Not Leaving Scotland Behind: Investigating the Impact and Motivations of Digital Innovation for Small Nation Trade Publishing in Large Language Markets

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Abstract

As an illustrative case of small nation trade publishing in a large language market, Scotland faces specific circumstances, challenges, and opportunities particularly regarding size and digitisation, making it a suitable context in which to investigate the role of the digital. The present thesis examines digital publishing advancements in Scotland's trade publishing sector, before investigating the degree to which such developments are taken up by Scottish trade publishers, and to what ends. The underlying reasons and motivations behind digitisation are also delved into, exploring the digital as a nuanced phenomenon involving different types of innovation and uptake. Through a characterisation of the contemporary market, the driving forces of Scottish trade publishers and their digital uptake are distinguished into 'hard' commercial versus 'soft' cultural goals. The present thesis examines the workings of this in practice, taking into account Scotland's wider cultural scene and observing digital trends in other sectors, namely cultural heritage and academic publishing, in order to further the understanding of trade publishing. This is informed by an understanding of trade publishing as embedded into a wider cultural ecosystem. By looking at comparable sectors, the present thesis reveals to what extent digital innovation and opportunities prove relevant to the specific circumstances of Scotland's trade publishing sector, highlighting a number of key strategies such as collaboration. It also posits the notion that digitisation is not universally taken up by trade publishers, on account of disparate goals. Furthermore, through this investigative process, the thesis also surveys the march of digitisation in Scotland's cultural landscape across the last twenty years, and critically assesses the discourse that has developed around this significant phenomenon.

Keywords: Small nation publishing in large language markets, Digitisation, Scottish trade publishing, Publishing ecosystem, Dual commercial/cultural market

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1. Introduction

Inspired by personal ties to Edinburgh, the present thesis places itself within a field of research into the Scottish publishing landscape and how this is changing in the digital age. The thesis investigates the country's contemporary trade publishing scene, particularly how it stays sustainable as a relatively small industry in contrast to competing forces and tides of globalisation. The role that digital innovation can play here is scrutinised, in light of prior research suggesting that its adoption is not yet entirely efficient by Scottish publishers.[1] As a new and ongoing development, digitisation is a phenomenon whose consequent effects still need to be better understood, especially so in trade publishing.[2] Digital uptake is thus focused on in this thesis and examined within the circumstances of smaller book industries, and the specific challenges and opportunities these face. Hence, by comparing digital publishing advancements within the trade publishing sector to those in a selection of Scotland's other cultural sectors, the research question of to what ends and purposes such advancements are or are not taken up by Scottish trade publishers will be addressed. The study will also delve into the reasons and motivations behind such uptake.

Why does Scotland as a case study merit particular attention? Given the UK's historical, cultural, political, and economic circumstances, Scotland has a unique position as 'both an embattled minority culture and a leading influence thanks to its imperial diaspora', as identified by McCleery and Ramdarshan Bold.[3] In a prior study into small nation publishing, using Scotland and Slovenia as case studies, Kovaĉ and Squires propose that other forms of power in the industry, including economic and capital, may 'represent a barrier almost as sizeable as language', and that this can be demonstrated in the Scottish publishing scene.[4]

The present study focuses upon an English-language market, whereby Scottish authors and publishers are not limited by language, have the advantage of not requiring translation to reach wider markets abroad, and are in theory not limited to a single nation's population.[5] Based on this reasoning, one could expect that the contemporary trade publishing industry in Scotland

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[1] Melanie Ramdarshan Bold, 'The Rights and Wrongs of Operational Practices in the Scottish Publishing Industry', *Publishing Research Quarterly*, 28 (2012), pp. 345–358 (p. 345).
[2] Ibid., p. 351.
[3] Alistair McCleery and Melanie Ramdarshan Bold, '"What is My Country?: Supporting Small Nation Publishing,' *Journal of Irish and Scottish Studies*, 6 (2012), pp. 115–131 (p. 116).
[4] Miha Kovaĉ and Claire Squires, 'Scotland and Slovenia', *Logos*, 25.4 (2014), pp. 7–19 (p. 8).
[5] Ibid., p. 9.

would now be reaching global markets. However, Kovaĉ and Squires summarise that 'research conducted … suggests that this is less the case than might be expected'.[6] Hence, the question arises of *why* this scope of impact remains limited, one which the present thesis aims to address. If a language barrier is not the problem, this leads Kovaĉ and Squires to conclude that '[i]t is Scottish *publishers* who face barriers to reaching global audiences' instead.[7] Size plays a role here. As English-language content becomes increasingly saturated online, smaller publishers may struggle for visibility, especially if they have less capital to invest towards digital platforms and infrastructures.[8] In fact, the paper by Kovaĉ and Squires links the barrier specifically to a lag in Scottish publishers' digital uptake.[9] This conclusion is reached because trade publishers in the present day have potential access to global resources for production and distribution, rather than being dependent upon physical proximity to dominant publishing centres, which had admittedly disadvantaged Scotland in the pre-digital world.[10] A comprehensive literature review of what has been observed in this context thus far, supported by more general resources about the impact of digitisation on small nation publishers and how digital developments can both lower barriers to entry and increase international competition, is provided in Chapter 2.[11] Precisely because of this salience, where the barrier is not language but rather challenges of size and digitisation, Scotland is chosen as a suitable context to investigate the role of the digital.

Chapter 3 then presents a comprehensive overview of the contemporary trade publishing scene in Scotland, particularly noting its fragmentary nature and composition of many small and/or independent publishers, as well as the challenges and opportunities it is facing. Focusing on English-language production, the Scottish trade publishing scene is also characterised as an illustrative example of small nation trade publishing in large language markets. The publishing industry as a whole can also be divided into various market sectors, each of which have differentiated products, communication circuits, and sales trends, as well as production cycles and infrastructures.[12] The present scope focuses upon trade publishing, taken here to mean 'the

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[6] Ibid., p. 10.
[7] Ibid.
[8] Anna Klamet, 'Publishing in the Shadow of Larger Neighbours: Opportunities and Challenges of Digitisation for Small Publishing Houses in Austria and Scotland', *Vilnius University Press*, 75 (2020), pp. 38–65 (pp. 56, 61).
[9] Kovaĉ and Squires, 'Scotland and Slovenia', p. 10.
[10] Ibid.
[11] Klamet, 'Publishing in the Shadow', p. 38.
[12] Claire Squires and Helena Markou, 'An Ecosystem Model of Small and Medium Sized Enterprises Publisher "Tiers": Publisher Size, Sustainability and Cultural Policy,' *Publishing Research Quarterly*, 37 (2021), pp. 420–438 (p. 426).

fiction and non-fiction books sold to consumers through bookshops and other non-specialist retail outlets', following the definition by Squires and Markou.[13] Notably, trade publishing is influenced by unique consumer behaviour, namely discretionary purchasing meaning purchases made not out of necessity but for entertainment or leisure purposes.[14] Nevertheless, the sector does not operate in a vacuum and will thus not be examined in isolation. An important theoretical framework underlying the present thesis is Simone Murray's notion of a publishing 'ecosystem' (further described in Chapter 2.1), utilised here as a way of conceiving how to conduct research into publishing.[15] Here, publishing is understood as embedded into a particular socioeconomic system, whereby the activities of one agent or sector impact the wider context, in a manner similar to an ecosystem.[16] The present thesis examines the workings of this in practice, taking into account Scotland's wider cultural scene and observing digital trends in other sectors, namely cultural heritage and academic publishing, in order to further the understanding of the trade publishing sector.

Another key idea informing the thesis is a divide between publishing *for* versus publishing *in* Scotland, as identified by McCleery and Ramdarshan Bold, which is linked to questions of introverted/extroverted outlooks and economic/cultural capital, as well as the related goals of commercial efficiency versus softer goals.[17] A useful definition of soft goals is offered by Sorensen, meaning a 'recognition of the larger social, artistic and educational value of the creative industries, which is hard to determine in purely economic terms'.[18] Based on the type of publishing in question as well as the publishers' motivations and goals, the nature of digitisation, its impact, levels of innovations, and digital strategies, are not a one-size-fits-all but may instead be adopted in varying ways and to differing degrees. This is a nuance upon which the present paper wishes to shine light, illustrating the digital as a multifaceted phenomenon with different types of innovation and uptake.

The thesis critically evaluates an extensive body of literature on the role of digital innovation in publishing and how this has been observed in Scottish sectors other than trade

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[13] Ibid., pp. 426.
[14] Ibid., pp. 423, 426-427.
[15] Simone Murray, *The Digital Literary Sphere: Reading, Writing, and Selling Books in the Internet Era*, 1st edn (Baltimore: Johns Hopkins University Press, 2018).
[16] Ibid., p. 117.
[17] McCleery and Ramdarshan Bold, 'What is My Country?', p. 117.
[18] Inge Sorensen, 'Literature Review of the Definition, Size and Turnover of the Creative Industries and Micro-Businesses in Scotland: Preliminary Research', *Cultural Enterprise Office*, 2013, pp. 1–14 (p. 11).

publishing, in order to qualitatively assess the nature of the field. This methodology is also chosen to investigate the reality of the trade sector on account of limited or lack of access to reliable, up-to-date commercial data.[19] It appears that most existing research conducted into the developments of technology and digitisation has focused on sectors such as higher education institutions, libraries, museums, or periodicals/journals, rather than trade publishing.[20] Hence, it is fruitful to look at comparable markets; after all, trade publishing does not occur in a vacuum, but is rather responding to and informed by trends active across the broader context. This is also in line with the understanding of publishing as embedded in an ecosystem, and how a meaningful analysis of digital innovation must consider the wider context and influences of social, technical, linguistic, and publishing trends.[21] Chapter 4 thus conducts a comparative study into digitisation as observed in Scotland's cultural heritage and academic publishing sectors. Being embedded in a wider publishing ecosystem, this evaluation of comparable sectors is then used to draw inductive reflections in Chapter 5, examining whether the affordances of digital innovation may or may not be relevant to Scottish trade publishers and their specific goals. The thesis hypothesises that looking at the varied goals and motivations that drive Scottish trade publishers – in which digital innovation may or may not play a part – will also illuminate to the ends and purposes of digital uptake in such contexts. Ultimately, by examining comparable contexts and inductively elaborating on the role of digitisation in small nation trade publishing, the thesis also presents a broader survey of the march of digitisation in Scotland's cultural landscape across the last twenty years, and critically assesses the discourse that has developed therein.

[19] Kovaĉ and Squires, 'Scotland and Slovenia', p. 10.
[20] E.g. Chowdhury and Margariti, 2004; Cunnea et al., 2019; Kidd and Stevenson, 2010; Wade, 2013; Walker and Sinclair, 2017; and Wallis, 2004 regarding periodicals. See *Bibliography* for full citations.
[21] Paul Cunnea, Gill Hamilton, Graeme Hawley, and Fred Saunderson, 'The Influence of Legal Deposit Legislation on the Digital Collections of the National Library Of Scotland', in *Electronic Legal Deposit*, ed. by Paul Gooding and Melissa Terras (Cambridge: Facet Publishing, 2019), pp. 33–56 (p. 46).

2. Survey of Digitisation

In order to critically contextualise the present debate, the thesis now evaluates prior research that has been conducted into the crossroads of Scotland's book market and the role of digitisation in publishing. It provides relevant theoretical background into the subject area, supported by general resources about the impact of digitisation on the publishing sphere. Having framed the importance of this discussion, the chapter then posits why digitisation is worth investigating specifically in small nation contexts. Finally, Scotland's contemporary trade publishing sector is zoomed into as an illustrative and worthwhile case study of these circumstances, justifying the present thesis's contribution to a better understanding of the role of digitisation therein.

2.1. Digitisation and Small Nation Publishing

Recent changes to the publishing sphere as a whole, brought about by the digital environment and the opportunities and challenges it offers, have been studied from a general perspective. To illustrate, some such changes recently shaping the industry include the 'disintermediation of the value chain, globalisation of book consumption, convergence of media types on digital devices, democratisation of authorship through the rise of self-publishing, [and] new modes of content discoverability online', as listed by Klamet.[22] In the context of the twenty-first century, shifts in the market alongside the rise of the digital have affected trade publishers in various ways, including downward pressure on prices, discount demands from retailers, the weakening of the pound, rising costs, and falling value.[23] Specific to the publishing market, there are also other challenges faced, such as cash flow, returns, income and how to generate this from back lists, warehouse costs, and investments held in physical stock.[24] All in all, as observed by Squires and Markou, although 'many publishers are highly adaptable to circumstances, demonstrating ingenuity in the face of digital and market-enforced change, and continuing to contribute to

[22] Klamet, 'Publishing in the Shadow', p. 41.
[23] Squires and Markou, 'An Ecosystem Model', p. 421; Sara Øiestad and Markus M. Bugge, 'Digitisation of Publishing: Exploration Based on Existing Business Models', *Technological Forecasting and Social Change*, 83 (2014), pp. 1–25 (p. 2).
[24] Squires and Markou, 'An Ecosystem Model', p. 421.

cultural diversity … [they] find themselves in a time of increasing, and severe pressure' in recent decades.[25]

Throughout the twenty-first century, the global publishing scene has also changed in size, as also seen in the emergence of new platforms for distribution and dissemination.[26] On one hand, the rise of new, mass-market mediums such as film, television, and radio, has been perceived as a threat to the trade book market, influencing its consumers' discretionary purchasing, making competition even more severe against other forms of entertainment or leisure.[27] Simultaneously, new media formats can offer opportunities for wider reach and commercial exploitation for both authors and publishers.[28] For instance, literary works can now be commercialised in a multitude of new formats, such as e-books and apps on various digital devices, which has also given rise to new subsidiary rights.[29] According to existing research, publishers can enhance the reach of their titles and increase income avenues by exploiting these emerging platforms.[30]

However, these technologies are not a blanket solution that would unequivocally level the playing field. Klamet conducted a study specifically into small nation markets, which he finds are increasingly affected by internationalisation and commercialisation, and describes this as largely due to digitisation.[31] On one hand, the digital and online realms lower barriers to market entry and enable publishers to reach beyond their nation's borders, and thus to access a wider reach of audiences and opportunities.[32] At the same time, however, globalisation also gives rise to increased competition, especially in a large language market like English.[33] This disproportionately disadvantages nations which are smaller, are on unequal footing, and whose economic power is reduced in contrast to larger neighbouring nations or transnational conglomerates.[34] This line of argumentation is also followed by McCleery and Ramdarshan Bold, who write that '[s]uch publishers find themselves in competition with much, much larger

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[25] Ibid.
[26] Melania Ramdarshan Bold, 'The Sorry Tale of Contemporary Authorship: A Study of Scottish Authors', *Publishing Research Quarterly*, 29 (2013), pp. 73–92 (p. 73).
[27] Squires and Markou, 'An Ecosystem Model', pp. 426-427; Ramdarshan Bold, 'Sorry Tale', p. 89.
[28] Ramdarshan Bold, 'Sorry Tale', p. 89.
[29] Ibid., p. 74.
[30] Ibid., p. 73.
[31] Klamet, 'Publishing in the Shadow', p. 40.
[32] Ibid., pp. 38-39.
[33] Ibid., pp. 38-39.
[34] Ibid., pp. 41-42.

enterprises that know no national or regional allegiance or responsibility'.[35] To make matters worse, smaller publishers have less economic capital to devote to the levels of investment that digital innovation often requires to grow.[36] As all this shows, small nation publishing in large language markets may be particularly vulnerable to the competitiveness and saturation brought on by digitisation.

