Educational, academic and legal publishing.

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Educational, Academic and Legal Publishing in Scotland 1880-2000

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By making education compulsory for children between the ages of 5 and 13, the 1870 Education and 1872 (Scotland) Education Acts established the beginnings of a modern education system in Britain – and offered increased opportunity for educational publishers. The 1872 Act established a non-sectarian system of public schooling under the control of popularly elected school boards and subject to the Scotch Education Department, based in Whitehall in London. As Knox points out, in Glasgow, prior to the 1872 Act, only 60% of children ever attended school but by 1910-11 Scotland had more children aged between 5 and 14 attending school than any other European country apart from France (W. W. Knox, *A History of the Scottish People*, http://www.scran.ac.uk/scotland/pdf/SP2_8religion.pdf). However, such education was elementary only – the Acts made no provision for secondary education. Neither was the elementary education offered by such schools free. For another 18 years after 1872 all but the poorest children paid a few pennies a week for their education. It was also possible to leave school earlier than the age of 13 if you could obtain a certificate of proficiency in the three Rs (Reading, wRiting and aRithmetic). It was not until the Act of 1883 that the leaving age was raised to 14 (although children were allowed to attend 'half-time' from the age of 10) and not until 1889 and 1890 that further Acts made funds available to enable School Boards to abolish fees for elementary education.

Did this influx of children into elementary schools stimulate demand for teaching materials? The simple answer is yes, this did happen. However, Eliot warns against an assumption that there was an immediate impact on the profits of educational publishers. He points out that publishers of educational books initially over-emphasised the likely increase in demand generated by the 1870 and 1872 Education Acts. In many areas, elementary school provision was already well established and the Acts did not introduce many more children into the schools (S. Eliot, *Some Patterns and Trends in British Publishing, 1800-1919,* Occasional Papers of the Bibliographical Society, No 8, London: Bibliographical Soc, 1994). Altick suggests that, in England, the 1870 Act did not significantly hasten the spread of literacy, merely ensured that the rate at which literacy had already increased between 1851 and 1871 was maintained. He describes the main role of the Act as a mopping-up operation by which the very poorest children were taught to read (R. Altick, *The English Common Reader*, Chicago: University of Chicago Press, 1957). In addition, in those areas where schools were not already provided, building works took some time

to complete. So demand for new educational titles was not as high as was anticipated in the immediate aftermath of the Education Acts. Eliot suggests that there was in fact some minor over-production of educational titles at the beginning of the decade followed by a slump in the middle years before a surge as the impact of the Acts really took hold.

It was from this time onwards that the education legislation stimulated a tremendous demand for teaching materials, in particular basic reading books. No attempt was made by the government to impose a uniform curriculum on the new board schools, although they were required to meet certain basic standards. It was left to the publishers, which included Scottish publishers such as Blackie & Son, William Collins, Thomas Nelson & Sons, and W & R Chambers, to provide suitable materials and to individual boards to select appropriately. This left an opening for publishers of textbooks to compete with each other on everything from price to the ability of a book to be economically used in more than one lesson. Teachers would also be keen to select books which would deliver satisfactory achievement of the 3Rs since in the early years of compulsory education they were operating under a 'Payment by Results' system which meant that the salaries of teachers were linked to the successes of their pupils.

One Scottish publisher particularly successful in the provision of reading books was Thomas Nelson & Sons. Their 'Royal Readers' and later the 'Royal School' series sold in vast quantities throughout the British Empire. The company was careful to keep in touch with trends in education, corresponding with educationalists and maintaining contact with school boards in order to identify particular needs. Between 1878 and 1881, educational books represented 25% of the total output of the company and yielded 88% of the total profit – 55% of which was provided by the six books in the 'Royal Readers' series (*Imprints in Time: A History of Scottish Publishers, Past and Present*, Edinburgh: Merchiston Publishing, 1991). Their elementary school catalogue was one of the largest and most comprehensive in the country. Nelsons introduced the first school atlases and the company is credited with the introduction into these of the lines of latitude and longitude. The reading books were followed by other series, such as *The Highroads of History* in 1907 and *The Highroads of Literature* and *Highroads of Geography* in 1911. Such titles benefited from a special attention given to illustrations and contained coloured reproductions, for example of paintings from the national galleries.

