

**Putting Cymru on the Map: Internationalising Children's Publishing from Wales**

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## **Declaration**

This work has not previously been accepted in substance for any degree and is not being concurrently submitted in candidature for any degree.

This thesis is the result of my own investigations, except where otherwise stated. Where correction services have been used the extent and nature of the correction is clearly marked. Other sources are acknowledged giving explicit references. A bibliography is appended.

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Megan Farr

February 2025

## **Abstract**

This thesis examines how Welsh children's and YA publishing can develop sustainable international engagement within a bilingual, small-nation context. As the first comprehensive study of internationalisation strategies in this sector, it investigates conditions enabling Welsh publishers to access global markets.

The research traces the historical development of Welsh- and English-language children's publishing since the 1970s, situating internationalisation efforts within Wales's bilingual ecology and cultural policy framework. Drawing on Bourdieu's field theory and Sapiro's sociology of translation, supplemented by minor literature theory, the study employs a mixed-methods approach combining quantitative analysis of publishing output and qualitative data from 46 stakeholder interviews. Eight case studies of children's and YA titles published between 2018 and 2023 examine three internationalisation pathways: import, export, and co-production. Comparative analysis with Catalonia, Ireland, Scotland, and New Zealand contextualises the Welsh experience within broader small-nation publishing models.

Findings demonstrate improvements in the visibility, professionalisation, and cultural value of Welsh children's literature, supported by public investment from the Books Council of Wales. Individual international successes, notably the multiple translations of *Llyfr Glas Nebo* (Y Lolfa, 2018), illustrate the sector's potential. However, international engagement remains uneven and structurally constrained. Key barriers include fragmented institutional coordination insufficiently aligned with publishers' commercial needs, limited rights management expertise, restricted translation capacity, and inadequate access to global distribution networks.

The thesis contributes theoretically by applying an integrated Bourdieu–Sapiro framework to small-nation children's publishing. It offers evidence-based recommendations including improved alignment between literature promotion agencies and publisher commercial strategies, enhanced rights management support, expanded translation expertise, and sustained international network development. These findings inform cultural policy debates on strengthening diversity and resilience in bilingual small-nation publishing.

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# 1. Introduction

## 1.1 Research context and significance

This chapter establishes the research context and significance of internationalising Welsh children's and young adult literature, outlines the central research questions that guide this investigation, and presents the theoretical framework grounding the study. The chapter introduces key stakeholders and terminology, explains the researcher's positioning as an industry insider, and provides a clear roadmap of the thesis structure. Drawing on Bourdieu's field theory and Sapiro's sociology of translation as the foundational theoretical approaches, this chapter demonstrates how these frameworks enable examination of Welsh publishers' strategies for international engagement. The analysis addresses the research questions outlined in Section 1.2 and establishes the foundation for the detailed case studies presented in Chapter 7 and comparative analysis explored in Chapter 9.

The internationalisation of Welsh children's and young adult (YA) literature represents a critical opportunity for cultural exchange and economic growth in Wales's publishing sector. As a nation with two official languages and a distinct cultural heritage, Wales occupies a unique position in children's publishing – simultaneously preserving and promoting its linguistic and cultural identity while seeking to engage with international markets both as an importer and exporter of children's literature. This thesis examines how Welsh publishers can develop effective international strategies that support domestic language preservation, cultural identity, and citizenship goals – priorities aligned with the Well-being of Future Generations Act 2015, which requires Welsh public bodies to consider the long-term impact of their decisions on future generations.

Welsh publishing operates in a unique context as both a small nation publisher within the UK and a bilingual publishing environment, where Welsh-language books compete with and complement English-language titles. With government support through the Books Council of Wales and an ambitious target of one million Welsh speakers by 2050, which in turn relies

heavily on increasing the bilingualism of the school age population, the children's publishing sector plays a vital role in language and cultural preservation and development.

The current landscape of children's literacy in Wales, the UK, and internationally presents significant challenges across multiple interconnected factors. Recent data from the National Literacy Trust reveals an alarming decline in reading for pleasure among young people in the UK, with only 35% of eight- to 18-year-olds enjoying reading for pleasure (Clark et al., 2024). This historic low represents a concerning downward trend, described as 'shocking and dispiriting' (Creamer, 2024). The implications of this decline are profound: reading enjoyment has been reported as more important for children's educational success than their family's socio-economic status (OECD, 2002), and numerous studies have linked reading for pleasure with future life success (Clark and Rumbold, 2006).

This reading crisis occurs against a backdrop of structural challenges within the UK publishing industry itself. Commercial children's publishing faces pressures from overproduction, with an ecosystem that generates more writers and illustrators than the market can sustainably support. The industry increasingly operates on a high-risk model: publishers offer substantial advances and market heavily to what they perceive as current market demands, but authors whose books underperform are quickly dropped. This contrasts sharply with the traditional publishing model, where modest advances would earn out against royalties if books proved successful, allowing publishers to support authors over longer periods with less financial risk (Clark and Phillips, 2019). While small publishers often maintain this more sustainable approach by necessity, larger commercial publishers have largely abandoned it.

Critically, few UK publishers can sustain their operations through domestic sales alone, particularly given the UK market's entrenched high-discounting culture. International sales – whether through rights licensing or export – have become the essential revenue stream for commercial children's publishers (Owen, 2024). However, in Wales, the grant-supported nature of the publishing industry has historically meant less emphasis on developing international markets, creating a distinct challenge for Welsh publishers seeking to navigate these commercial realities.

In Wales, the provision of reading materials for children operates through two distinct channels within the publishing industry: consumer trade books (often called ‘leisure books’) and educational books. While consumer trade books are designed for the general retail market and typically sold through bookshops, educational books are developed specifically for classroom use. Though these categories may appear distinct, the boundaries between them are often nuanced, as trade books frequently serve both entertainment and educational purposes. Through engaging storytelling and illustration, trade books cultivate essential literacy skills, foster empathy, and develop creative capacities that enhance children’s ability to engage with the school curriculum (Clark and Rumbold, 2006).

This categorisation reflects broader philosophical and structural differences in how children’s publishing is conceived, created, and distributed in Wales, supported by distinct funding mechanisms. Consumer trade books receive funding through the Books Council of Wales, which is supported by the Welsh Government via Creative Wales. Educational materials are commissioned through two primary routes: Welsh Government education department tenders and, since 2024, through Adnodd. Established in 2023 as an arm’s length body of the Welsh Government, Adnodd was created specifically to support the new Curriculum for Wales, which emerged from Donaldson’s (2015) independent review of curriculum and assessment arrangements, and launched in 2022.

The Welsh publishing landscape demonstrates a distinctly decentralised model, with publishers distributed across multiple regions including Gwynedd, Ceredigion, Carmarthenshire and Cardiff (see Section 5.2.2, Figure 1 to see the location of publishers in Wales). The Books Council of Wales, headquartered in Aberystwyth, serves as a central coordinating body for this geographically diverse network of publishers, which ranges from micro businesses to established printer publishers. This decentralised structure stands in marked contrast to the London-centric model of UK publishing and reflects Wales’s broader approach to cultural institutions, which historically developed across various regions rather than concentrating in Cardiff, a city that only gained its capital status in 1955.

The decentralised nature of Welsh publishing operates within an increasingly challenging economic environment. The period from 2008 to 2025 has been marked by significant

political and economic disruptions that have impacted the publishing sector's sustainability. These include the implementation of austerity measures, the economic implications of Brexit, disruptions caused by the Covid-19 pandemic, and the ongoing cost of living crisis. Publishers have faced mounting operational pressures through rising costs, while simultaneously experiencing reductions in available funding, particularly through diminished arts funding and local authority budgets. The history of cuts to arts and culture in the UK is well-documented, with evidence from the 2025 Welsh Parliament's Culture and Sport Committee report showing that Wales invests only £69.68 per capita in cultural services compared to the UK average of £91.12 (Welsh Parliament, 2025; S. Morris, 2025). In 2024, cultural spending as a proportion of the Welsh Government budget represented less than 0.15% of total overall expenditure – one of the lowest in Europe, where the average is 1.5% with some countries reaching 2.5% (Green, 2024). The Books Council of Wales receives funding from Creative Wales, which sits in the Economy, Energy and Transport group of the Welsh Government. These budgets too are under pressure for the same reasons.

The Welsh children's publishing industry faces several significant obstacles while working within these constraints. Former Children's Laureate Wales (2019–2021) Eloise Williams emphasises that the industry must overcome international perceptions of Welsh literature as merely 'parochial' or 'irrelevant' beyond its borders. She highlights the untapped potential of Wales's literary scene, noting that 'There is a wealth of creativity here. A bustling hive of authors, illustrators, poets, creative people of a very high calibre. It's a source just waiting to be tapped into' (E. Williams, 2020).

This perception of Welsh literature as peripheral to the broader UK literary landscape is echoed by Tann (2021), who argues that Wales's thriving literature scene remains largely invisible across the border despite the high calibre of its creative output. Tann (2024) further questions when Welsh literature will receive the recognition it deserves within the wider UK publishing industry, suggesting that structural barriers rather than quality account for this lack of visibility.

Central to this research is the examination of how Welsh children's literature can serve multiple functions: as a 'mirror' reflecting Welsh children's experiences and cultural identity,

and as a ‘window’ offering international readers insights into Welsh culture and experience (Bishop, 1990). This cultural role takes on particular significance in Wales, a nation of just over 3.1 million where language data shows varying levels of Welsh language use. The Annual Population Survey for the year ending September 2023 indicates that 29.7% of people aged three or over can speak Welsh (Welsh Government, 2024), while the 2021 Census recorded 17.8% (538,300 people) reporting Welsh language ability (Office for National Statistics, 2022). The disparity between these figures is currently under review by statisticians at both the Office for National Statistics and Welsh Government, though both sources confirm higher Welsh language proficiency among school-age children compared to the general population.

The Welsh language has been the focus of significant political and cultural investment through established institutions including the Books Council of Wales (founded 1961), the Arts Council of Wales<sup>1</sup>, S4C (established 1982), and BBC Cymru Wales, all of which have played key roles in supporting Welsh-language culture. The legal framework for the language has evolved through various legislative measures, notably the Welsh Language Act 1993 and the Welsh Language (Wales) Measure 2011, which established Welsh as an official language in Wales and created the role of Welsh Language Commissioner.

This research examines the internationalisation of Welsh children’s literature during a transformative period (2020–2025) marked by significant global disruption. Through extensive industry engagement and case studies of titles published between 2018 to 2023, this thesis investigates how publishers navigate linguistic, cultural, and commercial considerations in bringing Welsh children’s literature to global audiences. The research comes at a critical time when small nations are increasingly seeking to promote their literary heritage globally while developing sustainable international markets for their publishing industries.

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<sup>1</sup> The Arts Council of Wales was established within the Arts Council of Great Britain in 1946, as the Welsh Arts Council (Welsh: Cyngor Celfyddydau Cymru), its English name was changed to the Arts Council of Wales when it was independently established by royal charter on 30 March 1994.

The research builds upon foundational work in the field, notably Rosser's *Survey of Books for Children and Young People* (2017) and Büchler, Jones and Lake's *Internationalising Reading Experiences of Children and Young People in Welsh* (2020). These studies highlighted critical challenges in the sector, including the predominance of English-language translations in Welsh publishing and the need for more diverse international rights acquisitions. The *Research into international working in the literature sector in Wales* (Arad Research, 2015) report commissioned by Wales Arts International and Literature Wales provides additional context for these challenges, examining broader structural barriers in Wales's international literary engagement. While the report did not specifically focus on children's literature, its findings regarding fragmented organisational partnerships, reduced funding for translation, and limited presence at international book fairs have relevance for the children's publishing sector.

The Arad report's analysis of comparable models in Australia, Latvia, and the Basque Country offers valuable insights, though not specifically focused on children's literature. The Basque Country's comprehensive approach to translation funding and linguistic diversity strategy, Latvia's sustained investment in translation and strategic market targeting, and Australia's targeted support for authors and festival participation all provide potential frameworks that could be adapted for children's literature. However, the lack of specific analysis regarding children's book fairs, rights sales, and specialised marketing approaches in these countries underlines the need for focused research in this area.

This thesis addresses this research gap by examining how Wales might develop more effective approaches to internationalising its children's literature. The research is particularly significant given the distinct characteristics of children's publishing, including specialised translation requirements, marketing approaches, and distribution channels that differ significantly from adult literature. Through analysing current practices, examining international models, and identifying specific requirements for children's literature, this work aims to contribute to both scholarly understanding and practical development of international engagement strategies for Welsh children's literature.

The findings of this research have implications for policy development and sector support, particularly in addressing the structural barriers identified in the Arad report while accounting for the unique needs of children's literature. This analysis will provide insights into how small nations can effectively promote their children's literature internationally while supporting both artistic and commercial development in an increasingly global marketplace.

Drawing on theoretical frameworks from the sociology of literature, translation studies, and minor literature (detailed in Section 1.2 and Chapter 2), the analysis explores questions of cultural representation and market access, particularly when Welsh-language authors write in English.

This thesis makes an original contribution to knowledge by providing the first comprehensive study of Welsh children's publishing internationalisation, addressing the power dynamics influencing Welsh children's literature's international presence, strategies for effective global market engagement while maintaining cultural integrity, and the role of translation and bilingual writing in international dissemination. In doing so, it fills a significant gap in existing literature on children's publishing in small nations and minoritised languages, offering insights for publishers, cultural organisations, and policymakers.

## 1.2 Central research question and sub-questions

This research examines the central question: What strategies should the Welsh publishing sector adopt to operate successfully at international level in children's and young adult books across both Welsh and English language publishing?

This overarching question is explored through six key research questions:

1. How has the children's publishing industry developed in Wales, and how has it been supported economically?

2. What is the quantity of children's literature produced in Wales, and how can indicators of literary merit, prestige, and cultural value be identified and measured in the context of Bourdieu's concept of cultural capital?
3. What international strategies have been used to date, and how effective have they been?
4. How can the publishing sector in Wales build links with the international publishing industry, and what are the economic and cultural benefits of doing so?
5. What are the challenges of internationalisation, and what conditions (economic, political, cultural) are necessary to overcome them?
6. What roles do key stakeholders (Books Council of Wales, Wales Literature Exchange, publishers, authors, translators) play in developing and implementing internationalisation strategies?

To answer these questions, the research draws on a multidisciplinary theoretical framework (detailed in Chapter 2, Section 2.2), integrating concepts from the sociology of literature, minor literature, and translation studies to analyse the conditions and strategies for internationalising children's literature from a minoritised language context. Welsh children's literature thus becomes a case study applicable to other literatures in similar situations around the world.

This study is fundamentally grounded in Bourdieu's field theory and Sapiro's sociology of translation as the primary theoretical foundations that enable systematic analysis of how Welsh children's literature navigates international markets. Bourdieu's concepts of cultural, economic, and symbolic capital (Bourdieu, 1993) provide the framework for understanding publisher positioning and market dynamics within the Welsh publishing field, examining how different forms of capital shape publishers' approaches to internationalisation in both languages. Sapiro's three-logics model of economic, political, and cultural influences (Sapiro, 2008) explains how Welsh publishing balances cultural integrity with international expansion, a framework particularly relevant given Welsh publishing's Welsh Government funding support. Other theoretical approaches, including Venuti's (2008) concepts of domestication and foreignisation, are employed to analyse translation strategies used in

different editions of Welsh children's books and their impact on the representation of Welsh culture and language.

The thesis also engages with debates in world literature studies, drawing on theories of 'minor literature' (Deleuze & Guattari, 1986) and the 'world republic of letters' (Casanova, 2004) to situate Welsh children's literature within a global context. It examines how Welsh authors and publishers navigate the asymmetries of the international literary market, using translation and self-translation as strategies of resistance and assertion of cultural identity.

The study is further informed by a comprehensive literature review, which reveals significant gaps in existing research on the internationalisation of children's literature from Wales. While scholars such as S.M. Rosser (2012, 2020) have provided historical overviews of Welsh-language children's publishing, there has been little academic attention to contemporary Welsh children's books in English or to translation flows in and out of Wales. Moreover, previous studies have relied primarily on bibliometric data and secondary sources, with limited engagement with industry stakeholders through interviews or surveys.

