

## Whitcombe Lecture

*Of all the inanimate objects, of all men's creations,  
books are the nearest to us, for they contain our very  
thought, our ambitions, our indignations, our illusions,  
our fidelity to truth and our persistent leaning towards error*

Joseph Conrad  
*Notes on Life and Letters*

*Your manuscript is your baby, maybe your only child, but the publisher finds a dozen or so new babies on his doorstep every morning and has several thousand older children over-running his warehouse and his entire establishment, all of them calling simultaneously for his undivided attention*

Sir Stanley Unwin  
*The Truth About Publishing*

*Private in origin but public in effect, geared to the market, but produced with an idealism that runs counter to market forces: down to the present day books are the most resilient and at the same time the most sensitive product of European culture*

Freedom for Publishing, Publishing for Freedom

Ladies and gentlemen,

I am most grateful both for those generous words of introduction and the honour of being asked to deliver the Whitcombe lecture this year. I have read your conference programme and I am daunted by the concentration of publishing professionalism here and the relevance and practicality of your specialist sessions. This lecture will be more speculative than practical and may wander historically and geographically away from your immediate concerns, though I hope it will return home in the end.

I would like to consider some of the paradoxes of publishing as an activity that is both commercial and cultural and to speculate a little on its potential for destroying or supporting creativity and diversity.

My starting point is a piece of trivial information and an image. The trivial fact is that the geographical centre of the continent of Europe is, perhaps surprisingly, a hillock in Lithuania, and not far away in the old capital of Kaunas is my image, a statue of a man labouring under a heavy burden. He is a smuggler – but not any ordinary smuggler. He is a smuggler of books and he is the embodiment of publishing for me. On the one hand he was an heroic figure – struggling to preserve the Roman script and the Lithuanian language against the Russification programme of the last of the Tsars in the late nineteenth century and risking his life in the process. On the other hand, one has to assume he was in it for the money as well. And there you have it – publishing is to do with language, cultural identity, intellectual values, freedom of speech, creativity and textual integrity and it is also, at least since the secularisation of printing and publishing which was just one after effect of the Gutenberg revolution, mostly a business.

The majority of my working life was spent working in management in large publishing companies – such companies that it is now commonplace to blame for the commercialisation of the publishing process at the expense of quality and standards – dominated by accountants and marketing people, obsessed with the pursuit of the international best-seller (whether it is a novel or a college textbook), heedless of the creativity and intellectual innovation which, it is implied, characterised publishing in some earlier golden age.

In fact, publishing through print, in contrast to the copying of manuscripts, was from the first a commercial and competitive enterprise and throughout its history one can trace the tensions between those engaged in it who were driven by intellectual and idealistic objectives, those fascinated by improvements in the technical process of information transfer and finally those for whom it is a business – albeit one with some rather unusual characteristics and complications. Gutenberg was a brilliant innovator whose technology lasted almost unimproved for three hundred and fifty years, but he was a hopeless businessman who ended up owing the equivalent of \$ ½ m and forfeiting the best of his equipment to his financier. Caxton on the other hand was an entrepreneur and marketing man, not a printer, a true publisher who moved in the opinion-forming circles of his time and who brilliantly spotted a niche in the English market – that growing body of readers, mainly women and merchant classes, who were literate but not in Latin and for whom he could publish free from competition from powerful continental rivals.

In the twentieth century, many of the most significant publishers, at least in the Anglo-American tradition, were made in Caxton's mould. Of course they employed great editors who were scholars, intellectuals, book lovers, pursuers of ideas and custodians of quality and so on, but as Diana Athill's wonderful picture of publishing, *Stet*, makes clear, there is a world of difference between a fine editor such as herself and a consummate publisher such as her boss Andre Deutsch. At Oxford Brookes we happen to have Andre's personal library, made up of almost all the books he published and also those he had bought or been given and had kept. A study of this collection only confirms the view one draws from Athill's account of his life in publishing, that the young Hungarian intellectual became increasingly less interested in ideas, in the content of books, and increasingly obsessed with publishing as a business process, including the use of 40-watt bulbs wherever possible.