In comparison to the sector of academic and educational publishing, where digital publishing has been rapidly adopted and plays an increasingly prevalent role, trade publishing has been somewhat more cautious in its uptake.[37] Even so, digitisation is becoming more widespread across the trade industry; meaning that the uptake of digital technologies is a crucial step that trade publishers must take and capitalise on new opportunities, in order to remain sustainable.[38] Despite their awareness of these changes, it seems that many small trade publishers do not focus sufficiently on digital technologies; and Klamet writes that, 'if they do, it is hardly in an optimistic way. Established publishers focus mostly on what they have been doing for years'.[39] He adds that it seems as though small nation trade publishers have 'accepted the market conditions, and instead of using the opportunities to be flexible as well as exploit their intellectual property in new ways, try to come to terms with the dominance of transnational corporations'.[40] One surveyed publisher quoted in Klamet's study goes as far as to conclude that '[s]mall publishing houses are among the victims of globalisation'.[41]

In response, existing research also posits a number of strategies through which small nation publishers can remain sustainable and competitive in the digital age, including partnerships and collaborations, subsidies, or occupying a specific niche of output.[42] Studies such as by Donnell et al., focusing on 'the opportunities and challenges of the global literary marketplace for small and independent publishers, what they can learn from each other and from larger publishers', and specifically examining the role of digital technologies therein, are thus

[35] McCleery and Ramdarshan Bold, 'What is My Country?', p. 116.
[36] Klamet, 'Publishing in the Shadow', p. 52.
[37] Ramdarshan Bold, 'Rights and Wrongs', p. 351.
[38] Ibid., p. 352.
[39] Klamet, 'Publishing in the Shadow', p. 53.
[40] Ibid., p. 58.
[41] Ibid., p. 50.
[42] Ibid., pp. 52, 62.

relevant to contexts such as Scotland.[43] Further comparative research is needed into small nation publishing markets to better understand their circumstances, and how they have been shaped by forces specific to their contexts.[44] This aligns with Klamet's argument calling for further research into small book markets in order to understand their cultural specificities, and in turn, considering how to best support these nations' publishers and cultural activity.[45]

Research has also been conducted into the varying role of digitisation depending on the type of publishing output. This is because some genres or themes lend themselves better to an international audience than others, and are thus suited to different (e-)publishing strategies.[46] As a result, this seems to be dividing the market between publishing for wider audiences, where digital innovations are increasingly employed to achieve international reach, versus publishing for the domestic market.[47] This perspective is informed by the underlying publishing for/in divide, further defined in Chapter 3, and throughout the thesis indicates the importance of accounting for soft goals as well. While publishing becomes situated within a global literary marketplace through the rise of the digital age, the role of small, independent publishers nevertheless remains crucial in maintaining a healthy book market.[48] Other studies also suggest that recent innovations in publishing can bridge gaps between markets, with Ramdarshan Bold describing digital publishing technologies as a 'panacea' to the unequal footing often seen between larger, international, conglomerate publishing companies, and more independent, regional, mid- to small-sized ones.[49] This promise may be of interest to small nation publishing in particular.

Also relevant to the present thesis, prior research has been conducted into similar contexts of small nation publishing in large language markets – such as Austria, Ireland, or Canada – which bear similarities to Scotland in being smaller, more peripheral markets which can nevertheless cater to larger audiences beyond the confines of their borders.[50] In fact, McCleery and Ramdarshan Bold note that it is possible to 'examine policies and processes

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[43] Alison Donnell, Gail Low, Padmini Ray Murray, Claire Squires, Femi Folorunso, Andrew Nash, and Jeremy Poynting, *Independent Publishing: Making and Preserving Culture in a Global Literary Marketplace* (Glasgow: Scottish Universities Insight Institute, 2012), pp. 1–23 (p. i).
[44] Kovaĉ and Squires, 'Scotland and Slovenia', p. 17.
[45] Klamet, 'Publishing in the Shadow', p. 39.
[46] Ibid., p. 61.
[47] Ibid.
[48] Donnell et al., *Independent Publishing*, p. i.
[49] Ramdarshan Bold, 'Rights and Wrongs', p. 345.
[50] McCleery and Ramdarshan Bold, 'What is My Country?', p. 126.

within other small countries and assess the potential for the import of good practice into Scotland'.[51] For instance, in conducting a study into Austrian publishing, Klamet finds that Austria's reach beyond its borders has not been easy to achieve regardless of technological development – similar to the puzzling findings in Scotland.[52] Given that Germany is the third largest book market in the world,[53] Austria faces a level of competition comparable to that of Scotland within the UK. Austria also faces similar disadvantages in having relatively less capital than the German book market, and struggling with visibility as a result.[54] In this context, Austria's approach to digital publishing may also be a result of conscious strategies and decision-making; for instance, Klamet notes 'Austrian publishers focusing mainly on their home market while paying less attention to the possibilities of e-publishing to reach a wider audience'.[55] Turning to Canada, McCleery and Ramdarshan Bold list a number of mechanisms which may also be relevant to Scotland, such as 'grants to start-up publishers to an overall Canada Book Fund …; to make the supply chain more effective through targeted investment; to underwrite collective initiatives such as trade bodies; and to provide specific international marketing assistance'.[56] Furthermore, Kovaĉ and Squires also compare Scotland and Slovenia's book industries in terms of their efficiencies, concluding that factors such as multimedia sales channels and labour are ultimately outweighed by two main factors; those of market size, and the ability to streamline or outsource services.[57] Such observations are relevant for the present study because these nations' book industries are shaped by similar market forces.[58]

Overall, the digital age has rapidly brought about transformative changes to the publishing ecosystem. To remain competitive, both against multimedia conglomerates and in international markets, it is crucial for contemporary trade publishers to adapt to the digital realm.[59] Writing specifically about independent publishers, Donnell et al. conclude that these 'need to show a readiness to embrace digital culture by assessing the opportunities that the digital environment brings to their product and audience'.[60] It is important to note that this

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[51] Ibid., p. 128.
[52] Klamet, 'Publishing in the Shadow', p. 50.
[53] Ibid., p. 41.
[54] Ibid., p. 50.
[55] Ibid., p. 59.
[56] McCleery and Ramdarshan Bold, 'What is My Country?', p. 126.
[57] Kovaĉ and Squires, 'Scotland and Slovenia', p. 8.
[58] Ibid.
[59] Ramdarshan Bold, 'Rights and Wrongs', p. 345.
[60] Donnell et al., *Independent Publishing*, p. i.

hypothesis was put forth in the early 2010s, and much of the existing literature is in fact not fully up to date. In a discussion of digital adoption or digital lag, findings from such papers may by now be outdated and thus require reassessment; which further motivates and underlies the present study's aims. Moreover, within the context of small nation publishing, digitisation as an object of examination remains largely under-researched.[61] Ergo, the phenomenon of how digitisation impacts small nation publishing in large language markets is worth further investigation.

Moreover, the aforementioned notion of publishing as an ecosystem provides a useful rhetoric and organising principle for the present thesis. Drawing on Murray's work, the 'literary ecosystem' is understood here as an interconnected and layered landscape, whereby publishers are not operating in a vacuum but are shaped by the 'ripple effect' of their layered positionality.[62] Interpreting findings from the wider cultural landscape and comparable contexts is thus applicable in furthering the understanding of Scottish trade publishing and its current circumstances, which may not yet have been subjects of research in their own right. The following subchapter investigates this aspect further.

2.2. Scottish Trade Publishing Today

The publishing business is becoming increasingly connected in a digital world, facilitated by the ease of distribution and communication across its many channels.[63] It is thus worth examining the impact of such digital transformations within a Scottish context, which is both shaped by, and reflects, what is happening on a bigger stage. We must first define what a small nation is in the context of publishing. Here, the principal factor is that of limited economic power; according to Klamet, small nation publishing is that which occupies 'a peripheral position in the European market "due to a relatively low rate of publishing productivity"'.[64] Writing about Scotland, Klamet adds that 'its own national region occupies at the same time a rather peripheral role, not only politically but also economically in its location at the northern end of Europe'.[65] As of 2023, Scotland has a population of 5,49 million, which makes it peripheral in relation to the

[61] Klamet, 'Publishing in the Shadow', p. 42.
[62] Murray, *Digital Literary Sphere*, p. 117.
[63] Boyd, p. 17.
[64] Klamet, 'Publishing in the Shadow', p. 40.
[65] Ibid., p. 47.

neighbouring 56,5 million in England, as well as of lesser dominance and visibility within the UK-wide population of 68,3 million.[66] Based upon this understanding, Scotland falls within the definition of a small nation, within which the rise of digital innovation and technologies may offer new opportunities and untapped potential.

Furthermore, while the Scottish nation also fosters markets in the languages of Scots and Gaelic, the scope of the present thesis lies in the characterisation of Scotland as a small nation within the large English-language market specifically. Despite its peripheral status, Scotland's publishing activities largely take place in the English language, a lingua franca with an estimated 1,46 billion speakers around the world.[67] As a result, Scotland's authors and publishers have access far beyond the nation's borders and potentially into the global book market, meaning their reach is in theory not limited to the nation's population; an advantageous position compared to most other small nations which are restricted to their linguistic region.[68] Particularly in large language markets, this potential has been playing an increasingly important role in recent decades as transnational multimedia platforms and companies enable international reach.[69] At the same time, this also distinguishes Scotland from other small nation contexts without large language markets, which publish in national languages for domestic markets. While their reach may be relatively limited, these are also somewhat protected by their linguistic firewall from competitors abroad.[70]

On a global scale, the size and strength of the English-language publishing industry is undeniable; however, when zooming in, it is disproportionately dominated by a few large conglomerates, and this means that small nation publishers face difficult competition.[71] This perpetuates disadvantages faced by many Scottish trade publishers, who struggle more in the face of the difficulties and costs of advertising, technology, and overseas links such as agents, all of which require strong investments in order to reach the global potential and opportunities of the

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[66] Ibid., p. 47; 'Scotland's Population Grows', National Records of Scotland, 8 October 2024 <https://www.nrscotland.gov.uk/latest-news/scotland-s-population-grows/> [accessed 21 October 2024]; 'Population Estimates for the UK, England, Wales, Scotland, and Northern Ireland', Office for National Statistics, 8 October 2024 <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/bulletins/annualmidyearpopulationestimates/mid2023> [accessed 21 October 2024].
[67] 'The Most Spoken Languages Worldwide 2023', Statista, 4 July 2024 <https://www.statista.com/statistics/266808/the-most-spoken-languages-worldwide/> [accessed 2 November 2024].
[68] Kovaĉ and Squires, 'Scotland and Slovenia', p. 8; Klamet, 'Publishing in the Shadow', p. 47.
[69] Klamet, 'Publishing in the Shadow', p. 55.
[70] McCleery and Ramdarshan Bold, 'What is My Country?', p. 123.
[71] Ramdarshan Bold, 'Rights and Wrongs', p. 346.

English-language market abroad.[72] Furthermore, the rights and sales of publishing across different media can be more easily accessed and exploited by international, cross-media publishing conglomerates, and at a lower cost, than what smaller publishers experience.[73] These challenges will be further explored in Chapter 3.2.

As Wallis wrote in 2004, in the beginning of the twenty-first century, 'Scottish cultural publishing would be left behind if it could not make the step into the electronic publishing arena'.[74] The primary source of income for Scotland's trade publishers was and remains the traditional print medium, and due to a slower uptake of the digital, recent technological innovations have not had as much impact as might have been hoped.[75] Based on these findings, Ramdarshan Bold concluded in 2012 that 'digital publishing is not high on the agenda of Scottish publishers'.[76] This is also worth noting when situated in the small nation context, where many publishers have relatively less economic capital and are in precarious financial positions, often also reliant on external funding. This raises the question of whether such publishers could see an increase in their earnings – and thus more stable footing, sustainability, and competitiveness in the market – if they did shift more towards digital technologies and products.[77] For instance, Squires and Markou have identified how '[d]igital technologies have presented independent publishers with opportunities: short-run digital printing; new funding models such as crowdfunding; and marketing via social media'.[78]

However, existing literature often perceives the operational practices of Scottish publishers as lagging or failing to adapt, with Ramdarshan Bold writing that they are not 'in harmony with the burgeoning digital publishing environment'.[79] Her empirical research also includes areas such as the ownership and sales of rights, which she concludes that most Scottish publishers are also not fostering sufficiently.[80] What this means is that Scottish publishers often have ownership of the rights of their authors' works, but that they let these lie dormant instead of

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[72] Ibid.
[73] Ibid.
[74] Jake Wallis, 'Facilitating Scottish Cultural Publishing Online: Digital Directions', *Library Review*, 53.5 (2004), pp. 265–269 (p. 265).
[75] Ramdarshan Bold, 'Sorry Tale', p. 89.
[76] Ibid.
[77] Ibid.
[78] Squires and Markou, 'An Ecosystem Model', p. 429.
[79] Ramdarshan Bold, 'Rights and Wrongs', p. 345.
[80] Ibid.

exploiting them widely across multimedia, digital platforms, and markets abroad.[81] The practices of rights sales are closely tied to whether or not publishers have an international outlook, and how open or resistant they are to new media.[82] For the publishers who do turn towards a more global outlook, this goal can be facilitated precisely by the digital environment.[83] Part of the proposed reason for the differing outlooks, and underlying motivations on whether or not to digitise, is that some publishers in Scotland do not necessarily prioritise a commercial view of their work (as suggested in Chapter 3.1 and further explored in Chapter 5).[84]

In Scotland, it seems that trade publishers are not adopting the potential and opportunities of digital technologies as much as they could be, which hinders their business commercially as well as the authors they represent, and affects their competitiveness on a both national and international scale.[85] This continues to be a problem as the income streams of most Scottish publishers continue to largely rely on the print medium, and very few seem to be adopting innovative multimedia formats.[86] A survey conducted in 2010 by Publishing Scotland found that less than a third of the publishing houses had incorporated digital publishing.[87] This finding is especially alarming in its implication that these publishers may not be staying up-to-date with or acquiring technology skills, despite the advice of a preceding survey conducted seven years prior, which stressed the importance of these strategies for Scottish publishers if they wish to remain competitive on the international market.[88] Ramdarshan Bold interpreted this survey as showing that 'the digital publishing revolution had not yet affected most Scottish authors'.[89] Thus, there is an apparent lag in the uptake of digital publishing advancements in the Scottish publishing industry, and the present thesis examines why this appears to be the case.

Alongside the aforementioned need for updated research into digitisation in trade publishing, the lack of available and accurate data on Scotland's trade book market also poses a challenge here. Tellingly, the website by the trade union Publishing Scotland has a page headlined 'Research into the industry in Scotland' under which they promptly state that, '[a]lthough a diverse industry and operating in highly competitive markets, there has been little

[81] Ramdarshan Bold, 'Sorry Tale', pp. 73, 86.
[82] Ramdarshan Bold, 'Rights and Wrongs', p. 345.
[83] Kovaĉ and Squires, 'Scotland and Slovenia', p. 8.
[84] Ramdarshan Bold, 'Sorry Tale', p. 73.
[85] Ramdarshan Bold, 'Rights and Wrongs', p. 345.
[86] Ramdarshan Bold, 'Sorry Tale', p. 76.
[87] Referenced in Ramdarshan Bold, 'Rights and Wrongs', p. 352.
[88] Ibid.
[89] Ramdarshan Bold, 'Sorry Tale', p. 76.

research in the area'.[90] Hence, this is a gap within which the present thesis aims to situate itself and contribute to filling.[91] Moreover, questions around the impact and significance of digitisation in this market context are precisely what the present thesis aims to bring to the forefront. Having provided an overview of existing research regarding the role of digitisation and its significance in the Scottish trade publishing context, this context and industry itself are further characterised in the following chapter.

[90] 'Publishing in Context', Publishing Scotland, n.d. <https://www.publishingscotland.org/about-publishing/the-book-business/publishing-in-context/> [accessed 21 September 2024].
[91] Klamet, 'Publishing in the Shadow', p. 38.

3. Scotland's Publishing Scene

In order to investigate digitisation as one particular aspect of Scotland's publishing industry, the industry as a whole and the nature of the market must first be understood. Hence, the present chapter first provides a descriptive overview of the trade publishing industry in Scotland, as well as an analytic characterisation of how it exemplifies small nation publishing in a large language market. Within this characterisation, the present chapter is structured into thematic layers, first zooming into the trade publishing industry in Scotland, and then positioning this within the wider UK market.

3.1. Industry Overview: Publishing in Scotland

3.1.1. Size and Composition

In recent decades, the publishing industry across the United Kingdom has become increasingly concentrated. Ramdarshan Bold describes it as being divided into 'a small number of very large, cross-media global conglomerates and a large number of smaller companies operating at national and/or niche level'.[92] Narrowing in on Scotland, this statement rings true, as its publishing industry is built up of mainly small and medium enterprises (SMEs).[93] A paper by Squires and Markou helpfully provides a model to define and demarcate SME publishers, although their focus lies on how such a model can be used towards policy making.[94] Within SMEs, tiers can be established for 'medium-sized' with less than 250 employees and €50 million turnover, 'small' with less than 50 employees and €10 million turnover, or 'micro' with less than 10 employees and €2 million turnover; looking at employees and turnover to define company size in accordance with the European Commission.[95] Squires adds that 'the difference between a mid-sized company, operating with significant overheads, staffing levels and list sizes, is at least as far from a small, owner-publisher company as a mid-sized company is to a conglomerate', meaning that it is relevant to add nuance within the definition of SMEs.[96]

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[92] Ramdarshan Bold, 'Rights and Wrongs', p. 345.
[93] Ibid., p. 346.
[94] Squires and Markou, 'An Ecosystem Model', p. 420.
[95] Ibid., p. 430.
[96] Ibid., p. 423.