Nelson's profits were poured into growing the company. Having established a London office by 1844 and being the first British publisher to establish a branch in the United States, opening a New York office in 1854, by 1915 further offices had been established in Leeds, Manchester, Dublin, Paris, Leipzeg, Toronto and Bombay. Trading relations were also established in Australia

and South Africa. When a fire devastated the already-extended Hope Park printing works in 1878, causing damage estimated at between £100,000 and £200,000 (only some of which was covered by insurance), a new production works was swiftly built at Parkside near Arthur's Seat in Edinburgh. The new works benefited from investment in the latest technology and were spread over one storey, giving good lighting and ventilation throughout the building, As well as printing for sales in the UK and the Empire, the Parkside works also manufactured books for the American Thomas Nelson & Sons, which remained a branch until 1903 when it became a New York corporation wholly owned by the parent British company.

Until the death of Thomas Nelson II in 1892 educational, religious and prize books were the staple products of the firm. When he died, leaving an estate of over one million pounds, a form of trusteeship operated until the two sons of his brother William, who had died in 1887, were old enough to take over the business. It was at this time that Nelson's launched itself into more general publishing whilst still continuing its educational publishing as an important part of the business. In 1915 Nelson's became a limited company and family members were joined on the board by John Buchan, who had been associated with the firm as author, editor and literary adviser since 1906. Under his guidance the firm survived the traumatic years of the First World War, which included the loss of foreign markets, a reduction in manpower and the death of Thomas Nelson III at the Battle of Arras in 1917.

Another major Scottish force in educational and reference publishing was W & R Chambers of Edinburgh. While their strength lay in reference publishing (see ***) their *Radiant Way* and *Radiant Reading* series could be found in schools all over the UK and the rest of the world, from Australia to India. In Glasgow, publishers Blackie & Son and William Collins also flourished due to the high demand for teaching materials. Having been established in the early 1800s as both a printers and a publishing house, Blackie concentrated on religious, subscription and reference publishing until the introduction of compulsory education. From that time, however, the company moved into educational publishing, including the *Century Infant Readers* series, basic English and Latin grammars, mathematical primers and, from 1881, a whole series of children's stories designed as school prizes and published as 'Reward Books'. Educational publishing was certainly very profitable. Walter Blackie was rich enough to commission Charles Rennie Mackintosh, who designed bindings for the company, to design the family home, Hill House at Helensburgh.

This period also saw a growth in publishing for the university market. The quality of Scottish higher education by the middle decades of the 19th century is generally accepted as being poor. This was mainly due to the fact that there were no university entrance examinations and therefore

children as young as 14 or 15 could enter one of the five Scottish universities. The Universities (Scotland) Act of 1889 remodelled the constitution of the universities and introduced a new administrative body – the Scottish Universities Committee of the Privy Council – in order to secure greater uniformity in government. An executive commission was appointed with powers which included the regulation of the course of study for any degree; the introduction of examinations for entrance to a university or a particular degree course and the admission of women to instruction and graduation. In 1892 all Scottish universities were permitted to admit women. The number of students in higher education in Scotland grew from 4,400 in 1830 to 6,000 in 1900 and 10,000 by 1938. The reform of the older universities and establishment of newer ones throughout Britain during the later 19th century introduced new subjects to higher education, all of which needed new textbooks to support the teaching. Modern history, languages and literature and the sciences became established parts of university curricula.

Publishing opportunities were not only restricted to textbooks. The 19th century had seen the foundation of many scholarly journals, mostly by scholarly societies which were either regional or specialist in nature. For example, the Royal Society of Edinburgh published *the Transactions of the Royal Society of Edinburgh* from 1785 and its *Proceedings* from 1832. A large proportion of the print runs of such journals would be distributed for free, either to members of the society as part of their subscription, or by exchange with other societies. Sales for profit were limited, however, the latter half of the 19th century saw growing sales to university libraries and learned journals became established as steady income generators for their publishers.

