Libro
	    44. E/A Libros
	    45. Edilibre S.L.
	    46. Melisa

47. Astur Libros, S.A.
48. Disgalibro
49. Les Punxes
50. A Machado Libros S.A.
51. Babel libros S.L.
52. Lopez Caballero Libros
53. Disbook
54. Editorial Moll
55. Alfaomega
56. Benjamin Lopez
57. Contratiempo
58. Emaus Libros S.L.
59. Isis Distribuciones S.L.
60. Lemus Distribuciones
61. Serrano Llibres
62. Terrier Distribuciones y Promociones Editoriales S.L.
63. Disandal Málaga, S.L.L.
64. Liteca - Libros Técnicos Canarios S.L.U.
65. Ciencia 3
66. MIDAC Llibres
67. Museum Line S.L.
68. Nus de Llibres
69. Mares De Libros
70. Distribuciones de Libros de Barcelona S.L.
71. Promarex Libros
72. Logintegral 2000 SAU
   1. Logintegral Catalunya
73. Alicash S.L.
74. Miguel Sánchez Libros S.A.
75. Distribuidora Atenea
76. Hispano Hípica S.A.
77. Logilibro
78. Mensajerías del Libro S.A.
79. Anaquel de Libros S.L.
80. Un Per Un Solucions
81. ODI Llibres
82. Carles Navarro
83. Almario de Libros
84. Maidhisa
85. Mira Editors
86. Euskal Kulturgintza
87. Torre Libros
88. Anaya
89. Distribuidora Rotger
90. Ortega Distribuciones S.L.
91. Martin Fierro
92. J.L. RIVERO
93. Arguval S.L.
94. Baena Libros S.L.
95. Disvesa
96. Xarxa de Llibres
97. Distribuidora Extremeña S.L.
98. Asturarco S.L.
99. Papiro S.L.
100. Sendra Marco
101. PAU – La Tenda
102. Nadales

		103. ~~Deleted (Repeated Distributor)~~
		104. Distribuciones de Librerias Estevez S.L.
		105. Orozco-Representaciones Editoriales S.L.
		106. Centro Andaluz del Libro (Seville/Malaga) S.A.
		107. Nordest
		108. Editorial de Música PILES
		109. Delsan
		110. Arnoia
		111. Elkar
		112. Infolibro
		113. SD distribuciones
		114. Época Distribuciones
		115. Coedis
		116. Calvo Conde Distribución de Editoriales SA
		117. Ediciones Mínimas
		118. Besai Llibres
		119. ASED
		120. Zocolo libros
		121. Gracia Álvarez
		122. ~~Deleted (Repeated Distributor)~~
		123. JoaquÍn Vilas de Escauriaza
		124. Logistika Plus
		125. Comercial Gravi
		126. García-Barredo, S.L.
		127. Editorial juventud
		128. Abis & Books
		129. Latorre Literaria, S.A.
		130. Ben-Vil, S.A.
		131. La Union Libros
		132. Naturart S.A
		133. Los andes
		134. Liber Distribuciones Editoriales S.L.
		135. Llibres SEC
		136. Editorial Virus
		137. Ediciones Magina
		138. Editoriales Breogán
		139. Serveis Logístics (Road Book)
		140. Canary Books
		141. Odillibres
		142. Planeta Comercial
	3. Integrated Distribution Service	
Domestic Distribution (Scotland)	1. Self- Distribution	1. Digital
	2. Wholesale Distributors	1. Booksource
		2. Gardners
		3. Bertram Books
		4. Grantham Book Service
		5. The Book Service (TBS)
		6. Bookpoint
		7. Bookspeed
		8. Argyll Book Centre
		9. Highland Music
		10. Gaelic Book Council
		11. Antique Collectors Club
		12. Boydell & Brewer
		13. Deep Books
		14. Turpin Distributors

	15. ISIS 16. Harper Collins 17. Bournemouth English Books Centre 18. Foyles 19. KELTIC 20. CCL International Bookshop 21. Cordee 22. Macmillan Distribution Ltd 23. Central Books 24. Lomond books 25. Turnaround Publisher Services 26. Diamond Comic Distributors 27. Dawson's Books 28. East Lothian Council 29. AK Bell Library 30. Deleted (Repeat) 31. Deleted (Repeat) 32. Holt Jackson 33. Peters 34. Norwich Books and Music Distribution Service 3. Integrated Distribution Service
Sales Channels	1. Major Bookstores and Supermarkets 2. Independent Bookstores 1. Specialist Stores 3. Internet Stores 4. Personal Website (Direct)/Virtual Shop 5. Wholesale/Distributors 6. On Demand 7. Subscriptions 8. Catalogues 9. Order Direct 10. Kiosks 11. Online Access

Digital Products	1. No
	2. Yes
	     1. Online Databases
	     2. Ebooks
	     3. Webpages
	     4. Downloadable Maps
	     5. CDs
	     6. Audio-visual Material
	Audiobooks

Funding	1. No
	2. Subsidies
	     1. Creative Scotland
	     2. Gaelic Book Council
	     3. Charity
	     4. Tax Relief
	     5. Scottish Art Council
	     6. Council/Government/Other
	     7. ICIC
	     8. De Suizos
	3. Project Funding
	     1. Creative Scotland
	     2. Gaelic Book Council
	     3. Charity
	     4. Tax Relief
	     5. Scottish Art Council
	     6. Council/Government/Other

	7. Book Council 8. Lottery 9. EU 10. Scottish Cultural Enterprise 11. ICIC 12. Foundation 4. Awards 1. Michael Marks Award for Publishing

8.5 - Examples of Scottish Database

8.5.1 Example - Publisher Name and Details Page (Scotland)

Ref	Publisher	Based	Website	Address
1	Edinburgh University Press	Edinburgh	http://www.euppublishing.com/	22 George Square, Edinburgh, Midlothian EH8 9LF
2	Bright Red Publishing	Edinburgh	http://www.brightredpublishing.co.uk/	6 Stafford St, Edinburgh EH3 7AU
3	Hallewell Publications	Pitlochry	http://www.pocketwalks.com/	The Milton, Pitlochry, Perthshire PH16 5NQ
4	Saraband	Glasgow	http://www.saraband.net/	98 Woodlands Rd, Glasgow, G3 6HB
5	Sandstone Press Ltd	Dingwall	http://www.sandstonepress.com/	High St, Dingwall, Ross-Shire IV15
6	Luath Press Ltd	Edinburgh	http://www.luath.co.uk/	543/2 Castlehill, The Royal Mile, Edinburgh, EH1 2ND
7	Acair Ltd	Western Isles	http://www.acairbooks.com/	7 James St, Stornoway, Isle Of Lewis HS1 2QN
8	Association for Scottish Literary Studies	Glasgow	http://www.arts.gla.ac.uk/scotlit/asls/	7 University Gardens, University of Glasgow, Glasgow, G12
9	Barrington Stoke	Edinburgh	http://www.barringtonstoke.co.uk/	18 Walker St, Edinburgh, EH3 7LP
10	Black & White Publishing	Edinburgh	http://www.blackandwhitepublishing.com/	Ocean Dr, Edinburgh, EH6 6JL
11	Brown & Whittaker Publishing	Tobermory	http://www.brown-whittaker.co.uk/	Tobermory PA75 6PR
12	Brown, Son & Ferguson, Ltd	Glasgow	http://www.skipper.co.uk/	4-10 Darnley St, Glasgow, G41 2SD
13	Canongate Books	Edinburgh	http://www.canongate.tv/	14 High St, Edinburgh, EH1 1TE
14	Dionysia Press	Edinburgh	http://dionysiapress.wordpress.com/books/	Duddingston House, 105 Milton Rd W, Edinburgh, MEH15 1RB
15	Dudu Nsomba Publications	Glasgow	http://www.pamtondo.com/	5C Greystone Ave, Rutherglen, Glasgow, South Lanarkshire G73 3SN