When referring to small publishing enterprises, the aforementioned definition of size and turnover is often used, although such statistics are sometimes estimates.[97] Even with a qualitative and quantitative model of defining publisher size, Squires and Markou also acknowledge that such a definition is not exhaustive and remains variable, depending on measures ranging from the number of books or individual titles produced per year, market share, revenue, and/or number of employees.[98] Lack of accurate data complicates accurate distinctions in publisher size. In Sorensen's literature review of existing industry reports, she highlights how 'there is limited data specifically about the size of micro-businesses in the arts and creative industries in Scotland. There are no reliable statistics on the turnover of micro-businesses', and this thus results in discrepancies across different reports' methodologies and findings.[99] For instance, two surveys conducted in 2003 and 2010 report a significant growth in turnover; however, Kovaĉ and Squires note this is perhaps 'not a result of almost a doubling in size of the Scottish book industry, but of the lack of a consistent statistical approach … Hence it is not clear whether the Scottish book industry grew, shrank, or remained a similar size over this period'.[100] Moreover, the two studies indicated a drop in book sales; however, data from online platforms such as Amazon were not included in the statistics, and thus it remains unclear whether the findings reflect a real decrease, or rather a shift to online bookselling.[101]

Although it is undeniably a market in its own right, difficulties also arise when seeking to provide an overview specifically of the Scottish industry since it does not have its own ISBN agency; instead, these numbers are issued UK-wide.[102] The production of Scottish books is also difficult to delineate or count, because non-Scottish publishers are able to publish Scottish authors or books about Scottish interests as well.[103] Klamet writes about the complications in defining the size of the industry and analysing its state since disaggregated data is not fully available, and while Publishing Scotland does collect relevant data on the sector, it is not exhaustive because not all Scottish publishers are members of the trade union.[104] Significantly, McCleery and Ramdarshan Bold add that an aggregate increase in the number of publishers over

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[97] Sorensen, 'Literature Review', p. 10.
[98] Squires and Markou, 'An Ecosystem Model', p. 430.
[99] Sorensen, 'Literature Review', p. 12.
[100] Kovaĉ and Squires, 'Scotland and Slovenia', p. 13.
[101] Ibid.
[102] Ibid., p. 10.
[103] Ibid.
[104] Klamet, 'Publishing in the Shadow', pp. 45-46.

time may not necessarily mean a rise in Scotland's importance in wider markets, but in fact a potential fall, if there is a concealed but disproportionate loss within the Key Group publishers (further described in the following subchapter).[105]

Despite difficulties in providing precise estimates on the size and statistics of the Scottish trade publishing industry, a number of key characteristics can nevertheless be outlined. Generally speaking, the Scottish publishing scene largely consists of many small and/or independent, Scottish-owned companies, which then compete with larger, international conglomerates.[106] This is a notable division within the industry, and there does not appear to be much middle ground, partly because anything in between would 'find it difficult to compete on a global scale because there is a high chance of failure or, if they become successful, being bought by a conglomerate', according to Ramdarshan Bold.[107] In Scotland, findings show that nearly four-fifths of its publishers are made up of less than ten employees, over a quarter are owner-managed, and most are independent, with only a tenth being a subsidiary of a larger company.[108] To summarise, McCleery and Ramdarshan Bold write that 'the Scottish publishing industry is characterised by a small number of larger publishers and a relatively large number of … small and micro companies'.[109] Consequently, the industry is described as 'disjointed', whilst simultaneously embedded into a larger, highly competitive market.[110] In terms of book sale numbers in Scotland, a small number of global companies based beyond its borders continue to dominate, rather than indigenous Scottish publishers themselves.[111]

A recent study approximates that there are 110 publishing houses operating in Scotland, employing around 1,500 individuals (plus freelancers).[112] These publishers consist of some older companies established prior to 1960, a number of new companies from the twenty-first century, with the largest proportion having been established between 1981 and 2000.[113] This may be linked to Scotland's historical context, wherein Scottish literature experienced a cultural shift and rejuvenation in those decades (giving rise to renowned titles such as *Trainspotting*), but may also

[105] McCleery and Ramdarshan Bold, 'What is My Country?', p. 122.
[106] Ramdarshan Bold, 'Rights and Wrongs', p. 347.
[107] Ibid.
[108] Ibid., p. 346.
[109] McCleery and Ramdarshan Bold, 'What is My Country?', p. 122.
[110] Ramdarshan Bold, 'Rights and Wrongs', p. 346.
[111] Ibid., pp. 346-347.
[112] Sarah Boyd, 'Scottish Publishing and Independence', *Logos*, 25.1 (2014), pp. 14–20 (p. 15).
[113] McCleery and Ramdarshan Bold, 'What is My Country?', p. 122.

simply reflect the UK publishing industry's growth over time.[114] Moreover, there is a distinct pattern in which the vast majority of Scotland's publishing industry is located within the Central Belt (predominantly in Edinburgh and Glasgow), although a few have been established elsewhere in recent years.[115] The largest conglomerate operating in Scotland is HarperCollins, after which the companies range from ambitious, internationally-oriented, independent publishers such as Canongate (with 120 employees and a record-breaking turnover of £28 million in the year 2022, an outstanding case study which will be looked at further in Chapter 5), to niche micro-publishers like Freight Books (with an average turnover of £260,000).[116] Based on averaged findings throughout the past decade, the Scottish trade publishing industry produces around 3,000 titles per year.[117] Looking at Publishing Scotland's Annual Report, the total publishing income was £2,1 million for the 2022/23 year.[118] Although previous reports are no longer available, the Publishers Association's UK-wide summary of the same year claims a 4% increase from 2021, suggesting a resilient publishing income and promising trends.[119]

The trade book market in Scotland is described as relatively simple, in the fact that its dominant sales channel is retail, i.e. through physical or online bookshops and supermarkets.[120] In contrast to other countries, the UK does not have a fixed book price; the effect of this means that the retail prices of books produced by local publishers must compete with global conglomerates on an uneven playing field.[121] Furthermore, the type of output of Scottish trade publishing is often self-originated and indigenous books, and includes relatively few translations from foreign languages.[122] Looking at the size of print runs, the average for Scottish-produced bestsellers is around 200,000 copies, which then also reach similar sale numbers mainly within the domestic market.[123] Scottish bestsellers can reach above a million sales if a title breaks

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[114] Ibid.
[115] Ramdarshan Bold, 'Rights and Wrongs', p. 346.
[116] Boyd, 'Scottish Publishing', p. 15; 'Canongate Reports Record-breaking Turnover', Publishing Scotland, 2 September 2022 <https://www.publishingscotland.org/2022/09/canongate-reports-record-breaking-turnover/> [accessed 2 November 2024]; Alison Flood, 'Freight Books: Liquidator Takes Control of Award-winning Scottish Publisher', *The Guardian*, 30 October 2017 <https://www.theguardian.com/books/2017/oct/30/freight-books-award-winning-scottish-publisher-goes-into-liquidation> [2 November 2024]..
[117] Kovaĉ and Squires, 'Scotland and Slovenia', p. 13; Boyd, 'Scottish Publishing', p. 15.
[118] Publishing Scotland, *2022/2023 Annual Report and Accounts* (Edinburgh: Publishing Scotland, 2023), pp. 1–42 (p. 41).
[119] Publishers Association, *A Year in Publishing* (London: Publishers Association, 2024), n.p.
[120] Kovaĉ and Squires, 'Scotland and Slovenia', p. 14.
[121] McCleery and Ramdarshan Bold, 'What is My Country?', p. 124.
[122] Kovaĉ and Squires, 'Scotland and Slovenia', p. 14.
[123] Ibid., p. 15.

through to global audiences, but the authors of these successful titles are then often lured to publishers abroad.[124]

Despite the challenges and difficulties of being a smaller market, the Scottish publishing industry also has many positive attributes and aspirations. There are a number of household names of Scottish authors, such as Ian Rankin, Irvine Welsh, and Alistair Moffat, who are at the forefront of contemporary writing in the UK, across both fiction and non-fiction trade publishing.[125] It is important to note that a number of well-known Scottish authors are in fact not published by Scottish companies; for instance, Ian Rankin's novels are published by the UK branch of the international company Hachette, and Irvine Welsh's *Trainspotting* was published by Harvill Secker, a subsidiary of Penguin Random House.[126] At the same time, these authors' works centre on Scottish themes and facilitate the visibility and cultural export of Scotland onto a global scene, which is also of value for the industry. Boyd adds that 'a thriving and innovative body of independent publishers have contributed to a new buzz' in recent years as well.[127] Literary awards have also contributed to this; for instance, the Man Booker Prize has listed authors from Scottish publishers including Canongate and Sandstone Press in recent years, helping Scottish authors to gain recognition, success, and visibility both domestically and internationally.[128]

3.1.2. Types of Output and Tendencies

As has been established, the Scottish book industry is largely comprised of small publishers; there are nevertheless outliers to this rule, with a few niche publishers gaining global success.[129] SMEs are positioned in a way that enables them to efficiently exploit niches in the market, and this is how many can stay sustainable.[130] For British trade publishing overall, the most commercially lucrative genre appears to be fiction, making up 50% of the UK's publishing

[124] Ibid.
[125] Boyd, 'Scottish Publishing', p. 15.
[126] 'Ian Rankin', Hachette UK, n.d. <https://www.ianrankin.net/> [2 November 2024]; 'Harvill Secker: Books that Bring Us Together', Penguin, n.d. <https://www.penguin.co.uk/company/publishers/vintage/harvill-secker> [2 November 2024].
[127] Boyd, 'Scottish Publishing', p. 15.
[128] Ibid.
[129] Kovaĉ and Squires, 'Scotland and Slovenia', p. 17.
[130] Squires and Markou, 'An Ecosystem Model', p. 433.

output.[131] However, Marion Sinclar, the CEO of Publishing Scotland, reports that for Scotland 'the figure is much smaller with popular non-fiction and academic/cultural dominating' in particular.[132] This reflects that niche genres may be more suitable for, and more valued by, smaller publishers.[133] In line with this, McCleery and Ramdarshan Bold add that small publishers 'need to search for the "sure thing" and this leads in turn to moving into educational and academic publishing or to copying the latest trade publishing success'.[134] Publishers which illustrate this lucrative turn towards more niche output include Floris Books, the largest publisher in Scotland of specifically children's/educational material and non-fiction topics related to Scottish interest, and Witherbys, a large and successful independent publisher in Scotland focused on specialist nautical texts.[135] The non-fiction trade publishing market here provides particularly helpful ground for smaller publishers and their development. Furthermore, operating in more niche publishing markets also lessens the competition they face.

However, this is not the full story and, despite the difficulty of obtaining up-to-date data of sufficient scope, a retrospective examination illustrates important trends. Another study conducted in 2012 found that the market had changed, with an almost 20% decline in sales of non-fiction, making this genre less suitable for the publishing environment in Scotland.[136] Such a change in demand inevitably also forces smaller publishers to adjust and shift their business practices and attitudes.[137] In fact, Kovaĉ and Squires surveyed a publisher who, 'after a series of successes with non-fiction books of specifically Scottish interest—decided to focus on non-fiction books with globally oriented content instead of non-fiction books of Scottish interest, considering the latter market "to be exhausted"'.[138] A report conducted in 2017 also highlights difficulties within the trade conditions, alongside shrinking numbers of retail bookshops and review outlets.[139] The report's findings on the falling prices and sales of print fiction titles are also concerning, especially due to the lack of a corresponding rise in e-book sales to

[131] Ramdarshan Bold, 'Sorry Tale', p. 78; Kovaĉ and Squires, 'Scotland and Slovenia', p. 13.
[132] Qtd. in Kovaĉ and Squires, 'Scotland and Slovenia', p. 13.
[133] Kovaĉ and Squires, 'Scotland and Slovenia', p. 13.
[134] McCleery and Ramdarshan Bold, 'What is My Country?', p. 120.
[135] 'Floris Books', Publishing Scotland, n.d. <https://www.publishingscotland.org/ps-member/floris-books/> [accessed 2 December 2024]; 'About Witherbys', Witherbys, n.d. <https://www.witherbys.com/about> [accessed 2 December 2024].
[136] Kovaĉ and Squires, 'Scotland and Slovenia', p. 13.
[137] Ibid.
[138] Ibid.
[139] Squires and Markou, 'An Ecosystem Model', p. 428.

compensate.[140] Squires and Markou conclude that this report means the ‘market for print books has shrunk’, and that this market decline makes contemporary trade publishing ‘exceptionally tough’.[141] These forces driving the market, and the need for smaller publishers to be risk-aversive, are also noted by McCleery and Ramdarshan Bold, who acknowledge that some SME publishers may then turn away from national or regional markets, towards larger ones abroad.[142]

Being composed largely of SME publishers, it is also more common in the Scottish publishing industry to accept authors without agents, in contrast to practices seen elsewhere, such as with London-based publishers.[143] However, this could be partly explained by the niches of genres within which Scottish publishers often operate; a survey by Ramdarshan Bold finds that over half of the publishers focused on popular non-fiction, and a third on educational books; genres which are less likely to require literary agents.[144] Tellingly, out of the authors who did have agents, over two-thirds of these were not based in Scotland but rather in London.[145] Out of these authors, about half were published by Scottish-based publishers, in comparison to three-fifths if they did have Scottish agents.[146] Such a characteristic may also be an advantage for the Scottish publishing scene, as it allows for more opportunities and potential for exploiting rights, which Scottish publishers seem to have more direct control over.[147] Nevertheless, the influence of London as the central hub of publishing also plays a role; one which will be further explored in Chapter 3.2.

Interestingly, among the hundred or so publishers in Scotland, there seems to be a ‘Key Group’ of five, identified in a 2004 paper by Sinclair et al. as being the largest in size (in terms of turnover and employment), while the other publishers are smaller and their ‘main objectives are not primarily focused on profitability’.[148] The same pattern is found and supported by another study conducted in 2012; out of the Scotland-based publishers surveyed, a tenth seem to be the most significant, having an international outlook and multimedia interest, and publishing the

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140 Ibid.
141 Ibid.
142 McCleery and Ramdarshan Bold, ‘What is My Country?’, p. 120.
143 Ramdarshan Bold, ‘Rights and Wrongs’, p. 348.
144 Ramdarshan Bold, ‘Sorry Tale’, p. 80.
145 Ibid., p. 81.
146 Ibid., p. 82.
147 Ramdarshan Bold, ‘Rights and Wrongs’, p. 348.
148 Kovaĉ and Squires, ‘Scotland and Slovenia’, p. 12; McCleery and Ramdarshan Bold, ‘What is My Country?’, p. 122.

most diverse titles.[149] The study also finds these are often the imprints of larger companies within or beyond the UK; which is precisely what enables their international outlook, as McCleery and Ramdarshan Bold explain the ‘remaining 90% of publishers do not have in the main such easy and automatic access to different, external markets and to the financial backing of a larger company’.[150] Domestic sales have been found to make up 70–99% of turnovers for most small Scottish publishers; in contrast, domestic sales for the Key Group publishers only accounted for an average of 10%, meaning that they derive the rest from beyond Scottish borders.[151] This discrepancy strongly suggests an introverted versus extroverted, or domestic versus international, difference in outlook among publishers. These market orientations can also be seen in practice, through the publishers’ turnover rates over time. A survey in 2003 found that domestic sales made up 77% of Scottish publishers’ turnovers.[152] A follow-up survey in 2010 found that this high ratio continued to hold for a third of Scotland’s publishers, while half of them now make just over 50% of their turnovers in the domestic market.[153] In counterargument to Kovaĉ and Squires’ characterisation of Scottish publishing as extroverted, Ramdarshan Bold interprets the longitudinal findings of these two surveys as ‘reinforc[ing] how inward looking Scottish publishers can be and how little they have evolved since 2003’.[154] Here, the gap in research after the 2010s becomes evident again, and further rationalises why it is worth investigating anew. The present thesis raises the question of whether these findings truly reflect a lag in evolving and adapting over time, or whether the focus of small Scottish publishers may lie elsewhere, such as with more ‘soft’ goals of culture and nation building.