Changes were also occurring in professional education, and specialist publishers developed to meet a need for professional information. In 1875, William Green, a former Court of Session officer, set up business as a law bookseller near the Court of Session in the Old Town of Edinburgh. However, it was his twenty-year old son, Charles, who moved the firm into legal publishing when he was forced to abandon his medical studies and take over the business after his father's death in 1885. Green's might more accurately be described as a 'professional' publishers since the company also published medical, accounting, veterinary and agriculture works, including the *Encyclopaedia of Accounting* and the *Encyclopaedia of Agriculture*, but the focus of their publishing endeavours was the law. Green's published such standard legal reference works as the *Encyclopedia of Scots Law*, the *Scots Digest* and the *Scots Style Book.* Throughout the company's career, it has necessarily had a close relationship with Scottish higher education institutions. In 1889 the law faculties of the Scottish universities were considering the production of a law journal and in response Green's offered to establish the quarterly *The Juridical Review* as 'The Law Journal of the Scottish Universities'. In 1893 the *Scots Law Times,* a weekly legal

newspaper, started production and soon established itself as the authoritative source of law reporting within Scotland. In 1906 Green's took over the business of Bell & Bradfute, another Edinburgh-based firm which had been established as early as 1734 and which published texts such as Hume's *Commentaries* and Morison's *Dictionary of Decisions*. Green's became a limited company in 1913 and so the company was able to continue under the control of its directors on the death of Charles Green in 1920 at the age of 54.

At the end of the First World War, the Scottish Education Act of 1918 was intended to involve a complete re-organisation of the whole fabric of the Scottish educational system outside the universities. The 1918 Act provided for the school-leaving age to be raised to 15 on a date to be fixed. However, the difficult economic conditions which followed during the 1920s and 1930s meant that such plans had to be postponed indefinitely while cuts in expenditure were urgently sought. The 1918 Act also substituted the county for the parish as the local unit of administration. New education authorities were elected expressly for the administration of education and such a system lasted until the Local Government (Scotland) Act of 1929 transferred power in local educational affairs to the county councils.

Educational standards were rising and almost total adult literacy had now been achieved. Even during the years of Depression, however, educational publishers still had to react to changes in government policy regarding schools. At Nelson's, John Buchan brought Sir Henry Newbolt, with whom he had worked at the Ministry of Information during the War, into the company to act as editorial adviser in the educational field. New series were initiated, such as the *Nelson School Classics*. In part, this was in response to Newbolt's own 1921 report on the teaching of English in schools in England and Wales. In 1922 Nelson's produced *The Teaching of English* series, which eventually ran to around 200 titles. In a similar way, Chambers produced the *No Lumber* educational series in response to a call in the Hadow Report of 1931 to rid the curriculum of useless 'lumber'.

While the school board system had put the emphasis on financial prudence, leading to many textbooks being closely printed on poor quality paper, as the economic situation improved during the 1930s, textbook quality began to improve markedly. As the economy improved, a new date. was set in 1936 for the raising of the leaving age to 15 – September 1939. Obviously, with the outbreak of the Second World War this plan was quickly shelved and education in Scotland, and indeed most of the rest of Europe, suffered great disruption until 1945. Publishers' profits were of course damaged by the national emergency and related paper rationing, but in addition many found themselves physically on the front line – not only on the battlefield but also in their offices.

Blackie and Collins had their London offices bombed by the Luftwaffe during the Blitz although both firms still had their headquarters in Glasgow. Blackie's actually used part of their Bishopbriggs works for the manufacture of 25 pound shells for the Ministry of Supply and also produced aircraft radiators. Once peace had been declared, however, the public's attention turned once more to planning for the future. The Butler Education Act of 1944 repeated many of the provisions of the 1918 Act, but went further. The school-leaving age was to be raised to 15 as soon as possible and then, when the Secretary of State deemed it advisable, to 16. The first part of the measure came into force on 1 March 1947. In addition, and for the first time, secondary education became free for all pupils and secondary modern schools were created.

Post-1945 education became far more vocational in slant, although there was still no prescription for any textbooks other than the texts required for certain examinations. There was a reaction against the idea that studying certain subjects, such as Greek or Latin, was necessary as essential training for the mind and, as universities started to drop Latin as an admission requirement, emphasis on the Classics was reduced in favour of more 'relevant' subjects. This was reinforced in 1963 by the Brunton Report, *From School to Further Education*, which had a strongly vocational bias.