8.5.2 Example - Publisher Setup Page (Scotland)

Ref	Employees	Titles to Date	Titles per Annum	Specialism	Specialism 2	Specialism 3	Specialism 4	Specialism 5	Language	Language 2	Language 3	Date Founded	
1	5	1.7	1.6	1					3	18	19	1946	5
2	2	1.6	1.5	2					3	19		2008	1
3	1	1.4	1.1	3					3			1995	2
4	2	1.5	1.2	4.1	4				3			2000	1
5	2	1.5	1.2	4	2				3	19		2002	1
6	2	1.6	1.3	3	4.1	4.2	4.3	4.4	3	18	19	1981	3
7	2	1.6	1.2	4	3				3	18	19	1978	4
8	1	1.6	1.2	4.2	2	4			3	18	19	1970	4
9	4	1.6	1.3	4.3	4				3			1998	2
10	3	1.6	1.4	4.1	4.2	3	4		3			1986	3
11	1	1.3	1.1	3					3			1985	3
12	3	1.5	1.1	3					3			1850	6
13	5	1.7	1.5	4.1	4.2	4			3			1973	4
14	1	1.4		4.4	4.1	4			3			1989	3
15	1	1.1		4.1	4.2	4			3			1993	2

8.5.3 Example – Publisher Connections Page (Scotland)

Ref	Market 1	Market 2	Market 3	Market 4	Market 5	Market 6	Imprint	Imprint 2	Bus. Aff.	Bus. Aff. 2	Bus. Aff. 3	Bus. Aff. 4	Bus. Aff. 5
1	2	3					1		2.18	2.14	3.4	2	3
2	4	5					-1		-1				
3	1	6					1		1				
4	1						1		4.1	6.1	4	6	
5	1	7					1		6.1	2.5	6	2	
6	1	3	6	8.1	10	8	1		5.1	5			
7	7	6	8	1.3	1		1		1				
8	1	2	3	4			2.3	2	3				
9	7	8					1		2.6	2			
10	1						1		2.7	6.1	2	6	
11	1	6					1		1				
12	9	1					1		1				
13	1						1		2.8	2			
14	1						1		1				
15	1	9					2.2	2	1				

Table 1 – Target Market to Business Affiliation

Ref	Exporting	Exporting 2	Exporting 3	Exporting 4	Exporting 5	Exporting 6	Rights Sales	Rights Sales 2	Rights Sales 3	Translation/ Importing	Translation/ Importing 2	Translation/ Importing 3	Domestic Translation
1	2.1.1	2.3.2	2.12.3	2.12	2.3		3			1			
2	2.8.1	2.8.2	2.11.1	2.12.1	2.12	2.8	3			1			
3	1						1			1			
4	2.4	2.8.3	2.11.1	2.8	2.11	2.3	3			2.1.1	2.1	2	
5	2.11						3			2.4.1	2.4	2	2.5
6	2.4.1.17	2.4.2.3	2.8.7.1	2.4	2.8	2.3	2.4	2.7	2.4.4	1			
7	2.4	2.3					1			2			2.5
8	1						1			1			
9	2.4.1.18	2.9.1.5	2.8.19	2.9.3	2.11.2.1	2.10.3	3			1			
10	1						3			2			2.6
11	1						1			1			
12	1						1			1			
13	2.8.22	2.12.1.10	2.9.1.2	2.9.4	2.11.2.2	2.11.1	3			2.9	2		
14	1						1			2.4.2	2.4	2	
15	1						1			2.5.1	2.5	2	

Table 2 - Export to Domestic Translation

Ref	Unsolicited Manuscript	Distributor	Distributor 2	Distributor 3	Sales Channels	Sales Channels 2	Sales Channels 3	Digital Products	Funding
1	1	2.27	2.2	2.3	1	5		2.1	2.4
2	2	1			1	3	4	2.1	2.1
3	1	2.1	2		2	3		2.3	1
4	2	2.22	2		1	3	4	2.2	1
5	2	2.1	2.22	2	1	2	3	2.2	3.1
6	2	2.16	2	2.24	2	3	4	2.2	-1
7	2	2.1	2		2	3	5	1	3.2
8	2.1	2.1	2		3	4	7	1	2.1
9	1	2.4	2		1	3	4	1	-1
10	2	2.22	2	2.24	1	2	3	2.2	1
11	2	1			4	2		1	1
12	1	1			4	3	2.1	1	1
13	2	2.5	2		1	2	3	2.2	1
14	-1	1			4	3		1	3.1
15	1.1	1			4	3		1	1

Table 3 - Unsolicited Manuscripts – Funding

8.6 - Examples of Catalan Database

8.6.1 Example - Publisher Name and Details (Catalonia)

Ref	Publisher	Based	Website	Address
1	Publicacions de l'Abadia de Montserrat	Barcelona	www.pamsa.cat	CL Ausiàs Marc, 92-98. 08013 Barcelona
2	A Buen Paso	Mataró	www.abuenpaso.com	AV Maresme, 495 9è 2a,08301 Mataró
3	Acali S.C.P.	Barcelona		CL Mestre i Puig, 3-B Casa Hunza,08810 Sant Pere de Ribes,
4	Editorial Acanto	Vallromanes	www.editorialacanto.com	CL Can Guiu, 9,08188 Vallromanes
5	Flamma Editorial S.L.	Barcelona	www.flammaeditorial.com	CL Niça, 13, Piso AT ,Pta 3, 08024 Barcelona
6	Actar	Barcelona	www.actar.com	CL Roca i Batlle, 2-4 Baixos,08023 Barcelona
X				
8	Afers de Comunicacio Visual	Barcelona	www.acvglobal.com	Passeig de Gràcia 24, 08007 Barcelona
X				
X				
11	Alba Editorial S.L.U	Barcelona	www.albaeditorial.es	Baixada de Sant Miquel, 1, bajos. 08002 Barcelona
12	Editorial Albesa S.L.	Barcelona	www.albesaeditorial.com	Plaza Manuel Corachán 2, 2º. 08017 Barcelona
13	Albur Producciones Editoriales	Barcelona	www.albur-libros.com/	Passeig del Taulat, 202-206, 2-1,08019 Barcelona
14	Ediciones Alfabia	Barcelona	www.edicionesalfabia.com	Rambla Catalunya, 118, 2º 2ª, 08006 Barcelona
15	Ediciones Alpha Decay	Barcelona	www.alphadecay.org	Gran Via Carles III, 94, 10º, 08028,Barcelona

8.5.2 Example - Publisher Setup (Catalonia)

Ref	Employees	Titles to Date	Titles Per Annum	Specialism	Specialism 2	Specialism 3	Specialism 4	Specialism 5	Specialism 6	Specialism 7	Language	Language 2	Language 3	Language 4	Language 5	Language 6	Language 7	Date Founded	
1	-1	1.6	-1	3	2	4.1	4.3	5.5	4	5	1							1950	4
2	1	1.3	-1	5	4.3	5.10	4				2							2008	1
3	2	1.6	-1	2	3						2							1996	2
4	1	1.6	-1	4.2	4.3	3	4				1	2						1987	3
5	1	1.1	1	4.2	4						1	2						2008	1
6	5	1.6	-1	1	6						1	2	3	4	5	6	7	1994	2
X																			
8	5	2	-1	3	4.3	5.1	8	5	4		1	2						1987	3
X																			
X																			
11	4	1.6		4.2	4.1	1	3	4.3	4		2							1993	2
12	3	1.1	1	1	3						2							2004	1
13	3	1.6	-1	5.10	5						2							2004	1
14	1	1.4	-1	4.1	4.2	4					2							2007	1
15	3	1.6	2	4.1	4.2	1	4				2							2002	1