In line with this perspective, Ramdarshan Bold characterises the Scottish publishing industry by identifying two main groups; the first having a more commercial outlook, with relatively larger employment and turnover, and the second as less commercially motivated, and thus smaller, but with a focus on producing ‘products of cultural value’.[155] Writing about Slovenia, which is comparable to Scotland in its sociohistorical context and also an example of

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[149] McCleery and Ramdarshan Bold, ‘What is My Country?’, p. 121; Ramdarshan Bold, ‘Rights and Wrongs’, p. 346.
[150] McCleery and Ramdarshan Bold, ‘What is My Country?’, p. 121.
[151] Kovaĉ and Squires, ‘Scotland and Slovenia’, p. 13.
[152] Ramdarshan Bold, ‘Rights and Wrongs’, p. 347.
[153] Ibid.
[154] Ibid; Kovaĉ and Squires, ‘Scotland and Slovenia’, p. 16.
[155] Ibid.

small nation publishing, Kovaĉ and Squires similarly note the role of publishing in cultural identity and nation building:

> Slovene publishers readily perceived their professional identity in relation to national-identity construction processes not only as producers of books with Slovene-specific content but also as intermediary filters that bring to the Slovene language and culture globally available information and textual artefacts.[156]

In addition, Kovaĉ and Squires wrote about the role of trade publishing within the processes of identity forming and nation building, taken here as examples of 'soft' goals and aligning with McCleery's definition of publishing *for* Scotland.[157] This is particularly relevant to contexts of small nation publishing, illustrated here by Scotland, whose book industry is embedded within a larger context of the UK but nevertheless holds a strong identity of its own.[158] Moreover, within its political-historical context, Scotland may also have 'had to rely on non-statehood means for the preservation of their identity' according to Kovaĉ and Squires, a practice within which publications played an important role in preserving the idea and continued existence of the nation.[159] Similarly, Klamet describes this as 'an ongoing struggle for Scots, as books have long been a means to preserve their identity and idea of nationhood denied politically'.[160] In this perspective, trade publishing can be seen as an agent of regenerating, preserving, and promoting national culture and identity.[161]

The divide between publishing for/in also lines up with the distinction between small, independent publishers versus transnational conglomerates. Placing these in opposition, Squires and Markou explain that conglomerate publishing is 'dominated by the forces of capital, their shareholders, and "the market"; whereas independents or small press publishers are constructed as saviours of the uncommercial, the literary, and of "culture"'.[162] The conflicting demands that small nation publishers face are aptly summarised by Donnell et al., who investigate 'how small publishers … retain their own commitment to their stated regimes of value (cultural, aesthetic and political) whilst

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[156] Kovaĉ and Squires, 'Scotland and Slovenia', p. 17.
[157] Ibid., p. 8; McCleery and Ramdarshan Bold, 'What is My Country?', p. 117.
[158] Claire Squires, *Bookspotting Research Report: Mobilising Scottish Books* (Stirling: Nesta, 2014), pp. 1–14.
[159] Kovaĉ and Squires, 'Scotland and Slovenia', p. 9.
[160] Klamet, 'Publishing in the Shadow', p. 48.
[161] Squires and Markou, 'An Ecosystem Model', p. 422; Ramdarshan Bold, 'Rights and Wrongs', p. 357.
[162] Squires and Markou, 'An Ecosystem Model', pp. 422-423.

balancing the demands of the marketplace', elaborating upon the 'difficulties of negotiating and juggling a global and local readership, specifically, the cultural advantages in pursuing limited markets rather than always having to maximize and expand global readerships'.[163] Here, small publishers face difficult decisions between commercial pressures versus pursuing cultural output.[164]

The types of output of publishers thus also reflect this division, as the more commercial type of publishers do not solely aim their publications at nor rely on the Scottish market specifically; they seek to have a more international reach.[165] In fact, Kovaĉ and Squires's survey of Scottish publishers finds only 10% of their titles were related to specific Scottish interest.[166] Another statistic given by Boyd claims that 'books classified as "Scottish" account for just 5% of the country's retail market', shedding light on the peripheral proportion this entails.[167] In contrast, the Slovenian book market has been characterised as more 'introverted', borrowing from Kovaĉ and Squires' terminology, meaning they aim their products towards, and rely largely on the sales within, their domestic market.[168] Analysing publishers in Scotland, Kovaĉ and Squires further find that almost none operate solely within domestic activities; whether in terms of their books' content, or their business infrastructure.[169] Furthermore, 79% of these publishers reported overseas sales to some extent.[170] Both of these factors are taken by Kovaĉ and Squires to indicate that Scottish publishers display a more 'extrovert nature'.[171] This nuance underlying the publishers' motivations will be further explored in Chapter 5.

3.1.3. The Supporting Ecosystem

Being situated within a wider cultural landscape, an important aspect of the Scottish publishing industry is, understandably, also the support it receives from public institutions and organisations. Around a quarter of its publishing companies are a public sector organisation or

[163] Donnell et al., *Independent Publishing*, p. 5.
[164] Ramdarshan Bold, 'Sorry Tale', p. 80.
[165] McCleery and Ramdarshan Bold, 'What is My Country?', p. 122; Ramdarshan Bold, 'Rights and Wrongs', p. 347.
[166] Kovaĉ and Squires, 'Scotland and Slovenia', p. 16.
[167] Boyd, 'Scottish Publishing', p. 18.
[168] Kovaĉ and Squires, 'Scotland and Slovenia', p. 17; Ramdarshan Bold, 'Rights and Wrongs', p. 347.
[169] Kovaĉ and Squires, 'Scotland and Slovenia', p. 13.
[170] Ibid., p. 16.
[171] Ibid.

tied to a public institution.[172] Public money is channelled into Scotland's book industry and in support of various literary activities.[173] The state also offers financial help, in support of authors, promoting reading, and events such as book festivals, although this mostly goes to non-trade publishing institutions.[174] Key institutions are Creative Scotland and Publishing Scotland, as well as the Scottish Book Trust. Creative Scotland is a public body that plays an important role in long-term funding opportunities for book programmes, but trade publishing companies are not regularly funded.[175] In comparison, Publishing Scotland is a strong driving force behind the industry, partly funded by Creative Scotland; the trade union supports its member publishers to attend book fairs abroad, offers training programmes, and helps developments in business strategies and digital products.[176] Klamet explains how this applies to small publishers specifically, for whom 'market conditions make … risk averse in their publishing choices as they cannot afford to publish many titles that do not sell well'.[177] Here, publishers often rely on either cross-financing from commercial successes, or external funding and grants, to enable them to continue publishing books of specific Scottish interest.[178]

Such financing is particularly important for micro- and small businesses; these are more likely to rely on external funding or subsidisation to stay afloat, and may be more vulnerable to external circumstances or market shifts on a yearly basis.[179] When zooming in to individual publishers and sub-sectors, there is a key concern regarding the financial sustainability of the Scottish publishing industry, namely due to its size and composition.[180] Newer companies particularly struggle, as publishing is a long-term business and company maturity is strongly correlated to financial stability and longevity.[181] In 2021, Squires and Markou reported that 'small, independent publishers are in an extremely precarious position, even before the economic pressures brought about by COVID-19'.[182] Publishing Scotland has referred to the pandemic as causing 'a catastrophic drop in income … [which] has affected the entire publishing ecology of

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172 Ramdarshan Bold, 'Rights and Wrongs', p. 346.
173 Kovaĉ and Squires, 'Scotland and Slovenia', p. 16.
174 Ibid.
175 Ibid.
176 Ibid.
177 Klamet, 'Publishing in the Shadow', p. 56.
178 Ibid.
179 Squires and Markou, 'An Ecosystem Model', pp. 433-434.
180 Ibid., pp. 420, 429.
181 Ibid., p. 434.
182 Ibid., p. 421.

publishers, writers, illustrators, freelancers, bookshops, and other parts of the supply chain and infrastructure'.[183] The pandemic inevitably plays a role in the present thesis' overview of the current publishing scene, and also may partly account for the limited availability of up-to-date figures. While many of the existing sources on Scottish trade publishing are somewhat dated, which affects the nature of the data that the present paper is dealing with, they nevertheless hold a value in positing trends and allowing for critical observation. As this older data shows, SMEs were already particularly vulnerable to precarious financial positions prior to the pandemic, and existing trends remain salient in understanding the challenges they face today.[184]

Due to the characteristic forces and contextual circumstances outlined thus far, the contemporary publishing scene in Scotland is left 'in a fragile and fragmented state', as claimed by McCleery and Ramdarshan Bold.[185] Furthermore, they describe a 'loss of control' in the industry, due to top-down acquisitions and mergers of independent Scottish publishers by larger UK companies, and within a wider trend of the UK publishing industry becoming partly merged with international firms.[186] In fact, such a conclusion, emphasising the disparities of the industry, may usefully be applied to small publishers across all of the UK, not only Scotland, as well as to other small nation publishers.[187] Having described the contemporary publishing scene in Scotland to this extent, we now turn to a further understanding of its position as situated within the UK-wide market.

3.2. Situating Scotland within the UK Market

Building upon the characterisation of Scotland as an illustrative example of small nation publishing in a large language market in Chapter 2, and the overview of the contemporary Scottish publishing scene above, the present subchapter situates this industry within the wider UK market. To understand what exactly Scottish publishing is, we must disentangle its profile from the aggregated profile of the UK book market.[188] In the UK overall, publishing is a large business and a substantial sector of the nation's creative economy; it has an average turnover of

[183] Ibid., p. 430.
[184] Ibid., p. 421.
[185] McCleery and Ramdarshan Bold, 'What is My Country?', pp. 121-122.
[186] Ibid., p. 122.
[187] Ibid., p. 123.
[188] Ibid., p. 116.

£6 billion, provides employment to over 29,000 people, and is the largest book exporter in the world.[189] A study conducted in 2018 found that, within the UK book market, print books published in Scotland accounted for 8.4% of the sector's total sales.[190] Looking at such statistics, the position of Scotland's publishing scene seems relatively peripheral. Acknowledging this, Ramdarshan Bold writes that 'Scotland's publishing industry has often been overlooked in favour of, and merged with, the flourishing industry in London despite developing separately and having its own distinct history'.[191] Advocating, however, for the study of Scotland's book market in its own right, Squires and Markou write that 'its environment is also differentiated [from the UK as a whole] due to being populated largely by small and independent publishers, a devolved cultural policy environment, as well as cultural and political differentiation which affects content creation'.[192] Although Scottish publishing is certainly situated within the British publishing industry, it is important to acknowledge that it remains distinctive and retains its own clear, strong identity, rather than falling into one homogenised, generalised market.[193]

On the other hand, it is precisely its situatedness within the UK's context that also causes fierce competition for Scotland.[194] Squires and Markou aptly sum up that, '[i]n addition to general problems of the (economic) devaluing of … the UK England market, Scotland's publishers suffer from the centralisation of the UK publishing industry, which is heavily based in the south-east'.[195] The gravitational pull of London, and the consequent undercapitalisation of publishing in other regions, are key reasons behind why the Scottish market is fragmented (as described in the subchapter above, and as also perceived by Scottish publishers themselves).[196] It is important to note that Scotland did not always succumb to London's gravitational pull, but was in fact the home of many company headquarters up until the 1960s and 70s.[197] Those decades then saw a wave of acquisitions and mergers from the US or London-based publishers, and many subsequently moved away from Scotland.[198] In recent decades, there are concerns that this 'decline' of the Scottish publishing industry is ongoing, as raised by closures or movements of

[189] Squires and Markou, 'An Ecosystem Model', p. 420.
[190] Klamet, 'Publishing in the Shadow', p. 54.
[191] Ramdarshan Bold, 'Rights and Wrongs', p. 355.
[192] Squires and Markou, 'An Ecosystem Model', p. 426.
[193] Ramdarshan Bold, 'Rights and Wrongs', p. 347.
[194] Ibid.
[195] Squires and Markou, 'An Ecosystem Model', p. 429.
[196] Kovaĉ and Squires, 'Scotland and Slovenia', pp. 8, 16.
[197] Ibid., p. 10.
[198] Ibid.

some of its major publishers.[199] An example of this is Mainstream Publishing, which was one of the largest independent publishers in Scotland until its acquisition by Random House in 2013, which led to the closure of its Edinburgh headquarters and the letting go of its employees.[200] Despite a number of recent efforts to mitigate such events, with some publishers opening regional offices, the vulnerability to acquisitions and mergers remains.[201]

The proximity and gravitational pull of London has also proven to be a challenge as up-and-coming authors originally from or based in Scotland may be drawn to London publishers instead; they may offer higher advances, marketing deals, domestic and foreign sales opportunities, overseas links, and improved rights potential.[202] Forming the hub of the UK publishing industry, London-based publishers are larger in terms of size, turnover, employees, and titles in print, and seen as more prestigious; all of which adds symbolic and cultural capital that 'apparently offer[s] greater exposure to authors in this age' and makes the London-centric book market into a 'Goliath', as coined by McGowan.[203] Such strengths understandably attract authors, but pose a problem for independent publishers regardless of where they are located, a trend which is explained by Squires and Markou as '"poaching" … with their initial risk in investing in and nurturing writers then lost to larger publishers'.[204] Further interpreted by Klamet, this means that success for authors can actually be 'a double-edged sword' for trade publishers in Scotland.[205] The result of these circumstances has also been observed in practice, as Scottish authors who gain commercial success and wider audience reach then often transfer to London-based or international publishers.[206] As a potential way to address this imbalance, it has been proposed that these larger publishers should pay a 'transfer' fee to the smaller publisher from whom they are picking the author up.[207] However, for a more sustainable solution, it would be important to encourage and incentivise both authors and publishers to remain in Scotland.[208]

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199 Boyd, 'Scottish Publishing', p. 15.
200 Ibid.
201 Squires and Markou, 'An Ecosystem Model', p. 429.
202 Ramdarshan Bold, 'Rights and Wrongs', p. 347; Ramdarshan Bold, 'Sorry Tale', p. 83; Klamet, 'Publishing in the Shadow', p. 55.
203 Qtd. in Klamet, 'Publishing in the Shadow', p. 55.
204 Squires and Markou, 'An Ecosystem Model', p. 429.
205 Klamet, 'Publishing in the Shadow', p. 55.
206 Kovaĉ and Squires, 'Scotland and Slovenia', p. 10; Ramdarshan Bold, 'Rights and Wrongs', p. 347.
207 Squires and Markou, 'An Ecosystem Model', p. 429.
208 Ramdarshan Bold, 'Rights and Wrongs', pp. 356-357.

A key struggle is that Scottish publishers oftentimes offer smaller advances to their authors than the advances available in London, making it difficult to compete.[209] This dynamic is not unique to Scotland specifically, but also to other regional publishers in areas other than London, all of whom struggle to compete with London's budgets and dominance.[210] This creates a disparity in earnings, and a survey by Ramdarshan Bold reveals that even if authors did wish to work with a Scottish publisher, this was often not feasible due to insufficient advances.[211] A particularly concerning finding is that 'Scottish authors are earning lower advances now than they were in 2001', which Ramdarshan Bold highlights 'does not reflect well on the Scottish publishing industry'.[212] Nevertheless, there are ways forward here in the digital age; the aforementioned potential of exploiting rights sales across new platforms and media is a fruitful area which can be taken advantage of.[213] For instance, literary agents can step in and develop the necessary skills to ensure their authors' works are distributed and exploited more efficiently and more widely, which helps them to compete on more equal footing with services offered by London-based agencies.[214] In fact, this area may hold further untapped potential because conglomerate agencies are more selective in taking on clients, which means that authors can find representation offered by smaller literary agencies and publishers instead, such as by the majority of those in Scotland.[215]

As such, Klamet 'portraits the industry positively with an abundance of potential but with little opportunity for capitalisation'.[216] Alongside the issue of advances and rights sales, distribution also plays an important role, as Scottish publishers struggle to compete with the wider distribution networks of London-based publishers.[217] Larger publishers also have more leverage to negotiate than smaller publishers do, who in turn face barriers such as unfavourable supplier terms.[218] Tellingly, one literary agent is quoted in Ramdarshan Bold's survey saying that they 'would not want to limit potential readers by publishing with them [Scotland-based

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[209] Ramdarshan Bold, 'Sorry Tale', p. 84.
[210] Ibid.
[211] Ibid.
[212] Ibid., p. 90.
[213] Ibid.
[214] Ibid., p. 91.
[215] Ibid.
[216] Klamet, 'Publishing in the Shadow', p. 55.
[217] Ramdarshan Bold, 'Sorry Tale', p. 84.
[218] Squires and Markou, 'An Ecosystem Model', p. 431.

publishers]'.[219] Especially as English-language publishing becomes increasingly saturated, the wider influence and reach of powerful agents and publishers in London plays an important deciding factor.[220]

The problem of poaching affects not only individual titles and authors, but also the industry itself, when local publishing houses are acquired by, or merged with, conglomerates outside of Scotland. SME publishers are vulnerable to poaching by larger conglomerates if they manage to garner commercial success and attention; and thus become potential competitors to the remaining SMEs, further perpetuating their peripheral nature.[221] Ramdarshan Bold identifies this pattern as one of the causes behind the UK-wide publishing scene becoming homogenised, concentrated, and dominated by a handful of conglomerates.[222] Mark Buckland, the founder of Cargo Publishing, further posits that:

> [London's] media decides what is important to London and publishes accordingly. Its publishers follow that tact [sic], and inevitably, the artists there dance to the tune played by those with the pursestrings. It has little to no interest in Scottish writing, outwith a few, rightly celebrated authors – but there should be far more beyond that. Should Scottish authors be changing their work and deracifiying themselves so that they can fit into the London literary parties? I would hope not.[223]

Alarmingly, these acquisitions and mergers perpetuate a concentration and consolidation of the book market, which results in an increasingly shared transnational culture, but at the cost of decreasing cultural variety and consumer choice.[224] Such concerns of a transnational market are relevant not only within the UK, but also affect Scottish publishing on the global scale of the larger English-language market.