Sir Allen Lane, the father of the quality paperback, and Lord Hamlyn, the creator of the quality mass market illustrated book, were two of the great publishing innovators of the twentieth century, but they could not be described as bookish people. Neither, in fact, read much for pleasure and they read very little in their business as publishers. Nor did Sir Stanley Unwin, a dominant figure in the publishing business in the mid-twentieth century, who interfered in every detail of his company's business but was least interested in the editorial activities. When his son Rayner expressed his keen desire to publish *The Lord of the Rings*, although the figures looked pretty bad for the first printing, Sir Stanley wrote, a little testily it seems to me, 'If you believe it is a work of genius, then you may lose £1000.' He did not care to make judgements about genius himself. There are many other examples such as Michael Joseph, and even the great William Heinemann, creator of a magnificent stable of modern fiction, was not above advertising those pillars of modern Europe literature *War and Peace* and *Crime and Punishment* in his 1915 catalogue, as 'Newly Translated Fiction from our Gallant Allies in the East'. The fact is that publishers tend to be less interested in the idea *in* the book, than the idea *of* the book – as a product and a business proposition.

And of course, corporate publishing can be the enemy of freedom of expression and creativity on occasions. Again this is nothing new and I am not sure that Rupert Murdoch's cancellation of Chris Patten's contract for his book on Hong Kong was more heinous than Sir Allen Lane's secret visit, under cover of darkness, to his own warehouse at Harmondsworth to destroy the stock of a book which had been

accepted by the Penguin board but which Lane himself believed should not be published – though whether for ethical or commercial reasons is far from clear.

On the other hand, editors, often regarded as the custodians of value in publishing, themselves can at times be a threat to the integrity of text and thought. The compounded errors of the copyists meant that manuscripts could easily lose authenticity and consistency and this carried over into the early days of printing. Over time, text and image became progressively more stable, only to become once again highly unreliable in the electronic age where ease of intervention can lead all too quickly to the misappropriation or perversion of words and ideas in ways that are not always easy to detect.

That too is not new – just easier and more widespread. I was reading the other day of an instance where two highly regarded scholars rendered Congreve's prologue to the *Way of the World* as:

He owns with toil he wrote the following scenes;  
But, if they're naught, ne'er spare him for his pains:  
Damn him the more; have no commiseration  
For dullness on mature deliberation.

Whereas Congreve actually wrote:

*He owns, with Toil, he wrought the following Scenes  
But if they're naught ne'er spare him for his Pains:  
Damn him the more; have no Commiseration  
For Dulness on mature Deliberation.*

Changing a word and moving some commas has altered the emphasis and internal rhythm, destroyed an internal rhyme and arguable subtly changed the meaning, the better to suit the editor's interpretation.

In any case it is much too simplistic to characterise the editorial approach to publishing as the ethical one and the entrepreneurial as purely materialistic, but I do see publishing historically and almost inevitably caught in this tension between conflicting commercial and intellectual values. It is interesting that in China, where the government is heavily committed to the introduction of market economics in all aspects of the economy, including publishing, they nevertheless refuse to classify publishing as a business. It is defined, with typical Chinese finesse, as a cultural enterprise. At the other end of the ideological spectrum Christoph Mohn, the heir to the Bertelsmann empire is reported as saying to the *New York Times* that former chief executive Thomas Middlehoff had to go in order to preserve the culture of the business which, he said, has a public service dimension – an extraordinary statement to come out of a multinational media corporation one might think. But was Middlehoff fired for breaking with the company's traditions and sense of corporate social responsibility or for continuing to invest in cash-hungry, profitless new technology enterprises? As so often with publishing, it is ambiguous.

I think that in the Anglo-American tradition of publishing we are insufficiently sensitised to the duality of publishing and its relationship to our national identity and intellectual good health, and that is because we have lived in such a privileged publishing environment politically and linguistically.