To address these gaps, the present study adopts a mixed-methods approach that combines quantitative analysis of publishing output and translation flows with qualitative insights from publisher surveys, stakeholder interviews, and textual analysis of selected works. This approach allows for a more holistic understanding of the complex factors shaping the internationalisation of Welsh children's literature, from the level of individual authors and texts to the broader institutional and policy context.

### 1.3 Literature promotion organisations in Wales

The following section outlines the key institutions in Wales involved with literature promotion:

The **Welsh Government** is based in Cardiff and functions as the primary architect of literary and publishing support in Wales through its strategic funding allocations to two principal

bodies: the Arts Council of Wales and the Books Council of Wales (the latter through Creative Wales). The government's involvement operates through a multi-tiered administrative structure, with cabinet-level oversight distributed across several key portfolios. The Cabinet Secretary for Education, the Cabinet Secretary for Finance and Welsh Language and the Minister for Culture, Skills and Social Partnership can all play a role in supporting children's literacy and literature initiatives. For international promotion and cultural exchange, the First Minister's office provides strategic oversight through its international relations framework.

This hierarchical arrangement ensures literary and publishing matters receive consideration at senior governmental levels, with accountability maintained through the Culture, Communications, Welsh Language, Sport, and International Relations Committee, which exercises parliamentary oversight of governmental activities in these areas. This institutional framework demonstrates how literary and publishing support is integrated into Wales's broader governmental infrastructure, reflecting its significance in national cultural policy.

**Creative Wales**, founded in 2020 as a Welsh Government agency based in Cardiff, provides support to the creative industries, including the publishing sector, through directly financing the Books Council of Wales. Their work helps create a sustainable environment for creative businesses, including publishers and associated organisations, contributing to the broader cultural economy of Wales.

The **Arts Council of Wales**, established by Royal Charter in 1994, serves as the official body for funding and developing the arts in Wales. Operating as an independent charity, it provides financial support and strategic direction for arts and culture initiatives including literature as well as the internationalisation of literature through Wales Literature Exchange and Literature Across Frontiers. Its international division, **Wales Arts International**, extends this support globally by facilitating international arts collaborations and projects, creating essential pathways between Welsh arts and the wider world. The Arts Council of Wales's central office is in Cardiff with regional offices in Colwyn Bay and Carmarthen.

**British Council Wales**, based in Cardiff, represents the British Council's work in Wales, focusing on building cultural and educational connections between Wales and the wider world. The organisation has contributed to Wales's international profile through initiatives such as the 2018 Wales Soft Power Barometer (British Council Wales, 2018), which benchmarked Wales against comparable regions including Scotland, Québec, and Catalonia. British Council Wales is a delivery partner for the Welsh Government's bilateral cultural programmes, including Wales in Germany 2021, Wales in France 2023, Wales in India 2024 and Wales in Japan 2025.

**The Books Council of Wales** (known as the Welsh Books Council until 1995, hereafter referred to as the Books Council), established in 1961 and based in Aberystwyth, is a national charity funded by the Welsh Government to support the country's book industry. With approximately forty staff members, the Books Council provides comprehensive support through multiple channels: administering government grants for book and magazine publishing in both Welsh and English languages, offering professional development through skills training, and delivering essential services, including editing, design, marketing, and distribution through its dedicated sales centre. Beyond its industry-focused initiatives, the Books Council's Children's Books and Reading Promotion Department actively cultivates reading engagement through various schemes, including Welsh iterations of significant UK-wide programmes such as World Book Day and the Summer Reading Challenge, while also maintaining distinctly Welsh traditions through the Tir na n-Og Children's Book Awards and coordinating Meet the Author tours, all delivered through strategic partnerships with Welsh libraries, bookshops, and publishers across Wales.

**Cyhoeddi Cymru Publishing Wales (CCPW)**, established in 2021, serves as the primary representative body for the publishing sector in Wales. The organisation represents both Welsh and English language publishers, operating alongside the pre-existing Welsh-language publishers' group Colwm. CCPW operates as a membership body with a board comprising publishers and currently has no permanent office. While the organisation itself is not funded, it receives project-specific funding to organise a Welsh presence at book fairs,

including the London Book Fair and, for the first time in 2025, the Bologna Children's Book Fair. Creative Wales coordinates a Wales presence at Frankfurt Book Fair.

CCPW's mission centres on promoting and developing publishing from Wales to the world. As part of its foundational events programme, the organisation has hosted international speakers from Publishing Scotland, Publishing Ireland and the Publishers Association of New Zealand to share insights and best practices from their respective countries. These knowledge-exchange sessions were delivered as Zoom webinars for CCPW members.

The organisation functions as a collaborative platform where publishers share information and expertise, working to advance the sector's collective interests. Its core mission encompasses six strategic aims: establishing a clear identity for Welsh publishing, positioning the sector globally, championing industry growth, developing readership within Wales, supporting linguistic and cultural diversity, and providing an authoritative industry voice. Through this unified approach, CCPW works to strengthen the Welsh publishing sector's presence both domestically and internationally, while fostering information sharing and cooperation among its members.

**Literature Wales** operates as the national body for writers' development with funding from the Arts Council of Wales. The organisation implements its mandate through three strategic priorities: representation and equality, health and well-being, and environmental sustainability. Operating bilingually with offices in Llanystumdwy and Cardiff, Literature Wales supports both writer development and community engagement.

The organisation administers several significant initiatives, including the Children's Laureate Wales and Bardd Plant Cymru (Welsh-language equivalent) programmes, the National Poet of Wales position, and the Wales Book of the Year Awards. Through the Tŷ Newydd Writing Centre in Llanystumdwy, Gwynedd, it provides professional development opportunities for writers, while its Representing Wales funding scheme supports underrepresented voices. Together, these programmes facilitate literary development across Wales through creator support and public engagement.

Wales's international literary promotion is driven by two specialised organisations: **Wales Literature Exchange (WLE)** and **Literature Across Frontiers (LAF)**. Both organisations are based at the University of Wales Trinity Saint David and operate from the University of Wales Centre for Advanced Welsh and Celtic Studies, located on the site of the National Library of Wales in Aberystwyth.

Established at Aberystwyth University in 1997, Wales Literature Exchange operates under the motto 'Translating Wales, Reading the World.' WLE's core activities include managing translation grants, fostering partnerships with international literature organisations, and showcasing Welsh literature globally. The organisation curates an annual collection of outstanding Welsh and English-language literature from Wales and maintains an active presence at international book fairs and cultural events.

Literature Across Frontiers, founded in 2001 with European Union support, serves as the European Platform for Literary Exchange, Translation and Policy Debate. LAF's strategic position strengthens Wales's integration into international literary networks, with a particular focus on translation initiatives and policy development. Both organisations receive funding from Arts Council of Wales, ensuring continued support for their mission to promote Welsh literature internationally. The UK's withdrawal from the European Union and in particular from the Creative Europe programme means that Wales can no longer lead major European initiatives in this field, as has been the case for over two decades. Nevertheless, the resilience of the long standing relationship between LAF/WLE and other similar European organisations continues through aligned activity, funded through non-EU sources. LAF/WLE are founder members of the European Network for Literary Translation (ENLIT), whose members include cognate organisations from 25 European countries.

**Wales PEN Cymru**, officially recognised in 2014, represents Wales within the international PEN network. As one of 145 PEN centres worldwide, it advocates for freedom of expression and campaigns on behalf of persecuted writers, adding an important rights-based dimension to Wales's literary landscape. Their work connects Welsh writers to a global community while promoting linguistic rights and literary freedom.

Based in Cardiff, **BookTrust Cymru** is the Welsh division of BookTrust that works to promote children's literacy and love of reading across Wales through bilingual programmes and resources. Operating with funding from the Welsh Government, the organisation takes an innovative, child-centred approach to developing its reading initiatives, with a particular focus on reaching children with the greatest needs. Through partnerships with libraries and health centres across Wales, BookTrust Cymru distributes bilingual reading materials and promotes its message about the transformative power of reading in children's lives, making it an integral part of Wales's literacy and educational landscape. BookTrust Cymru's website features recommended Welsh and bilingual books suitable for adults to read with babies and reception-age children.

International promotion of Welsh literature is primarily facilitated through Wales Literature Exchange and Literature Across Frontiers, small organisations that have established connections with literary publishers and translation networks worldwide. While these organisations are beginning to expand their expertise into children's literature networks, their focus has traditionally been on adult literature.

Domestically, organisations such as the Books Council, Literature Wales, and BookTrust Cymru provide essential support for children's literature within Wales. However, their remit focuses primarily on domestic development, with limited infrastructure for international engagement. This creates a gap in support for authors and illustrators seeking to build international connections, both within the UK and beyond. This gap in international support structures for Welsh children's literature forms a central concern of this research.

#### 1.4 Key terms and categories

This thesis examines the internationalisation of Welsh children's and YA literature through several interconnected conceptual frameworks. Before proceeding with the analysis, it is important to establish clear definitions of key concepts that will be referenced throughout this work.

## **Translation, adaptation, and cultural transfer**

In the context of Welsh children's publishing, the distinction between translation and adaptation represents more than semantic difference; it reflects fundamental approaches to cultural transfer. While translation primarily involves linguistic conversion of text from one language to another, adaptation in Welsh publishing encompasses broader cultural transformation. This distinction becomes particularly significant in the Welsh context, where publishers often use the term 'adaptation' rather than 'translation' to describe the process of bringing English-language works (and other languages) into Welsh. As evidenced through publishers like Rily and Dref Wen, adaptation typically involves localising names, settings, and cultural references to create what feels like an indigenous Welsh text rather than a foreign work in translation. Venuti's (2008) concepts of domestication and foreignisation provide a useful framework for analysing these translation strategies, as explored in the Literature Review (Section 2.5) and applied to specific case studies in Chapter 7.

## **Small nation and minority language publishing**

The thesis operates within the framework of both small nation and minority language publishing – related but distinct concepts that require clear definition. Small nation publishing refers to publishing industries operating within nations of limited population and market size, often with distinct cultural and linguistic traditions. Minority language publishing specifically addresses publishing in languages that exist alongside more dominant languages within the same geographical space. The Welsh context embodies both situations, with Welsh-language publishing operating as minority language publishing within Wales, while both Welsh- and English-language publishing from Wales function as small nation publishing within the broader UK and international context.

## **Cultural capital and market dynamics**

Drawing on Bourdieu's (1993) concept of cultural capital, this thesis examines how cultural value operates within Welsh publishing. In this context, cultural capital manifests through various forms: institutional recognition (such as literary prizes), critical acclaim, and

educational adoption. The relationship between cultural and commercial capital becomes particularly complex in Welsh publishing, where state funding often supports cultural objectives while commercial success might be measured differently than in majority language markets.

### **Children's and YA publishing**

Children's and young adult (YA) publishing represents a specialised sector of the publishing industry focused on creating and distributing literature for readers from birth through adolescence. This sector encompasses distinct age categories, each with specific content requirements, formatting considerations, and marketing approaches. The specific ages in each category including YA can vary across language communities and reading cultures (Büchler et al, 2020).

The children's publishing segment produces books for readers from birth through to age twelve, including board books, picture books, early readers, chapter books, and middle-grade novels in both fiction and non-fiction. These publications emphasise age-appropriate content, often incorporating educational elements while maintaining strong entertainment value. The production process typically involves close collaboration between authors, illustrators, editors and designers to create engaging, developmentally appropriate content.

YA publishing targets readers approximately 13–18 years old, though the readership often extends into adulthood. This category addresses more complex themes and sophisticated narratives while remaining mindful of age-appropriate content boundaries. YA publications often explore challenging social issues, identity formation, and coming-of-age experiences through various genres and formats.

### **Children's publishing categories**

As noted above, these vary across languages and publishing cultures. Those outlined here refer to the categorisations used in the UK/anglophone and Welsh language.

Board books (0–5 years):

Board books designed for pre-readers and emerging readers, often featuring simple stories, basic concepts, and sturdy construction. Examples in the thesis include *Early One Morning* and *Bedtime, Not Playtime!*, which were specifically designed as board books for very young children.

Picture books (3–7 years):

Fully illustrated books where text and images work together to tell a story, typically thirty-two pages in length. The thesis examines several examples, including *Y Lloches* and the *Molly* series, which demonstrate how picture books can convey complex themes through the interplay of words and illustrations.

Middle grade (8–12 years):

Chapter books and novels aimed at confident independent readers, often featuring historical, adventure, fantasy, and family themes. The thesis discusses notable examples like *The Clockwork Crow* and *Dog Town*, which represent the sophisticated storytelling possible in this category.

Teen / YA (12+ years):

Literature aimed at teenage readers, dealing with more complex themes and mature content. The thesis examines significant works in this category, including *Llyfr Glas Nebo* and *The Short Knife*, which tackle challenging subjects while remaining relevant and accessible to young readers. Young adult novels primarily explore coming-of-age themes across diverse genres, from contemporary fiction to fantasy, with murder mysteries and ‘romantasy’, a blend of romance and fantasy, emerging as popular trends in 2024. While YA literature targets readers aged 14 and older, recent research shows that 74% of YA readers are adults, with 28% of all YA readers being over the age of 28 (Farshore and HarperCollins Children’s Books, 2024).

These categories present distinct challenges and opportunities for international exchange, examined through specific case studies in Chapter 7.

## **Bridge languages and cultural mediation**

The concept of bridge languages – particularly English’s role as intermediary for Welsh literature reaching other languages – requires careful consideration. Bridge translation raises questions about cultural and linguistic mediation: whether translation via English preserves Welsh cultural specificity and linguistic features as effectively as direct translation from the Welsh source text. Translators may use the English translation or version as well as the Welsh language original in order to produce the new text in the target language. The use of languages other than English as bridge languages is rare (Büchler et al, 2020).

## **Frontlist and backlist**

Understanding how publishers generate revenue is essential for analysing sector sustainability. Clark and Phillips (2014) distinguish between two fundamental categories of a publisher's catalogue:

Frontlist refers to newly published titles, typically those released within the current publishing season or year. Frontlist titles receive the majority of marketing investment and media attention, but carry significant financial risk – new titles need to recover their production and marketing costs.

Backlist refers to titles published in previous years that remain in print and continue to sell. Backlist titles are crucial to publisher sustainability: having already recovered their initial investment, backlist sales generate higher profit margins than frontlist releases. A strong backlist provides the stable revenue base that enables publishers to take risks on new authors and experimental projects.

This distinction is particularly relevant for grant funded publishers, where the relationship between grant-funded production and long-term catalogue sustainability shapes different commercial dynamics than majority-language markets.

## **Rights and international publishing models**

Understanding the commercial mechanisms of international publishing is essential for analysing internationalisation strategies. Intellectual property (IP) refers to the legal rights protecting creative works, including copyright, which grants authors, illustrators and publishers exclusive rights to reproduce, distribute, and adapt their work (Owen, 2024). When publishers acquire a book, they typically purchase various subsidiary rights from the author or literary agent – secondary rights that can be licensed to third parties for different formats, territories, or languages.

Three distinct pathways enable Welsh publishers to engage with international markets, each examined through case studies in Chapter 7, import (Sections 7.1.2–7.1.5), export (Section 7.2), and co-production (Section 7.3.1).

**Import through rights acquisition:** Publishers purchase translation rights from international publishers and arrange their own production, enabling them to publish foreign-language works in Welsh or English. This pathway brings international children’s literature to Welsh readers.

**Export through rights sales:** Publishers can export English language books around the world as well as sell translation rights in their own IP to international publishers, enabling Welsh-language or English-language works to reach readers in other languages and markets.

**Co-production and co-editions:** Publishers collaborate internationally through two models. Co-editions involve one publisher initiating a book project (typically a highly illustrated work) and inviting international partners to join the print run. Each participating publisher receives copies for their territory and holds the license to sell that language edition in their market, but does not purchase translation rights in the traditional sense – instead, they share production costs and receive distribution rights as part of the co-edition arrangement.