Having provided an overview of the Scottish publishing industry and its distinguishing characteristics, as well as the potentials of what opportunities and challenges are brought about by digitisation in publishing, the adoption of digital innovation stands out as significant and

[219] Ramdarshan Bold, 'Sorry Tale', p. 85.
[220] Ibid., p. 90.
[221] Ramdarshan Bold, 'Rights and Wrongs', p. 347.
[222] Ibid.
[223] Qtd. in Boyd, 'Scottish Publishing', p. 18.
[224] McCleery and Ramdarshan Bold, 'What is My Country?', p. 130.

relevant to the current challenges of Scottish trade publishing. As we shall see, while the development of digital innovation appears under-researched in the trade publishing sector, it has nevertheless been found beneficial for other sectors such as libraries and academic publishing.[225] Hence, the following chapter provides an analytical study of what has been observed regarding digital innovation across Scottish cultural sectors other than trade publishing. This comparative study is grounded in a series of case studies and examples, from which relevant parallels may be drawn to further the understanding of digital change within Scotland's trade publishing.

[225] Ramdarshan Bold, 'Rights and Wrongs', p. 351.

4. Digitisation in Comparable Sectors

As acknowledged hitherto, detailed data on the trade publishing sector in Scotland is somewhat limited and outdated. In order to contribute to the discussion and fill this gap, the present chapter conducts a comparative study, assessing the role and impact of digital innovation in other comparable markets in Scotland; namely, the cultural heritage sector and academic publishing. These sectors are of particular interest not only because of their situatedness within the specificity of Scotland's cultural landscape, but also because of their particular innovation in digitisation and information provision. Digital information services have been innovatively developed in recent years, and the electronic format has been especially taken up in academic publishing, such as for journals and periodicals, both of which lend themselves well to digital presentation and searchability.[226] Furthermore, electronic subscriptions and resources have quickly become commonplace for institutions such as libraries, and in turn, the users of these services have become accustomed to accessing them electronically.[227] The same speed and/or extent of digital uptake is much less clear in Scottish trade publishing, as touched upon in Chapter 2; and Chapter 5 will return to develop this theme in more detail.

In both sectors chosen for comparative analysis, fundamental shifts brought about by the digital revolution are also relevant to those that arise in Scottish trade publishing. Key issues identified in these sectors also hold relevance for Scottish trade publishing, such as cuts to public expenditure, and the sectors are thus comparable in facing similar challenges.[228] The method of observing and drawing reflections from shared contexts is in part inspired by existing studies, such as by Klamet, who explains that the 'same process is studied in different fields and leads to a better understanding of local specificity or generalities', specifically in book publishing.[229] The value of looking at existing projects and digital services in other sectors is also to 'serve as a benchmark against which services elsewhere can be measured', as added by Chowdhury and Margariti.[230] Hence, the following subchapters analyse the uptake of digital innovation in Scotland's cultural heritage and academic publishing sectors, providing respective case studies to

[226] Wallis, 'Facilitating Scottish Cultural Publishing', p. 265.
[227] Ibid.
[228] Martyn Wade, 'Re-inventing the Library: The Role of Strategic Planning, Marketing and External Relations, and Shared Services at the National Library of Scotland', *Library Review*, 62 (2013), pp. 59–66 (pp. 59, 62).
[229] Klamet, 'Publishing in the Shadow', p. 43.
[230] Gobinda Chowdhury and Simone Margariti, 'Digital Reference Services: A Snapshot of the Current Practices in Scottish Libraries', *Library Review*, 53.1 (2004), pp. 50–60 (p. 54).

ground these observations. In Chapter 5, the focus returns to Scottish trade publishing, where parallels will be drawn between that sector and those under discussion in this chapter.

4.1. Cultural Heritage Sector

Publishers across the UK are producing unprecedented levels of output in recent decades, ever since the 1990s when, as Cunnea et al. explain, 'publishing underwent a rapid and unforeseen expansion. Works were published in both print and digital formats simultaneously, born-digital works emerged', and the web and digital platforms offered an environment with less barriers to entry.[231] Cunnea et al. further explain that '[t]his shift, from print to digital, and the dissemination of digital works outwith traditional publishing routes', has posed a challenge to institutions within the cultural heritage sector, particularly to libraries.[232] Digital developments have given rise to new questions of how to collect, capture, preserve, and archive the increasingly digital output across the UK.[233] Looking at public/national libraries, both the challenges and opportunities of digital innovation have been studied to an extent. For instance, an overview of libraries in Scotland was conducted by Chowdhury and Margariti in 2004, observing the main practices these institutions were following for the provision of digital services.[234] They conclude that 'digital reference services are effective forms of service delivery in Scotland's academic, national and public libraries, but … their full potential has not yet been exploited'.[235] This appears similar to what has been observed thus far in Scotland's trade publishing sector. However, in a discussion of digitisation, developments occur at a rapid pace and findings from the previous decade may now require reappraisal. To diversify and update the source base here, secondary studies are brought into discourse with recent primary sources, such as the National Library of Scotland's (hereafter referred to as NLS) *Thriving or Surviving?* report with its prospective vision of 2030.[236] Particularly with regard to the digital, the NLS is a trendsetting adopter, and will be treated in further detail in subchapter 4.3.

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[231] Cunnea et al., 'The Influence of Legal Deposit', in *Electronic Legal Deposit*, ed. by Gooding and Terras, p. 34.
[232] Ibid., pp. 34-35.
[233] Ibid., p. 35.
[234] Chowdhury and Margariti, 'Digital Reference Services', p. 50.
[235] Ibid.
[236] National Library of Scotland, *Thriving or Surviving? National Library of Scotland in 2030. A report by David Hunter and Karen Brown* (Edinburgh: National Library of Scotland, 2010), pp. 1–85.

The digital age, according to Cunnea et al., has challenged the library sector's '300 year-old print-based processes and practices. In just 10 years it has become rapidly necessary to develop the digital skills of those staff working with and managing these resources', as well as rendering some processes redundant and evolving new ones.[237] Across sectors, digital innovation brings possibilities of speed, accuracy, and efficiency in many tasks, where computers may outperform the human workforce.[238] Here, efficiency is understood in terms of how well the flow of the service works.[239] Looking at the immediate transformations brought about digitisation in libraries, these include their existing services, methods of content delivery, workflow activities, modes of access, readable formats, necessary infrastructure, and staff competencies.[240] Digitisation also affects in-house reference services of libraries, in terms of workload distribution, the potential of electronic queries, and provision of digital services.[241] To sum up, Wade writes that libraries 'must respond to the digital, financial and societal changes by similarly challenging their own ways of working … [or] be increasingly marginalised by commercial organisations'.[242] The *Thriving or Surviving* report also identifies key impacts of the digital revolution on libraries, namely a shift to digital publishing, organisational changes, changes to customer needs and behaviour, and external competing forces.[243] Altogether, it appears that digitisation 'leaves few areas of the Library untouched', Ames and Lewis claim.[244] Interestingly, although written in 2020, they refer to this as a 'disruption' and as 'disrupting' the library sector; using somewhat negative wording to describe the digital shift.[245] The way in which this study and other dated sources present digitisation in this fashion is notable, in that its potential is not firmly brought out.

Such negative framing may be partly because digitisation also gives rise to challenges in the library sector; namely the availability of the infrastructure required, with cost implications of both obtaining the digital material and maintaining these, as well as bandwidth and platform

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[237] Cunnea et al., 'The Influence of Legal Deposit', in *Electronic Legal Deposit*, ed. by Gooding and Terras, pp. 51-52.
[238] Chowdhury and Margariti, 'Digital Reference Services', pp. 50-51.
[239] Ibid., p. 59.
[240] Sarah Ames and Stewart Lewis, 'Disrupting the Library: Digital Scholarship and Big Data at the National Library of Scotland', *Big Data & Society*, 7.2 (2020), pp. 1–7 (pp. 1, 4-5); Cunnea et al., 'The Influence of Legal Deposit', in *Electronic Legal Deposit*, ed. by Gooding and Terras, pp. 51-52.
[241] Chowdhury and Margariti, 'Digital Reference Services', p. 56.
[242] Wade, 'Re-inventing the Library', p. 60.
[243] National Library of Scotland, *Thriving or Surviving?*, p. 5.
[244] Ames and Lewis, 'Disrupting the Library', p. 5.
[245] Ibid., pp. 1, 4.

limitations.[246] Although writing 20 years ago, Chowdhury and Margariti already pointed to the salient issue of many Scottish libraries lacking software tools, which they understood to also imply their potential time-saving impact if introduced.[247] For instance, with any larger volume of electronic enquiries, institutions seem to lack sufficient management software to store, track, or save these for future reference.[248] Although these findings are somewhat dated, Chowdhury and Margariti nevertheless manage to forecast potential solutions; such as the likelihood that 'reference services … will be developing such features in the near future, as the benefits of such enhancements become firmly established in library practice', and will enable usage statistics.[249] This has indeed proven to be the case. A related challenge in libraries is also the digital literacy of both staff and users, and the training and awareness this calls for, to enable them to produce and consume information from digital resources.[250] Regarding core skillsets in libraries, multiple surveys across the UK report a training gap, particularly skill shortages with regard to technical knowledge, data-related tasks, and tool expertise.[251] A key strategy for managing digital change in this sector thus includes the development of new technical and professional competencies to build a skilled workforce, as well as the reallocation of financial resources towards both expertise and infrastructure.[252]

Existing surveys further raise concerns regarding both the sustainability of libraries in the digital age, and the need for supporting digital scholarship; the rise of which has particularly transformed the library sector.[253] Digital scholarship brings about new opportunities and research activities, but also means that libraries encounter new implications and challenges of working with unprecedented scales of data, in both volume and velocity.[254] A culture in which libraries should support the rise of computational methods in scholarship, and make their content increasingly available in machine-readable formats, is also on the rise.[255] In their 2020 report, Ames and Lewis note that this 'presents new challenges around data management, storage, rights, formats, skills and access', as well as other practical issues such as digitisation processes

[246] Chowdhury and Margariti, 'Digital Reference Services', pp. 51, 57-58.
[247] Ibid., p. 57.
[248] Ibid., pp. 56-57.
[249] Ibid., p. 59.
[250] Ibid., pp. 50, 58-59.
[251] Ames and Lewis, 'Disrupting the Library', p. 3.
[252] Wade, 'Re-inventing the Library', p. 60.
[253] Ames and Lewis, 'Disrupting the Library', pp. 1, 3.
[254] Ibid., p. 1.
[255] Ibid., p. 2.

and discovery.[256] The sources noted here, namely Chowdhury and Margariti's 2004 paper and Ames and Lewis' 2020 report, are distanced by sixteen years and written during a time of unprecedented transformation and scale of digitisation. Yet, comparison of these sources enables a survey of how the discourse around digitisation in the library sector has developed and been shaped over time.

Alongside the noted challenges, digital scholarship also opens up new opportunities for digital innovation and efficiency, particularly highlighted in the NLS' prospective report.[257] Innovative tools and techniques include machine-learning, big data, interoperable systems, and crowd-sourcing.[258] Cunnea et al. add that the maintenance and support of digital infrastructure is something that 'requires a few hours of trained technician time per month, compared with many hours of ten Collection Support staff per month in respect of physical materials … they are able to spend more time on value-added duties'.[259] Moreover, in contrast to print runs of thousands of physical publications that staff would need to unbox and process each week, the use of digital formats removes this and frees up time for other forms of work.[260] A number of key strategies towards digitisation are also identified, including the design of electronic books, interoperability, and the electronic publishing of content.[261]

Seemingly, there is a call for innovative approaches to the traditional practices of the heritage sector and of libraries as organisations, as well as broader changes to cultural understandings of libraries and resituating their role within the digital world.[262] Moreover, Wade writes that, '[i]n an era of increasingly scarce funding for public services in many countries, and rapid technological change, libraries must be agile if they are to continue to be relevant … They will need to demonstrate their value to both funders and society'.[263] For libraries, the digital calls for a broader shift from stewardship toward access, and a focus more upon the end-user and their needs, which are increasingly necessary to consider and cater to, in the context of digital services

[256] Ibid., p. 1.
[257] National Library of Scotland, *Thriving or Surviving?*
[258] National Library of Scotland, *Thriving or Surviving?*, p. 24; Cunnea et al., 'The Influence of Legal Deposit', in *Electronic Legal Deposit*, ed. by Gooding and Terras, p. 51.
[259] Cunnea et al., 'The Influence of Legal Deposit', in *Electronic Legal Deposit*, ed. by Gooding and Terras, p. 52.
[260] Ibid., p. 51.
[261] Derek Law, Dennis Nicholson, and Gordon Dunsire, 'Whole Environment Research on Distributed and Collaborative Digital and Non-digital Networked Libraries in Scotland', *Bibliothek Forschung Und Praxis*, 26.2 (2002), pp. 113–123 (p. 113).
[262] Ames and Lewis, 'Disrupting the Library', pp. 3, 5.
[263] Wade, 'Re-inventing the Library', p. 62.

and the diversity of users these can reach.[264] While the digitisation of libraries can be investigated at both a national and international level, a literature review by Law et al. focuses on libraries within smaller community contexts, where non-digital environments seemingly still hold an important role and value, and hence affect the libraries' uptake of the digital.[265] This is because community-based aims are important to consider when developing digital environments, and can for instance result in preference for a hybrid approach to offering both electronic and print resources.[266] This is an important consideration and is a useful parallel to the alternative goals identified via the for/in divide within trade publishing. In such an understanding, libraries within smaller community contexts would align closely with the side of publishing *for* Scotland.

Similarly, in the steps taken by libraries towards digitisation, tensions may also arise between the goals and needs of these institutions, researchers, and the wider public on one hand, and the interests of rights holders and publishers on the other.[267] For instance, looking at legal deposit libraries, Cunnea et al. acknowledge that while 'many large publishers have "transitioned" from print to non print legal deposit', digitisation also creates legal challenges due to restrictions on the access and use of some material.[268] Moreover, Cunnea et al. elaborate that the more complex digital environment, compared to print, may result in 'potentially very different [views on access] from those of both commercial and non-commercial traditional publishers'.[269] A striking example of this is in the academic publishing sector, where innovations of Open Access and open licences are increasingly taken up for scholarly publications; which has also given rise to debates between libraries and academic publishers.[270] Accordingly, the following subchapter looks at the uptake of digital innovation in the academic publishing sector.

4.2. The Academic Publishing Sector

A significant shift from print into the digital is particularly seen in academic publishing, taken up by many institutions, with e-only agreements and coverage often taking the place of print.[271] The

[264] Ibid.
[265] Law et al., 'Whole Environment Research', pp. 114-115.
[266] Ibid., p. 115.
[267] Cunnea et al., 'The Influence of Legal Deposit', in *Electronic Legal Deposit*, ed. by Gooding and Terras, p. 42.
[268] Ibid., p. 41.
[269] Ibid., pp. 42-43.
[270] Ibid., pp. 43, 46.
[271] Tony Kidd and Liz Stevenson, 'SHEDL – The Scottish Higher Education Digital Library: An Update', *The Journal for the Serials Community*, 23 (2010), pp. 196–200 (p. 199).

digital era was perceived at first as a threat to the print format of journals; but electronic formats have since served to widen both the reach and markets of the publications' content, and increase sales.[272] At an institutional level, these changes also affect the workflow, distribution, and use of content; similar to what we observe in libraries and trade publishing.[273] In the Scottish academic publishing sector, these shifts can be observed in practice.