However, my experiences over the last decade working with publishers in East and Central Europe and in parts of Asia have modified my perspective. For us in the Anglophone world, access to the science and poetry, the history and popular fiction of our own societies and much of the rest of the world is a given thing – a cultural utility – a fact we are inclined to take for granted. And, like our other utilities, they are

mainly delivered by large commercial corporations. But in other parts of the world, within the last century and currently, societies are suffering assaults on their language, their scripts or alphabets, their whole cultural identities or are being denied access to the wider worlds of learning and creativity because of the barrier of language or the lack of access to books. In the United Kingdom over 1500 new titles are published each year for each million of population. In Ukraine it is about 150 and in sub-Saharan Africa the number would be around 15 and most of these would not be in the mother tongues of the majority of the populations.

So, what I would like to explore are a number of interrelated issues:

- The first is the paradox that the publishing of printed books has, from the very beginning, been predominantly a secular, commercial, profit-oriented business and yet it has carried the responsibility for sustaining national cultures and languages and contributing to the creation of civil societies. I would argue that despite the many criticisms of market-driven publishing organisations, they have been more effective in this role than any of the alternatives – church, state or cultural institutions. However, I would also argue that the ability of competitive secular publishing to play this role is contingent upon political, social and commercial conditions, to the creation of which publishing itself contributes in a circular way. The existence of the technology of printing with moveable type – or for that matter electronically – is not in itself sufficient.
- Secondly, I would like to review the threats to cultural identity and diversity posed by globalisation and the part played by publishing in promoting or resisting this process.
- Thirdly, I would like to consider the extent to which the e-revolution in communication is also likely to speed the process of globalisation or may provide unexpected opportunities for diversity.
- And finally, I would like to consider some of the concerns I have with the current situation in our own publishing circumstances.

First we must go back to the origins of publishing as a business and its relationship with social change and cultural identity and diversity. The Chinese had practised block printing over centuries and the Koreans and Ugric Turks had invented forms of moveable type; there was also a thriving trade in books in Europe before printing. But there is no doubt that Gutenberg's invention in the mid-fifteenth century of a moveable type using individual letters of the alphabet and a printing press was a watershed in communication technology, with immense social, political and cultural impact. Thomas Carlyle declared that, along with gunpowder and Protestantism, it was one of the three great levers of change for the creation of modern European society. There is, of course, considerable general debate about the nature of the part publishing did play in the great intellectual and social changes of the Renaissance, the Reformation and the Scientific Revolution. Elizabeth Eisenstein famously advanced very wide claims in her great work, *The Printing Press as an Agent of Change*, while others have argued that, at least initially, printing helped to promulgate conservative views and outdated knowledge as well as spreading the new learning and promoting social change. Paracelsus got published as well as Galileo.

What is certain is that the popular idea that printing spread rapidly and evenly out from Germany throughout Europe, displacing the copied manuscript, was not at all the case. Its spread outside the heartland of Western and Central Europe was actually not so very rapid and the changes printing brought about were contingent ones, highly dependent on the political, social and cultural conditions of the communities concerned. So although printing was to play a significant part in the use and standardisation of vernacular languages, the majority of works published in the fifteenth century were in Latin and

although printing/publishing was from the start a largely secular and commercial business, a high proportion of the products in the early years were religious and many of the customers were clerics and religious organisations. It all depended on the context in which the technology was operating.

The clear distinction which we now see between the copied manuscript and the printed book was not so clear at the time, any more than today we are clear about the essential differences between ink on paper and electronic publishing. The two products were sold alongside each other and the output of copied manuscripts in Europe continued to increase for decades – perhaps up to 80 years after Gutenberg's invention. At the very time that Andreas Hess was introducing printing to Hungary, King Matthias Corvinas was collecting the *Corvinas*, the greatest library of illuminated manuscripts outside the Vatican. In terms of illustration, books were clearly inferior objects for some time, although they did prove to be rapidly more reliable for the reproduction of cartography and astronomical diagrams. Printing only advanced strongly where the social and commercial conditions were right. For instance printing was established relatively early in Belgrade, but took no root and the production of Serbian books reverted to the copyists for a century. Indeed there was little or no secular book printing of substance in much of the Balkan region for another three hundred years.