8.5.3 Example – Publisher Connections (Catalonia)

Ref	Market	Market 2	Market 3	Market 4	Market 5	Market 6	Imprint	Imprint 2	Imprint 3	Bus. Aff.	Bus. Aff.	Bus. Aff.	Bus. Aff.	Bus. Aff.	Bus. Aff.	Bus. Aff.	Bus. Aff.
1	4	7	8	1.1	3	1	1			5.1	6.4	6.6	5	6			
2	1.2	8	1				1			5.1	3	5					
3	1.2	3	9	1			1			5.1	5						
4	1	9	8				1			5.1	5						
5	1						1			1							
6	2	9	3				2.4	2		3	5.1	5.2	5				
X																	
8	1	8	9				2.2.7	2.2	2	5.1	5						
X																	
X																	
11	1.2	2	3	8	8.1	1	2.1.31	2.1	2	1							
12	1.2	2	3	9	1		1			5.1	5						
13	1.2	8	1				3.4	3		2.18	5.1	2.16	2.17.1	2.17	2	5	2.17
14	1.2	3	1				1			5.1	5						
15	1.2	3	1				1			5.1	5						

Table 1 – Target Market to Business Affiliation

Ref	Exporting	Exporting 2	Exporting 3	Exporting 4	Exporting 5	Exporting 6	Rights Sales	Rights Sales 2	Translation/ Importing	Translation/ Importing 2	Translation/ Importing 3	Domestic Translation
1	-1						-1		2.4.6	2.4.7	2.4	
2	1						1		-1			
3	-1						-1		-1			
4	2.4.4.6	2.5	2.7.1	2.8.4			1		2			
5	1						2.2	2	2.4.11	2.4		
6	2.8.4	2.8.6	2.4.3	2.5	2.6	2.7.1	1		-1			
X												
8	2.4.3	2.6.1	2.8.2.8				-1		1			
X												
X												
11	2.2.2						2.2	2	2			
12	-1						2.2	2	2			
13	-1						1		2			
14	2.4.3.1	2.6.1.1	2.6.9. 1	2.6.6. 1			2.2	2	2			
15	2.4.3.2.4	2.6.1.2	2.6.6.2	2.6.7.1	2.6.9.1		2.2	2	2			

Table 2 - Export to Domestic Translation

Ref	Unsolicited Manuscript	Distributor	Distributor 2	Distributor 3	Distributor 4	Sales Channels	Sales Channels 2	Sales Channels 3	Sales Channels 4	Digital Products	Funding
1	-1	1.1	1			4	3	2		2.2	
2	1	2.16	2			2	3			1	
3	2	1				1	2	5		2.3	
4	1	2.130.	2			2	4	3		1	
5	2	1.1	1			3				2.2	
6	1.1	3	2			2.1	2	3	4	1	
X											
8	1.1	3	2			3	4	1	2	2.2	1
X											
X											
11	-1	2.49	2.5	2		1	2	3	4	1	
12	-1	2.3	2.4	2.5	2.6	1	2	3	4	1	
13	-1	2.15	2			1	2	3	4	1	1
14	1	2.16	2.20.	2.10.	2.17	1	3	2	5	1	
15	1	2.16	2.17	2.10.	2.18	1	3	2	5	1	

Table 3 - Unsolicited Manuscripts – Funding

8.6 - Tables of Results

8.6.1 Location

Scotland		Catalonia	
No	**Place**	**No**	**Place**
1	Ayr	2	Alzira (Valencia)
1	Barrhead	3	Badalona
1	Bishopbriggs	185	Barcelona
1	Blairgowrie	1	Bellcaire d'Empordà
1	Catrine	1	Cànoves i Samalús
1	Crieff	1	Cerdanyola del Vallès
2	Dalkeith	1	Corbera de Llobregat
1	Dalry	3	El Masnou
1	Dingwall	1	El Papiol
2	Doune	1	Esplugues de Llobregat
1	Dumbarton	1	Figueres
1	Dunbeath	1	Gandia (Valencia)
2	Dunblane	4	Girona
3	Dundee	1	Granollers
1	Dyke	1	La Roca del Vallès
1	East Kilbride	1	l'Hospitalet de Llobregat
34	Edinburgh	2	Lleida
1	Eyemouth	1	Mataró
1	Fearn	1	Paiporta (Valencia)
25	Glasgow	1	Sant Adrià de Besòs
1	Glendaruel	3	Sant Cugat del Vallès
1	Glenrothes	3	Sant Cugat del Vallès
3	Haddington	1	Sant Feliu de Llobregat
1	Iona	1	Sant Joan Despí
1	Irvine	1	Sant Pol de Mar
1	Isle of Skye	1	Santa Coloma de Queralt
1	Kinloss	1	Tarragona
1	Kirkcudbright	3	Teià
1	Livingston	1	Torroella de Montgrí
1	Moffat	1	Vallirana
1	Musselburgh	1	Vallromanes
1	Newtonmore	2	Valls
1	Orkney	2	Vic
1	Paisley	1	Viladasens
1	Perth	1	Viladecavalls
1	Peterhead	1	Vilafranca del Penedès
1	Pitlochry	1	Vilanova i la Geltrú
1	Prestonpans		
1	Renefrewshire		
1	Tobermory		
4	Western Isles		

8.6.2 No. of Employees

	Scotland		Catalonia	
Code	**No**	**%**	**No**	**%**
1	67	56.8	43	19.9
2	27	22.9	48	22.2
3	10	8.5	49	22.7
4	5	4.2	31	14.4
5	4	3.4	25	11.6
6	4	3.4	7	3.2
7	0	0	13	6.0
Total	**118**		**216**	

8.6.3 Titles

	Scotland				Catalonia			
	Titles to date		**Titles per year**		**Titles to date**		**Titles per year**	
Code	**No**	**%**	**No**	**%**	**No**	**%**	**No**	**%**
1	0	0	0	0	0	0	16	47.1
1.1	17	14.8	28	51.9	16	6.5	0	0.0
1.2	17	14.8	15	27.8	9	3.7	0	0.0
1.3	10	8.7	7	13.0	22	9.0	0	0.0
1.4	14	12.2	1	1.9	14	5.7	0	0.0
1.5	13	11.3	2	3.7	17	6.9	0	0.0
1.6	35	30.4	1	1.9	123	50.2	0	0.0
1.7	6	5.2	0	0	32	13.1	0	0.0
1.8	0	0	0	0	6	2.4	0	0.0
2	1	0.9	0	0	3	1.2	6	17.6
2.1	1	0.9	0	0	2	0.8	0	0.0
3	1	0.9	0	0	0	0	5	14.7
4	0	0	0	0	0	0	3	8.8
5	0	0	0	0	0	0	1	2.9
6	0	0	0	0	0	0	3	8.8
Total	**115**		**44**		**245**		**34**	

8.6.4 Specialisms

	Scotland		Catalonia	
Code	**No**	**%**	**No**	**%**
1	17	14.4	88	35.6
1.1	1	0.8	7	2.8
1.2	1	0.8	8	3.2
1.3	5	4.2	0	0.0
2	19	16.1	38	15.4
2.1	0	0.0	3	1.2
3	42	35.6	110	44.5
3.1	8	6.8	9	3.6
3.2	8	6.8	7	2.8
3.3	2	1.7	1	0.4
4	72	61.0	176	71.3
4.1	50	42.4	108	43.7
4.1.1	2	1.7	7	2.8
4.1.2	2	1.7	8	3.2
4.1.3	13	11.0	1	0.4
4.2	35	29.7	107	43.3
4.3	15	12.7	81	32.8
4.4	14	11.9	28	11.3
5	25	21.2	62	25.1
5.1	2	1.7	9	3.6
5.2	7	5.9	15	6.1
5.3	0	0.0	7	2.8
5.4	3	2.5	3	1.2
5.5	5	4.2	6	2.4
5.6	4	3.4	6	2.4
5.7	0	0.0	2	0.8
5.8	3	2.5	1	0.4
5.9	0	0.0	1	0.4
5.10.	0	0.0	7	2.8
5.11	2	1.7	5	2.0
5.12	0	0.0	2	0.8
5.13	3	2.5	6	2.4
6	2	1.7	13	5.3
6.1	0	0.0	9	3.6
7	2	1.7	17	6.9
8	2	1.7	4	1.6
9	5	4.2	9	3.6
Total	**118**		**247**	