As reported by Boyd, 'academic publishing—traditionally a strong sector in Scotland—has been greatly depleted over the last few years', citing the closure of the Scottish branches of larger conglomerates such as Wiley & Chambers, and with the last remaining academic publisher in Scotland being Edinburgh University Press, which is also in a precarious financial position.[274] At the same time, it is notable that academic publishing in Scotland 'continues to punch above its weight … with regard to competitive sources of research funding', as reported by Cannell, since they receive over 25% share of the sector's funding across the UK despite making up only 9.7% of the total population.[275] Akin to the aforementioned circumstances of how trade publishing in Scotland competes with London's gravitational pull, the academic sector displays similar patterns wherein London, Cambridge, and Oxford dominate the scene.[276] Academic research and publishing activities in Scotland undoubtedly have international impact but, similarly to the challenges faced by the trade publishing sector, there are concerns with regards to size, maximising economies of scale, and the allocation of funding.[277] Sustainability and efficiency are also common areas of concern in Scotland's academic publishing scene, partly due to external factors such as funding cuts in the higher education sector, rising subscription prices, and the overpowering profits of conglomerate companies.[278]

Furthermore, a key motivation underlying digitisation of Scottish academic publishing is remote access, which is of particular significance because there is a market and demand at universities abroad for research into Scottish interests and culture; particularly due to the tradition of immigration from Scotland into countries such as Australia, USA, and Canada.[279]

[272] Wallis, 'Facilitating Scottish Cultural Publishing', p. 267.
[273] Kidd and Stevenson, 'SHEDL', p. 200.
[274] Boyd, 'Scottish Publishing, p. 15.
[275] Sheila Cannell, 'Supporting Research in Scotland: The Scottish Higher Education Digital Library', *Alexandria*, 22.2-3 (2011), pp. 41–48 (p. 41).
[276] Ibid.
[277] Kidd and Stevenson, 'SHEDL', p. 196.
[278] Wallis, 'Facilitating Scottish Cultural Publishing', p. 266.
[279] Ibid., p. 267.

Wallis aptly writes that ‘offering an online gateway to Scottish cultural material … can connect Scottish publishers with overseas markets’.[280] Here, there is a clear driving purpose and immediate impact of digitisation, upon offering these resources abroad. If academic journals published in or about Scotland are offered digitally, this also has cascading advantages of raising the international profile and visibility of these journals, as well as the marketing and attractiveness of the service to future subscribers.[281] Digitisation in academic publishing hence also heightens the presence of Scottish culture and research on the global scene, which is crucial in an increasingly saturated environment.[282]

This context has given rise to projects across the Scottish academic sector, which are specifically aimed at small and/or independent publishers, providing aid without which they may not have the skills or resources to keep up with digital innovation.[283] Such aid includes providing the necessary expertise in electronic publishing, as well as the technical infrastructure that must be put in place.[284] This aid is significant because, although electronic publishing circumvents some costs associated with the print format, it is nevertheless not a cost-free venture. Particularly, the start-up period requires substantial investment, for undertakings such as purchasing equipment, hiring or training staff, and relevant marketing.[285] After these initial investments, which eventually decrease once automated, costs will still be required for skilled staff and maintenance tasks such as file format conversions, back-up storage, and technological upgrades.[286] In response to these cost barriers, funded projects aiding academic publishers can also help cover the additional start-up costs such as staff hours and establishing infrastructure.[287] However, a sustainable and viable business model (i.e. one that generates additional revenue) is ultimately necessary, to cover the costs of sustaining these services beyond the period of establishing the project, and to incentivise the academic publishing sector to adopt the service in the first place.[288]

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[280] Ibid.
[281] Ibid.
[282] Ibid.
[283] Ibid., p. 266. Such projects are further exemplified in Chapter 4.4.
[284] Ibid.
[285] Ibid, p. 268.
[286] Ibid.
[287] Ibid., pp. 267-268.
[288] Ibid., p. 268.

Furthermore, in academic publishing, digital content has become increasingly dealt with through so-called 'big deal' and bundle agreements.[289] Although print subscriptions remain, many frameworks between academic publishers and libraries are increasingly based on the delivery of journals solely in electronic format.[290] This service is then often sustained through subscription models, and has additional benefits of reducing demands on print holdings.[291] However, larger conglomerates have the ability and tendency to offer package deals to libraries at more competitive prices, which disproportionately disadvantages many small and/or independent academic publishers in Scotland, and deals with smaller publishers are often cancelled by libraries who wish to save money.[292] This becomes of increasing concern when it is precisely the independent academic publishers who produce output regarding Scotland's cultural heritage; which must remain accessible to students and researchers in the increasingly electronic environment or risk being pushed to the margins.[293] As the demands and expectations of students and researchers are becoming increasingly digital, both academic publishing and libraries are adjusting to support these needs.[294]

4.3. The National Library of Scotland

Here, we turn to an illustrative example that serves as a linchpin between what is observed across both sectors examined in the prior subchapters, conducting a close investigation of the NLS. This library is chosen as a relevant case study due to its prominent role in Scotland, and its ongoing in-house programme of mass digitisation.[295] In fact, Ames and Lewis write that, '[s]et against this shifting national and international backdrop, the mass-digitisation programme at the Library lends itself well to this computational turn' in the cultural heritage sector.[296] Observing the NLS, Wade further notes their 'clear response to the digital revolution. The strategy signalled a clear commitment to exploit the opportunities created by a shift towards digital'.[297] A 2020 report found a rapidly increasing percentage of content offered in digital formats by NLS in recent

[289] Cannell, 'Supporting Research in Scotland', p. 43.
[290] Ibid., p. 44.
[291] Wallis, p. 265; Cannell, 'Supporting Research in Scotland', p. 45.
[292] Wallis, 'Facilitating Scottish Cultural Publishing', p. 266.
[293] Ibid.
[294] Cannell, 'Supporting Research in Scotland', p. 42.
[295] Ames and Lewis, 'Disrupting the Library', pp. 1-2.
[296] Ibid., p. 3.
[297] Wade, 'Re-inventing the Library', p. 62.

years, with the NLS having digitised 22% of their collection at the time of writing.[298] The NLS initially focused upon providing digital content and datasets, making these available in consistent formats, with further goals of publishing audiovisual material, metadata, and web archives in digital form in the future.[299] Importantly, their experiences shine light on challenges such as format (of new media, including e-books and interactive fiction), widening access, and digital preservation and safeguarding.[300]

For a successful future of the NLS as an institution, Wade identifies 'the transition to digital, the need for an outward focus and the development of an agile library as fundamental'.[301] In fact, the adoption of digital systems and services has helped the NLS achieve financial savings, adjusted workflow, and improved operational resilience, identified as especially important to its sustainability into the future.[302] In addition, digital developments at the NLS also provide useful evidence in favour of the potential demand from its audience, to the collections and services it offers, and particularly of remote access.[303] Relevant key strategies also include external relations and marketing, not only to widen the reach and use of the NLS's collections and services, but to promote the NLS itself and its role in the present day.[304]

In the digital age, there is unprecedented access to data on use and consumer behaviour, which both library and academic sectors can employ to their advantage. Wade's report on the NLS credits much of its digitisation strategy to precisely this. The NLS' development strategies are largely based on preliminary market research, as well as horizon scanning, customer feedback, and monitoring the use of their services.[305] The NLS also uses market research to inform their decisions on which items to digitise, and how.[306] Here, the NLS' ongoing focus on market research and expertise regarding the audience's needs is also what helped the success of their publicity and marketing campaigns, which specifically promote their growing range of services.[307] For instance, the NLS has invested in producing campaigns which 'set out to

[298] Ames and Lewis, 'Disrupting the Library', p. 2.
[299] Ibid, p. 3.
[300] Cunnea et al., 'The Influence of Legal Deposit', in *Electronic Legal Deposit*, ed. by Gooding and Terras, p. 33.
[301] Wade, 'Re-inventing the Library', p. 59.
[302] Ibid.; National Library of Scotland, *Thriving or Surviving?*, p. 25.
[303] Wade, 'Re-inventing the Library', p. 62; National Library of Scotland, *Thriving or Surviving?*, p. 28.
[304] Wade, 'Re-inventing the Library', pp 59-60.
[305] Ibid., p. 61.
[306] Ibid., p. 64.
[307] Ibid., pp. 63-64.

challenge traditional assumptions about national libraries', writes Wade.[308] Altogether, Wade reports that the 'combination of significant service developments together with imaginative and high quality marketing and external relations have resulted in awareness of NLS more than doubling, together with substantial increases in use both by visitors to the Library and by remote users', indicating the success of these digital initiatives.[309]

Wade also deduces two key lessons from the NLS; that sufficient staff is first required to ensure the effective adoption of digital potential, and, crucially, committed support from a governing body that has a shared vision.[310] In fact, the *Thriving or Surviving* report states that 'NLS must lie in positioning itself as close as possible to the heart of government policy … [but] will also need to diversify its funding base'.[311] In line with this, Ames and Lewis write that activities seen in NLS are 'set amidst a burgeoning context' in Scotland, one in which 'there has been an increasing investment … with a significant emphasis on data-driven innovation'.[312] Wade's report further encourages technological innovation at all levels, suggesting the development of operating systems and effective performance monitoring, and a focus on both new and shared services, to target a wider and more remote audience.[313] Importantly, widening access also indirectly helps foster relationships and to develop the organisation.[314]

The NLS has also been largely involved with the aim of Scottish institutions towards optimising digital resources through collaboration; which Chowdhury and Margariti already noted in 2004 could 'support the co-ordination of digital reference strategy across Scotland' overall.[315] As the sectors of libraries and publishers intersect, digital steps taken by libraries then also enrich the resources and tools available for investigating Scotland's publishing scene. To illustrate, rich information resources regarding Scotland include the *Bibliography of Scottish Literature in Translation*, the *Union Catalogue of Art Books in Scotland*, and the *Scottish Book Trade Index* (*SBTI*), all of which are linked on the NLS' website.[316] Digital tools and methods developed in libraries and digital scholarship, such as metadata and text mining, also bring about the potential of analysing and furthering the understanding of the publishing output specific to

[308] Ibid., p. 64.
[309] Ibid.
[310] Ibid., p. 65.
[311] National Library of Scotland, *Thriving or Surviving?*, p. 25.
[312] Ames and Lewis, 'Disrupting the Library', pp. 2-3.
[313] Wade, 'Re-inventing the Library', p. 60.
[314] Ibid., p. 62.
[315] Chowdhury and Margariti, 'Digital Reference Services', p. 55.
[316] Ibid.

Scotland or the UK overall, which ‘the growing digital corpus is ideally suited to meet, and which would be of value to a wide range of stakeholders, including the publishing industry,’ as claimed by Cunnea et al.[317] This aligns with an understanding of publishing as embedded in a wider ecosystem of these multiple agents and entities. The following subchapter turns to examine these circumstances and the relevant collaborative strategies they may facilitate.

4.4. Cross-sector Collaboration

Neither the library nor academic publishing sectors operate in a vacuum, but rather within Scotland’s wider cultural landscape. A key digitisation strategy which stands out here is collaboration. There appears to be a strong tradition for shared services, collaboration, and cooperation in Scotland’s cultural heritage sector.[318] For instance, such collaboration is already taking place between the NLS and the National Galleries of Scotland, where developing shared services benefits both organisations, which are comparable in size and services.[319] The country’s higher education sector is similarly made up of a relatively small number of institutions.[320] Consequently, the size and composition of Scotland’s cultural sectors is taken by Kidd and Stevenson to be ‘both a threat and an opportunity’, explaining that it is precisely what has also ‘led to a high degree of personal interaction and trust among staff, fostering an atmosphere where collaboration is an expected way forward’, as well as enhancing their cultural capital, status, and prestige.[321] In fact, Wade adds that the sharing of services has become ‘a major policy for the Scottish Government to improve the efficiency of the public sector’.[322] Overall, Law et al. argue in favour of establishing a collaborative infrastructure across digital services in Scotland, as well as joint support of funding towards more digitisation projects in this landscape.[323]

Sharing services, expertise, and resources, and bringing teams together to cooperate in innovative ways, is thus a key foundation in shifting towards the digital, and supporting new needs such as digital scholarship.[324] More practically, another important benefit is resilience;

[317] Cunnea et al., ‘The Influence of Legal Deposit’, in *Electronic Legal Deposit*, ed. by Gooding and Terras, p. 42.
[318] Cannell, ‘Supporting Research in Scotland’, p. 42.
[319] Wade, ‘Re-inventing the Library’, p. 65.
[320] Kidd and Stevenson, ‘SHEDL’, p. 196.
[321] Ibid.
[322] Wade, ‘Re-inventing the Library’, p. 64.
[323] Law et al., ‘Whole Environment Research’, pp. 117, 121.
[324] Ames and Lewis, ‘Disrupting the Library’, p. 5.

which Wade aptly notes is ‘important in itself for smaller organisations … there will be significant cost avoidance in the future as shared services become embedded and grow’.[325] In specific, collaborative endeavours can reduce expenditure and labour by supporting the development and maintenance of digital services and software facilities, guidelines and standards, cataloguing of electronic resources, and training of staff, as well as more broadly the creation of a digital information culture.[326] Furthermore, the sharing of infrastructure at a general level could also benefit organisations at a regional, institutional, or domain-specific level.[327] Notably, while the NLS’s *Thriving or Surviving* report identifies their situatedness in a ‘small country’, it also acknowledges how ‘their very size might enable them to respond rapidly to changing circumstances … and help … [tackle] issues of common concern’ in a broader context.[328] Hence, although shared services may not be a blanket solution, they appear beneficial to institutions in the specific context of Scottish sectors, and by extension in other small nations.

To illustrate further, a collaborative project was started in 2008 between the British Library, the NLS, and the National Library of Wales, working together to establish a digital library system, include digital content and metadata, and focus on core technical infrastructure such as access, storage, and security.[329] This infrastructure helped not only libraries but also publishers, by providing and universalising access to wider collections across various physical locations, and making methods such as depositing copies more efficient and streamlined.[330] A number of other projects have also been established, partly in response to changes in the publishing industry which are otherwise ‘perceived as threats to the long-term sustainability of Scottish cultural publishing’, writes Wallis.[331] One such initiative is *Digital Scotland*, which Wallis describes as pursuing a ‘vision of Scotland as a knowledge-based society within a global information economy’; hence with a clear extroverted focus on Scotland’s place within a larger global environment, and being interoperable therein.[332] Here, it would be important to follow metadata standards which will enable interoperability outside of Scotland.[333] Overall, Law et al.

[325] Wade, ‘Re-inventing the Library’, p. 65.
[326] Law et al., ‘Whole Environment Research’, pp. 116–118.
[327] Ibid., pp. 115-116.
[328] National Library of Scotland, *Thriving or Surviving?*, p. 2.
[329] Cunnea et al., ‘The Influence of Legal Deposit’, in *Electronic Legal Deposit*, ed. by Gooding and Terras, p. 36.
[330] Ibid., pp. 36-37.
[331] Wallis, ‘Facilitating Scottish Cultural Publishing’, p. 266.
[332] Ibid.
[333] Ibid., p. 267.

add that these strategies do not only hold 'very practical relevance to the Scottish and UK scene, but also … wider relevance' at an international scale.[334]

Two more illustrative examples of collaborative digitisation initiatives in Scotland are the *Scottish Higher Education Digital Library* (*SHEDL*), and the *Scottish Academic Periodicals: Implementing an Effective Networked Service* (*SAPIENS*). SHEDL began in 2013, collaborating with academic publishers to expand their journal portfolio after a market investigation found that many did not have the sufficient infrastructure.[335] Here, Kidd and Stevenson add that 'collaboration becomes ever more important to make the most effective and efficient use of available resources', especially in the UK-wide context of recent pressures on funding across the public sector, and particularly higher education.[336] Reviewing SHEDL, Cannell adds that its implementation arose out of the context of this environment faced by Scottish libraries, researchers, and universities.[337] In agreement, Kidd and Stevenson link its establishment to the specific Scottish context, as well as to the existence of similar projects in smaller-sized nations, citing examples from Scandinavia and Ireland.[338]

Secondly, the SAPIENS initiative aims to encourage and enable smaller academic publishers to make their journals available in electronic format, by offering a centralised electronic journal service in Scotland.[339] Through such forms of assistance, SAPIENS removes some of the barriers to entry that specifically smaller publishers face in the digital environment.[340] Significantly, Wallis adds that SAPIENS has the further goals and outcomes of 'heightening Scotland's cultural presence in the global information environment', through digitisation strategies.[341] In line with this goal, the periodicals covered by SAPIENS are all related to Scottish culture.[342] Wallis adds that these digital publications can, 'in marketing terms, … be branded as Scottish culture and Scottish knowledge. This will be a feature that should distinguish the service in today's competitive information environment'.[343] This may be linked to

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334 Law et al., 'Whole Environment Research', p. 123.
335 Wendy Walker and Colin Sinclair, 'Collaborative Evidence-based E-book Acquisition in Scotland', *Society of College, National & University Libraries Focus*, 70 (2017), pp. 5–8 (pp. 5-6).
336 Kidd and Stevenson, 'SHEDL', p. 200.
337 Cannell, 'Supporting Research in Scotland', p. 41.
338 Kidd and Stevenson, 'SHEDL', p. 197.
339 Law et al., 'Whole Environment Research', p. 122.
340 Ibid., p. 120.
341 Wallis, 'Facilitating Scottish Cultural Publishing', p. 265.
342 Ibid., pp. 266-267.
343 Ibid., p. 269.

the aforementioned division of Scottish publishers being oriented either inwardly or outwardly, whereby the underlying reasons of whether or not to digitise are related to the publishers' potential goals of nation building and cultural identity. Aptly, Wallis writes that the 'emphasis in making Scottish resources available in the global information environment has been on thinking globally, while acting locally'.[344] Alongside aforementioned benefits of sharing infrastructure for both library and educational sectors, the widening and standardisation of digital access also benefits teaching and research, strengthens cross-sector relationships between institutions, and encourages further engagement with the content.[345] This also indicates a cycle wherein offering digital access to Scottish publications has the impact of widening their accessibility and visibility, which in turn gives rise to further study of the nation's cultural heritage; which will be linked as also relevant to Scotland's trade publishing in Chapter 5.[346]

Collaboration and knowledge sharing has also been identified as helpful in other small nation contexts, such as Slovenia, where even competitive areas such as marketing show a sharing of knowledge and experience across publishers.[347] Compared to other markets, Kovaĉ and Squires observe that 'servicing their local market and trying to reach international audiences were easier for Scottish … publishers … because their business environment enabled them to focus on core publishing operations by outsourcing much of their publishing infrastructure'.[348] The outsourcing of infrastructure is thus also a key strategy in this context.