Hungary was also interesting in terms of the vernacular. Hess was in action in Budapest in 1473, three years before Caxton set up in Westminster, but for decades Hungarian book production was in Latin. The first Hungarian language book to be printed in Hungary did not appear for another seventy years, whereas a strong vernacular publishing industry emerged right away in England. This early success of vernacular publishing was mainly due to the market economics of the book trade of the time.

The benchmark for the triumph of the vernacular is sometimes taken as the printing of a vernacular Bible, but this too is a misleading measure of modernity. The citizens of Minsk, in what is now Belarus, had a Bible in their own language before those of London, and Minsk is, so far as I know, the only capital city in the world where the main boulevard is named after a printer/publisher, Matthew Skaryna, but the great Lithuanian empire was in decline, its days as one of the cultural centres of Europe long over, as the intellectual and commercial centre of gravity moved steadily westwards and publishing and printing failed to flourish for vernacular languages this far East.

Printing and publishing flourished instead in urban and mercantile environments, so it is no surprise that in the late fifteenth century Venice, that most urban and mercantile of states in the Europe of the time, was responsible for a quarter of the European output of books in many languages. Books were produced both for expatriate communities and for export back to the home countries in the languages of the Balkans and beyond. Perhaps most remarkable is the case of Armenia. The first book in Armenian was printed in Venice in 1517. It was called the Friday Book and was a cookery book, a very early Delia Smith, but there was a publishing house in the commercial expatriate Armenian community in Madras in the eighteenth century, before the first home-grown product was produced in landlocked and isolated Yerevan in 1772.

The commercial interests of publishing also did much to secure the regulation of intellectual property and the freedom to publish. In Britain the first copyright legislation came about as a result of lobbying from the printer/publishers – it was only subsequently that it came to be seen as the cornerstone of protection for the author's rights. From the seventeenth century on, the freedom to publish was a political issue, but in practice the boundaries of control were constantly pushed by the publishers, who were prepared to risk prosecution for commercial gain and this was as much the work of the popular gutter press as the high-minded literary and political publishers. This remained the case down to the twentieth century. It was the hard-nosed Alan Lane who challenged the law with the unexpurgated version of *Lady Chatterley's Lover*, and the even more profit conscious directors of Reed International who defied the Thatcher government

over the famous *Spycatcher* case. In that instance, in which I had some role to play, we were forbidden to publish the book in the UK, but we won the right to publish in Australia and the law could not prevent importation via the European Union. However, the established book trade was extremely reluctant to take the risk of prosecution and I found myself in close liaison with an importer of erotic magazines. He was experienced in trading with Amsterdam and at out-facing the Customs and Excise – he must have imported up to half the 70,000 copies that came into the country in this way, so the principle of freedom of expression was defended by a rather unlikely champion in pursuit of commercial gain. Needless to say, not only my friend Mr Gold, but also Penguin and Reed made handsome profits in the defence of freedom of expression.

Commercial publishers have led the way in the campaigns against VAT on books and for the increase in public expenditure on books for schools, and less successfully, public libraries. On the whole, I think the publishing industry has served the British reader quite well in terms of price, quality and variety.

The post-Gutenberg experience was very different elsewhere in Europe. The small cultures and language groups of the Baltics and the Balkans survived because they were lowly and agrarian. They lived on in the language of the farmyard and the kitchen and in folk tales and song. In many instances in the great empires of Central and Eastern Europe, they were almost totally divorced from the language and culture of the ruling classes. They survived, ironically, in part, because they were not part of the published world. It was only from the mid-nineteenth century, in the liberating intellectual aftermath of the French revolution and in the age of interconnectivity provided by the railways and the telegraph, that the revival of national identities in Ireland and Norway, as in Latvia and Serbia, brought these cultures back into the public and published sphere and closely identified them with movements for self-determination. This in its turn brought the counter repression which made the work of the Lithuanian book smuggler so important.