The Curriculum Development movement came to the fore in the late 1950s. This started with the work of the Physical Science Study Committee in the US and in the UK was manifest in the Nuffield Science Programme and the School Mathematics Project. There was a concern that children were turning against mathematics and science in school because of the way in which these subjects were taught. Curriculum development put emphasis on 'learning by discovery' and the teaching of science became a process of enquiry where 'learning' replaced 'being taught'. As Becher and Young point out, such a change in educational methodologies obviously impacted on educational publishers, particularly as far as the commissioning of textbooks was concerned (T. Becher and B. Young, 'Planning for Change', in A. Briggs, *Essays in the History of Publishing*, Asa Briggs (ed.), Harlow: Longman, 1974). A wide range of materials now needed to be produced and it was unlikely that an individual author would have the necessary skill-set. Instead, publishers had to learn to work with teams, usually of experienced teachers. Basic issues of design and presentation had to be settled early on in the process of development and publishers were expected to produce not only textbooks but materials such as slides and sound recordings, which had previously been the preserve of the specialist supplier. Curriculum developers also insisted that materials were trialled in schools and possibly revised before publication. Publishers such as Chambers, who published the *Nuffield Mathematics Project* for the Nuffield Foundation,

or Blackie, who published *Modern Mathematics for Schools* by the Scottish Mathematics Group jointly with Chambers, had to learn to work within these new parameters.

In the later half of the 1960s a second phase of organised curriculum change was introduced. While the emphasis in the first phase had been on subjects such as mathematics and science, the second phase focused on the notion of compensatory education. The Plowden and Newsom reports had suggested that equality of educational opportunity was not enough. Underprivileged children needed to be given more help. This lead to the creation of mixed-ability groupings in classrooms, with cooperation rather than competition stressed. The old teaching methods based on one teacher using a set of textbooks with a whole class of students were replaced. Now classes could contain separate groups or even individual students working at different rates through a range of activities. There was a new emphasis on independent study, projects and discussions. As Becher and Young point out, in such a situation classroom materials attained a position of central importance as essential resources and offered new opportunities for publishers. However, curriculum change was a mixed blessing for publishers. In 1975 the Bullock Report described a situation where schools had moved away from a reliance on basic course books, which could be printed in large quantities and so were comparatively cheap. Schools now needed to purchase a greater variety of books to support individual and group work and these new books tended to be more expensive since individual print runs were lower. As the recession of the 1980s began to impact on school budgets, declining book purchasing by schools became a growing problem for many educational publishers.

This was also a period of expansion in higher education and concomitant changes in academic publishing throughout the Western world. From 1950 there was a great increase in scientific activity, partially in response to the Cold War. New subjects appeared at universities, such as space research and nuclear physics, and there was a tremendous growth in the number of scholarly journals on such subjects. As Cook points, active scholars could no longer read all the relevant papers in their field and so journals came into being that published reviews for whole topics (A. Cook, 'Academic Publications before 1940' in E. H. Fredriksson (ed.), *A Century of Science Publishing,* Amsterdam: IOS Press, 2001). The numbers of students in full-time courses at Scottish institutions of higher and further education grew to 31,000 by the early 1960s (J. Scotland, *The History of Scottish EducationI,* London: University of London Press, 1969). Edinburgh University Press published its first titles in 1948 although the decision to establish a publishing imprint for the university was actually taken by the Senatus during the war years.

The 1960s and 70s saw a growth in Scottish intellectual life and national debate, particularly around the subject of devolution and Scottish independence. Academic publishing, in particular,

responded to such debate with the establishment of several small presses such as the Scottish Academic Press in 1969. In 1968 the Edinburgh University Student Publications Board was set up to take responsibility for student publications and by 1975 had an annual turnover of nearly £60,000. As well as publishing a weekly tabloid newspaper, *Student*, it also published titles such as *Red Paper on Scotland*, a collection of essays on various aspects of the current debate on Scottish politics, culture and finance including contributions by Gordon Brown, the future Chancellor.