Overall, key motivations underlying digital innovation in both cultural heritage and academic publishing sectors appear to include workflow efficiency, operational resilience and interoperability, provision of digital services to meet users' changing needs, widening reach and enhancing the impact of Scottish culture, and resituating their role and visibility in a digital world. While these sectors face principal challenges of sustainability, funding, size, and competition, they turn to suitable strategies of collaboration. The present chapter sheds light upon key opportunities and challenges that digitisation brings to these sectors, which in turn lays the ground for weighing the same conundrum in the context of trade publishing. As has been established, the two sectors examined are comparable in size, composition, and circumstances to Scotland's trade publishing sector. Similarly beneficial strategies may thus apply to adopting

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[344] Ibid., p. 267.
[345] Walker and Sinclair, 'Collaborative Evidence-based E-book Acquisition', p. 7.
[346] Wallis, 'Facilitating Scottish Cultural Publishing', p. 265.
[347] Kovaĉ and Squires, 'Scotland and Slovenia', p. 14.
[348] Ibid., p. 17.

digitisation, such as cooperation. The following and final chapter thus turns to trade publishing in Scotland, and investigates the impact and underlying motivations therein.

5. Aims of Scottish Trade Publishing

Drawing on aforementioned critical observations of comparable sectors across Scotland and the role of digitisation therein, the present chapter returns to the question of digitisation in the trade publishing sector. This investigation examines why trade publishers may or may not pursue digitisation, their underlying motivations, and what digitisation can achieve therein, while also offering a wider examination of the characteristics specific to this market. As this discussion will show, the opportunities and benefits of the digital may hold relevance to certain sectors and institutions, while others are motivated by different goals which may not be accomplished through digitisation at all.

Here, the distinction of publishing *for* Scotland versus publishing *in* Scotland is crucial, as borrowed from McCleery and Ramdarshan Bold.[349] Dividing the trade publishing sector in this way enables going beyond the mere question of whether digital innovation is taken up, and the for/in question may reflect a more nuanced understanding of the desire or reluctance to digitise. The perceived 'lag' in some aspects of digitisation is hence revealed as not necessarily inherent to, or enhanced by, the context of small nation publishing, but can rather be understood based on how digital opportunities may not always align with the varied goals and motivations of Scottish publishers. Here, the for/in distinction aligns with a difference in employing digitisation for commercial success, efficiency, and widening reach, versus other goals such as cultural capital and nation building. Therefore, the following subchapters test this tension in practice, investigating the uptake of the digital first through an illustrative commercial publisher, before turning to those who publish *for* Scotland and their distinctive motivations. For the latter, the challenges and opportunities of digitisation in achieving these specific goals is also explored.

5.1. Driving Innovators in Trade Publishing

Building upon Chapter 4's analysis of motivations behind digital development within Scotland's cultural heritage and academic publishing sectors, we first turn to a case study which illustrates how similar strategies and motivations may be applicable to trade publishing. Among Scottish publishers which remain independent from larger conglomerates, Canongate stands out as the

[349] McCleery and Ramdarshan Bold, 'What is My Country?', p. 117.

largest and most successful.[350] It is also particularly renowned for its international and innovative outlook.[351] As such, Canongate is a worthwhile case study; so much so that Ramdarshan Bold aptly questions whether it is a 'Paragon or Anomaly'.[352] Moreover, Donnell et al. add that Canongate has successfully transitioned to 'more mainstream publishing', a fact which contrasts it with many other publishers in Scotland.[353] In line with this, Ramdarshan Bold posits that Canongate can be seen as 'an example of how independent publishing companies can prosper within the globalised, conglomerated publishing industry'.[354] Within McCleery's aforementioned distinction of publishing for/in Scotland, Canongate can be seen as leaning towards the latter type, which is more commercially driven, and whereby publishers happen to be located in Scotland but do not publish solely for it.[355]

A key aspect of Canongate's success is precisely their uptake of digital innovation and new avenues of exploiting publications in the digital environment, which they have been quick to take advantage of and profit from.[356] Ramdarshan Bold adds that '[e]mbracing digital technology, particularly having an educated grasp on apps and e-books, has ensured that Canongate are competitors on a national and international scale'.[357] While moving into the digital opens up risks from competitive markets and threats such as Amazon, the success of Canongate is linked to their strategy of diversifying and making the most of their content, for instance by publishing multimedia content alongside analogue books.[358] This is particularly relevant to contexts of small nation publishing in large language markets such as Scotland because, as explained by Ramdarshan Bold,

> Increased competition from other English-language publishers has emphasised the importance of Scottish publishers looking at alternative methods for creating revenue. … Publishers can take advantage of new media and technology to create revenue from existing titles, therefore increasing their value. This can be done by

[350] Ramdarshan Bold, 'Rights and Wrongs', p. 349.
[351] Ibid.
[352] Ibid.
[353] Donnell et al., *Independent Publishing*, p. 1.
[354] Ramdarshan Bold, 'Rights and Wrongs', p. 349.
[355] McCleery and Ramdarshan Bold, 'What is My Country?', p. 117.
[356] Ramdarshan Bold, 'Rights and Wrongs', p. 349.
[357] Ibid.
[358] Donnell et al., *Independent Publishing*, p. 4.

exploiting the rights through new formats or even reprinting out-of-print titles in an up-to-date way.[359]

This strategy of adopting multimedia formats offered by the digital facilitates similar goals as those observed in Chapter 4, such as the diversification of financial streams, the provision of digital services, and the meeting of users' shifting needs.

Scottish trade publishers who are further driven by goals of establishing a presence and heightening their visibility on a global scale also stand to gain from the digital environment, similar to what has been observed in the academic publishing sector. In line with this, Canongate is also distinguished from other Scottish trade publishers by their focus on purchasing and exploiting the rights of their publications.[360] This also indicates Canongate's more extroverted focus towards an international level, compared to other Scottish publishers.[361] The sale of translation rights abroad has helped Canongate's success and visibility on the international stage, as well as generating a greater readership of their publications.[362] Notably, although commercially focused, the more extroverted type of publishing does also have a vulnerability, in being heavily dependent and reliant on markets outside Scotland.[363] In response, it appears that establishing transnational links is an effective strategy, which can 'take a variety of forms such as specific publishing partnerships, targeted linkages on certain projects, or … niche markets outside the UK', Donnell et al. write.[364] Overall, this observation links back to the discussion of Scotland's situation within a wider market in Chapter 3, which identifies the exploitation of both new media and rights sales as strategies towards strengthening Scottish publishers' footing against overseas competitors.[365] Furthermore, whether or not these commercial strategies are taken up can be taken as an indicator of publishers' desire or reluctance to digitise.[366]

Looking at driving adopters of digital innovation amidst other Scottish trade publishers, regardless of size, a few more examples stand out. Cargo Publishing, established in 2009, focuses both on working with Scottish authors and using digital platforms to reach global audiences.[367] The publisher Can of Worms is also noted by Donnell et al., for exemplifying 'how

[359] Ramdarshan Bold, 'Rights and Wrongs', p. 353.
[360] Ibid., p. 349.
[361] Ibid.
[362] Donnell et al., *Independent Publishing*, p. 5.
[363] McCleery and Ramdarshan Bold, 'What is My Country?', p. 117; Klamet, 'Publishing in the Shadow', p. 56.
[364] Donnell et al., *Independent Publishing*, p. 9.
[365] Ramdarshan Bold, 'Sorry Tale', p. 90.
[366] Ramdarshan Bold, 'Rights and Wrongs', p. 345.
[367] Donnell et al., *Independent Publishing*, p. 1.

a joined-up marketing campaign which was designed to engage young readers both online and offline led to industry-wide recognition and online sales, despite not being stocked by high street bookshops'.[368] Moreover, the Freight publishing house is employing a dual strategy to capitalise both on the digital age and on the current trend of bookish interest, by publishing e-books as well as high-end editions of print books.[369] In line with this, Buckland's perspective is that 'now, there's a new generation of Scottish publishers … burning down the "conventions" we're all supposed to adhere to'.[370] For these publishers, digital uptake is driven by challenging and innovating the traditional understanding of publishers and the book market, to remain relevant and resituate themselves within a digital world, as was also seen with the cultural heritage sector in Chapter 4.1.

These cases illustrate that the more commercially-oriented publishers in Scotland may be primarily driven by goals of growing output, financial gain, and wider reach; which lend themselves well to the opportunities offered by digital innovation, technologies, and strategies. However, as established in Chapter 3, the current trade publishing scene in Scotland is largely fragmented into many SMEs, with only a handful of such outliers.[371] At first glance, the lag in digital uptake may seem inherent to, or enhanced by, the size and fragmentation that is characteristic of small nation publishing contexts such as Scotland. However, the following subchapter posits another perspective: trade publishers around Scotland may be driven by goals and motivations other than growing output, financial gain, and increasing reach. In these cases, the potential opportunities and associated challenges of digital innovation may play a different role.

5.2. Digitisation and Other Goals When Publishing for *Scotland*

Having observed reasons to digitise, and the advantages this brings towards facilitating goals such as large-scale efficiency, commercial success, and international reach, the present subchapter turns to whether digitisation does or does not lend itself well to the soft goals of publishing *for* Scotland. This is investigated through examining the motivations of

[368] Ibid., p. 4.
[369] Ibid.
[370] Qtd. in Boyd, 'Scottish Publishing', p. 15.
[371] Ramdarshan Bold, 'Rights and Wrongs', p. 346.

trade publishers in Scotland, as well as through a wider lens looking at the wider ecosystem of Scotland's cultural landscape within which they operate. Key motivations of this latter type of publishers include promoting culture, reflecting minority voices, and providing a medium for the expression of national identity; all of which are particularly relevant to the context of small nation publishing in large language markets.

5.2.1. Remaining Sustainable and Diversifying Revenue

In the context of aforementioned concerns of globalisation and conglomerate concentration in the wider publishing industry, Wallis writes that, '[w]hile this commercial environment might be seen as irrelevant to Scottish independent cultural publishers who know their market and are not threatened by the commercial publishers,' the digital shift nevertheless plays a role.[372] Furthermore, despite some publishers having a less commercial outlook, they are nevertheless situated within the reality of the cultural sector and its aforementioned financial pressures. Here, it is also important to acknowledge that publishing for/in is not a binary dichotomy; in fact, Sorensen writes that 'most practitioners within the creative industries place themselves on a spectrum between these two poles'.[373] While companies may be driven by motivations of economic versus cultural capital to lesser or greater extents, it is often a combination of the two, and cultural publishers not driven by growth still operate as a micro-business.[374] This means that those publishing *for* Scotland can still benefit from new opportunities offered by digital technologies, through which they can also potentially diversify their revenue streams.[375]

A further challenge is that if those publishing for Scotland do find success, they then become vulnerable to losing their independence to larger publishers down in London.[376] On one hand, local success giving way to international reach could be argued as benefiting the nation's literature by widening its audience.[377] Such a perspective has been employed by Scotland's academic publishing sector, keeping up with digital shifts and

[372] Wallis, 'Facilitating Scottish Cultural Publishing', p. 266.
[373] Sorensen, 'Literature Review', p. 7.
[374] Ibid.
[375] Claire Squires and Doris Ruth Eikhof, *Digital R&D Fund for the Arts in Scotland: CReATeS Final Report* (Stirling: Nesta, 2014), pp. 4–40 (p. 8).
[376] McCleery and Ramdarshan Bold, 'What is My Country?', p. 117; Klamet, 'Publishing in the Shadow', p. 56.
[377] McCleery and Ramdarshan Bold, 'What is My Country?', p. 127.

offering remote access to retain their international profile, as observed in Chapter 4. However, for trade publishers, this may come at a cost for their domestic industry, which must compete for domestic sales while its intellectual workforce is being depleted.[378] In this context, the disadvantages of digital uptake may outweigh its advantages seen in other sectors.

The characterisation of the Scottish publishing industry in Chapter 3.1 has also suggested its more outward, extroverted outlook in comparison to other small nations, such as Austria and Slovenia, which are characterised as more introverted.[379] As established in the literature review of Chapter 2.2, an outward nature is indicated by strategies such as adopting new digital media, and exploiting rights sales.[380] However, in a survey of Scottish publishers, Ramdarshan Bold reports that for over a third, the ‘exploitation of translation rights was not applicable’, which she takes to mean that ‘international markets are not important to many Scottish publishers’.[381] As selling to foreign markets is not a focus of publishers focusing on the domestic market, such findings can be taken to mean that many Scottish publishers are focused on producing Scottish output for local audiences and not expanding elsewhere.[382] If widening reach across borders is not the goal of these publishers, this would also bear an effect on the related appeal of the digital.