When the Europe of nation states emerged after 1919 publishing became absolutely central to their national identity. Nowhere was this more so than in the Baltic republics – Lithuania had not existed as a state for centuries before 1919 and Estonia and Latvia had never existed but their language had survived. For twenty years the activities of the publishers and booksellers of that brief period of independence played a major part in defining national identity and culture and helping them to survive the massive assaults of war, wholesale deportation and ideological repression which was to be their history for the next fifty years. It was true throughout the region. There was a great national flowering of publishing. As many books were published in Czechoslovakia and Hungary in the twenties and early thirties as in France.

Finally in the Balkans, emerging from up to 500 years of Ottoman overlordship where the geography of cultures was extremely confused and the sense of being a Greek, Albanian or Serb emerged very hesitantly, the secular vernacular media organisations which did come into being in the late nineteenth and early twentieth century played a significant part in helping to define national cultural identity.

After these faltering first steps, cultural diversity and intellectual freedom was to be challenged as never before in a variety of ways. The first threat came through totalitarianism. Whilst the book-burning fascist regimes proved to be an appalling but relatively short-lived phenomenon, in Eastern and Central Europe and in the Soviet Union the effects of Communist publishing policies were much more fundamental and longer lasting. The second threat, in the latter part of the twentieth century was more complex and less overt – the explosion in published knowledge linked to a process of commercial and cultural globalisation. Finally in some parts of the world, especially those which did not have any tradition of written and published culture, languages and cultures have suffered not only from the impact of globalisation but also from the policies of colonial and post-colonial governments, economic collapse, corruption, illiteracy and book famine.

The most overtly brutal assault on the root and branch of cultural identity was mounted by Stalin in the Caucasus and Central Asia with a combination of rigid censorship, the elevation of Russian to the language of public life and higher learning and the replacement of traditional scripts of the Caucasus and the Arabic script of Central Asia with Cyrillic for the publication of vernacular languages. Only in his native Georgia was the ancient *mxedruli* script allowed to co-exist. Whole segments of the populations were made effectively, if only temporarily, illiterate. In recent years it has proved extremely hard to reverse the effects of such a savage assault – attempts to restore the wonderful vertical Mongolian script seemed doomed to failure and in Azerbaijan the government has moved on to a modified 32-letter Roman alphabet from Cyrillic, rendering many people illiterate once again and shutting children off from the accumulated stock of most published books. Ironically, the approved new alphabet books only exist courtesy of the commercial sponsorship of Exxon.

West of the Soviet Union itself, the state-controlled publishing industries of the Soviet empire had an ambivalent relationship with cultural identity. Publishing was directed by the Ministries of Education and Culture and channelled through a small number of monopolistic and state-owned publishing houses. They did produce a superabundance of heavily subsidised literature, some of which, at least, sustained a strong sense of national consciousness for individual cultures alongside a great mass of meretricious ideological effusions. It encouraged bilateral but asymmetric cultural interchange between the satellites and Russia, but it did not encourage multilateral relationships within the Soviet empire, let alone ready access to the cultural products of the rest of the world. Meticulous philological and editorial standards went alongside generally poor levels of design and production except in a few showcase books.

Communism did not, at least in East and Central Europe, destroy cultures; it controlled, corrupted and distorted but at the same time encouraged. Many people were engaged in writing books, plays and essays, and books were very cheap and readily accessible, but such activities proved very hard to contain. Counter-cultures emerged and increasingly, through either tacit connivance or sheer inefficiency, formerly forbidden works became increasingly available at least in societies such as Hungary. By simultaneously encouraging cultural activity and trying to control it these regimes prepared the way for their own destruction.