Co-production represents deeper collaboration where publishers jointly develop content from inception, sharing creative input, costs, risks, and IP ownership across territories. Both approaches enable resource-sharing while maintaining each publisher's market presence. Chapter 7 examines specific examples of each pathway, revealing how Welsh publishers navigate import, export, and collaborative production within international children's publishing markets.

### 1.5 Evaluating the success of internationalisation strategies

This study assesses the effectiveness of strategies used to internationalise Welsh children's and YA literature. To evaluate success and impact, the research employs a comprehensive set of markers encompassing both quantitative and qualitative measures, including sales data, international presence, translations, and cultural impact. While detailed sales figures are often restricted due to commercial sensitivity, the study draws on multiple indicators to provide a nuanced understanding of success in the international children's book market. These markers will serve as a framework throughout the thesis to analyse the development, current state, and future prospects of Welsh children's literature globally, and are developed fully in the methodology chapter (Chapter 3, Section 3.3) before being applied in the case study analysis in Chapter 7.

### 1.6 Researcher's position as industry insider

The researcher's position as an industry insider with over twenty years of experience in UK publishing, including eight years working in Wales for Firefly Press and Graffeg, shapes this study's approach and access. This experience provides valuable insights into Welsh publishing sector dynamics, including privileged access to key stakeholders and data sources such as the Books Council's archives and reports.

The researcher's background in publicity and marketing spans both large multinational publishers (Bonnier Books, Macmillan Publishing) and smaller independents (Little Tiger Press, Chicken House). This breadth of experience across different business models and

market scales provides critical understanding of how publishers promote books, build author platforms, and engage with international markets – all central to assessing feasible internationalisation strategies. The contrast between resource-rich multinational marketing operations and the constraints faced by Welsh micro-publishers informs the study's analysis of what international strategies are realistically achievable within the sector's limitations.

While this insider knowledge offers significant advantages for understanding sector dynamics, it also requires careful methodological consideration to maintain scholarly objectivity. The researcher's positionality, including potential bias from employment at Firefly Press during the early research stages, is addressed fully in Chapter 3 (Section 3.8.1.1), where measures taken to ensure academic rigour are detailed.

## 1.7 Thesis structure overview

This thesis is structured to systematically examine the internationalisation of Welsh children's publishing through theoretical, historical, and practical lenses. Following this introductory chapter, Chapter 2 establishes the theoretical foundation through a comprehensive literature review, examining Welsh publishing contexts, minor language literatures, and children's literature in translation. This review identifies key research gaps and positions this study within existing scholarship.

Chapter 3 details the methodological approach, outlining the mixed-methods framework that combines quantitative analysis of publishing data with qualitative case studies. The chapter explains how effectiveness markers were developed and applied to evaluate internationalisation strategies.

The historical context is established in Chapter 4, which traces the development of Welsh children's publishing from the 1800s to the present day, with particular attention to the pivotal changes following the 1960s that shaped current publishing practices. This historical perspective provides essential context for understanding contemporary challenges and opportunities.

Chapter 5 analyses the current Welsh children's publishing landscape, examining the role and status of publishers, support structures, and funding mechanisms. The chapter includes both quantitative analysis of recent publications and qualitative assessment of literary quality through translation, awards and experimental projects. Chapter 6 presents detailed profiles of individual Welsh publishers producing children's and young people's literature, examining their organisational missions, domestic output, and internationalisation efforts to date. This chapter provides insight into how different publishers approach both the domestic Welsh market and international opportunities.

Chapter 7 forms the analytical core of the thesis, examining specific international strategies through detailed case studies of both import and export initiatives. These case studies, including the international success of *Llyfr Glas Nebo* and innovative co-production projects like the *Molly* series, provide concrete examples of different approaches to internationalisation.

The practical implications of these findings are explored in Chapter 8, which examines potential strategies for international engagement, including the role of book fairs and stakeholder responsibilities. Chapter 9 broadens the perspective by analysing comparable approaches in other minority language contexts, from Catalonia to New Zealand.

The thesis concludes with Chapter 10, which synthesises the research findings into practical recommendations for publishers and policymakers, while acknowledging study limitations and suggesting directions for future research.

Having established the research context, objectives, and theoretical approach, the next chapter examines existing literature on small nation publishing, translation studies, and children's literature internationalisation. The literature review provides theoretical grounding for analysing Welsh children's publishing while identifying gaps in current research that this thesis addresses. Particular attention is paid to studies of successful internationalisation strategies in comparable markets, creating a foundation for evaluating Welsh publishers' approaches.

## 2. Literature Review

### 2.1 Introduction

This chapter establishes the theoretical foundation for analysing the internationalisation of Welsh children's literature through a comprehensive review of existing scholarship. The review directly addresses the central research question outlined in Chapter 1: What strategies should the Welsh publishing sector adopt to operate successfully at international level in children's and young adult books across both Welsh and English language publishing? By examining theoretical frameworks from small nation publishing studies, translation studies, and children's literature internationalisation, this chapter provides the analytical foundation for addressing the six research questions outlined in Chapter 1, with particular relevance to questions concerning the effectiveness of current international strategies (RQ3), building international links (RQ4), and overcoming internationalisation challenges (RQ5). The review demonstrates how the thesis contributes to existing knowledge while establishing the theoretical foundations that enable the case study analysis presented in Chapter 7 and comparative analysis explored in Chapter 9.

The internationalisation of children's literature from bilingual small nation contexts presents unique challenges and opportunities that intersect with questions of cultural preservation, market dynamics, and linguistic identity. The Welsh publishing sector offers a particularly valuable case study in literary internationalisation within this context. Operating within what Withers (2021) terms a 'special cultural ecology', Welsh publishing maintains parallel streams in Welsh and English, each functioning under distinct market conditions and cultural imperatives while sharing common challenges of scale, international visibility, and cultural positioning. M.W. Thomas (2021) characterises these parallel streams as 'two rivers from a common spring', highlighting the unique dynamics of this bilingual publishing landscape. The children's publishing sector holds special significance within this context, serving both language preservation and market development aims while navigating an increasingly globalised literary marketplace.

## **Scope and parameters**

The review encompasses literature published between 1990 and 2024, with particular attention to developments following Welsh devolution in 1999, which marked a significant shift in cultural policy and institutional support for Welsh publishing. While focused primarily on academic sources, the review also draws on key industry reports that have shaped understanding of the sector, including the Rosser report (2017) and subsequent strategic analyses by Büchler et al. (2020).

## **Structure of the review**

The review progresses through five main sections, each building toward an integrated theoretical framework for analysing Welsh children's literature internationalisation: Section 2.2 establishes the foundational theoretical approach anchored in Pierre Bourdieu's field theory and Gisèle Sapiro's sociology of translation. These frameworks enable systematic analysis of how Welsh publishing navigates between different forms of capital, competing market logics, and the dual challenges of serving domestic audiences while pursuing international opportunities. This theoretical foundation directly informs the analysis of publisher strategies and cultural capital accumulation examined in Chapters 6 and 7.

Section 2.3 examines scholarly perspectives on Welsh publishing specifically, analysing how academics have conceptualised its unique characteristics and development within both language contexts. This section addresses RQ1 concerning how the children's publishing industry has developed in Wales and how it has been supported economically.

Section 2.4 explores the internationalisation of small nation literatures more broadly, drawing comparative insights from bilingual contexts such as Catalonia and Ireland that offer strategic models for Wales. These comparative perspectives inform RQ4 regarding how Welsh publishers can build international links and the economic and cultural benefits of doing so.

Section 2.5 focuses specifically on children’s literature translation, examining both theoretical approaches (including Venuti’s concepts of domestication and foreignisation) and practical considerations relevant to Welsh publishers’ internationalisation strategies. This section provides frameworks for addressing RQ3 on the effectiveness of international strategies to date.

Section 2.6 identifies key research gaps in existing scholarship and establishes how this study’s research questions address these limitations while contributing to theoretical development in minority language and small nation publishing. These gaps inform the research design detailed in Chapter 3 and guide the empirical analysis in Chapters 7-9.

### **Significance and contribution**

While scholars have examined aspects of Welsh children’s literature and translation (S.M. Rosser, 2020) and children’s literature translation more broadly (O’Sullivan, 2005; Lathey, 2016), there remains a significant gap in understanding how Welsh children’s literature specifically might develop international reach while advancing Welsh-language and cultural priorities.

This review makes several original contributions: it provides the first comprehensive synthesis of research relating to the internationalisation of Welsh children’s literature, develops an integrated theoretical framework drawing on multiple disciplinary perspectives, identifies specific gaps in current understanding that inform the development of research questions, and establishes a foundation for examining practical strategies for internationalisation.

### **2.2 Theoretical framework**

This study is fundamentally grounded in two interconnected theoretical approaches that provide the analytical foundation for examining Welsh children’s literature internationalisation: Pierre Bourdieu’s field theory (Bourdieu, 1993) and Gisèle Sapiro’s sociology of translation (Sapiro, 2008, 2010, 2015). These frameworks enable systematic

analysis of how Welsh children's literature navigates domestic and international markets, balances competing forms of capital, and strategically positions itself within global publishing systems.

Bourdieu's concepts of field, capital, and habitus provide the foundational framework for understanding how cultural production operates within structured spaces. Sapiro, Bourdieu's former doctoral student, extends his field theory specifically to international literary circulation, examining how literature crosses linguistic and national boundaries through translation. Her work proves particularly valuable for Welsh publishing, as her empirical studies of how culturally prestigious but numerically smaller languages (like French) navigate English-dominated global markets offer direct insights for Welsh publishers' international strategies.

While Bourdieu and Sapiro provide this study's primary theoretical lens, additional theoretical concepts are employed to address specific aspects of the research. Venuti's translation theory highlights specific translation strategies, Deleuze and Guattari's concept of minor literature helps explain Welsh positioning within larger literary systems, and Bishop's framework addresses audience reception dynamics. These complementary approaches are integrated within the Bourdieu-Sapiro foundation rather than functioning as separate theoretical frameworks.

The following sections establish this theoretical framework in detail.

### **Bourdieu's field theory: Foundation for analysing cultural production**

Bourdieu's field theory provides the foundational framework for understanding how Welsh children's literature operates within structured spaces of cultural production. Heilbron and Sapiro (2007) extended this framework specifically to international literary circulation, developing what they termed a 'sociology of translation' that applies field theory concepts to cross-national cultural exchanges (discussed below under 'Sapiro's sociology of translation'). Bourdieu conceptualises fields as semi-autonomous social spaces where agents (publishers, authors, translators, institutions) compete for various forms of capital

while following specific ‘rules of the game’ that determine how success and legitimacy are constructed (Bourdieu, 1993).

### **Capital: The currency of literary fields**

Central to Bourdieu’s framework are four interconnected forms of capital that determine positioning within literary fields:

**Economic capital** represents direct financial resources, including sales revenue, publishing grants, and market share. For Welsh publishers, this includes both commercial income and institutional funding from bodies like the Books Council.

**Cultural capital** encompasses knowledge, skills, and cultural competencies that provide legitimacy within literary circles. This includes literary expertise, editorial judgment, understanding of genre conventions, and cultural knowledge specific to Welsh contexts.

**Social capital** consists of networks, relationships, and institutional connections that enable market access and recognition. For Welsh publishers, this includes relationships with UK distributors, international rights contacts, literary festival connections, and institutional relationships with cultural organisations.

**Symbolic capital** represents reputation and consecration that transforms other forms of capital into recognised authority. Literary awards, critical acclaim, and institutional recognition convert into symbolic capital that enhances publisher prestige and author reputation (Bourdieu, 1993).

These forms of capital are not static – they can be converted and accumulated strategically. For instance, symbolic capital from winning a prestigious literary award can be converted into economic capital through increased sales, or into social capital through enhanced industry connections.

## **Field positioning and the logic of cultural production**

Bourdieu distinguishes between two modes of cultural production that operate according to different logics. Large-scale production follows primarily economic logic, focusing on immediate market success, high-volume sales, and profit maximisation. Restricted production operates according to cultural and symbolic criteria, prioritising artistic innovation, cultural value, and long-term reputation over immediate commercial returns.

The Welsh context requires adaptation of this binary framework. Wales currently hosts no large commercial publishers; both Welsh-language and English-language Welsh publishers operate as small-scale independent enterprises. Welsh-language publishing demonstrates classic restricted production characteristics, operating primarily through institutional support and accumulating cultural capital through language preservation. English-language publishing from Wales, while engaging with broader UK markets, similarly functions on small-scale independent models that balance a Welsh cultural identity with commercial viability.

This creates a unique bilingual landscape where publishers across both languages must navigate what Bourdieu terms a 'double game' – balancing cultural integrity with commercial viability while developing strategies for both domestic recognition and international market engagement. Thompson's (2012) application of Bourdieusian analysis to Anglo-American trade publishing demonstrates how publishers strategically position themselves within overlapping fields, providing a model for understanding how Welsh publishers develop sophisticated positioning strategies despite small-scale operations.

## **Habitus: Internalised strategic knowledge**

This complex navigation between fields reflects what Bourdieu terms habitus – the internalised dispositions and practical knowledge that guide strategic action. Welsh publishers develop intuitive understanding of how to position their work across multiple field contexts, knowing when to emphasise Welsh specificity versus market accessibility,

how to leverage institutional relationships, and when to prioritise symbolic over economic capital accumulation.

### **From quality to cultural capital**

This theoretical framework proves particularly valuable for moving beyond subjective notions of 'quality' to examine how literary prestige and value are actually constructed and recognised. Rather than attempting to judge whether books are objectively 'good,' Bourdieu's capital framework enables analysis of how recognition is accumulated through measurable indicators: awards, critical reviews, educational adoption, institutional endorsement, and international rights sales. For Welsh children's publishing, this reveals how small-scale publishers strategically convert between different forms of capital – for instance, how cultural capital gained through Welsh literary awards can be used to secure international rights deals (economic capital) or critical recognition in international markets (symbolic capital).

### **Sapiro's sociology of translation: Extending field theory internationally**

Sapiro extends Bourdieu's field theory specifically to examine how literature circulates beyond national boundaries, providing essential analytical tools for understanding Welsh children's literature's international potential. The foundational framework was established in her co-authored work with Heilbron (Heilbron and Sapiro, 2007), which provided an outline for a sociology of translation that Sapiro subsequently developed in her work (Sapiro, 2008, 2010, 2015). Sapiro's empirical research on how French literature circulates in English-dominated global markets proves particularly relevant for Welsh publishing. Her studies demonstrate how culturally prestigious but numerically smaller languages can maintain distinctiveness while achieving international reach – directly applicable to Welsh publishers' challenges and opportunities.

## **The three-logics model for international literary circulation**

Central to Sapiro's framework is her three-logics model, which identifies the competing forces governing translation decisions and international literary circulation (Sapiro, 2008, 2015, 2016):

**Economic logic** operates through market forces, commercial considerations, and profit maximisation. This logic typically favours works with broad commercial appeal, established market recognition, and authors with existing international profiles. It prioritises genres with proven commercial track records and works that fit easily into existing market categories.

**Political logic** encompasses state cultural policies, institutional support mechanisms, and governmental strategies for promoting national literatures internationally. This includes translation grants, cultural diplomacy initiatives, and institutional support for literary promotion abroad. Political logic proves particularly relevant for Welsh publishing given substantial Welsh Government investment in cultural institutions like Wales Literature Exchange and the Books Council.

**Cultural logic** prioritises aesthetic value, literary innovation, and cultural authenticity. This logic often supports works that might lack immediate commercial appeal but contribute to cultural diversity, artistic development, and literary innovation. Cultural logic values distinctive cultural perspectives and linguistic experimentation.

Crucially, these three logics do not operate independently but interact in complex ways. Sapiro (2008, 2015) identifies four principal modes of interaction. Logics may reinforce one another, as when state translation subsidies (political logic) enable the publication of culturally distinctive works (cultural logic) that subsequently achieve commercial success (economic logic). They may contradict each other, as when market pressures favour standardised content while cultural logic demands innovation and distinctiveness. One logic may compensate for another — for instance, political support through translation grants may offset limited economic returns from small print runs. Finally, one logic may mediate

another: at the small-scale pole of production, economic logic operates primarily through symbolic capital conversion rather than direct profit maximisation, with cultural recognition eventually generating economic returns. For Welsh children's publishing, understanding these interaction patterns proves essential, as strategic alignment between political support structures and cultural distinctiveness offers the most viable pathway to overcoming the economic constraints of a small domestic market.