Moreover, it seems that certain output is more suitable for rights exploitation than others; which in turn implies that Scottish publishers who *do* wish to have a more commercial focus must look beyond Scottish-specific content.[383] At the same time, Klamet writes that ‘Scottish publishers found international success in exploiting a Scottish aura’ in the recent decades, reminiscent of the SAPIENS project’s use of Scottish branding and marketing to stand out in a saturated global market.[384] And, although selling rights abroad may not be an important part of the business model for Scottish publishers who predominantly focus on the domestic market, the rights department can nevertheless bring value through other avenues; particularly in the digital age.[385] In addition to the

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378 Ibid., pp. 127-128.
379 Kovaĉ and Squires, ‘Scotland and Slovenia’, p. 17; Klamet, ‘Publishing in the Shadow’, pp. 59-60.
380 Ramdarshan Bold, ‘Rights and Wrongs’, p. 345.
381 Ibid., pp. 354, 356.
382 Ibid.
383 Ibid, p. 356.
384 Klamet, ‘Publishing in the Shadow’, p. 56; Wallis, ‘Facilitating Scottish Cultural Publishing’, p. 265.
385 Ramdarshan Bold, ‘Rights and Wrongs’, p. 356.

long-standing option of selling rights for dramatic adaptations, electronic rights can also be exploited through successful formats ranging from movie and television, audiobooks, (enhanced) e-books, and mobile apps.[386] Overall, there is a precarious balance between widening reach and diversifying revenue, while not losing the cultural identity or essence of the work.[387]

Importantly, the publishing *for* type may not necessarily be commercially sustainable, or at least not prone to growth.[388] Donnell et al. offer the explanation that these publishers tend to be 'motivated by social, ideological, cultural or aesthetic agendas … generally operat[ing] with higher commercial risks in order to secure certain product benefits that are first and foremost of cultural, rather than financial, value'.[389] The divide between cultural versus commercial endeavours becomes more stark when literature with strong national themes or cultural niches is simultaneously also the least profitable, for instance in terms of e-publishing, rights sales, and audiences abroad.[390] Interestingly, Klamet interviews a publisher who admits that whilst they produce cultural output, they 'know we're unlikely to make any money. We do it consciously'.[391] This is not to say that publishers who prioritise the cultural over the commercial do not see a return in benefits. Rather, such a conscious choice suggests that these Scottish publishers may not necessarily be driven by economic capital, but rather by cultural capital and the pursuit of more 'soft' goals and motivations, as defined in the Introduction.[392]

5.2.2. Fostering Cultural Diversity of a Small Nation

Such soft goals include fostering cultural diversity and minority voices. Especially in large language markets such as English, globalisation and transnational publishing conglomerates are a driving force of homogenised products and market concentration, rather than of diversity.[393] In fact, McCleery and Ramdarshan Bold observe that the effects of 'globalisation upon publishers

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[386] Ibid.
[387] Ramdarshan Bold, 'Sorry Tale', p. 85.
[388] Klamet, 'Publishing in the Shadow', p. 56; Sorensen, 'Literature Review', p. 7.
[389] Donnell et al., *Independent Publishing*, p. 1.
[390] Klamet, 'Publishing in the Shadow', p. 61; McCleery and Ramdarshan Bold, 'What is My Country?', p. 130.
[391] Qtd. in Klamet, 'Publishing in the Shadow', p. 56.
[392] Pierre Bourdieu, 'The Field of Cultural Production, or: The Economic World Reversed', *Poetics*, 12 (1983), pp. 311–356 (p. 349).
[393] Ramdarshan Bold, 'Rights and Wrongs', p. 350.

providing a successful and needed service within small nations … can be detrimental to the economic, social and cultural interests of those nations'.[394] A related consequence of globalisation and concentration in the publishing industry is that 'culturally important works are often overlooked for more commercially successful ones', Ramdarshan Bold claims.[395] Furthermore, the UK-wide market has seen an increase in corporate ownership (as opposed to independently-owned companies) and a fall in independent bookshops, both of which also perpetuate market uniformity and concentration, at the cost of more diverse content.[396] This concern is also voiced in Murray's framework, quoting an Authors Guild saying that '[book-ish] ecosystems should be as diverse as possible, containing traditional big publishers, small publishers, Amazon, … and independent bookstores, as well as both e-books and print books … [but] such an ecosystem cannot exist while entities within it are committed to the eradication of other entities'.[397] Extending the ecosystem metaphor, Murray writes that small/independent publishers are individual actors 'who regard what they do as akin to maintaining biodiversity within a system otherwise tending to species loss at the hand of profit-maximising corporations'.[398] In the bigger picture, the observed developments thus pose a threat to the cultural diversity of smaller nations such as Scotland.[399]

It is also precisely local publishers who can push back against this threat, through their agency of preserving and promoting cultural output.[400] Under such circumstances, Donnell et al. add that 'independent publishing has an important role to play in addressing and sustaining local cultural concerns that are often marginalised by corporate publishing', and it has in fact been observed that it is mainly independent publishers who pay attention to ideas of the local, regional, and culturally specific.[401] Small publishers are also better situated to produce works by minority voices and to reflect the locale and specific context they inhabit.[402] In the UK, this applies to trade publishers outside of London who provide an important channel for local voices which may be otherwise under-represented, providing a platform to less visible publications.[403]

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394 McCleery and Ramdarshan Bold, 'What is My Country?', p. 119.
395 Ramdarshan Bold, 'Sorry Tale', p. 74.
396 Donnell et al., *Independent Publishing*, p. 7.
397 Richard Russo qtd. in Murray, *Digital Literary Sphere*, p. 75.
398 Simone Murray, *Introduction to Contemporary Print Culture: Books as Media* (London: Routledge, 2021). p. 94.
399 McCleery and Ramdarshan Bold, 'What is My Country?', p. 131.
400 Ramdarshan Bold, 'Rights and Wrongs', p. 350.
401 Donnell et al., *Independent Publishing*, pp. i, 7, 10.
402 Ibid., p. 8; Squires and Markou, 'An Ecosystem Model', p. 423.
403 Squires and Markou, 'An Ecosystem Model', p. 423; Donnell et al., *Independent Publishing*, p. 5.

This is similar to the motivations underlying digital shifts in Scotland's academic publishing sector, in order to continue producing quality research about Scotland's culture which may otherwise not be addressed.

An example of a project which combines both concerns of diversifying revenue whilst retaining cultural diversity is the Bookspotting app, launched by Publishing Scotland. This project was developed precisely with the aim of promoting Scottish books through digital technology, exploring innovative ways of guiding new and existing readers to Scottish content, aiding their visibility through non-traditional book discovery methods, and deepening engagement with books of Scottish focus.[404] Alongside book discoverability, audience reach, and engagement depth, further aims of the app were to 'celebrate Scotland's unique literary heritage; update the image of Scotland's vibrant publishing industry; support cultural tourism around all regions of Scotland; and offer new contexts for and new routes into Scottish literature', as summarised by Squires.[405] Consequently, Squires posits that the 'extent to which the app has attracted an audience, both to itself and to Scottish books … [can be] used as an exemplar for other regional or national literatures to promote themselves digitally', mentioning Wales and Ireland.[406] In fact, a more international outlook could help foster the local publishing scene in return, by raising both profits and awareness of Scottish publishing output.[407]

5.2.3. Collaboration in Trade Publishing

Here, a potential strategy could be collaborations with other small and/or independent publishers abroad, rather than conglomerates, since the more niche content could be of greater relevance to their publication profiles.[408] These partnerships could be especially advantageous between small publishers across different nations within the same language market, allowing them to access foreign markets more easily.[409] Moreover, collaboration in the sense of establishing what Ramdarshan Bold has referred to as 'a community of practice', sharing expertise, and developing new skills are suitable avenues for the Scottish publishing industry to continue sustainably into

404 Squires and Eikhof, *Digital R&D Fund*, p. 21; Squires, *Bookspotting*, p. 4.
405 Squires, *Bookspotting*, pp. 5-6.
406 Ibid., pp. 2, 12.
407 Ramdarshan Bold, 'Rights and Wrongs', p. 352.
408 Ibid., pp. 354-355.
409 Klamet, 'Publishing in the Shadow', p. 62.

the digital age.[410] This bears similarity to the identified challenge of skill shortages in the cultural heritage sector (see Chapter 4.1), and the subsequent key strategies of collaborations, expertise pooling, and shared infrastructure.

To further facilitate such collaboration and knowledge exchange, intermediaries such as Creative Scotland and Publishing Scotland are also helpfully positioned.[411] Here, we step away from individual publishers and towards the wider landscape in which they are operating. This also aligns with Murray's publishing ecosystem, which explicitly encompasses arts funding bodies and cultural policy entities, as relevant and influential stakeholders.[412] In fact, Murray writes that these agents, 'whether at local, regional, national or even supranational levels – are potent *enablers* … to subsidise, protect, or otherwise promote local book production, distribution, and consumption to achieve desired socio-political ends'.[413] National funding bodies, public sector organisations, and government initiatives also concretely support the local production of cultural output.[414] Notably, this support is often prioritised towards trade publishers who are at risk of losing their independence, hence serving as a barrier against foreign takeovers.[415]

Collaboration and knowledge exchange is also especially relevant to SMEs within the cultural sector of small nations, which do not necessarily have the funds for investing in cutting-edge digital R&D on their own, as also observed in Chapter 4.2.[416] Squires and Eikhof explain that it is '[m]uch more common … [to adapt] digital products and services developed elsewhere to the context of the art and cultural sector, for instance the use of social media for marketing'.[417] In line with this, Ramdarshan Bold adds that 'it is clear that, given the size of Scotland, creative organisations from different sectors can work together to strengthen the Scottish creative industries … and, in turn, help other small-nation's creative industries'.[418] This relates back to Chapter 4, whereby digital innovation and adoption in other sectors across Scotland also partly allows for electronic publishing and distribution systems to be developed in

[410] Ramdarshan Bold, 'Rights and Wrongs', p. 357.
[411] Ibid.
[412] Murray, *Contemporary Print Culture*, p. 55.
[413] Ibid., p. 70.
[414] Klamet, 'Publishing in the Shadow', p. 40.
[415] McCleery and Ramdarshan Bold, 'What is My Country?', p. 129.
[416] Squires and Eikhof, *Digital R&D Fund*, p. 31.
[417] Squires and Eikhof, *Digital R&D Fund*, p. 31.
[418] Ramdarshan Bold, 'Rights and Wrongs', p. 357.

the trade publishing sector.[419] Alongside the digital services and products themselves, other soft benefits include valuable knowledge exchange about digital technologies and the building of new relationships.[420]

In the circumstances of small nation SMEs, the specific challenges they face may also benefit more from sustainable, collective, and ongoing support for infrastructural costs and provision, rather than (or, in addition to) one-off funding for title costs or individual projects.[421] Moreover, collective mechanisms for broader activities such as marketing and rights sales may be beneficial.[422] Overall, collaboration is once again raised as a key counterbalance to the challenges that small publishers face, helping to build sustainable business practices, invest in infrastructure, and have wider reach.[423] Squires aptly adds that 'the current Scottish publishing scene is … keen to demonstrate its importance as both a commercial and cultural force'.[424] An ideal combination of both globalisation and localisation would allow Scottish publishers to reach a global audience, more directly than as part of a larger UK trade market, while simultaneously promoting and preserving their local culture and national identity.[425] This perspective posits a positive interaction between the global and the local, to be explored by publishers in small nation contexts.[426]

An illustrative initiative connecting the arts and cultural sector to digital innovation is the Digital R&D Fund for the Arts in Scotland, which Squires and Eikhof write 'explicitly looked at soft benefits' such an initiative could bring.[427] Here, soft benefits include engagement and reach, both to new and existing audiences as well as geographical reach, increasing diversity in the publishing sector, and boosting cultural tourism in Scotland.[428] This is further highlighted by Squires and Markou's claim that Scottish trade publishing contributes 'to the cultural and economic life of the nation, and to spreading culture beyond Scotland's borders', which in turn stimulates Scotland's tourism industry and local interest.[429] The link between books and tourism

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[419] Wallis, 'Facilitating Scottish Cultural Publishing', p. 266.
[420] Squires and Eikhof, *Digital R&D Fund*, p. 23.
[421] Squires and Markou, 'An Ecosystem Model', pp. 435-436.
[422] Ibid., p. 436.
[423] Klamet, 'Publishing in the Shadow', pp. 61-62.
[424] Squires, *Bookspotting*, p. 4.
[425] Boyd, 'Scottish Publishing', p. 19.
[426] Ibid.; Donnell et al., *Independent Publishing*, p. ii.
[427] Squires and Eikhof, *Digital R&D Fund*, p. 12.
[428] Ibid., p. 17.
[429] Squires and Markou, 'An Ecosystem Model', p. 429; Ramdarshan Bold, 'Rights and Wrongs', p. 356.

is also further fostered by Publishing Scotland and their close ties with Visit Scotland, supplying Information Centres with books published by their members.[430] Another instance of collaborative partnership among trade publishers is also Publishing Scotland's Translation Fund, an annual project which offers grants to cover foreign publishers' translation costs of Scottish works into their languages, with the aim of widening its reach and visibility abroad.[431] Overall, the interaction between trade publishing and tourism also diversifies publicity and sales channels, in less conventional outlets such as tourist centres, gift shops, museums, festivals, and online platforms.[432] These external promotional opportunities, partnerships, and revenue diversifications are all particularly beneficial to SMEs in small nation contexts.[433]

As this chapter has demonstrated, on one hand, digitisation may threaten small nation publishers, who are disadvantaged by market concentration and infrastructure costs. However, digitisation can nevertheless also be employed to sustain and facilitate the varied goals and motivations relevant to those publishing *for* Scotland, even if these publishers are not driven by goals of efficiency, commercial success, or widening reach. Namely, such publishers can diversify their revenue streams via multimedia formats and cultivate their resilience through collaborations, both of which serve to sustain their important goals of maintaining cultural diversity of minority voices and smaller nations. Ultimately, conducting a comparative approach across sectors in the present and preceding chapters has shed light upon the role and impact of digital innovation in Scotland's cultural landscape in general, and by extension, its trade publishing sector in particular.

[430] Squires, *Bookspotting*, p. 5.
[431] Porter Anderson, 'Publishing Scotland's 2024-25 Translation Fund: First Round Opens', *Publishing Perspectives*, 6 June 2024 <https://publishingperspectives.com/2024/06/publishing-scotlands-2024-25-translation-fund-first-round-opens/> [accessed 26 November 2024].
[432] Donnell et al., *Independent Publishing*, pp. ii, 5.
[433] Squires and Markou, ''An Ecosystem Model', p. 433.

6. Conclusion and Further Avenues

The present thesis set out to investigate the role and impact of digitisation within Scottish trade publishing. Trade publishing in Scotland was selected as a particular entity also embedded within a wider cultural landscape, and was characterised as an illustrative example of small nation publishing in large language markets. By employing a critical survey of existing digitisation discourse in contemporary Scottish publishing, and a comparative study of the same phenomenon as observed in two related sectors, the question was addressed of to what ends and purposes digital innovation is or is not taken up by Scottish trade publishers. Within the specific circumstances, challenges, and opportunities faced by this small nation industry in an English-language market, the division of publishing *for* versus *in* Scotland is identified as a key driving force behind the varying extent of digital uptake. Ultimately, the thesis concludes that the perceived digital 'lag' in Scottish trade publishing is perhaps not a lag at all, and rather that the focus of these publishers may simply lie elsewhere.

Within the present argument, it is also important to acknowledge that characterising small nation publishing in a dual-market may be reductionary. A narrow view of publishing 'Scottish' content runs the risk of stereotyping small and/or independent publishers, skewing what this sector and individual publishers may be trying to achieve.[434] On one hand, the tendency of focusing on softer goals such as cultural identity and nation building can partly explain the current composition of Scottish trade publishers as mainly fragmented SMEs and their differing approach to digital uptake. On the other hand, the question of whether Scottish trade publishing wishes to become a bigger player, or whether they are content with focusing elsewhere, remains a valid nuance.

Either way, the market must nevertheless continue to evolve alongside these publishers who do prioritise cultural output and target a domestic audience, for instance through supporting mechanisms and subsidies.[435] Ultimately, McCleery and Ramdarshan Bold posit that 'the concern is not just with the economic vulnerability of publishing in small nations or non-indigenous ownership of the booktrade *per se* but with the effects of

[434] Squires and Markou, 'An Ecosystem Model', p. 423.
[435] Klamet, 'Publishing in the Shadow', p. 61.

that upon the small nation's sense of itself, upon its cultural identity'.[436] To elaborate, this means that the gap between commercial versus cultural (i.e. market feasibility versus sociocultural value) must be bridged, with the help of national governments who may counterbalance these challenges by mechanisms supporting local products and companies, in the interest of both the nation's economy and cultural diversity.[437] A key point which the present thesis continuously uncovers as crucial to the context of small nation publishing is collaboration; namely the sharing of expertise, resources, and infrastructure at various intra- and intersector levels. Overall, the thesis reveals that digitisation is a nuanced phenomenon, one which is not undertaken uniformly but employed in various ways, to differing degrees, and towards facilitating a range of publishers' goals.

The present study and its methodology, drawing on existing literature, has utilised material that was sometimes dated, an aspect that may appear to limit its scope. While this bears consequence on a discussion of digitisation which develops at a rapid pace, the data has here been used to chart the discourse's development, which has at times foretold what can now be observed, and facilitated longitudinal comparison in the twenty-first century. By observing the development of digitisation throughout comparable sectors of Scotland's cultural landscape, a secondary contribution of the present thesis is thus also a meta-reflection on how this progress has been looked at over time.

In line with this reasoning, and to further contribute to filling the data gap of Scotland's trade publishing sector and its development into the digital age, an avenue of future research would be to conduct case studies into specific trade publishers. Primary research could be collected via methods such as interviews, surveys, or financial analyses, in order to bring the industry's overview up-to-date. Another avenue of further research would be veering away from the large language market context, and turning to how Scottish trade publishing operates within the Scots and Gaelic language markets. This would promise a closer understanding of publishing *for* Scotland, since such a focus would primarily be on regional audiences and the preservation of cultural and linguistic heritage. Finally, although these avenues merit research, the present treatment of publishing as

[436] McCleery and Ramdarshan Bold, 'What is My Country?', p. 130.
[437] Ibid.

embedded in a wider ecosystem would remain necessary in understanding how these regional publishers operate within a wider cultural and economic context.

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