One curious by-product of the command economy system of publishing was that, being product rather than market driven, it gave birth to a breed of publishers who had a total disregard for the marketplace. East European publishers of the seventies and eighties were cultivated people and by and large, they were mostly liberally inclined and yearned for the freedom to trade intellectual property more extensively with the West. However, they were also inclined to be intellectual snobs and to believe that they could and should determine what their public ought to want to read not ideologically, but in terms of high culture. Consequently they were very ill-prepared for the outcomes of glasnost, perestroika and beyond.

The collapse of the Soviet Empire produced an extraordinary level of publishing activity throughout East and Central Europe. There was intense interest initially in what had been forbidden or unavailable before – the samizdat writers, pornography, western coffee-table books, mass-market fiction, media tie-ins and children's information books. Amongst the cultivated cultural publishers of the old regime there was despair – freedom to publish was wonderful, but the people were reading Mills and Boon in translation: there would be no more Bulgarian poetry or Romanian *belles lettres*. But the lumbering old state houses undergoing the painful process of privatisation and downsizing were in no position to make a stand against the mushrooming new private operators and the incursions of the multinational publishing corporations in those markets which seemed commercially attractive.

In the 500 years since the invention of moveable type the world's population has risen 13-fold, the literate population 1000-fold and the consumption of printed paper 250,000 times – 10 billion books, 50 million tons of paper for books alone. 50 pounds of paper for every one of us. The great majority of the growth has been in the late twentieth century – but not evenly spread.

### **New titles published**

	<b>1920s</b>	<b>1960</b>	<b>2000</b>
France	12,000	12,000	40,000
Great Britain	14,000	21,000	108,000
Hungary	4,500	3,500	10,500

What is apparent is that the massive growth in world language publishing, and especially Anglophone publishing, was not matched by smaller language groups. Thus, in the 1920s Hungary was publishing at a one-third the rate of the UK, by 2000 it was one-tenth the rate.

The USA and the European publishing markets each represent currently about a third of the world market by value, Japan about a sixth. Adding in the other large world markets – Brazil, China, India – you are left with 97% of sales by value in the Americas, Western Europe and the Asia Pacific region and just two per cent in East and Central Europe and one per cent in Africa, the Middle East and the rest of the world. The figures would change somewhat by volume, but not in Africa's favour.

In terms of the export of books to other markets, including other language markets, the way is led overwhelmingly by the Anglophone producers Britain and USA, followed at some distance by Spain, Germany and France. Yet again in terms of translation well over half the books commercially translated worldwide were written originally in English, followed by French, German and Spanish. Before 1990 Russia was also a major source but this has rapidly dwindled, and while there is some growth in translation from Chinese and a modest amount from Arabic the rest of the world's languages hardly feature. The balance of trade in terms of intellectual property is negative for almost all countries outside USA and UK and nowhere is this more true than in Africa.

If African writers wish to reach a world, or even a pan-African market, they must write in the old colonial languages and generally seek publication through foreign publishing houses. Today the magnificent *African Writers Series* of modern African creative work is dependent on the bottom line requirements of the giant Reed Elsevier. Tertiary, most secondary and some primary education is conducted in the colonial language rather than the mother tongue of most African children even though all the research suggests that the mother tongue is the best medium for cognitive development.

And the physical as well as the intellectual well-being of the continent is at stake. The most culturally deprived section of society are women and girls and we know that teenage girls are half as likely to become mothers, to contract HIV or to see their babies die in infancy if they are literate, especially in their own languages.