Successful international circulation requires sophisticated navigation between these three logics rather than dominance by any single approach. For Welsh children's literature, this framework explains how publishers can strategically use political logic (institutional support mechanisms) and cultural logic (distinctive Welsh cultural content, bilingual innovation) to overcome economic logic disadvantages (small domestic market, limited resources for international marketing).

This three-logics model directly informs this study's analysis of Welsh publishers' internationalisation strategies, revealing how different publishers emphasise different logics and how successful cases often skilfully balance all three.

### **Core-periphery dynamics and translation flows**

Heilbron and Sapiro's (2007) empirical analysis reveals the structural hierarchies in international literary markets through quantitative data on translation flows. Their research demonstrates an inverse relationship between language centrality and translation percentage: English-speaking countries (UK/US) translate less than 4% of published books, while Germany and France translate 14-18%, Netherlands and Sweden 25%, and Portugal and Greece 35-45%. Literature from 'core' languages (particularly English) dominates global circulation, while 'peripheral' languages face significant barriers to international recognition.

However, Sapiro's subsequent research (2008, 2010, 2015) demonstrates how peripheral literatures can maximise cultural prestige, distinctive perspectives, and strategic institutional support to overcome these structural disadvantages. This framework moves

beyond deterministic centre-periphery models to reveal strategic possibilities for smaller literatures.

For Welsh publishing, this framework reveals both challenges and opportunities. Welsh occupies a peripheral position in global literary markets, as reflected in the high proportion of translations into Welsh (nearly 50% of children's titles, according to S.M. Rosser 2017). Yet Welsh-language literature carries significant cultural prestige domestically and can be used for international positioning. English-language Welsh literature benefits from linguistic accessibility while potentially offering distinctive cultural content that differentiates it in crowded anglophone markets. The quantitative context provided by Heilbron and Sapiro (2007) helps explain why institutional support (political logic) and cultural distinctiveness (cultural logic) become essential strategies for Welsh publishers to overcome the economic logic disadvantages of peripheral positioning.

### **State support and literary autonomy**

Sapiro's examination of how state cultural policy influences literary production proves directly relevant to Welsh publishing's institutional context (Sapiro, 2003). She demonstrates how state support can enable cultural production that might not survive purely commercial pressures, while also examining how such support affects literary autonomy and creative freedom. For Welsh publishing, heavily supported by Welsh Government funding through the Books Council, this framework enables nuanced analysis of how institutional support shapes both possibilities and constraints for international development.

### **Applying Bourdieu-Sapiro framework to Welsh children's publishing internationalisation**

Together, Bourdieu's field theory and Sapiro's sociology of translation provide a comprehensive analytical framework for examining Welsh children's literature internationalisation. The integrated approach enables systematic analysis of how Welsh publishers position themselves strategically within overlapping domestic and international fields, accumulating and converting different forms of capital to build recognition and

market access. Institutional support structures shape possibilities for international development, with Welsh Government funding operating as political logic that enables cultural and symbolic capital accumulation even when immediate economic returns are limited. Wales's bilingual publishing ecology creates distinctive opportunities for field positioning: Welsh-language publishing leverages cultural and symbolic capital while English-language Welsh publishing emphasises accessibility combined with cultural distinctiveness. At the level of individual publishing decisions, translation choices reflect strategic navigation between competing logics, as publishers balance cultural authenticity, market accessibility, and institutional support possibilities. The framework also highlights how small-scale operations can develop sophisticated international strategies despite resource constraints, by strategically leveraging accumulated symbolic capital, institutional relationships, and cultural distinctiveness.

This theoretical framework directly informs the research design (Chapter 3), provides analytical tools for the case study analysis (Chapter 7), and enables comparative analysis with other small nation publishing contexts (Chapter 9). Throughout the thesis, Bourdieu-Sapiro concepts provide the primary analytical lens through which internationalisation strategies, challenges, and opportunities are examined.

### **Complementary theoretical approaches for specific lines of enquiry**

While Bourdieu's field theory and Sapiro's sociology of translation provide this study's foundational analytical framework, additional theoretical concepts are employed to address specific aspects of Welsh children's literature internationalisation. These complementary approaches are integrated within the Bourdieu-Sapiro foundation, providing focused analytical tools for the research questions.

### **Translation strategies: Venuti's domestication and foreignisation**

Venuti's (2008) influential concepts of 'foreignisation' and 'domestication' provide essential terminology for analysing specific translation choices within Sapiro's broader framework of international literary circulation. Foreignisation maintains the source culture's distinctive

elements, making the translated text's foreign origin visible to readers – aligning with cultural logic and symbolic capital accumulation. Domestication adapts cultural elements to match target audience expectations, potentially increasing accessibility (economic logic) but risking cultural distinctiveness (cultural logic).

This tension becomes particularly acute in children's literature, where questions of source culture preservation intersect with concerns about readability and accessibility for child readers. Children's literature scholarship recognises that young readers typically require greater cultural familiarity and contextual accessibility than adult readers, often leading publishers and translators toward domestication strategies that make texts more immediately comprehensible (Oittinen, 2000; O'Sullivan, 2005). This reader-centred consideration - ensuring that children can engage with translated texts without extensive cultural mediation – shapes translation choices differently than adult literature, where readers may have greater tolerance for cultural unfamiliarity.

Welsh publishers frequently distinguish between translation (maintaining the original cultural elements) and adaptation (extensive cultural modification), as demonstrated through publisher interview data examined in Section 5.4, reflecting strategic decisions about cultural preservation versus market accessibility informed by these reader-focused considerations. Venuti's framework enables precise analysis of these strategic choices within the broader field theory context.

Central to Venuti's critique is the concept of 'translator invisibility' – the Anglo-American publishing tradition's preference for fluent, transparent translations that erase the translator's presence and the text's foreign origins. Venuti argues this fluency ideal serves cultural hegemony by absorbing foreign texts into dominant cultural norms, making them appear as natural English-language works. His advocacy for foreignisation represents a form of resistance to this hegemony: by making the translation process visible through less fluent, more 'visible' translations that highlight the source text's foreignness, translators can resist the cultural dominance of English and value linguistic and cultural difference. For Welsh language children's literature, this theoretical framework highlights the strategic challenge of balancing market accessibility with cultural preservation.

The application of Venuti's framework to minority language publishing contexts raises particular theoretical questions. Minority language publishers may face competing pressures: domesticating imported works to create 'mirrors' (Bishop, 1990) that validate domestic readers' cultural identity, while simultaneously seeking to preserve cultural distinctiveness when exporting their own literature to maintain symbolic capital in international markets. This potential asymmetry in translation strategy reflects broader tensions in minority language cultural production between cultural validation (requiring domestication to show readers their culture reflected in global narratives) and cultural preservation (requiring foreignisation to maintain distinctive value in international circulation). How Welsh children's publishers navigate these theoretical tensions in practice is examined empirically in Chapters 5-8.

### **Minority language positioning: Deleuze and Guattari's minor literature**

Deleuze and Guattari's (1986) concept of 'minor literature' provides insights into how minority language literatures operate within larger literary systems, complementing field theory's analysis of peripheral positioning. Their identification of three key characteristics has direct application to Welsh children's publishing: the use of a major language by a minority group (relevant to Welsh-language authors writing in English), the inherently political nature of minor literature (reflected in cultural preservation aims), and the collective value of minor literature (evident in how Welsh children's books serve both cultural and market development aims).

This framework, analysed through Bourdieu's capital lens, suggests how features that might seem to constrain Welsh literature – its minority status and political implications – can become sources of distinctive symbolic capital in international markets.

### **Audience reception: Bishop's mirrors, windows, and sliding doors**

Bishop's (1990) framework provides tools for analysing how children's literature functions across cultural boundaries, complementing field theory's focus on production with attention to reception dynamics. While Bishop originally developed this framework to address

representations of race and diversity in children's literature, it offers valuable analytical tools for examining cultural transfer more broadly. The metaphor conceptualises children's literature as mirrors (reflecting readers' own experiences), windows (offering insights into different cultures), and sliding doors (enabling transformative encounters).

For Welsh children's literature analysed through the Bourdieu-Sapiro lens, this framework reveals how the same works accumulate different forms of capital in different contexts: domestically functioning as mirrors (cultural capital through identity validation) while internationally functioning as windows (symbolic capital through cultural distinctiveness). This audience-focused analysis complements structural field theory approaches.

### **World literary space: Casanova, Heilbron and Cronin**

Casanova's (2004) conceptualisation of international literary space as a competitive arena and Heilbron's (1999) world-system theory of translation provide additional context for understanding structural challenges facing Welsh literature within Sapiro's core-periphery framework. These approaches reinforce field theory's emphasis on how peripheral literatures can strategically accumulate literary capital despite structural disadvantages, while Heilbron's identification of English as a 'hypercentral' language helps explain both opportunities and barriers for Welsh literature in international markets.

Cronin's (2003) *Translation and Globalization* extends this understanding of bilingual publishing through his concept of 'translation ecology'. Drawing on Ireland as a case study, Cronin addresses the paradoxical relationship minority languages have with translation: speakers need translations from dominant languages for their languages to remain lexically viable, yet the prestige of major languages can simultaneously impoverish minority language development. His 'translation ecology' framework — defined as 'a translation practice that gives control to speakers and translators of minority languages of what, when and how texts might be translated into or out of their languages' (2003, p. 167) — positions translation as a mechanism for cultural sustainability rather than merely linguistic transfer. Cronin argues that translation can serve as resistance against linguistic homogenisation, enabling minority cultures to participate actively in global literary flows. This ecological framework proves

directly applicable to Welsh publishing, providing theoretical justification for viewing internationalisation not as capitulation to market forces but as active participation in sustaining linguistic diversity.

### **Integration within the foundational framework**

These complementary theoretical concepts function as specialised analytical tools employed within the Bourdieu-Sapiro foundation rather than as separate theoretical frameworks. Throughout the thesis, analysis begins from field theory and sociology of translation perspectives, drawing on the theorists above when examining specific aspects like translation strategies, minority positioning, audience reception, or world literary hierarchies. This maintains theoretical coherence while enabling nuanced analysis of Welsh children's literature internationalisation's multiple dimensions.

### **2.3 Scholarly analysis of Welsh publishing**

Academic analysis of Welsh publishing provides essential theoretical groundwork for understanding the sector's development and potential for internationalisation. This section examines how scholars have conceptualised and analysed the unique characteristics of Welsh publishing, particularly in relation to children's literature and translation.

#### **Theoretical approaches to publishing development**

Scholars have developed several analytical frameworks for understanding Welsh publishing's unique position within both UK and international contexts.

S.M. Rosser's (2016) comprehensive analysis of Welsh translations of Roald Dahl's children's novels provides a multifaceted conceptual model for understanding publishing development in minority language contexts. Drawing on the field theory framework established in Section 2.2, S.M. Rosser demonstrates how minority language publishing must balance cultural preservation imperatives with commercial viability. This tension manifests in what S.M.

Rosser identifies as a fundamental paradox: while substantial state funding supports translation as a tool for cultural survival, this institutional investment has created market conditions where translations now constitute nearly 50% of Welsh children's titles and consistently outsell original works. Her examination of translation practices demonstrates how this dual role makes translation both 'predator and deliverer' – simultaneously supporting language vitality while potentially undermining space for indigenous literary production. Through her concept of 'Welsh Dahl' versus 'Dahl-in-Welsh,' S.M. Rosser (2016) shows how translation becomes a process of cultural reorientation rather than mere linguistic transfer.

Building on this understanding of field dynamics in Welsh publishing, Withers (2021) extends the analysis through her concept of 'cultural ecology' – examining how Wales's unique institutional infrastructure enables alternative publishing models to survive. Her case study of Honno: The Welsh Women's Press demonstrates how sustained public funding through bodies like the Books Council created market conditions fundamentally different from England, where feminist presses largely collapsed in the 1980s following funding cuts. This analytical approach reveals how institutional support systems can insulate minority-focused publishers from pure market pressures, enabling them to maintain their original missions over decades rather than succumbing to commercial imperatives alone.

### **Institutional framework analysis**

S.M. Rosser's (2012) historical analysis of O.M. Edwards and *Cymru'r Plant* (1892-1920) demonstrates how early Welsh publishers developed strategies for sustaining cultural identity through children's literature, providing historical context for the contemporary tensions examined in this thesis.

The Rosser report (2017), an industry survey commissioned by the Books Council, documented translation patterns in Welsh-language children's publishing and identified practical challenges in balancing linguistic priorities with market development. While this applied research provides valuable empirical data on translation flows and market dynamics rather than developing new theoretical frameworks, its findings on the relationship

between translation policy and cultural sustainability offer insights particularly relevant when considering international expansion.

Following the Rosser report's findings, the British Council Wales, Wales Literature Exchange and Literature Across Frontiers scoping report (Büchler et al., 2020) developed practical recommendations showing how successful internationalisation strategies require integrated networks of expertise and support across multiple areas — from translation funding to professional development — rather than relying on simple translation support alone.

#### 2.4 Small nation publishing: Comparative models and theoretical frameworks

The internationalisation of literature from small nation contexts requires understanding both the structural challenges these markets face and the successful strategies they have developed to overcome them. McCleery and Ramdarshan Bold's (2012) analysis of Scottish publishing provides useful theoretical foundations for understanding how small nation publishers navigate the tension between cultural distinctiveness and commercial viability in globalised markets.

##### **Theoretical foundations of small nation publishing**

McCleery and Ramdarshan Bold (2012) develop an important analytical distinction between publishers that 'publish for' versus those that 'publish in' small nations. Publishers that 'publish for' their nation are founded to reflect cultural nationalism and literary expression, often struggling with limited domestic markets and vulnerability to acquisition by larger houses. Those that 'publish in' small nations, while not necessarily culturally focused, face different challenges around market access and international competitiveness. This distinction proves particularly valuable for understanding how Welsh publishers across both languages position themselves within domestic and international markets.

Their analysis reveals how globalisation affects small nation publishing through three interconnected mechanisms: increased transnational flows of media products, growing commonality of transnational culture, and rising transnational ownership (McCleery &

Ramdarshan Bold, 2012). These forces create cyclical pressures where consolidation leads to market concentration, reducing consumer choice while strengthening the dominance of major publishing centres like London. These structural disadvantages are reflected in global translation flows, where Heilbron and Sapiro (2007) demonstrate that peripheral languages face significant barriers to international circulation, with translation flows heavily weighted toward central languages – particularly English, which accounts for 50% of all translations worldwide. For Welsh publishing, this framework explains both the structural disadvantages facing domestic publishers and the imperative for coordinated response strategies.

The study's examination of support mechanisms across Scotland, Ireland, and Canada demonstrates how different institutional approaches enable small nation publishers to maintain their national literary character while developing international presence. Their analysis shows that successful support requires understanding the relationship between cultural and economic objectives, avoiding both pure market logic and disconnected cultural protectionism (McCleery & Ramdarshan Bold, 2012).

### **Nordic children's literature: Established international success**

Nordic children's literature has a long history of achieving international recognition while retaining a distinct national voice, providing particularly relevant insights for Welsh publishing strategies. Works like Astrid Lindgren's *Pippi Longstocking* (first published in English in 1950) and Tove Jansson's *Moomin* series (introduced to English readers in the 1950s and 1960s) demonstrated how literature from smaller language communities could achieve international recognition through English translation while preserving cultural specificity. This success contributed to establishing Swedish as one of the most translated languages in children's literature, with data for 1990-2015 showing 501 publications, followed by Norwegian (268 translations) and Danish (159 translations) (Trentacosti & Nicholls, 2017), with Berry (2013) identifying the period 1950-1975 as particularly formative for this cultural transfer.