8.6.5 Languages

	Scotland		Catalonia	
Code	**No**	**%**	**No**	**%**
1	0	0	163	66.0
2	0	0	213	86.2
3	113	95.8	43	17.4
4	0	0	12	4.9
5	0	0	19	7.7
6	0	0	7	2.8
7	0	0	13	5.3
8	0	0	7	2.8
9	0	0	4	1.6
10	0	0	7	2.8
11	0	0	4	1.6
12	0	0	4	1.6
13	0	0	3	1.2
14	0	0	2	0.8
15	0	0	1	0.4
16	0	0	2	0.8
17	0	0	1	0.4
18	16	13.6	0	0
19	20	16.9	0	0
total	**118**		**247**	

8.6.6 Date Founded

	Scotland		Catalonia	
Code	**No**	**%**	**No**	**%**
1	37	35.6	84	35.1
2	18	17.3	41	17.2
3	23	22.1	38	15.9
4	11	10.6	46	19.2
5	8	7.7	28	11.7
6	7	6.7	3	1.3
Total	**104**		239	

8.6.7 Target Markets

Code	Scotland No	Scotland %	Catalonia No	Catalonia %
1	72	61.5	161	65.2
1.1	0	0.0	25	10.1
1.2	0	0.0	64	25.9
1.3	12	10.3	0	0.0
1.4	1	0.9	0	0.0
1.5	0	0.0	0	0.0
2	14	12.0	72	29.1
3	8	6.8	39	15.8
4	10	8.5	41	16.6
4.1	2	1.7	10	4.0
5	5	4.3	28	11.3
6	22	18.8	13	5.3
7	24	20.5	39	15.8
8	20	17.1	79	32.0
8.1	3	2.6	4	1.6
9	30	25.6	86	34.8
9.1	0	0.0	18	7.3
10	15	12.8	12	4.9
total	117		247	

8.6.8 Imprint

Code	Scotland No	Scotland %	Code	Catalonia No	Catalonia %
1	72	61.5	1	152	61.8
2	44	37.6	2	89	36.2
2.1	9	7.7	2.1	70	28.5
2.1.1	0	0.0	2.1.1	23	9.3
2.1.2	2	1.7	2.1.2	1	0.4
2.1.3	2	1.7	2.1.3	1	0.4
2.1.3.1	0	0.0	2.1.4	0	0.0
2.1.4	1	0.9	2.1.5	1	0.4
2.1.5	1	0.9	2.1.6	1	0.4
2.1.6	1	0.9	2.1.7	2	0.8
2.2	15	12.8	2.1.8	2	0.8
2.3	11	9.4	2.1.9	1	0.4
2.4	5	4.3	2.1.10.	1	0.4
2.5	2	1.7	2.1.11	0	0.0
2.5.1	1	0.9	2.1.12	1	0.4
3	1	0.9	2.1.13	1	0.4
Total	117		2.1.14	2	0.8
			2.1.15	1	0.4
			2.1.16	1	0.4
			2.1.17	1	0.4
			2.1.18	1	0.4
			2.1.19	3	1.2
			2.1.20.	2	0.8
			2.1.21	0	0.0
			2.1.22	1	0.4
			2.1.23	1	0.4
			2.1.24	3	1.2
			2.1.25	2	0.8
			2.1.26	2	0.8
			2.1.27	1	0.4
			2.1.28	2	0.8
			2.1.29	4	1.6
			2.1.30.	2	0.8
			2.1.31	1	0.4
			2.1.32	1	0.4
			2.1.33	4	1.6
			2.2	10	4.1
			2.2.1	1	0.4
			2.2.2	1	0.4
			2.2.3	1	0.4
			2.2.4	1	0.4
			2.2.5	1	0.4
			2.2.6	1	0.4
			2.2.7	1	0.4
			2.2.8	1	0.4
			2.3	3	1.2
			2.3.1	0	0.0
			2.3.2	3	1.2
			2.4	6	2.4
			2.4.1	0	0.0
			2.4.2	1	0.4
			2.4.3	1	0.4
			2.4.4	1	0.4
			2.5	2	0.8
			2.5.1	1	0.4
			2.5.2	1	0.4
			3	6	2.4
			3.1	0	0.0
			3.2	2	0.8
			3.3	1	0.4
			3.4	2	0.8
			3.5	1	0.4
			Total	246	

8.6.9 Business Affiliation

	Scotland			Catalonia	
Code	No	%	Code	No	%
1	40	35.4	1	47	19.0
2	26	23.0	2	18	7.3
2.1	1	0.9	2.1	0	0.0
2.2	1	0.9	2.2	2	0.8
2.3	1	0.9	2.3	1	0.4
2.4	1	0.9	2.4	1	0.4
2.5	2	1.8	2.5	1	0.4
2.6	1	0.9	2.6	1	0.4
2.7	1	0.9	2.7	1	0.4
2.8	1	0.9	2.8	1	0.4
2.9	1	0.9	2.9	1	0.4
2.10.	1	0.9	2.10.	0	0.0
2.11	2	1.8	2.11	1	0.4
2.12	2	1.8	2.12	1	0.4
2.13	1	0.9	2.13	1	0.4
2.14	3	2.7	2.14	1	0.4
2.15	0	0.0	2.15	1	0.4
2.16	0	0.0	2.16	1	0.4
2.17	1	0.9	2.17	4	1.6
2.18	1	0.9	2.18	1	0.4
2.19	1	0.9	2.19	1	0.4
2.20.	1	0.9	2.20.	0	0.0
2.21	1	0.9	2.21	1	0.4
3	32	28.3	2.22	1	0.4
4	5	4.4	2.23	1	0.4
4.1	1	0.9	2.24	0	0.0
5	41	36.3	2.25	1	0.4
5.1	34	30.1	2.26	0	0.0
5.2	11	9.7	2.27	1	0.4
5.3	1	0.9	3	8	3.2
6	5	4.4	3.1	0	0.0
6.1	4	3.5	3.2	0	0.0
Total	113		3.3	1	0.4
			3.4	1	0.4
			3.5	1	0.4
			3.6	1	0.4
			3.7	1	0.4
			3.8	1	0.4
			3.9	1	0.4
			4	21	8.5
			4.1	16	6.5
			4.2	1	0.4
			4.3	1	0.4
			4.4	0	0.0
			4.5	0	0.0
			4.6	1	0.4
			5	170	68.8
			5.1	171	69.2
			5.2	2	0.8
			5.3	3	1.2
			5.4	0	0.0
			5.5	1	0.4
			6	45	18.2
			6.1	2	0.8
			6.2	1	0.4
			6.3	1	0.4
			6.4	31	12.6
			6.5	2	0.8
			6.6	42	17.0
			Total	247	