So the concern now is that the old balance between the commercial and the intellectual elements in publishing have been thrown out of kilter by the globalisation of Anglo-Saxon, and more particularly American, culture and by the global expansion of the corporate media giants. If one takes an individual

well-developed small European language culture, Hungarian, about a quarter of books published currently are translations, 60% from English, 20% from German, 6% from French and 2% from Italian. In terms of copies of books printed, however, 40% were by foreign authors and in terms of fiction 80% were by foreign authors. All of this suggests that there is a massive asymmetry in Hungarian written culture: if one takes into account the import of foreign language books which account for nearly 10% of the market as a whole and is largely made up of fiction, the overwhelming majority of literature being read by Hungarians comes from other cultures, and predominately from America. Indeed a number of modern Hungarian popular authors write in Hungarian, but under assumed American names in order to boost their sales. So far as specialist and scholarly works, especially in business, computers, science and technology, are concerned the world of learning has to be accessed substantially in a foreign language whether through books or journals, and increasingly higher education in many of these areas is conducted in English.

In market after market the published media have fallen into fewer and fewer corporate hands and they have generally been multinationals. In the USA itself 80% of the media industries is in the control of the five largest companies and 93% in the hands of the top twenty. In France almost half of book publishing is in the hands of two corporations, one of them currently in a state of financial collapse. In Britain 75% of any major genre of publishing is controlled by the top ten companies and so on. And of course these top companies are operating across the world's major markets. So is globalisation in publishing all conquering?

Well, there is another take on this. Small cultures under the right circumstances can be extraordinarily resilient, and corporations themselves are having to learn that simplistic globalisation does not work with publishing in the same way that it may with cola and burgers. They are coming to realise that while they may manage globally, they have to publish locally. In East and Central Europe, twelve years after the floodgates opened to the international output of books, a much healthier balance is reasserting itself. In Hungary indigenous children's authors and illustrators, for instance, have recouped much of the ground lost in the early 1990s. The bookshops are no longer over-filled with Dorling Kindersley illustrated books, and positive steps have been taken by government to reintroduce prizes and subventions to encourage Hungarian writing, after such things were abandoned in the mid 1990s. A new alliance has emerged between independent Hungarian publishers and a-political but publicly funded foundations to protect the Hungarian cultural heritage whilst keeping the doors open to the world of learning and literature of all kinds.

There is also room for hope in the new applications of information technology.

Professor John Kay, that hammer of the old university, concocted an amusing allegory a few years ago. He imagined Pope Pius III, head of the predominant media corporation of the mediaeval world, sending a Borgia cardinal and business consultant north to look at the potential of the new technology of moveable type, which had come to his attention. The cardinal duly reported with a series of totally erroneous predictions: that Latin would be the universal language within 50 years, that the Church, as the main deliverer of information and education, could monopolise the new technology and that it would encourage a concentration on the few big sellers which the Church already controlled and so on. In every respect the cardinal's report was wrong and so, John Kay argued, are many of our own fears, that English – or rather American as in ASCII, the American Standard Code for Information Interchange – would dominate the world of electronic communication, Microsoft and a handful of other technology and telecommunications giants will dominate the world of information and so on. I am inclined to think he may be right. It is dangerous to assume that the world of the web is of its essence going to be democratic and provide unlimited access for the people of the world for creativity and information exchange in a diverse uncontrolled way, but there are reasons for optimism.

Electronic publishing does allow narrowcasting and undermines the unfair advantage of economies of scale. Print on demand enables the continuous publication of specialist works and minority languages. There is new opportunity for academic publishing in Africa through on-line journals, and for local language production through schemes such as the South African initiative to make all major desktop systems available in the nine official languages – an idea that is being promoted by the African Publishers Network elsewhere.

While ASCII remains the language of the PC, Unicode now recognises the characters of 143 different scripts and there is semi-automated translation between web sites in different languages and scripts. Only a few weeks ago Versisign Global Registry Services offered to register domain names in non-Roman scripts and the choice of 26 letters and 10 numerals has now extended to 40,000 symbols. There has been a huge growth in Arabic and Chinese domains and even in that Mongolian script that was threatened with extinction. The conversion from Chinese or Arabic to Roman script is still very cumbersome but will no doubt be overcome with voice recognition systems.