Berry's doctoral research (2013) on Nordic children's literature in the UK provides the most comprehensive analysis of these translation flows. Her examinations of the *Moomin* series

(Berry, 2014b) and *Mrs Pepperpot* editions (Berry, 2014a) demonstrate how personal relationships and cultural intermediaries facilitate market entry between smaller language markets and major publishing centres. This historical analysis shows how sustained publisher commitment and careful cultivation of translator-author relationships create sustainable cultural exchange mechanisms.

The Welsh dimension of this Nordic success story emerged through the Welsh publisher Dref Wen's ambitious translation project (1974-1984), which brought Nordic children's works to Welsh readers. Key publications included the Welsh translation of Tove Jansson's *Finn Family Moomintroll* as *Dewin ym Mwmin-Gwm* (1975, translator unknown), alongside works by Astrid Lindgren, Gunilla Bergström, and Danish writers including Ole Lund Kirkegaard. This initiative represents a significant example of bilateral literary exchange, demonstrating how Welsh publishers could both enrich domestic literature through international content and develop translation expertise for potential export strategies. See Chapter 7, Section 7.1 for full details of Dref Wen's translation programme.

### **Irish bilingual publishing: Methodological and theoretical frameworks**

O'Sullivan's (2020) comprehensive analysis of Irish children's literature provides a directly relevant methodological framework for understanding bilingual small nation publishing. Her study of 'Two languages, two children's literatures: Translation in Ireland today' (2020) offers a systematic approach that this research adapts for the Welsh context.

**Parallel systems analysis** O'Sullivan demonstrates how Irish-language and English-language publishing operate as parallel but fundamentally different systems. Irish-language publishing benefits from heavy state subsidisation since independence, enabling translation programmes and cultural preservation initiatives, while English-language publishing must compete commercially with UK conglomerates. This structural analysis provides a model for understanding how institutional support shapes different publishing logics within shared national contexts.

**Historical-institutional approach** Her historical methodology, tracing development since Irish independence in 1922, offers particular insights for Welsh publishing analysis.

O’Sullivan shows how state cultural policy creates distinct market conditions – in Ireland’s case, enabling minority language publishing to survive where commercial forces alone would prove insufficient. Her documentation of how the economics of publishers surviving in a small market affects strategic choices provides useful comparative context for Welsh publishers facing similar scale challenges.

**Methodological significance** The methodological significance of O’Sullivan’s work extends beyond empirical findings to provide proven frameworks for analysing bilingual small nation publishing. Her systematic approach to examining how minority and majority languages operate within shared national contexts informed this study’s research design and analytical framework.

### **Scottish theoretical contributions**

McCleery and Ramdarshan Bold’s (2012) analysis of Scottish publishing demonstrates how their theoretical framework applies in practice. Their distinction between publishing ‘for’ versus ‘in’ Scotland reveals how different publishers navigate cultural and commercial imperatives within the same national context. The Scottish case illustrates how coordinated institutional support can enable small nation publishers to keep a distinct cultural voice while competing in English-language markets dominated by larger enterprises. This theoretical application provides a framework for understanding how other small nations, including Wales, might develop strategic approaches to international market engagement while asserting cultural identity.

### **Other comparative contexts: Scotland-Catalonia parallels and New Zealand frameworks**

Additional comparative insights emerge from examining how other small nations address similar challenges through different approaches. Daniel Boswell’s (2014) comparative analysis of Scottish and Catalan publishing reveals how ‘strategic cultural positioning’ enables publishers to balance cultural distinctiveness with market accessibility despite b

operating within larger state frameworks. His comparison demonstrates how different political arrangements – Scotland within the UK versus Catalonia within Spain – create varying opportunities and constraints for small nation publishing development. The Catalan experience offers insights into how publishers can leverage institutional autonomy while maintaining commercial viability in competitive markets.

New Zealand’s publishing landscape provides theoretical insights into how geographically peripheral nations develop distinctive approaches to indigenous-language publishing alongside English-language market strategies. Daly’s research (2024) demonstrates how New Zealand publishers have successfully positioned Pacific literature internationally, leveraging indigenous and Pacific cultural perspectives as competitive advantage despite geographic isolation. Her work reveals specific mechanisms through which small nations can overcome structural disadvantages through innovative approaches to cultural representation and market positioning. The detailed comparative analysis of Welsh and New Zealand bilingual publishing practices, including specific case studies of language boundary negotiations and cultural activism through children’s literature, is examined in greater depth in Chapter 9.

These comparative contexts demonstrate how different small nations have approached publishing challenges, providing methodological frameworks and theoretical insights that inform the analytical approach applied in subsequent chapters.

## 2.5 Children’s literature in translation: theoretical perspectives

The translation of children’s literature presents unique theoretical challenges that extend beyond simple linguistic transfer. Building on the theoretical frameworks established in Section 2.2, this section examines how scholars have conceptualised the particular dynamics of children’s literature translation, with special attention to frameworks that highlight the challenges facing Welsh children’s publishing internationalisation.

## Theoretical approaches to children's literature translation

O'Sullivan (2005) provides foundational theoretical insights into how children's books undergo cultural and linguistic adaptation when crossing borders. Her framework emphasises that successful translation must consider not only linguistic accuracy but also educational norms, literary traditions, and cultural concepts of childhood in target markets. Of particular relevance to Welsh children's publishing, O'Sullivan demonstrates how translation choices reflect and shape perceptions of cultural identity in both source and target markets.

Lathey (2016) extends this analysis by identifying several key theoretical considerations specific to children's literature translation. Her concept of 'dual audience address' explains how translated children's literature must simultaneously engage child readers and adult mediators, a dynamic that becomes particularly complex when cultural elements require explanation or adaptation. This theoretical framework helps explain why translation strategies that succeed for adult literature may prove inadequate for children's books, a consideration particularly relevant when developing internationalisation strategies for Welsh children's literature.

Lathey's later work extends children's literature translation theory by explicitly linking translation strategies to the structural conditions of the publishing economy. In *"Only English Books": The Mediation of Translated Children's Literature in a Resistant Economy* (2020), she conceptualises the UK children's book market as a 'resistant economy', arguing that limited institutional support for translation and children's restricted exposure to translated texts directly shape translation practice. Lathey demonstrates how mediation strategies — including peritextual framing, calibrated domestication, and managed translator visibility — operate as adaptive responses to this resistant context rather than purely aesthetic choices. This analysis bridges macro-level accounts of translation flows with micro-level decision-making in children's literature translation, offering a framework for understanding how market conditions influence translation strategies for young readers.

These foundational approaches to children's literature translation become more complex when considering how cultural elements transfer between different national contexts.

### **Cultural transfer and multimodal considerations**

Translation choices significantly affect both domestic and international reception of children's literature. The complexity of cultural transfer becomes particularly evident in picture books, where meaning emerges through the interplay of text and image — a consideration particularly relevant for Welsh picture books seeking international markets.

Understanding these cultural transfer mechanisms requires examining how small nation contexts specifically shape translation dynamics. Cotton (2013) further explores how picture books can develop intercultural awareness in young readers, examining the challenges and opportunities of sharing culturally specific visual narratives across borders.

O'Sullivan (2011) argues that children's literature is a particularly rich field for imagological research, since it is where a culture's identity is formulated and where young readers encounter their earliest images of the world. Her work advocates for imagology — the study of how national and cultural images are constructed and represented in literature — as a valuable approach for children's literature scholarship, asking not whether representations are accurate but how and why they are constructed. While a full imagological analysis falls outside the scope of this study, O'Sullivan's framework offers a complementary lens to Bishop's, particularly for understanding how Welsh cultural identity is constructed and projected through children's literature in international contexts. The potential application of this approach is considered further in relation to diversity (Section 5.5) and as a direction for future research (Chapter 10).

### **Cultural adaptation and co-edition strategies**

The globalisation of children's picture book publishing has generated important theoretical insights about cultural adaptation. Salisbury's (2006) analysis of international co-editions reveals tensions between preserving cultural authenticity and meeting international market

demands. His research demonstrates how public funding can create space for culturally specific illustration and storytelling which remains commercially viable, a framework particularly relevant for understanding Welsh publishing's potential international development.

### **Self-translation and bilingual contexts**

The phenomenon of self-translation has generated important theoretical insights particularly relevant to bilingual contexts. Grutman & Van Bolderen (2014) demonstrate how self-translating authors, possessing both authority over their original text and agency in the translation process, can reshape their work for different audiences while maintaining creative control. This framework helps explain how Welsh-language authors might adapt their work for international audiences while preserving essential cultural elements.

These translation theories inform the analysis of Welsh self-translation practices in Section 5.4 and the *Llyfr Glas Nebo* case study in Section 7.2.1.

### **Supply-driven translation theory**

Hellewell's (2019) theory of supply-driven translation, developed through her study of translation flows in Slovenia using a theoretical framework that combines Even-Zohar's polysystems theory with Bourdieu's concepts of cultural capital and field, provides important insights into how literature from small nations reaches international markets. Her framework identifies three key pathways through which translated books move between source and target cultures, offering theoretical insights that can be productively applied to understanding Welsh literary translation.

**Institutional discovery:** Hellewell theorises how cultural organisations facilitate connections between markets through structured professional networks and cultural exchange programmes. This understanding helps explain how organisations like Wales Literature Exchange have the capacity to enable Welsh publishers to develop sustainable international

connections, suggesting similar institutional mechanisms operate across different small nation contexts.

**Academic pathways:** The framework explains how academic connections and research influence translation selection, particularly relevant given strong connections between Welsh publishing and educational institutions. This theoretical insight suggests potential strategies for identifying and evaluating international publishing opportunities within the Welsh literary field.

**Personal networks:** Hellewell's theory explains how individual relationships and recommendations drive translation decisions, suggesting why successful internationalisation often depends on developing strong professional networks across borders. This pathway indicates that similar relationship-building strategies may be crucial for Welsh literature's international reach.

## 2.6 Research gaps and future directions

The preceding review of theoretical frameworks and scholarly literature reveals several significant gaps in current understanding of Welsh children's literature internationalisation. This synthesis demonstrates how existing research, while providing valuable theoretical foundations, leaves key questions unanswered about developing international reach for Welsh children's publishing.

While S.M. Rosser's (2016, 2017) foundational work provides essential theoretical grounding for understanding Welsh publishing field dynamics, including significant insights into translation practices through her analysis of Dahl translations, scholarly attention to how Welsh publishers specifically approach international markets and develop strategic frameworks for global engagement remains limited. This theoretical gap, combined with the absence of comprehensive industry analysis of internationalisation practices, necessitated extensive primary research through stakeholder interviews to understand both the

challenges facing Welsh publishers and the practical strategies they employ when seeking international engagement.

### **Integration of theoretical frameworks**

The intersection of small nation publishing, translation studies, and children's literature presents complex theoretical challenges that warrant deeper investigation in the Welsh publishing context. While Bourdieu's field theory and Sapiro's sociology of translation provide the essential foundational frameworks for understanding Welsh publishing dynamics, their specific application to Welsh children's literature internationalisation remains underdeveloped. This thesis addresses this gap by systematically applying field theory concepts (Bourdieu, 1993) and Sapiro's three-logics model (Sapiro, 2008, 2015) to analyse how Welsh children's publishers navigate domestic and international markets.

Hellewell's (2019) supply-driven translation theory offers promising analytical tools for understanding small nations' literary export strategies. However, its application to Welsh publishing requires careful consideration of bidirectional flows. While her framework explains how small nations can develop pathways for international content export, examination of how Welsh publishers might adapt these mechanisms for content import remains limited, particularly given Wales's distinctive position accessing both the world's largest English-language market and a minority language publishing sector.

### **Cultural policy and market development**

A significant gap exists in understanding the relationship between cultural policy and market development in the Welsh context. While scholars like Büchler et al. (2020) have established the importance of institutional support for small nation literatures, detailed analysis of how such support specifically enables or constrains international market development for Welsh children's literature remains limited. This gap becomes particularly relevant given the complex interplay between cultural preservation goals and commercial imperatives.

## **Translation and cultural adaptation**

Current theoretical frameworks inadequately address the specific complexities of translation and cultural adaptation in Welsh children's publishing. While Grutman & Van Bolderen's (2014) work on self-translation provides valuable insights for bilingual contexts, deeper understanding of how these processes function within Wales's unique publishing environment requires investigation. O'Sullivan's (2020) bilingual publishing analysis provides a proven methodological framework that this study adapts for Welsh contexts, extending her approach to examine specific internationalisation challenges facing Welsh children's literature. The success of works like *Llyfr Glas Nebo* in reaching international markets suggests potential pathways that warrant thorough theoretical investigation.

## **Limited scholarly literature and methodological implications**

A fundamental challenge in researching Welsh children's literature internationalisation is the limited academic literature specifically addressing this topic. While industry reports (addressed in Chapter 1 and examined in detail in Chapters 4 and 5) provide valuable empirical data, theoretical scholarly analysis remains sparse. This gap in published scholarship necessitated extensive primary research through stakeholder interviews to understand both historic and current internationalisation practices and strategic thinking within the Welsh publishing sector. The reliance on interview-based methodology, while methodologically sound, highlights the nascent state of academic research in this area and underscores the original contribution this study makes to understanding Welsh children's publishing dynamics.

## **Implications for research**

These identified gaps directly inform this study's research questions and methodological approach. The overarching question – what strategies should the Welsh publishing sector adopt for successful international operation in children's books – requires systematic application of the Bourdieu-Sapiro framework established in Section 2.2. Specifically, this research applies field theory to examine how Welsh publishers position themselves,

accumulate and convert different forms of capital, and navigate between cultural and economic logics. Sapiro's three-logics model enables analysis of how Welsh publishers can leverage political logic (institutional support) and cultural logic (distinctive content) to overcome economic logic disadvantages. Complementary theoretical approaches – including Venuti's translation theory, concepts of minor literature, and comparative small nation models – address specific aspects of internationalisation within this foundational framework.

This research addresses critical gaps in current understanding while contributing to theoretical development in several key areas: integration of theoretical frameworks for analysing small nation children's literature internationalisation, understanding of how cultural policy enables market development in bilingual publishing contexts, analysis of translation and cultural adaptation processes in children's publishing, and examination of professional development requirements for international engagement.

The methodology detailed in Chapter 3 demonstrates how this integrated theoretical framework – grounded in Bourdieu and Sapiro's foundational approaches – translates into empirical research design, enabling systematic analysis of Welsh children's literature internationalisation strategies, challenges, and opportunities.

### 3. Methodology

This chapter outlines the methodological approach used to investigate strategies for internationalising Welsh children's publishing. The chapter is structured around eight main sections: Section 3.1 establishes how the methodology addresses the research questions outlined in Chapter 1; Section 3.2 presents the conceptual framework drawing on the theoretical foundations established in Chapter 2; Section 3.3 develops markers of success that move beyond subjective notions of 'quality' to employ Bourdieu's concept of cultural capital; Section 3.4 details the mixed-methods research design; Sections 3.5-3.6 outline the case study approach and data collection methods; Section 3.7 explains the data analysis approach; and Section 3.8 addresses research ethics and limitations.

The methodology responds directly to the research gaps identified in Chapter 2, particularly the insufficient understanding of how cultural policy enables market development in bilingual publishing contexts and the limited analysis of practical challenges facing Welsh publishers seeking international engagement. By employing a mixed-methods approach combining quantitative analysis with qualitative case studies, this methodology enables examination of both broad patterns in Welsh publishing internationalisation and specific mechanisms for successful market development.

#### 3.1 Research approach and questions

This methodology addresses the central research question established in Chapter 1 (Section 1.2): 'What strategies should the Welsh publishing sector adopt to operate successfully at international level in children's and young adult books across both Welsh and English language publishing?' The six research questions outlined in Chapter 1 (Section 1.2) require investigation of historical development, current output and prestige measures, existing international strategies, potential for building international links, challenges and necessary conditions for success, and stakeholder roles.

The mixed-methods approach detailed in this chapter is specifically designed to capture both quantitative patterns and qualitative insights necessary to address these multifaceted questions. The six areas of enquiry necessitate different methodological approaches: historical analysis for development patterns, bibliometric analysis for output assessment, case study methodology for strategy evaluation, interview-based research for understanding stakeholder perspectives, and documentary analysis for examining policy frameworks.