8.6.10 Exporting

	Scotland		Catalonia	
Code	No	%	No	%
1	66	60	96	42.7
2	44	40	129	57.3
2.1	16	11.8	34	15.1
2.1.1	1	0.9	0	0.0
2.1.2	1	0.9	0	0.0
2.1.3	0	0	0	0.0
2.1.4	0	0	18	8.0
2.1.5	0	0	0	0.0
2.1.6	0	0	0	0.0
2.1.7	1	0.9	0	0.0
2.2	1	0	19	8.4
2.2.1	0	0	1	0.4
2.2.2	0	0	6	2.7
2.2.3	0	0	3	1.3
2.2.4	0	0	1	0.4
2.2.5	0	0	4	1.8
2.2.6	0	0	0	0.0
2.2.7	1	0.9	0	0.0
2.3	32	26.4	2	0.9
2.3.1	0	0	0	0.0
2.3.2	3	0	0	0.0
2.4	20	18.2	4	1.8
2.4.1	18	16.4	32	14.2
2.4.1.1	1	0.9	0	0.0
2.4.1.2	1	0.9	0	0.0
2.4.1.3	2	1.8	0	0.0
2.4.1.4	0	0	1	0.4
2.4.1.5	0	0	9	4.0
2.4.1.6	0	0	1	0.4
2.4.1.7	0	0	1	0.4

Code					Code				
2.4.1.8	0	0	1	0.4	2.6.1.3	0	0	1	0.4
2.4.1.9	0	0	1	0.4	2.6.1.4	0	0	4	1.8
2.4.1.10	0	0	1	0.4	2.6.1.5	0	0	1	0.4
2.4.1.11	1	0.9	0	0.0	2.6.1.6	0	0	0	0.0
2.4.1.12	0	0	0	0.0	2.6.1.7	0	0	2	0.9
2.4.1.13	1	0.9	0	0.0	2.6.1.8	0	0	1	0.4
2.4.1.14	1	0.9	0	0.0	2.6.1.9	0	0	0	0.0
2.4.1.15	2	1.8	0	0.0	2.6.2	0	0	8	3.6
2.4.1.16	0	0	0	0.0	2.6.3	0	0	5	2.2
2.4.1.17	1	0.9	0	0.0	2.6.3.1	0	0	1	0.4
2.4.1.18	2	1.8	0	0.0	2.6.4	0	0	9	4.0
2.4.1.19	1	0.9	0	0.0	2.6.4.1	0	0	2	0.4
2.4.2	5	4.5	3	1.3	2.6.4.2	0	0	1	0.4
2.4.2.1	1	0.9	0	0.0	2.6.5	0	0	27	12.0
2.4.2.2	0	0	0	0.0	2.6.5.1	0	0	1	0.4
2.4.2.3	2	1.8	0	0.0	2.6.5.2	0	0	2	0.9
2.4.3	0	0	59	26.2	2.6.5.3	0	0	1	0.4
2.4.3.1	0	0	1	0.4	2.6.5.4	0	0	1	0.4
2.4.3.2	0	0	0	0.0	2.6.5.5	0	0	1	0.4
2.4.3.3	0	0	1	0.4	2.6.5.6	0	0	1	0.4
2.4.3.4	0	0	2	0.9	2.6.5.7	0	0	0	0.0
2.4.3.5	0	0	1	0.4	2.6.6	0	0	41	18.2
2.4.3.6	0	0	1	0.4	2.6.6.1	0	0	1	0.4
2.4.3.7	0	0	2	0.9	2.6.6.2	0	0	1	0.4
2.4.3.8	0	0	1	0.4	2.6.6.3	0	0	2	0.9
2.4.3.9	0	0	1	0.4	2.6.6.4	0	0	2	0.9
2.4.3.10	0	0	1	0.4	2.6.6.5	0	0	1	0.4
2.4.3.11	0	0	1	0.4	2.6.6.6	0	0	1	0.4
2.5	0	0	21	9.3	2.6.6.7	0	0	1	0.4
2.5.1	0	0	8	3.6	2.6.6.8	0	0	1	0.4
2.5.2	0	0	8	3.6	2.6.6.9	0	0	0	0.0
2.5.2.1	0	0	2	0.9	2.6.6.10	0	0	1	0.4
2.5.3	0	0	16	7.1	2.6.6.11	0	0	1	0.4
2.5.3.1	0	0	1	0.4	2.6.6.12	0	0	1	0.4
2.5.3.2	0	0	1	0.4	2.6.6.13	0	0	0	0.0
2.5.3.3	0	0	3	1.3	2.6.6.14	0	0	1	0.4
2.5.4	0	0	11	4.9	2.6.7	0	0	36	16.0
2.5.4.1	0	0	1	0.4	2.6.7.1	0	0	1	0.4
2.5.4.2	0	0	1	0.4	2.6.7.2	0	0	1	0.4
2.5.4.3	0	0	1	0.4	2.6.7.3	0	0	5	2.2
2.5.4.4	0	0	1	0.4	2.6.7.4	0	0	1	0.4
2.5.5	0	0	11	4.9	2.6.7.5	0	0	1	0.4
2.5.5.1	0	0	1	0.4	2.6.8	0	0	20	8.9
2.5.5.2	0	0	1	0.4	2.6.8.1	0	0	1	0.4
2.5.5.3	0	0	1	0.4	2.6.8.2	0	0	1	0.4
2.5.6	0	0	7	3.1	2.6.8.3	0	0	2	0.9
2.5.6.1	0	0	1	0.4	2.6.8.4	0	0	1	0.4
2.5.6.2	0	0	0	0.0	2.6.8.5	0	0	1	0.4
2.5.7	0	0	3	1.3	2.6.8.6	0	0	0	0.0
2.6	2	1.8	29	12.9	2.6.8.7	0	0	1	0.4
2.6.1	0	0	45	20.0	2.6.9	0	0	24	10.7
2.6.1.1	0	0	1	0.4	2.6.9.1	0	0	1	0.4
2.6.1.2	0	0	2	0.9	2.6.9.2	0	0	1	0.4

Code	n	%	n	%
2.6.9.3	0	0	1	0.4
2.6.9.4	0	0	1	0.4
2.6.10	2	1.8	3	1.3
2.6.10.1	0	0	1	0.4
2.6.10.2	0	0	1	0.4
2.6.10.3	0	0	0	0.0
2.6.10.4	0	0	1	0.4
2.7	2	1.8	2	0.9
2.7.1	0	0	12	5.3
2.7.1.1	0	0	2	0.9
2.7.1.2	0	0	1	0.4
2.8	16	14.5	12	5.3
2.8.1	5	4.5	1	0.4
2.8.1.1	1	0.9	0	0.0
2.8.2	1	0.9	5	2.2
2.8.2.1	0	0	1	0.4
2.8.2.2	0	0	1	0.4
2.8.3	1	0.9	0	0.0
2.8.4	0	0	14	6.2
2.8.4.1	0	0	1	0.4
2.8.4.2	0	0	1	0.4
2.8.4.3	0	0	1	0.4
2.8.5	0	0	0	0.0
2.8.6	0	0	8	3.6
2.8.6.1	0	0	1	0.4
2.8.6.2	0	0	0	0.0
2.8.6.3	0	0	1	0.4
2.8.7	2	1.8	5	2.2
2.8.7.1	2	1.8	1	0.4
2.8.7.2	0	0	0	0.0
2.8.8	0	0	6	2.7
2.8.8.1	0	0	0	0.0
2.8.8.2	0	0	0	0.0
2.8.8.3	0	0	1	0.4
2.8.9	0	0	2	0.9
2.8.10	0	0	1	0.4
2.8.10.1	0	0	1	0.4
2.8.11	0	0	2	0.9
2.8.12	0	0.9	1	0.9
2.8.12.1	1	0.9	1	0.4
2.8.12.2	0	0	0	0.0
2.8.13	0	0	1	0.4
2.8.14	0	0	1	0.4
2.8.15	0	0	0	0.0
2.8.16	0	0	2	0.4
2.8.16.1	0	0	1	0.4
2.8.17	1	0.9	1	0.4
2.8.17.1	0	0	1	0.4
2.8.18	2	1.8	0	0.0
2.8.19	2	1.8	0	0.0
2.8.20	0	0.0	0	0.0
2.8.21	0	0.0	0	0.0
2.8.22	1	0.9	0	0.0