In addition to dealing with curriculum and methodological change at home, many academic and educational publishers were also dealing with global markets. Some had been involved in overseas sales since the early days. As early as 1887 Nelson's produced a reader in the Nyanja language of the-then Nyasaland. By the 1950s the company published a wide range of books in languages such as Kiswahili, Yoruba, Ewe, Twi and Ga. In post-war Britain, educational books had become very important to Nelson's success and it nurtured its overseas markets for textbooks. The old links with the British Empire became new links with Commonwealth countries, especially with East and West Africa and the West Indies. In 1961 and 1963 offices were opened in Lagos and Nairobi. Specialist schoolbooks were produced, for example Indian histories, demonstrating the company's determination to hold on to such markets in the teeth of competition, not just from British publishers but also from American and home-grown publishers. In 1962 Thomas Nelson & Sons merged into the Thomson Organisation in an effort to sustain its educational publishing interests on a global scale. The new management separated the editorial and printing operations and the printing and binding division of the company, based in Edinburgh, was sold in 1968. In 1969 the American company was sold and in 1983 the colophon showing Thomas Nelson's shop in Edinburgh was dropped from the imprint. In 2000 Thomas Nelson merged with Stanley Thornes to form Nelson Thornes, part of the Wolters Kluwer group. Such a history is not unusual amongst Scottish educational publishers. Over the course of the later twentieth century Scottish firms have increasingly become subjects of mergers and conglomerate activity and many have moved their core businesses to London or even further afield. The move to the south was often initially in response to their own success and the perception that it was best to compete in international markets from a base in London. Blackie's, Nelson's and Collins became established in London while, at first, retaining Scottish ownership. The trend from family-run businesses to shareholder-funded plcs became marked during the 1970s with the emergence of conglomerate enterprises as the dominant force in the industry. Successful Scottish firms inevitably attracted the attention of larger international companies offering increased sources of finance and access to new markets. On merger, however, part or all of the operations

of a company might be moved south to England. In the same year that Nelson's was taken over by the Thomson Organisation, another Edinburgh educational publisher – Oliver & Boyd – was acquired by the Financial Times. The publishing part of the company was later acquired by Longman's, itself part of the Pearson Group, but continued to publish under its own imprint in Edinburgh until 1989 when its educational list was removed to Longman's head office in Essex. This was the beginning of the end for Oliver & Boyd, which had ceased trading by 1990, partly because their profit levels were not reaching targets set by Pearson Longman. Blackie retained its Glasgow base but moved editorial and distribution functions to England. The company ceased publishing in 1991 when its school titles were acquired by Thomas Nelson & Sons Ltd.

One company which does remain at least partially based in Glasgow is HarperCollins. Although most of the company's editorial and management is now based in London and New York, cartographic and reference editorial remains in Scotland. Collins was founded in 1819 and remained under family control for 162 years. It became the largest independent publishing house in Britain whilst under the leadership of a succession of William Collins. When the company was floated on the stock market in December 1949, it was oversubscribed four times within a few minutes. Whilst remaining an essentially Glasgow-based printing and publishing company, Collins had established a London office before the Second World War and, as Eric de Bellaigue explains, by the 1960s the publishing in Glasgow encompassed bread-and-butter products such as schoolbooks, dictionaries, bibles and children's books while the London offices undertook the more glamorous trade publishing (E. de Bellaigue, *British Book Publishing as a Business since the 1960s*, London: The British Library, 2004). Financial differences between the two sides of the company grew during the 1960s and early 1970s as publishing experienced sustained growth but the printing side of the company encountered problems. The 1970s were challenging for most British publishing companies, but for Collins the problems were exacerbated by its exposure to manufacturing. In 1974 Collins purchased the World Publishing Company from the Times Mirror Group with the intention that its bible, reference and children's publishing would complement Collin's existing activities in the United States. In addition, it was hoped that the Bishopbriggs manufacturing division would benefit from print orders from the US. However, by 1980 the company had been forced to dispose of the World Publishing Group and also make 600 redundancies and job savings, mostly in the UK and largely in manufacturing. The company began to attract the attention of potential purchasers, the most interested being Robert Maxwell's British Printing Corporation (BPC) and Rupert Murdoch's News International. In 1989 the company was taken over by News International for £403m and merged with the jointly owned American publisher Harper & Row to become HarperCollins with its headquarters based in New