Of particular importance is the methodology's approach to the second research question, which examines 'the quantity of children's literature produced in Wales, and how indicators of literary merit and cultural value can be identified and measured in the context of Bourdieu's concept of cultural capital.' This approach moves beyond subjective assessments of 'quality' to develop objective measures for literary recognition and cultural value that can be systematically analysed and compared across different contexts.

### 3.2 Conceptual framework

This research design applies the theoretical frameworks established in Chapter 2 to inform both methodological choices and analytical approaches. As detailed in Chapter 2 (Section 2.2), Bourdieu's field theory and Sapiro's sociology of translation provide the foundational theoretical approaches for this study, with other theories employed to follow specific lines of enquiry. This section explains how these theoretical insights translate into practical investigation methods.

#### **Implementing Bourdieu and Sapiro**

The mixed-methods approach is specifically designed to capture the different forms of capital (economic, cultural, social, and symbolic) identified by Bourdieu as operating within Welsh publishing. Quantitative bibliometric analysis tracks economic capital accumulation through sales and rights deals, while qualitative interviews reveal how publishers strategically convert between different capital forms. The case study design (detailed in

Section 3.5) enables examination of how publishers navigate between the three competing logics identified by Sapiro: economic, political, and cultural.

Sapiro's work on translation flows and Venuti's concepts of domestication and foreignisation further shaped the case study design presented in Chapter 7. These frameworks highlight the importance of examining not just what is translated, but how cultural elements are preserved or adapted for new markets. This informed the decision to include detailed textual analysis alongside market data when examining specific cases of successful internationalisation.

### **Researcher positionality and methodological design**

The researcher's position as an industry insider with over twenty years of experience in publishing, including eight years working for Welsh publishers Firefly Press and Graffeg, provides valuable insight into sector operations. This experience facilitates access to key stakeholders and industry data, but necessitates rigorous triangulation of sources and reflexive research practices to ensure objective analysis. The mixed-methods design helps mitigate potential bias by providing multiple perspectives on the research questions, as detailed in Section 3.8.1.1.

### **3.3 Markers of success**

This study requires comprehensive markers for evaluating the success of internationalisation strategies that move beyond subjective notions of 'quality' to employ measurable indicators grounded in Bourdieu's theoretical framework. Drawing on Bourdieu's capital framework, established in Chapter 2 (Section 2.2.1), this section develops objective measures for assessing literary recognition and cultural value that can be systematically analysed across different contexts. The framework enables analysis of how small-scale publishers strategically convert between capital forms — for instance, how cultural capital gained through Welsh literary awards can be leveraged to secure

international rights deals (economic capital) or critical recognition in international markets (symbolic capital).

The four interconnected forms of capital translate into the following measurable indicators:

Economic capital — Direct financial measures:

- Sales figures and revenue data (where available)
- International rights deals and translation contracts
- Institutional funding secured
- International distribution and sustained market presence across multiple territories, indicating commercial viability

Cultural capital — Accumulated literary prestige:

- Awards: both Welsh-language (Tir na n-Og Children's Book Awards, Eisteddfod Prose Medal, Wales Book of the Year) and English-language recognition (Carnegie Medal, international awards)
- Critical recognition in literary journals, educational publications, and international media, focusing on the nature and extent of critical engagement rather than subjective assessments of worth
- Educational adoption and curriculum inclusion, including school reading lists, university curricula, and teacher training materials, indicating institutional recognition of literary and educational value
- Institutional endorsement by cultural bodies

Social capital — Networks enabling market access:

- Publisher partnerships and distribution agreements
- Author-translator collaborations
- International book fair participation and industry relationships
- Institutional connections with cultural organisations

Symbolic capital — Reputation transcending economic value:

- Critical acclaim, media discussion, and integration into broader cultural discourse
- Recognition as representative of Welsh literary achievement
- Academic study and scholarly attention
- Translation and adaptation activity, including number and diversity of language translations and international co-production partnerships, demonstrating cross-cultural appeal and market validation beyond immediate sales figures

This framework enables systematic comparison of different internationalisation approaches while maintaining theoretical grounding in Bourdieu's framework for understanding cultural production and literary value. Not all indicators are equally applicable across every case study; the relevance of specific measures varies according to publisher scale, language of publication, and the nature of each internationalisation pathway. These indicators are applied consistently across the case studies in Chapter 7, enabling comparison across different internationalisation pathways and publishing contexts.

### 3.4 Research design

#### 3.4.1 Hybrid case study approach

This research adopts a hybrid case study methodology synthesising approaches from three leading methodologists in the field. From Simons's (2009) work, it incorporates a strong focus on practical application and policy relevance, essential for developing actionable insights for the publishing sector. This is reflected in the extensive stakeholder engagement through interviews with publishers, authors, illustrators, translators, and industry professionals.

The study draws on Yin's (2017) structured approach through systematic data collection and analysis procedures, while employing Stake's (1995) emphasis on rich contextual description to capture the unique aspects of Welsh children's publishing internationalisation. This

combined approach enables examination of both broad industry patterns and specific publishing initiatives. This case study approach is supported by precedents in children's literature publishing research, including O'Sullivan's (2020) analysis of Irish publishing contexts (see Section 2.4) and Biernacka-Licznar and Paprocka's (2016) study of small Polish 'Lilliputian publishers'.

This methodology is particularly appropriate for researching the internationalisation of minority language and small nation literature, which involves complex interplay of cultural, economic, and political factors requiring analysis at multiple levels — from individual books and authors to publishing houses and national policies. The participatory aspect ensures that voices within the Welsh-language publishing industry are centrally represented, while the combination of theoretical rigour with practical application allows the research to contribute to both academic understanding and industry strategy. The interpretive elements provide flexibility to explore unexpected themes, particularly important in a relatively understudied field, while enabling examination of both historical developments and contemporary challenges.

### 3.4.2 Theoretical framework application to case studies

The case study design employs an integrated theoretical framework that combines multiple complementary perspectives to analyse the complexity of children's literature internationalisation in the Welsh context. This framework incorporates theories operating at different analytical levels:

At the macro level, the research draws on structural frameworks that explain market dynamics and power relations:

- Bourdieu's (1993) field theory and Sapiro's (2008; 2010; 2016) framework for understanding translation within institutional fields, which describe how Welsh children's literature navigates between different forms of capital and competing market logics

At the meso level, the framework employs theories that address cultural positioning and translation strategies:

- Deleuze and Guattari's (1986) concept of minor literature, adapted to examine how literature from minority language contexts functions within larger literary systems
- Venuti's (2008) domestication and foreignisation translation theory, which examines how cultural elements are preserved or adapted across linguistic boundaries

At the micro level, the research utilises specific analytical tools for examining textual representation and reception:

- Bishop's (1990) mirrors, windows, and sliding doors concept, which provides insights into how literature functions for different audiences
- Grutman and Van Bolderen's (2014) self-translation theory, which analyses how authors navigate bilingual contexts and creative rewriting

This multi-level theoretical framework allows comprehensive analysis across the three forms of international engagement examined in Chapter 7: import strategies (Section 7.1), export initiatives (Section 7.2), and co-production approaches (Section 7.3). The framework addresses both structural conditions (institutional support mechanisms, market access, stakeholder coordination) and specific strategies (translation approaches, rights management, cultural adaptation) that shape the internationalisation of Welsh children's literature, while maintaining theoretical consistency across different pathways to international markets.

### 3.4.3 Case study structure and selection criteria

The research employs a multiple case study design comprising nine cases distributed across three distinct internationalisation models, eight contemporary case studies plus one historical case study:

#### Import case studies (6):

Five strategically selected import cases comprising one international board book duology and one picture book duology (each imported into both Welsh and English), two additional picture books imported into Welsh, and one middle grade novel imported into English. These titles were identified through consultations with Welsh publishers and Wales Literature Exchange to represent diverse approaches across the import pathway. Also included is a historical case study of Dref Wen's internationalisation strategy in the 1970s and 80s.

#### Export case studies (2):

Two contrasting export cases: one Welsh-language original YA novel and one English-language original middle grade novel, both expressing strong Welsh cultural identities while achieving international market placement. These cases were selected through industry consultations to examine divergent internationalisation pathways.

#### Co-production case study (1):

An international partnership project between Welsh and Irish publishers demonstrating collaborative creative and financial development. This trilingual picture book series (produced simultaneously in Welsh, Irish and English) represents an alternative internationalisation model that leverages shared investment and linguistic proximity.

This structure allows for systematic comparison both within and across internationalisation pathways. The selection criteria prioritised cases that represent diverse linguistic origins, demonstrate varying degrees of commercial success, involve different publishing models within Wales's grant-supported ecosystem, provide sufficient documentation of the internationalisation process, and include reader reception data where available.

### 3.5 Case studies

The case studies selected focus on the period from 2018 to 2022, a timeframe chosen to capture recent developments in the wake of two influential industry reports: S.M. Rosser's

*Survey of Books for Children and Young People* (2017) and a subsequent scoping report by Böhler et al. *Internationalising Reading Experiences of Children and Young People in Welsh* (2020). This period also coincides with significant policy initiatives such as the Welsh Government's target of reaching one million Welsh speakers by 2050, which has important implications for the publishing sector.

Cases are selected based on a purposive sampling strategy, with the aim of representing a range of internationalisation strategies (import, export, co-production), source and target languages (Welsh, English, Czech, Spanish, French, German, Latvian, Irish), and target audiences (children, young adults, parents/carers). The selection process was informed by preliminary analysis of bibliographic data from the Books Council's databases and catalogues, as well as consultation with publishers during the initial survey questionnaire and interview process and Wales Literature Exchange.

The case studies were selected to provide balanced representation across languages, genres, and internationalisation approaches within Welsh children's publishing:

The import case studies encompass diverse source languages and age categories, providing comprehensive insight into different translation approaches. These include:

- The translation of Spanish board books into both Welsh and English, demonstrating dual-language publishing strategies
- A Czech picture book duology into English and Welsh, highlighting connections between small nation publishers.
- A Swiss German picture book's adaptation into Welsh, highlighting connections between small nation publishers.
- A French-language picture book from Québec translated into Welsh, connecting publishers operating in minoritised language contexts within larger anglophone environments
- A Latvian middle-grade novel's translation into English, showing how Welsh publishers can bring international children's literature to broader English-language markets and highlighting connections between small nation publishers.

For export strategies, the research examines two contrasting examples:

- *Llyfr Glas Nebo* (Y Lolfa, 2018) represents Welsh-language literature reaching international markets through multiple translations
- *The Clockwork Crow* (Firefly Press, 2018) demonstrates how English-language Welsh literature can achieve international recognition while maintaining Welsh cultural elements

The co-production category is represented by the *Molly* picture book series (Graffeg, 2018-2024) developed collaboratively between Welsh and Northern Irish publishers, offering insights into Celtic language publishing partnerships.

This range of examples enables analysis of various approaches to cultural and linguistic adaptation across different age groups and markets.

### 3.6 Data collection methods

This section outlines the comprehensive mixed-methods approach employed to examine internationalisation in Welsh children's publishing. The research design combined quantitative and qualitative data collection through surveys, interviews, and documentary analysis, enabling thorough investigation of current practices, historical developments, and future opportunities in the sector.

#### 3.6.1 Survey design and implementation

The research began with a systematic survey of Welsh children's publishers to establish baseline data about internationalisation activities across the sector. The sample comprised all publishers receiving regular funding from the Books Council who published more than five children's titles annually during the research period, plus one educational publisher based at University Wales Trinity Saint David. This purposive sampling strategy ensured coverage of the most active participants in Welsh children's publishing.

Ten publishers were approached via email on March 29, 2021, with a follow-up sent to non-respondents on April 12, 2021. An additional data collection phase occurred on April 6,

2023, to capture recent developments in internationalisation activities and gather specific information for identified case studies. The surveyed publishers included:

1. Atebol
2. Broga
3. Carreg Gwalch
4. Dalen
5. Dref Wen
6. Firefly Press
7. Graffeg Books
8. Peniarth
9. Rily
10. Y Lolfa

The survey instrument employed a mixed-methods design, combining quantitative metrics with qualitative insights from publishers. The quantitative component focused on gathering precise operational data through structured questions about publishing volumes, staffing levels, and business demographics. The qualitative dimension implemented open-ended questions allowing respondents to provide detailed narratives about their experiences and business practices. See Appendix A for the Welsh publisher survey questionnaire.

The survey achieved a 92 percent response rate, with nine of the ten funded Welsh children's publishers participating in the research. Only one publisher, Dref Wen, did not respond to multiple requests for survey completion and interview participation. While this represents a minor limitation, information about their publishing activities was obtained through Books Council archives and industry documents and historical publishing activities through an in-depth interview with the founder, Roger Boore.

### 3.6.2 Interview methodology

This research employed a comprehensive interview methodology to gather detailed insights into the internationalisation of Welsh children's literature. The interview process was designed to capture diverse perspectives from key stakeholders while ensuring rigorous academic standards and ethical research practices.

### 3.6.2.1 Research phases

The interview research progressed through three distinct phases between 2021 and 2024, each building upon previous findings to develop increasingly detailed understanding of internationalisation strategies and practices.

#### Phase one: publisher survey and follow-up interviews (2021)

The initial interview phase expanded on publisher survey questionnaire responses through detailed discussions with Welsh publishers about their internationalisation activities. Nine Welsh publishers participated in these follow-up interviews, conducted primarily via video conference due to Covid-19 restrictions. These conversations followed a semi-structured format that allowed for exploration of survey responses while enabling publishers to highlight additional areas of interest or concern. This phase established foundational understanding of current market practices and helped identify potential case studies for deeper investigation.

#### Phase two: industry context interviews (2021-2024)

The second phase broadened the research scope through interviews with industry stakeholders to understand the wider landscape of Welsh publishing internationalisation. Thirteen interviews were conducted with current and former executives of the Books Council, representatives from Wales Literature Exchange and Literature Across Frontiers, and other industry professionals. Of particular significance were conversations with historical figures in Welsh publishing, including Roger Boore, founder of Dref Wen (1970-1999) and former directors of the Books Council, Gwerfyl Pierce Jones (1987-2009) and

Elwyn Jones (2009-2017). These interviews provided crucial historical context about the development of internationalisation strategies over several decades and established the broader context within which specific case studies could be understood and analysed.

Phase three: case study research (2022-2024)

The final phase comprised twenty-eight targeted interviews with stakeholders connected to each selected case study title, including Welsh publishers discussing specific titles, international publishers who had acquired rights to Welsh books or whose books had been acquired by Welsh publishers, translators working on case study titles, and authors whose work was featured in the case studies. These interviews were conducted through a mixture of in-person meetings at international book fairs, video conferences, and email correspondence, exploring detailed aspects of each case study including decision-making processes, translation challenges, and market outcomes.

#### 3.6.2.2 Interview implementation

The interview methodology demonstrated considerable flexibility in response to both practical constraints and participant needs. While originally designed for in-person interactions, the research adapted to incorporate multiple interview methods that proved effective for different contexts and participants.

Video conferencing platforms facilitated in-depth discussions with participants across Wales and internationally, while in-person interviews were conducted where possible, particularly at international book fairs in London and Bologna during 2022-2023. Email interviews proved especially valuable for international participants and for those requiring time to formulate detailed responses in their non-native language.

All interview participants were informed of the research purpose at the start of each interaction and gave verbal consent to participate and to have conversations recorded

where applicable. The flexible interview methodology accommodated different participant preferences while maintaining consistent ethical standards across all formats.

The study engaged 46 participants representing key stakeholders across the publishing ecosystem, including publishers, translators, rights agents, authors, illustrators and industry leaders. Participants were drawn from both Wales and international markets, offering a balanced perspective on Welsh children's publishing within a global context. Of the total participants, 26 were based in Wales, representing prominent Welsh publishing houses such as Y Lolfa, Firefly Press, Graffeg, and Atebol, as well as key industry bodies like the Books Council and Wales Literature Exchange. These individuals provided critical insights into the local publishing infrastructure, funding mechanisms, and translation initiatives shaping the sector.