Code	n	%	n	%
2.9	5	4.5	2	0.9
2.9.1	5	4.5	1	0.4
2.9.1.1	1	0.9	0	0.0
2.9.1.2	2	1.8	0	0.0
2.9.1.3	0	0	0	0.0
2.9.1.4	1	0.91	0	0.0
2.9.1.5	1	0.91	0	0.0
2.9.2	1	0.91	1	0.4
2.9.3	1	0.91	0	0.0
2.9.4	1	0.91	0	0.0
2.10.	1	0.91	2	0.9
2.10.1	0	0	2	0.9
2.10.2	1	0.9	3	1.3
2.10.3	1	0.9	0	0.0
2.11	11	10.0	3	1.3
2.11.1	3	2.7	2	0.9
2.11.1.1	0	0.0	0	0.0
2.11.1.2	0	0.0	0	0.0
2.11.1.3	0	0.0	0	0.0
2.11.2	2	1.8	1	0.4
2.11.2.1	1	0.9	0	0.0
2.11.2.2	1	0.9	0	0.0
2.11.3	1	0.0	3	1.3
2.11.4	3	2.7	1	0.4
2.11.4.1	3	2.7	0	0.0
2.11.5	0	0	2	0.9
2.11.6	0	0	1	0.4
2.11.7	0	0	1	0.4
2.11.8	1	0.9	0	0.0
2.11.8.1	0	0.0	0	0.0
2.11.9	1	0.9	0	0.0
2.11.10	0	0.0	0	0.0
2.12	15	13.6	2	0.9
2.12.1	9	8.2	4	1.8
2.12.1.1	1	0.9	0	0.0
2.12.1.2	0	0.0	0	0.0
2.12.1.3	0	0.0	0	0.0
2.12.1.4	1	0.9	0	0.0
2.12.1.5	1	0.9	0	0.0
2.12.1.6	1	0.9	0	0.0
2.12.1.7	1	0.9	0	0.0
2.12.1.8	1	0.9	0	0.0
2.12.1.9	0	0.0	0	0.0
2.12.1.10	1	0.9	0	0.0
2.12.2	5	4.5	2	0.9
2.12.2.1	2	1.8	0	0.0
2.12.2.2	1	0.9	0	0.0
2.12.2.3	1	0.9	0	0.0
2.12.2.4	1	0.9	0	0.0
2.12.3	2	1.8	0	0.0
2.12.4	1	0.9	0	0.0
2.12.5	0	0.0	0	0.0
Total	110		225	

8.6.11 Rights Sales (Foreign)

	Scotland		Catalonia	
Code	No	%	No	%
1	76	67.9	70	32.7
2	4	3.6	141	65.9
2.1	2	1.8	0	0.0
2.2	0	0.0	54	25.2
2.3	0	0.0	0	0.0
2.4	3	2.7	0	0.0
2.4.1	1	0.9	0	0.0
2.4.2	0	0.0	0	0.0
2.4.3	0	0.0	0	0.0
2.4.3.1	1	0.9	0	0.0
2.4.4	2	1.8	0	0.0
2.4.5	1	0.9	0	0.0
2.5	0	0.0	0	0.0
2.6	0	0.0	0	0.0
2.7	1	0.9	0	0.0
2.7.1	0	0.0	0	0.0
2.7.2	1	0.9	0	0.0
2.7.3	1	0.9	0	0.0
2.8	1	0.9	0	0.0
3	31	27.7	2	0.9
Total	112		214	

8.6.12 Importing (Rights/ Translation)

	Scotland		Catalonia	
Code	No	%	No	%
1	89	76.1	40	17.5
1.1	3	2.6	26	11.4
2	28	23.9	160	69.9
2.1	4	3.4	4	1.7
2.1.1	2	1.7	0	0.0
2.1.2	0	0.0	3	1.3
2.2	0	0.0	1	0.4
2.2.1	0	0.0	1	0.4
2.3	0	0.0	0	0.0
2.4	5	4.3	5	2.2
2.4.1	1	0.9	0	0.0
2.4.2	1	0.9	0	0.0
2.4.3	1	0.9	2	0.9
2.4.4	1	0.9	0	0.0
2.4.5	2	1.7	0	0.0
2.4.6	1	0.9	4	1.7
2.4.6.1	0	0	1	0.4
2.4.7	0	0	4	1.7

2.4.8	0	0	1	0.4
2.4.9	0	0	2	0.9
2.4.10	0	0	0	0.0
2.4.11	0	0	2	0.9
2.4.12	0	0	2	0.9
2.5	2	1.7	1	0.4
2.5.1	1	0.9	0	0.0
2.6	0	0	1	0.4
2.6.1	0	0	1	0.4
2.7.1	0	0	3	1.3
2.7.2	0	0	1	0.4
2.8	1	0.9	1	0.4
Total	117		229	

8.6.13 Translation (Domestic)

	Scotland		Catalonia	
Code	No	%	No	%
1	4	33.3	27	69.2
2	0	0.0	2	5.1
2.1	0	0.0	5	12.8
2.2	0	0.0	7	17.9
2.3	0	0.0	2	5.1
2.4	0	0.0	2	5.1
2.5	5	41.7	0	0
2.6	1	8.3	0	0
2.7	2	16.7	0	0
2.8	2	16.7	0	0
2.9	1	8.3	0	0
2.10.	1	8.3	0	0
2.11	0	0	0	0
Total	12		39	

8.6.14 Unsolicited Manuscripts

	Scotland		Catalonia	
Code	No	%	No	%
1	50	43.9	61	30.8
1.1	6	5.3	65	32.8
2	51	44.7	70	35.4
2.1	7	6.1	2	1.0
Total	114		198	

8.6.15 Domestic Distribution

	Scotland			Catalonia	
Code	No	%	Code	No	%
1	71	61.2	1	115	46.9
1.1	1	0.9	1.1	37	15.1
2	65	56.0	2	173	70.6
2.1	29	25.0	2.1	6	2.4
2.2	5	4.3	2.2	3	1.2
2.3	2	1.7	2.3	8	3.3
2.4	1	0.9	2.4	1	0.4
2.5	2	1.7	2.5	13	5.3
2.6	2	1.7	2.6	7	2.9
2.7	2	1.7	2.7	2	0.8
2.8	1	0.9	2.8	11	4.5
2.9	1	0.9	2.9	25	10.2
2.10.	2	1.7	2.10.	38	15.5
2.11	2	1.7	2.11	3	1.2
2.12	2	1.7	2.12	1	0.4
2.13	0	0.0	2.13	32	13.1
2.14	2	1.7	2.14	19	7.8
2.15	1	0.9	2.15	1	0.4
2.16	3	2.6	2.16	17	6.9
2.17	1	0.9	2.17	34	13.9
2.18	1	0.9	2.18	15	6.1
2.19	1	0.9	2.19	25	10.2
2.20.	0	0.0	2.20.	10	4.1
2.21	1	0.9	2.21	4	1.6
2.22	4	3.4	2.22	6	2.4
2.23	1	0.9	2.23	9	3.7
2.24	9	7.8	2.24	4	1.6
2.25	1	0.9	2.24.1	1	0.4
2.26	1	0.9	2.25	12	4.9
2.27	1	0.9	2.26	3	1.2
2.28	1	0.9	2.27	7	2.9
2.29	1	0.9	2.28	1	0.4
2.30.	0	0.0	2.29	12	4.9
2.31	0	0.0	2.30.	18	7.3
2.32	0	0.0	2.31	8	3.3
2.33	2	1.7	2.32	5	2.0
2.34	1	0.9	2.33	2	0.8
3	2	1.7	2.34	39	15.9
Total	116		2.35	9	3.7
			2.36	16	6.5
			2.37	16	6.5
			2.39	7	2.9
			2.40.	1	0.4
			2.41	2	0.8
			2.42	16	6.5
			2.43	1	0.4
			2.44	16	6.5
			2.45	1	0.4
			2.46	6	2.4
			2.47	7	2.9
			2.48	3	1.2
			2.49	20	8.2
			2.50.	10	4.1
			2.51	7	2.9
			2.52	3	1.2
			2.53	3	1.2
			2.54	7	2.9
			2.55	1	0.4
			2.56	1	0.4
			2.57	6	2.4
			2.58	3	1.2
			2.59	1	0.4
			2.60.	3	1.2
			2.61	3	1.2
			2.62	8	3.3
			2.63	2	0.8
			2.64	8	3.3
			2.65	1	0.4
			2.66	9	3.7
			2.67	4	1.6
			2.68	4	1.6
			2.69	1	0.4
			2.70.	1	0.4
			2.71	1	0.4
			2.72.1	1	0.4
			2.73	1	0.4
			2.74	1	0.4
			2.75	4	1.6
			2.76	1	0.4
			2.77	2	0.8
			2.78	1	0.4
			2.79	1	0.4
			2.80.	10	4.1
			2.83	4	1.6
			2.84	2	0.8
			2.85	1	0.4
			2.86	3	1.2
			2.87	1	0.4
			2.88	2	0.8
			2.89	3	1.2
			2.90.	3	1.2