York. By the 1990s the Glasgow base retained only some warehousing and reference publishing, in particular cartographic publishing after a merger with Edinburgh-based Bartholomew.
Robert Maxwell may not have been successful in his plans for Collins, but he did manage to take over Aberdeen University Press in 1978 with the aim of creating a Scottish academic imprint. Until this time, AUP was a printing rather than a publishing concern and had no formal relationship with the university, although informal links were made by a number of university figures on its board of directors. In 1970 AUP was taken over by the British Bank of Commerce, and in 1978 it became a wholly owned subsidiary of Maxwell's Pergamon Press and was re-born as an academic publisher specialising in Scottish literature, history and politics. In 1989 the printing and publishing divisions were separated with the printing division becoming part of Maxwell's British Printing and Communications Corporation while the publishers remained part of Pergamon, itself part of the Maxwell Communications Corporation. Shortly after Maxwell's death by drowning in November 1991, his publishing empire, including AUP, collapsed.
Of course it was not only educational and academic publishers who were affected by the internationalisation of commerce during the second half of the twentieth century. The legal publishers W Green and Son Ltd became a subsidiary of the English law publishing firm Sweet & Maxwell Ltd in 1956. In turn, Sweet & Maxwell became part of Associated Book Publishers Ltd in 1964, which was then acquired by the Thomson Corporation in 1987. Before 1987, as the volume published to celebrate Sweet & Maxwell's bicentenary in 1999 points out, Green's was managed wholly independently of its English owner. Warehousing, accounts and subscription records were maintained separately and Scottish customers of Greens probably had little notion of the connection. The reason for this can be found in the distinctive Scottish legal system which required Scottish publications. In 1960, the Scottish Universities Law Institute was established to promote publication on Scottish law after the doldrums into which it had fallen by mid century. Much of the new legal literature which was produced as a result was published by Greens. In addition, 1960 saw a major change in legal education, with law becoming a full-time undergraduate course rather than a part-time postgraduate qualification. Such changes required the publication of more textbooks aimed at this younger, less experienced group. Green's was provided with substantial competition for the first time by the entrance of Butterworth's to the field of Scottish legal publishing in 1984. Founded in England in 1818, Butterworth's presence in Scotland began when the company reached an agreement with the Law Society of Scotland to co-publish the *Stair Memorial Encyclopaedia*, a 25-volume work covering the law of Scotland. Butterworth's is now a sister company of LexisNexis in the United States and part of the legal division of Reed Elsevier. Both publishers have made substantial investments in electronic

publishing and many of their products, particularly reference and information provision, are now delivered to their subscribers electronically.

The later years of the 20th century provided a series of challenges for academic and educational publishers. Demographic decline in Scotland meant falling school rolls, and the 1980s in particular were a testing time for educational publishers as school budgets were squeezed throughout the UK – we have already seen that it was at the end of the 1980s that both Oliver & Boyd and Blackie's ceased trading. Report after report from organisations such as the Educational Publishers Council, the National Book League and the Book Trust found that schools were spending less on book provision. The introduction of local management of schools, with individual schools gaining more responsibility for their own budgets, could also impact negatively on book purchase. Spending on books was now merely one part of 'non-teaching' costs and had to be weighed against costs such as stationery, ancillary help and the maintenance of school grounds. Exports of school books, which accounted for as much as 40% of all sales during the 1970s, was also hit by the strength of sterling, the growth of local publishing in developing countries, cutbacks in overseas aid and the introduction, in 1988, of the National Curriculum. The National Curriculum also affected publishers' sales in England and Wales since it proscribed the content of what should be taught at all levels and, as a consequence, the market became even more competitive. In Scotland the 5-14 curriculum is not prescribed by statute. Responsibility for the management and delivery of the curriculum belongs to education authorities and head teachers, or in the case of independent schools, the boards of governors and head teachers. However, broad guidance is produced by the Scottish Executive Education Department (SEED) and Learning and Teaching Scotland (LTS).