The 20 international participants, spanning 12 countries, included translators working in multiple European languages, such as Maria Listewnik (Polish), Lise Garond (French), and Nataša Srdić (Serbian), who played a key role in the translation and circulation of Welsh children's books abroad. Industry professionals from major publishing firms and literary agencies, including Grupo Planeta (Spain), Fischer Sauerländer (Germany), and Sterling Lord Literistic (USA), provided perspectives on rights sales, market positioning, and international distribution challenges. Comparative insights were also gathered from Catalan publishers, such as Aniol Rafel (Periscopi), whose experiences offered valuable lessons in internationalisation from other minority-language publishing sectors. See Appendix G: Interview data summary table.

The research methodology incorporated in-depth interviews conducted via Zoom, email, MS Teams, WhatsApp, and in-person meetings at key industry events such as the London Book Fair (LBF) and Bologna Children's Book Fair (BBF). The findings from these discussions helped contextualise the opportunities and barriers facing Welsh children's literature in global markets. A comprehensive list of participants and their roles is provided in Appendix G.

Interviews were conducted in English, with participants given the option to respond in Welsh when preferred. This approach acknowledged the bilingual nature of the Welsh publishing industry while ensuring consistency in data collection. Where necessary, translation support was provided by Welsh-speaking colleagues to ensure accurate interpretation of responses.

### 3.6.3 Documentary research

The research encompassed comprehensive analysis of institutional archives, reports, and industry materials. Primary sources included:

- The Books Council's library, annual reports, strategic documents and catalogues<sup>2</sup>
- The Arts Council of Wales's annual reports and strategic documents
- Literature and literacy promotion organisations websites and annual reports (Literature Wales, Wales Literature Exchange, Literature Across Frontiers, BookTrust Cymru)
- Cyhoeddi Cymru Publishing Wales website and webinars
- Publisher catalogues and marketing materials
- Media coverage of Welsh children's literature
- Welsh Parliament Culture, Communications, Welsh Language, Sport, and International Relations Committee meeting transcripts and recordings
- The National Library of Wales historical archives and catalogues

These materials provided essential context for understanding the institutional frameworks and market positioning that shape the internationalisation of Welsh children's publishing.

### 3.6.4 Bibliometric analysis

The study examined translation flows and publishing patterns using quantitative data from multiple sources. The Books Council and Wales Literature Exchange provided selected

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<sup>2</sup> Including the Books Council of Wales Children's Yearbooks (2020-2024) and thematic catalogues such as *Myths and Legends: Epic Books from Wales* (Books Council of Wales, 2017).

publishing records, while individual publishers shared selected sales and rights data. This analysis tracked the volume and direction of translations, identifying patterns in language pairs, genres, and market penetration from 2018-2024, allowing for identification of emerging trends and changing market dynamics.

### 3.6.5 Textual analysis for case studies

The textual analysis examined internationalisation strategies in children's literature through the seven carefully selected contemporary case studies and one further historical case study. The analytical framework focused on three key dimensions:

- Paratextual elements examination
- Translation strategies investigation
- Methods of cultural presentation

### 3.7 Data analysis approach

The diverse range of data collected through these methods required a systematic approach to analysis that could effectively integrate quantitative and qualitative findings.

The analysis process integrated multiple data sources to ensure comprehensive understanding. The survey questionnaire provided foundational data, while follow-up interviews offered deeper insights and clarification. The researcher's industry experience provided valuable context for interpreting responses and identifying significant patterns and practices.

The cross-validation process involved cross-referencing information from questionnaires against interview data to ensure accuracy and completeness. This triangulation approach, combined with the researcher's industry knowledge, enabled verification of findings and identification of patterns across different publishers.

Qualitative data from the interviews and documentary research was analysed using thematic analysis, a flexible approach that allows for both deductive and inductive coding. Deductive codes were derived from the theoretical frameworks outlined above, while inductive codes emerged from close reading of the data itself. Codes were organised into broader themes and sub-themes, which were then interpreted considering the research questions and theoretical propositions.

Interview transcripts underwent detailed thematic analysis using an iterative coding process. Initial close reading identified emerging themes, refined through subsequent readings to develop a comprehensive coding framework. These codes were systematically applied across all transcripts, with key themes and patterns documented through detailed analytical memos. Following transcription, relevant quotes and key findings were shared with participants for verification and approval, ensuring accuracy and adherence to institutional ethical guidelines.

Within-case analysis involved the construction of detailed case descriptions, drawing on multiple data sources to provide a holistic account of each case's context, strategies, and outcomes. Cross-case synthesis was then used to identify patterns and divergences across the cases, with particular attention to how different internationalisation strategies (import, export, co-production) played out in practice.

Throughout the analysis process, the researcher engaged in reflexivity and triangulation to enhance the credibility and trustworthiness of the findings. This involved critically examining how the researcher's own positionality may have shaped the interpretation of the data, as well as seeking out alternative explanations and disconfirming evidence.

### 3.8 Research ethics and limitations

#### 3.8.1 Research ethics and data management

This research was conducted in accordance with the University of Wales Trinity Saint David research ethics approval granted on 18 September 2020. All aspects of the research design, data collection, and data management procedures complied with the university's research ethics framework for postgraduate research and the General Data Protection Regulation (GDPR) requirements for handling personal data. This section details the specific ethical considerations and limitations encountered during the research process.

### 3.8.1.1 Researcher positionality and institutional relationships

This research benefits from significant institutional connections that required careful ethical consideration throughout the research process. The study is sponsored by the Books Council, and the supervisory team includes the directors of Wales Literature Exchange and Literature Across Frontiers – key agencies responsible for internationalising Welsh literature. Additionally, the researcher's background as an industry professional, including eight years of experience in Welsh publishing and previous employment with Firefly Press and Graffeg, necessitated careful attention to potential conflicts of interest.

During the research period, the researcher undertook project-based work for the Books Council, specifically supporting the Tir na n-Og Children's Book Awards marketing and publicity. To maintain appropriate boundaries, the Books Council, Wales Literature Exchange, and Literature Across Frontiers implemented protocols to exclude the researcher from internal communications, strategic planning discussions, and operational decision-making that could present sensitivity concerns or compromise research independence. These organisations deliberately maintained separation between their supervisory relationships and their operational activities, ensuring the researcher could benefit from publicly available institutional knowledge while maintaining academic distance from internal organisational processes.

The researcher's positionality as an industry insider required careful consideration throughout the research process. To mitigate potential bias, the researcher engaged in reflexivity, maintaining a research diary to track decisions and assumptions, and seeking feedback from supervisors and participants on the interpretation of the data. All research was conducted in accordance with the University of Wales Trinity Saint David research

ethics approval granted on 18 September 2020 and followed established protocols for informed consent and data protection, ensuring fair and transparent research conduct compliant with university ethical standards and GDPR requirements.

To maintain academic integrity and objective analysis, several measures were implemented:

- The research established clear separation between academic investigation and operational involvement with these organisations, with formal protocols implemented by all three sponsoring/supervisory bodies to limit researcher access to sensitive internal communications and operational activities
- All findings were triangulated through multiple independent sources to ensure validity
- Stakeholder interviews and data analysis were conducted with explicit acknowledgment of institutional relationships
- The research design incorporated regular external review to ensure findings were not unduly influenced by these connections

This systematic approach allowed the study to benefit from institutional knowledge while maintaining rigorous academic standards and ethical research practices.

### 3.8.1.2 Interview ethics

To ensure objective analysis and maintain appropriate ethical boundaries, interviews with stakeholders connected to sponsoring and supervisory organisations were approached with particular care. Interviews with Firefly Press staff were scheduled for 2024, allowing a two-year interval following the conclusion of the researcher's employment with the publisher.

Similarly, interviews with staff from the Books Council, Wales Literature Exchange, and Literature Across Frontiers were conducted with explicit acknowledgment of the sponsorship and supervisory relationships. Clear protocols established separation between these institutional roles and research data collection. All data gained from interviews and communications with staff from these organisations was systematically checked and verified

through triangulation with independent sources, documentary evidence, and follow-up clarifications to ensure accuracy and objectivity.

Interview participants were contacted via email and professional networks between 2021 and 2024. At the start of each interview, participants were informed about the research purpose and asked for permission to record conversations for research purposes. All interviews were conducted with participants' knowledge and consent that the material would be used for this PhD thesis on Welsh children's publishing. Given the professional nature of the research and the small, interconnected Welsh children's publishing community, participants were interviewed in their professional capacities as publishers, authors, translators, rights professionals, and other industry stakeholders.

Participants are identified by name and professional role in the thesis, reflecting standard practice in professional industry research where attribution acknowledges expertise and provides context for institutional perspectives. This approach aligns with professional expectations in the publishing sector, where expert knowledge and organisational perspectives constitute valued forms of knowledge contribution. The research content examines international publishing strategies, translation pathways, and sector development, representing participants professionally in their expert roles.

These measures ensured that the research maintained academic integrity while benefiting from the knowledge and insights of key institutional stakeholders.

### 3.8.1.3 Data management and access

The research implemented comprehensive data management protocols to ensure participant privacy and data security. Interview conversations were recorded with participants' verbal consent, and recordings were stored securely on password-protected devices in accordance with GDPR requirements and university data protection protocols. Where interviews were conducted via email, correspondence was archived in its original

form. All digital data was backed up securely on institutional servers with appropriate access controls.

Following transcription and analysis, interview recordings were securely deleted in accordance with data protection principles of storage minimisation. Transcripts and email interview records were retained for research verification purposes and are stored securely in compliance with university research data management policies.

Given that interview participants are identified by name and professional role in the thesis, reflecting their expert contributions to the research, raw interview data constitutes identifiable personal information that cannot be shared under GDPR regulations without explicit additional consent. However, the research methodology, interview protocols, and analytical frameworks are fully documented and transparent within this thesis, enabling methodological verification. The thesis itself provides full transparency regarding how participant contributions inform the research findings, with all participants identified and their contributions appropriately attributed.

A complete list of interview participants, including dates and methods of interview, is provided in Appendix G. Enquiries regarding research methodology or verification should be directed to Postgraduate Research ([pgresearch@uwtsd.ac.uk](mailto:pgresearch@uwtsd.ac.uk)).

### 3.8.2 Research limitations

Several limitations should be acknowledged in interpreting this research.

#### 3.8.2.1 Sample size and selection

The study's sample size was limited to publishers in Wales who publish books for children and young people in Welsh or English and are recipients of funding from the Books Council, as well as the educational publisher Peniarth. While this may limit the generalisability of the findings, the use of purposive sampling and the inclusion of key industry stakeholders

helped to ensure that the sample was representative of the diversity of the sector. The in-depth, contextualised nature of the case study approach provided valuable insights that may be transferable to other contexts, even if not statistically generalisable.

For internationalisation examples (import, export, and co-production), the research included most identified cases due to their limited number and distinct characteristics. This comprehensive approach to case selection ensured the research captured the full spectrum of international publishing activities within the sector.

### 3.8.2.2 Language access

Language access presented both methodological challenges and analytical opportunities in this research. As a non-native Welsh speaker, the researcher required additional support when working with Welsh-language materials and conducted interviews with Welsh-speaking participants in English. This was addressed through systematic collaboration with Welsh-speaking academic colleagues, who provided translation and interpretation support, access to the Books Council's translation resources and bilingual staff members, and the researcher's own Welsh-language training throughout the research period, achieving B1 proficiency level on the CEFR.

Rather than viewing this language barrier solely as a limitation, it offered valuable insight into the challenges and processes of cultural mediation – a central concern when examining international publishing strategies. The researcher's position as a non-Welsh speaker paralleled the experience of international publishers approaching Welsh literature, providing first-hand understanding of how Welsh cultural content is presented and interpreted across linguistic boundaries.

### 3.8.2.3 Data availability

Data availability and reliability vary across the markers of success due to inconsistencies in collection methods and reporting practices. This is particularly evident in sales data, where

publishers often maintain confidentiality around specific figures to protect their competitive position in the market. Publishing houses typically consider detailed sales information to be commercially sensitive data, as it could reveal business strategies and market performance to competitors. While aggregate industry data may be available, granular sales figures for individual titles or specific markets are often closely guarded. This commercial sensitivity creates a particular challenge when evaluating the quantitative impact of internationalisation efforts in the publishing sector.

#### 3.8.2.4 Temporal and geographical scope

This research focuses on Welsh children’s publishing from 1970 to 2024, with particular emphasis on recent developments between 2018 and 2024. While this specific temporal and geographical scope might appear to limit the broader applicability of findings, the Welsh case study offers valuable insights into the challenges and opportunities facing minority language and small nation publishers globally. By examining these developments within Wales while drawing comparisons with other small nation publishers, particularly those in Catalonia, Scotland, Ireland, and New Zealand (detailed in Chapter 9), the study identifies patterns and strategies relevant to minority language and small nation publishing more broadly.

#### 3.8.2.5 Covid-19 impact

The Covid-19 pandemic significantly affected data collection methods during the initial phase of this research (2020–2022). In response to public health restrictions, all interviews were conducted remotely through videoconferencing, telephone conversations, and email correspondence rather than the originally planned in-person meetings. While this adaptation presented some challenges in building rapport with interviewees, the digital format ultimately enabled broader participation and more flexible scheduling with international participants as well as being able to record and transcribe the interviews.

The pandemic also transformed the landscape of international book fairs, with major industry events shifting to virtual platforms during 2020 and 2021. Following the lifting of travel restrictions in 2022, the researcher conducted in-person visits to Bologna, London and Frankfurt book fairs, facilitating face-to-face interviews with Welsh and international publishers, collection of marketing materials and participation in international market focus events.

### 3.9 Methodological framework and research questions

The table below maps the methodological framework against the research questions, demonstrating how different methods were combined to address each research objective.

**Table 1: methodological framework and research questions**

Research question	M1: Survey questionnaire	M2: Semi-structured interviews	M3: Documentary research	M4: Bibliometric analysis of translation flows	M5: Textual analysis of selected case studies
1. How has the children’s publishing industry developed in Wales, and how has it been supported economically?		X	X		
2. What is the quantity of children’s literature produced in Wales, and how can indicators of literary merit, prestige, and cultural value be identified and measured in the context of Bourdieu’s concept of cultural capital?	X	X	X	X	
3. What international strategies have been used to date, and how effective have they been?	X	X	X	X	X
4. How can the publishing sector in Wales build links with	X	X	X		X

the international publishing industry, and what are the economic and cultural benefits of doing so?					
5. What are the challenges of internationalisation, and what conditions (economic, political, cultural) are necessary to overcome them?	X	X	X		X
6. What roles do key stakeholders (Books Council of Wales, publishers, authors, translators) play in developing and implementing internationalisation strategies?		X	X		

The matrix reveals that documentary research and semi-structured interviews were the most widely applied methods, while bibliometric analysis and textual analysis were employed more selectively for specific research questions. This distribution reflects the study's emphasis on gathering both qualitative insights from industry stakeholders and quantitative data about publishing patterns and translation flows.

This methodological framework enables systematic investigation of internationalisation strategies in Welsh children's publishing. The following chapters present the findings that emerged through application of these methods, beginning with historical analysis of the sector's development.

## 4. Historical Development of Welsh Children's Publishing

Understanding the historical development of Welsh children's publishing provides essential context for analysing current internationalisation strategies examined throughout this thesis. This chapter directly addresses Research Questions 1 and 6, tracing how the children's publishing industry developed in Wales, how it has been supported economically, and what roles key stakeholders have played in shaping the sector. The evolution of the sector from its religious and educational roots to today's diverse publishing landscape reveals persistent patterns in how Welsh publishers navigate cultural preservation alongside market development. This historical perspective highlights both the opportunities and challenges facing contemporary efforts to bring Welsh children's literature to international audiences.

The chapter traces this development through four distinct periods, each marking significant shifts in publishing approaches and institutional support. Section 4.1 examines the dominance of religious publishing in the nineteenth century, tracing how early publishers established foundational infrastructure while responding to dramatic declines in Welsh-language use. Section 4.2 analyses the pivotal changes of the 1960s and 1970s, which brought new institutional support structures and the first systematic attempts to develop international connections, particularly through pioneering work in translation and rights acquisition for co-editions in Welsh. Section 4.3 examines the strategic shift toward sourcing books from European languages, while Section 4.4 traces the increasing professionalisation of the sector through the 1980s and 1990s alongside growing recognition of the need to develop both Welsh- and English-language publishing for children in Wales. Finally, Section 4.5 analyses the evolution of economic support structures that have shaped contemporary publishing.