Of course, the fundamental problem remains that the technology is contingent on the context in which it is applied and its availability. Africa, for instance, is still pathetically poorly connected and the gap with the rest of the world is increasing, but there are clear if difficult ways to tackle that if there is the political will and financial support. In all of this there is much hope for a world which is interconnected but also maintains diversity, and in which the multinational media organisations will co-exist with a variety of national and local publishers in print and digital form.

Clearly we are moving into an uncharted publishing environment that is:

More complex and demanding of new skills

Faster moving and more competitive

Both more global and more local and personalised

Able to offer more choices and more risks.

Publishing companies, large and small, must recognise this and take note of the need for professional development – and continuous renewal of skills at all levels – if they are to compete successfully with the new entrants to the business of information and communication provision.

Whilst I do not subscribe to the blanket criticism of corporate publishing companies, I would take them to task on several grounds in terms of their current policies and performance.

The first is that they have not proved very successful at what they are supposed to be good at – that is to say, strategic management, accountancy and marketing. Last year of America's five largest media organisations: AOL/Time Warner, Disney, News Corporation, Viacom and Bertelsmann only the latter was in profit – though even there large areas, such as Random House USA, went into loss. And AOL, Bertelsmann and the giant French-based Vivendi have all lost their top management in recent months because of poor financial performance.

The corporations have proved astonishingly bad at valuing their acquisitions accurately and equally wrong in their judgements about the direction and nature of the electronic publishing and communication markets. They have tended to go for growth through acquisition without balancing that with creative

natural growth and they have mismanaged and threatened the survival of many of their sound traditional publishing businesses in the process.

Furthermore they have jeopardised the future good health of publishing, whether in print or digital form, by squandering resources on profitless development areas while screwing down salaries for junior staff and rates for freelancers on whom they are increasingly dependent. Many have also seen their training budgets as an easy target for cost-cutting, and training expenditure is now lamentably low across UK publishing just at a time when the need for new professional and management skills is greater than ever.

Although some employers are beginning to recognise the dangers, there is still a high degree of complacency in the industry about employment practices. Traditionally it has been easy to recruit very good graduates and to fish in the large pool of freelancers, some of who were always prepared to work for the day before yesterday's rates and be paid on the month after next's due date. However, I can say from very direct personal experience that recruitment of the best graduates and postgraduates is getting harder, and retention rates are falling. In the freelance sector the pool of properly trained and experienced people is not self-sustaining, as editors, proofreaders, indexers and designers retire or move into other more adequately rewarded employment. Meanwhile the level of skill and experience in-house is frequently perilously low. It is ironic that at a time when the provision of publishing education and training is more extensive than ever, the industry is in real danger of de-skilling.

This is not simply a piece of special pleading from someone with a particular interest in the market for well-educated and trained young publishing professionals. It was one of the major conclusions drawn by the recent DTI report on the competitiveness of the UK publishing industry.

Whilst I suppose that the issues of levels of remuneration will always be a matter of contention between staff, freelancers and the management, they should at least be able to unite around the issue of skills and standards and this is particularly necessary at this time, when government seems set on ignoring the special and separate needs of publishing in its new national training structure. SfEP, at least, has long championed the cause of professionalism, as this conference exemplifies so clearly.

I would like to close on a lighter note and share with you my favourite publishing quotation. Williams Collins I was an excellent example of my thesis of the possibility of a happy marriage of high ideals in publishing with the profit motive. He was a notable Christian and social reformer, but also a shrewd Glasgow businessman. And to my mind he penned the most effective twenty-word sales pitch for a book that I have come across. The show card he produced for the Scottish book trade in the 1840s read:

*Holy Bible,  
Writ Divine,  
Bound in leather,  
1s and 9d.  
Satan trembles when he sees  
Bibles sold as cheap as these.*

**Professor Paul Richardson**, *Director of the Oxford International Centre for Publishing Studies.*  
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Cambridge, September 9, 2002.