			2.91	1	0.4
			2.92	1	0.4
			2.93	1	0.4
			2.94	1	0.4
			2.95	2	0.8
			2.96	3	1.2
			2.97	2	0.8
			2.98	1	0.4
			2.99	1	0.4
			2.100.	3	1.2
			2.101	1	0.4
			2.102	3	1.2
			2.104	1	0.4
			2.105	4	1.6
			2.106	4	1.6
			2.107	1	0.4
			2.109	1	0.4
			2.110.	1	0.4
			2.111	2	0.8
			2.112	3	1.2
			2.113	1	0.4
			2.114	1	0.4
			2.116	2	0.8
			2.117	3	1.2
			2.119	1	0.4
			2.120.	1	0.4
			2.121	1	0.4
			2.123	1	0.4
			2.125	1	0.4
			2.126	1	0.4
			2.127	1	0.4
			2.128	1	0.4
			2.129	1	0.4
			2.130.	2	0.8
			2.131	1	0.4
			2.132	1	0.4
			2.133	1	0.4
			2.135	1	0.4
			2.136	1	0.4
			2.137	1	0.4
			2.138	1	0.4
			2.139	1	0.4
			2.140.	1	0.4
			2.141	1	0.4
			2.142	26	10.6
			3	43	17.6
			Total	245	

8.6.16 Sales Channels

	Scotland		Catalonia	
Code	No	%	No	%
1	31	26.5	163	66.0
2	65	55.6	214	86.6
2.1	3	2.6	38	15.4
3	63	53.8	227	91.9
4	81	69.2	159	64.4
5	68	58.1	169	68.4
6	11	9.4	7	2.8
7	21	17.9	9	3.6
8	1	0.9	17	6.9
9	1	0.9	39	15.8
10	0	0	5	2.0
11	0	0	6	2.4
Total	117		247	

8.6.17 Digital Products

	Scotland		Catalonia	
Code	No	%	No	%
1	71	61.2	134	55.4
2	46	39.7	99	40.9
2.1	11	9.5	10	4.1
2.2	29	25.0	72	29.8
2.3	6	5.2	25	10.3
2.4	0	0.0	1	0.4
2.5	0	0.0	4	1.7
2.6	2	1.7	1	0.4
3	1	0.9	21	8.7
Total	116		242	

8.6.17 Funding

Code	Scotland		Catalonia	
	No	%	No	%
1	68	61.3	7	50
2	21	18.9	3	21.4
2.1	3	2.7	0	0
2.2	4	3.6	1	7.1
2.3	7	6.3	1	7.1
2.4	2	1.8	0	0
2.5	2	1.8	1	7.1
2.6	11	9.9	0	0
2.7	0	0.0	0	0
2.8	0	0.0	0	0
3	11	9.9	3	21.4
3.1	4	3.6	0	0
3.2	3	2.7	2	14.3
3.3	0	0.0	1	7.1
3.4	0	0.0	0	0
3.5	0	0.0	0	0
3.6	3	2.7	0	0
3.7	2	1.8	0	0
3.8	1	0.9	0	0
3.9	1	0.9	0	0
3.10.	1	0.9	0	0
3.11	0	0.0	0	0
3.12	0	0.0	0	0
4	1	0.9	0	0
4.1	1	0.9	0	0
Total	**111**		**14**	

8.7.1 - List of Surveyed Publishers (Catalonia)

REF	Publisher	REF	Publisher	REF	Publisher
1	PAMSA	55	Editorial Claret	115	Ediciones Glénat
2	A Buen Paso	56	Clie	116	Global Rhythm Press
3	Acali S.C.P.	57	Clivis Publicaciones	117	GRAO
4	Editorial Acanto	58	Coco Books	118	Santillana
5	Flamma Editorial S.L.	59	Columna Edicions	119	Herder Editorial
6	Actar	60	Editorial Comanegra		
8	ACV	61	Combel Editorial	121	Edicions Hipotesi
11	Alba Editorial S.L.U	63	Editorial Corimbo S.L.	122	Editorial Hispano-Europea
12	Editorial Albesa S.L.	64	Cossetania/lectio	123	Hora
13	Albur Prod. Editoriales	65	Editorial Critica	124	Editorial Horsori
14	Ediciones Alfabia	66	Cromosoma	125	Arola Editors
15	Ediciones Alpha Decay	67	Editorial Cruilla	126	Editorial Iberia
16	Editorial Alpha	68	Ediciones La Cupula	127	Icaria Editorial
17	Editorial Alpina	69	Curbet Edicions	128	Institut d'Estudis Catalans
18	Editorial Alreves	70	Curial Edicions Catalanes	130	Editorial Inde
19	Revista Altair	71	Edicions DAU	131	Index Books
21	Ediciones Ambar	73	Edicions Destino	133	Inforbook's Ediciones
22	Anagrama	77	Dinsic Publicacions Musicals	134	ING Edicions
23	EPC Andana	78	Distrimapas - Telstar S.L.	135	Editorial Intermed 22
24	Angle Editorial	79	Dobleerre Editorial	137	J&C Ediciones Medicas
25	Animallibres	80	Duomo Ediciones	139	Editorial Juventud
26	Edicions a Peticio	81	DUXELM	140	Editorial Kairos
27	Ara	82	Edebe	141	Kolina
30	Libros del Asteroide	83	Edhasa	142	Laertes Editorial S.A.
31	Alhena S.L.	84	Edicions 62	143	Laia Libros
32	Ediciones B	85	Edicromo	145	Librooks Barcelona
33	Bang Ediciones	87	Edigol ediciones	146	la Liebre de Marzo
34	Editorial Barcanova	88	Edikamed S.L.	147	Los Libros del Lince
35	Editorial Barcino	90	Editorial UOC	148	Lunwerg Editores
36	Barcelona Multimedia	91	Editorial Efados	149	Lynx Edicions
37	Barril Barral	92	Eina d'Escola	150	Malsinet Editor
38	Editorial Base	93	Ekare Europa	151	Marcombo
39	Edicions Baula	94	Ediciones Elfos	152	Marge Books
40	Bellaterra Edicions	95	Elsevier Espana	154	Ediciones Mayo
42	Bibliogemma	96	Enciclopedia Catalana	155	Ediciones Medici
43	Blackie Books	97	Editorial Escua	156	Editorial Mediterrania
44	Editorial de Musica Boileau	98	Editorial Fisa Escudo de Oro	157	Mediuscula
45	Bonal /Somoslibros	99	Eumo Editorial	158	Editorial Milenio
46	Antoni Bosch Editor	100	Ediciones Experiencia	161	Editorial Minuscula
47	Editorial Bosch	105	Ediciones Folio	162	Miret Editorial
48	J.M. Bosch Editor	106	Fragmenta Editorial	163	M. Moleiro Editor
49	Brotons & Mercadal	107	(Futurbox Project) Ático de los Libros	164	Instituto Monsa de Ediciones
50	Editorial Cabaret Voltaire	109	La Galera	165	Montagud Editores
51	Edicions Cadi	111	Gedisa	166	MTM Editores
52	La Campana	112	Gemser Publications S.L.	167	NAONO
53	Editorial Casals	113	Gigamesh	168	Naturart (BLUME)
54	CPL	114	Editorial Gustavo Gili	170	Editorial Noray