In higher education, research libraries' buying power had also been hit by budget cuts. During the 1980s UK university library funding dropped by 32% and polytechnic book provision by 56% (David Croom, 'Academic and Textbook Publishing', P. Owen (ed.) *Publishing Now,* London: Peter Owen, 1993). The 'serials crises' – whereby the numbers of journals published grew, journals' prices rose, but library budgets were cut – became a major debating point. University libraries cut their purchase of monographs in order to sustain journal provision. Student numbers were also static until the end of the decade and, with the erosion of their grants, students were spending less on textbooks purchases. There were also growing threats to textbook publishers through second-hand sales and the growing use of the photocopier.

Student numbers began to grow again at the end of the 1980s as the connection was made at governmental level between a well-educated workforce and long-term economic growth. In 1992 the distinction between universities and polytechnics was removed and in 1998 the Labour government set a target for 2010 of 50% of young people to be participating in higher education. In fact, Scotland had already achieved this figure by 2000, despite the demographic decline in Scotland. Growing numbers of mature students (over the age of 21) were attending higher education institutions, which attracted them through more flexible modes of study such as part-time, block-release and distance-learning. However, higher numbers of students did not necessarily translate into higher numbers of textbook purchases. Again, library cuts and student debt impacted on textbook sales, but additional factors have included the fragmentation of the market – the level of choice offered to students, particularly in their later years at university has meant that the numbers studying individual subjects might still be low – and the speed of the expansion. Important areas of growth in the 1990s included the new (post-1992) universities, which were starting with under-resourced libraries, and vocational subjects, where publishers are still struggling to catch up.

As far as the serials crises is concerned, the rise of the electronic journal in the 1990s was at first perceived as a solution since it was hoped that electronic-only journals would be cheaper to produce and would therefore lead to a drop in journal prices. However, by the beginning of the 21st century the situation had not changed materially, mainly because many journals were now being published in dual formats – print and electronic. The introduction of the Research Assessment Exercise (RAE) in the UK during the 1990s, whereby the published research output of individual university departments was assessed and access to funding council grants limited to the higher achieving departments, also impacted on academic publishing. Since textbooks were not highly rated by RAE panels, it was sometimes difficult for publishers to persuade academics to write them. On the other hand, journal publishers were inundated by submissions from academics eager to publish before the latest cut-off point for the RAE census.

A new Labour government was elected to power in 1997 with the promise that its priorities would be 'Education, Education, Education'. A massive increase in spending on books in schools followed to support its new National Literacy Strategy and the National Year of Reading. In total, schools in the UK received grants amounting to £140 million between January 1998 and July 1999. According to the Bookseller publication *Book Publishing in Britain,* sales to primary schools increased from £77 million in 1997 to £90 million in 1998. Publishers of reading schemes and children's books did well because the money was focused on lifting reading attainment and

reading for pleasure. However, industry observers suggested that other educational publishers suffered in comparison and, in particular, sales to secondary schools remained flat.

How possible is it any more to talk of a specifically Scottish educational or academic industry? As we have seen, many of the larger players in the field had merged or been purchased by multinational conglomerates by the end of the 20th century and their headquarters are no longer based in Scotland. At the same time, this is a sector which is very susceptible to change, either imposed by central government or because of changing educational theory. Changes in the National Curriculum, research funding or teaching methodologies all impact on the profits of educational and academic publishers, both positively and negatively. However, because Scotland retains a distinctively different legal and educational system there are still opportunities for smaller Scottish publishers in these sectors. Since devolution in 1999, new legislation dealing with education is a matter for the Scottish Parliament and, as we have seen, Scotland has its own curriculum for schools independent of the English National Curriculum. Niche publishers such as Barrington Stoke, started in 1997 to publish fiction and resources for reluctant, dyslexic and under-confident readers, or Leckie & Leckie, publishers of past papers and study guides for Scottish secondary school examinations, have been able to establish themselves. At the same time, the growth in Scottish intellectual life, debate and culture in the last decades of the 20th century has enabled successful academic publishers such as Mainstream, Edinburgh University Press and Birlinn to thrive.

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