REF	Publisher	REF	Publisher	REF	Publisher
171	Norma Editorial	216	Editorial Seix Barral	270	Editorial Portic
172	Editorial Nortesur	217	Associacio de Mestres Rosa Sensat	271	Salsa books
173	Noufront	218	Bellaterra Música Edicions	272	la Butxaca
174	Ediciones Obelisco	219	Ediciones del Serbal	273	Estrella Polar
175	Editorial Oceano	220	Shinden Ediciones	274	Educaula
176	Ediciones Octaedro	221	Editorial Libros del Silencio	275	El Aleph
178	Ediciones Omega	222	Símbol Editors	276	Ediciones Peninsula
181	Pabst & Pesch	223	Editorial Sirpus	277	Ediciones luciernaga
182	Panini Espana	224	Sleepyslaps S.L.	278	Timun Mas/infantil
184	Parramon Ediciones	227	Larousse Editorial	281	Edicions Bromera
185	Periferia Music	228	Taranna Edicions	282	Algar Editorial
187	Picobello Publishing	229	Editorial Teide	283	Edicions Saldonar
188	Editorial Planeta de Agostini	230	Terapias Verdes	285	Editorial Meteora
189	Editorial Planeta	232	Thule Ediciones	286	Pol.len Edicions
190	Plataforma Editorial	233	Tibidabo Edicions	287	Editorial Riu Blanc
191	Random House Mondadori	234	Triangle Postals	288	Tandem Edicions
192	La Poesia, Senor Hidalgo, Editor	235	Trito Edicions	289	Liniazero
193	Ediciones Poligrafa	236	Tusquets Editores	293	Témenos Edicions
194	Profit Editorial Immobiliaria	238	Edicions de la Universitat Politecnica de Catalunya	294	Austral
195	Proteus Libros y Servicios Editoriales	239	Ediciones Urano	295	Oniro
196	Prous Science	240	Editorial de Vecchi	296	Ariel
197	PUNTEX	242	Ediciones Vicens Vives	297	Zenith
198	Acantilado - Quaderns Crema	243	Editorial Viceversa	298	Esencia
200	RBA Collecionables	244	Viena Serveis Editorials	299	Libros Cupula
202	Reditar Libros	246	Why Worry	300	Geoplaneta
203	Editorial Reverte	247	Zendrera Zariquiey	301	Deusto
204	R.M. Verlag	248	Brau Edicions	302	Gestion 2000
205	Ediciones Robinbook S.L.	251	Edicions l'Alber S.L. Gurb	303	Alienta
206	Roca Editorial de Libros	252	Edicions Vitel.la	304	Emecé
208	Rossell Books	253	El Cep I la Nansa Edicions	305	Ediciones Mr
209	Sajalin Editores	256	Llibresdel Segle	306	Backlist
210	Ediciones Salamandra	257	Manel Padura S.L.	307	Temas De Hoy
211	Editorial Salvat	260	Obrador Edendum	308	Espasa
212	Salvatella Editorial	261	Pages Editors S.L.		
213	Ediciones de Belloch	264	Libros del Zorro Rojo		
214	Sapiens/Ara	266	Proa Editors		
215	Scyla Editores	267	Editorial Empuries		

8.7.2 - List of Surveyed Publishers (Scotland)

REF	Publisher	REF	Publisher	REF	Publisher
1	Edinburgh University Press	46	Christian Focus Publications Ltd	97	The Saltire Society
2	Bright Red Publishing	47	Clan Books	99	Scottish Children & Cultural Press
3	Hallewell Publications	48	Continuing Education Gateway	100	Scottish Natural Heritage
4	Saraband	50	Dundee City Council - Central Library/School Library Service	101	Scottish Text Society
5	Sandstone Press Ltd	51	Dundee University Press Ltd	102	Scottish Society for Northern Studies
6	Luath Press Ltd	52	East Lothian Library Services	103	Shoving Leopard
7	Acair Ltd	53	Edpax International Ltd	104	Spartan Press
8	Association for Scottish Literary Studies	54	Elsevier Ltd	105	Sportscotland
9	Barrington Stoke	55	The Ernest Press	106	Stenlake Publishing
10	Black & White Publishing	56	Fidra Books	107	Taigh Na Teud
11	Brown & Whittaker Publishing	57	Findhorn Press	108	The Publishing Cupboard
12	Brown, Son & Ferguson Ltd	58	Forestry Commission	109	TJ Publishers
13	Canongate Books	59	Fort Publishing Ltd	110	Two Ravens Press
14	Dionysia Press	60	Freight	111	West Dunbartonshire Libraries
15	Dudu Nsomba Publications	62	Glasgow Museums	112	Wild Goose Publications
16	Dunedin Academic Press	63	Glen Murray Publishing	113	Witherby publishing group
17	Fledgling Press Ltd	64	Grace Note Publications	118	Bill Lawson Publications
18	Floris Books	65	GW Publishing	122	Cauldron Press Ltd (Lyrical Scotland)
19	The Gleneil Press	66	W Green	127	Clann Tuirc
20	Goblinshead	67	Handsel Press	128	Clàr
21	Hachette Scotland (Defunct)	68	Hardie Press	133	D C Thomson
22	Hodder Gibson	69	HarperCollins	137	Geddes and Grosset
23	Mainstream Publishing	70	Harvey Maps Services Ltd	141	Leamington Books
24	Neil Wilson Publishing Ltd	71	Islands Book Trust	147	Stòrlann
25	The New Iona Press	72	Kea publishing	149	The Grimsay Press
26	Saint Andrew Press	73	Kettillonia	153	Kohl Publishing
27	Serafina Press	74	Koo Press (Happenstance Press)	154	Lomond Books
28	Strident Publishing Ltd	76	Leckie & Leckie	155	Catkin Press
29	Vagabond Voices	77	Lexus Ltd	157	Stone Country
30	Waverley Books	78	Librario	158	Ness Publishing
31	Whittles Publishing	79	The Linen Press		
32	Allan (R L) & Son Publishers	80	Metaphrog		
33	Argyll Publishing	81	National Archives of Scotland		
34	Atelier Books	82	National Galleries of Scotland		
35	Avizandum Publishing	86	NMS Enterprises Limited		
36	Backpage Press Ltd	87	North Star ELT		
38	Birlinn Ltd	88	Olida Publishing		
39	Blackwell Publishing Ltd	89	Ovada Books		
40	Bloomsbury Professional	90	Perth & Kinross Libraries		
41	Books Noir	91	Pocket Mountains Ltd		
42	Brae Editions	92	RCAHMS and SCRAN		
43	Capercaillie Books	94	RIAS Publishing		
44	Cargo Publishing	95	Royal Botanic Garden Edinburgh		
45	Carrick Media	96	Rucksack Readers		

III. Data on CD-Rom

Interviews

Catalan Excel Database

Scottish Excel Database

Catalan Publishing Sector Map (HTML)

Scottish Publishing Sector Map (HTML)