Several key themes emerge through this historical analysis that inform the theoretical framework developed in Chapter 2. First, the persistent tension between cultural mission and commercial viability has shaped publishing strategies across all periods, reflecting the complex dynamics that Bourdieu and Sapiro identify in cultural production fields. Second,

the development of institutional support structures, particularly through the Books Council, has been key to enabling market development while protecting cultural objectives. Third, approaches to translation and international rights trading have evolved, moving from primarily importing international works to more recent efforts at exporting Welsh literature, although this remains underdeveloped. These historical patterns provide the foundation for the detailed case studies of contemporary publishing strategies examined in Chapter 7.

By examining these historical patterns, we can better understand both the foundations supporting current internationalisation strategies and the persistent challenges that must be addressed. This understanding is essential for developing effective approaches to bringing Welsh children's literature to global audiences while maintaining its distinctive cultural voice, and establishes the context for the contemporary landscape analysed in Chapter 5.

#### 4.1 Religious and educational foundations (1800–1950s)

During the eighteenth and nineteenth centuries, publishing for children was based around the teachings of the church. S.M. Rosser's comprehensive analysis of nineteenth-century Welsh children's literature demonstrates how these religious foundations shaped not only content but also distribution networks and reading practices, creating the infrastructure that would later support secular educational publishing (S.M. Rosser, 2020). Each of the four Nonconformist denominations in Wales had its own book room, with publishing and distribution divisions issuing books and magazines through its Sunday schools. At its peak, the magazine *Trysorfa y Plant* (The Children's Treasury), founded in 1862, sold around 40,000 copies a month across all denominations and its editor Thomas Levi also translated many children's books from English into Welsh. As Huws (1998a) demonstrates, by the end of the nineteenth century, education had become the driving focus of publishing for children.

In 1892, the Welsh historian, educationalist and writer O. M. Edwards launched *Cymru'r Plant* (Children's Wales), the first non-denominational periodical that met the real needs of children. It was highly illustrated and included folk tales, poems, stories and history written

to a high standard by writers who were paid for their work. The magazine reached monthly sales of 11,500 at the time. O.M. Edwards also wrote many books for children. Rosser's detailed analysis of O.M Edwards's work reveals how *Cymru'r Plant* represented more than just publishing innovation - it embodied a sophisticated understanding of how children's literature could serve both educational and cultural preservation purposes. Edwards's approach to balancing entertainment with Welsh cultural content established editorial principles that would influence Welsh children's publishing for decades (S.M. Rosser, 2012). After O.M Edwards' death in 1920, his son, Ifan ab Owen Edwards, edited the periodical, taking it to 15,000 copies a month by 1929. He subsequently created *Y Capten* (The Captain) for teenagers aged 12–18, which folded due to a lack of suitable material (D.G. Lewis, 2021). S.M. Rosser argues that O.M Edwards's editorial vision went beyond simple language preservation to encompass a broader project of cultural identity formation, using children's literature as a vehicle for developing Welsh cultural consciousness in an increasingly anglicised context (S.M. Rosser, 2012).

Throughout the 1800s several printer publishers were established across Wales, publishing books for adults and children. The largest publishers of the time were Gwasg Gee in Denbigh (1808–2001), one of the principal publishers of Welsh-language books for almost two centuries, and Hughes & Son of Wrexham (1824–1977). Gwasg Gomer in Llandysul, Ceredigion, was set up as a printer in 1892 and began publishing its own books in 1946. The population of Wales doubled in size over the century, rising from 1 to 2 million inhabitants, with people from all over the world moving to South East Wales for work during the industrial revolution of the mid to late 1800s, changing the linguistic background of the area as English became the lingua franca. The Welsh language was spoken by over half of the Welsh population in the late 1800s but, by the 1921 census, this had dropped to under 40 per cent. This generation was more fully bilingual than monolingual Welsh and increasingly choosing English books, which were more varied than the Welsh-language books published at the time (D.G. Lewis, 2021). Many Welsh speakers were lost during World War I and the subsequent Great Depression of the 1920s and 1930s, particularly among young people. This decline was exacerbated by emigration from Wales in search of work, as English was increasingly seen as essential for employment opportunities outside the region.

As the number of Welsh speakers continued to drop dramatically in the first half of the twentieth century, Welsh-language publishing reached a critical point, compounded by the rise in the price of paper during the Second World War, with just six children's books published in 1945 (Griffiths, 2021). The Ready Report published in 1952, highlighting the difficulties of Welsh-language publishing, signalled the beginning of a new future of funded publishing in Wales. Westminster responded to the report by issuing grant aid and proposing that books be printed, distributed and financed through the local authorities. The Welsh Joint Education Committee (WJEC) was central at this point in commissioning and producing books for children through schools.

These institutional developments marked the beginning of a more systematic approach to supporting Welsh-language publishing. Academic and Welsh children's literature expert S.M. Rosser has observed that publishing for children in Wales has had a direct link with promoting the Welsh language: 'It is no coincidence that the growth of children's publishing is juxtaposed with the language's decline in the twentieth century. As the number of Welsh speakers decreased, producing books for children was increasingly seen as a crucial part of the regeneration project to revive the Welsh language' (S.M. Rosser, 2012). This recognition of publishing's role in language preservation would shape the political and cultural developments of the following decades.

#### 4.2 Political awakening and institutional development (1960s and 1970s)

The 1960s marked a watershed moment in Welsh politics and language activism, catalysed by the controversial Tryweryn Reservoir Bill of 1957. Despite unanimous opposition from Welsh MPs, the Westminster government granted Liverpool Corporation permission to flood the Welsh-speaking village of Capel Celyn to create a reservoir serving Liverpool - a decision that starkly illustrated Wales's political powerlessness and became a rallying point for Welsh nationalism. This political disenfranchisement was particularly poignant against the backdrop of linguistic decline, with the 1961 census revealing that Welsh speakers had fallen to just 26 percent of the population. In response to these challenges, 1962 saw academic, author and political activist Saunders Lewis deliver his influential radio broadcast

‘Tynged yr Iaith’ (The Fate of the Language), which proved revolutionary in galvanising Welsh-language activism and directly led to the establishment of Cymdeithas yr Iaith Gymraeg (Welsh Language Society).

This period of heightened cultural consciousness also saw the creation of the Welsh Office and Secretary of State for Wales in 1964, alongside growing demands for Welsh-language media in television, radio, and publishing. The emergence of new Welsh-language publishers, many founded by language activists, reflected a broader movement to assert Welsh cultural and political identity through increased Welsh-language publishing and documentation of the contemporary political landscape (M.W. Thomas, 2021). The reverberations of Tryweryn thus extended far beyond the flooding of a single village, helping to spark a renaissance in Welsh language activism that would shape Welsh cultural and political life for decades to come.

National organisations key to the future growth of the publishing industry in Wales were also established during the 1960s. The Welsh Books Council (renamed the Books Council of Wales in 1995; referred to throughout this thesis as the Books Council) was founded in 1961 to consolidate adult book orders from county councils and distribute books to bookshops across Wales. Initially, the Books Council did not distribute children’s books, as this was managed by the Welsh Joint Education Committee (WJEC). The Arts Council of Wales, which began as the Welsh Arts Council (Cyngor Celfyddydau Cymru) within the Arts Council of Great Britain in 1946, marked a pivotal development in 1967 with the appointment of Meic Stephens as Literature Officer, a move that significantly influenced Welsh literary production (D.G. Lewis, 2021).

In response to the political environment, Bangor University graduate Robat Gruffudd founded Y Lolfa in 1966, as a printer publisher in Tal-y-bont near Aberystwyth specialising in books about Welsh activism and politics and producing material for Cymdeithas yr Iaith Gymraeg. Gruffudd helped establish *Papur Pawb* in 1974, one of the first Welsh-language *papurau bro* (community papers) to be sold to the public. There are now over fifty *papurau bro* produced throughout Wales, with funding support from the Books Council (Papur Pawb, 2022).

Y Lolfa's early contributions to Welsh children's literature were marked by two significant series that helped shape Welsh-language publishing for young readers. The first major success came with *Cyfres y Llewod* (Lion series), a middle-grade series created by Dafydd Parri in the 1970s. As an educator committed to Welsh-medium education in north-west Wales, Parri wrote 23 adventure stories following five friends whose names - Llinos, Einion, Wyn, Orig, and Delyth - cleverly formed the Welsh word 'LLEWOD' (lions). Illustrated by Y Lolfa's in-house artist Elwyn Iwan, the series gained such popularity that it generated its own book club. The series' lasting impact was demonstrated when Y Lolfa reprinted five titles in the late 1990s which are still available to order from the publisher (Gruffudd, 2021).

Building on this success, Y Lolfa published an early reader series in 1983 with Angharad Tomos's *Cyfres Rwdlan* (Rwdlan series). As both author and illustrator, Tomos created thirteen volumes set in the imaginative world of *Gwlad y Rwla* which are still in print today. The series, beginning with *Rala Rwdins*, demonstrated significant cultural impact, winning the prestigious Tir na n-Og Children's Book Award and achieving some international recognition through translations into Irish and Breton. The series' success extended beyond publishing, inspiring both television and theatre adaptations (L. Gruffudd, 2021).

The 1970s saw great developments in Welsh children's literature, including the emergence of children's books translated from other languages into Welsh by Dref Wen in 1970 and the Welsh Youth Libraries Association established in 1974. In 1974, the highly influential *Literature for Children in Wales* report by children's literature expert Mairwen Gwynn Jones was published, which highlighted the lack of quality original language children's literature in Wales in both languages along with recommendations on how to improve it. In response to the report, the Welsh Arts Council Literature Committee created the Children's Books Panel in 1976 chaired by Mairwen Gwynn Jones, which commissioned children's literature and established the Tir na n-Og Children's Book Awards in the same year. One example of a picture book the Welsh Arts Council commissioned at the time is *Cartre Newydd Mici* (Micky's New Home) by one of the leading fantasy/science-fiction artists of the time, Patrick Woodrooffe, published and printed as a co-edition in Welsh and English by D. Brown a'i Feibion in 1976.

A significant development in Welsh children's publishing occurred in 1979 with the establishment of a children's commissioning panel by the Books Council with Welsh Office funding. The coordination between three key funding bodies – the WJEC focusing on educational materials, the Welsh Arts Council supporting literary works for children, and the Books Council financing general leisure reading – helped foster a more diverse landscape of Welsh-language children's literature. This tripartite funding structure enabled publishers to create a broader range of books that served different needs within the Welsh-language children's book market.

In an interview, Gwerfyl Pierce Jones, former Director of the Welsh Books Council (1987–2009), explained that the Books Council's children's commissioning panel was set up with Welsh Office funding to commission and fund children's books in Welsh. The brief was to publish as many books for different ages as possible in Welsh and in particular to fill gaps in the market. According to G.P. Jones, the Books Council acted as a commissioner and edited and designed the books before giving them to a publisher to publish (G.P. Jones, 2022).

To fill the gap in picture books, which were expensive to produce, the Books Council had two strategies: producing original language books and selling the rights to cover costs and buying Welsh translation rights from other publishers and joining co-edition print runs, which was more affordable than producing an original book. The Books Council found it difficult to sell rights in their original picture books as there was little interest from international publishers in buying the rights of books with specific Welsh content. G.P. Jones found that the more 'Welsh' the book the less interest there was from international publishers, concluding that they would have ended up with a very bland book to sell internationally (see Chapter 7, Section 7.2 for further discussion on this theme). This is a conclusion shared with Martin Salisbury in his 2006 article 'No Red Buses Please' and at the heart of the commercial co-edition picture book model (Salisbury, 2006). A key example is *Congrinerio* by David Meredith, illustrated by Wil Rowlands (Gomer, 1983), two of Wales's most exciting book creators at the time. According to G.P. Jones, the Books Council had high hopes for its success internationally, but publishers at the book fairs found the Welsh countryside setting and anthropomorphised animals unsuitable for their own markets (G.P. Jones, 2022).

A far easier and more cost-effective way to fill this gap was to buy Welsh-language rights from international publishers and join co-edition print runs, especially in English-language publications as it was easier to identify suitable books to translate. The Books Council relied on the expertise of children's librarians to identify the best books for this purpose. One example of a successful picture book co-edition at the time was the picture book classic *Rosie's Walk* by Pat Hutchins (The Bodley Head, 1967), translated into Welsh by Mary Vaughan Jones, the author of the successful *Sali Mali* series, published by Gomer in 1980.

In the same year the commissioning panel was set up, teacher and children's literature expert Menna Lloyd Williams was appointed to lead the newly established Children's Literature Centre Wales, funded by the Welsh Arts Council and originally based in the College of Librarianship Wales (CLW) in Aberystwyth. The centre was originally intended as a place for research, including a library which held sample copies of every children's book published in Wales, as well as running reading promotion initiatives. According to G.P Jones, CLW principal Frank Hogg was also hopeful that the centre would make international connections with other children's centres around the world, in keeping with the ethos of the college at the time. However, as the centre's focus was more domestic than international, it moved into offices based at Castell Brychan in Aberystwyth and was later absorbed into the Books Council as the Children's Books Department in 1990 with Menna Lloyd Williams at its head. According to G.P. Jones, the Books Council's remit meant that it was more interested in promoting reading and contemporary literature than in maintaining the historical collection, which was donated to the National Library of Wales and other private library collections. The Books Council kept a showroom containing copies of all Welsh children's books published in the past ten years for teachers as a resource, which they still do today (G.P. Jones, 2022).

#### 4.3 Sourcing books from languages other than English (1970s and 1980s)

Both the quantity and quality of children's books produced in Wales in the 1950s and 1960s were not high enough to sustain a minority language, as outlined by the publisher Roger Boore, who advised that a minimum of 150 children's books should be published annually

for this purpose. Only twenty new titles were produced in 1950 and, despite some improvements over the following decade, the output had increased to just thirty in 1963 (Huws, 1998b).

One publisher who attempted to address the need for quality Welsh children's books was Roger Boore, who established Dref Wen in 1969 in direct response to the Gittins Report's (1968) recommendations on Welsh language teaching in primary education, with the mission to 'expand Welsh children's horizons' beyond the English language. Boore pioneered international co-edition publishing, bringing high-quality picture books from European publishers to Welsh readers through innovative partnerships with continental European publishers (see Chapter 7, Section 7.1.1 for detailed analysis of Dref Wen's strategy and impact). Dref Wen's translations of international classics like *Pippi Longstocking* and *Asterix* revolutionised Welsh children's publishing, introducing young readers to authors and illustrators beyond the Anglosphere and inspiring future Welsh publishers like Huw Aaron of Broga Books.

During the 1980s and 1990s, significant changes in the Welsh educational market influenced Dref Wen's publishing strategy. The Welsh Joint Education Committee (WJEC) shifted its funding priorities toward non-fiction books for schools, presenting new challenges for translation. These educational texts proved difficult to adapt from other languages due to specific cultural and curricular requirements in Wales. In response, Dref Wen adapted its approach, increasingly sourcing picture books from London-based publishers for Welsh co-editions rather than continental European publishers. This strategic shift has persisted, with the majority of Dref Wen's current Welsh-language children's books being sourced from UK and US publishers rather than translated from other European languages (Boore, 2021).

The institutional frameworks established in the 1960s and 1970s laid the groundwork for major advances in Welsh children's publishing over the following decades. A key structural change came with the formation of the Welsh Assembly, when the Books Council's funding shifted from contributions by 22 local authorities to direct government support. This new arrangement, combined with the existing infrastructure, allowed publishers to adopt more sophisticated strategies for both domestic and international markets. With the Council's

distribution centre fully operational and growing backing for Welsh- and English-language publishing, the 1980s became a period of increasing professionalisation and strategic market expansion.

#### 4.4 Market development and professionalisation (1980s and 1990s)

The 1980s marked a period of significant expansion in Welsh publishing, with several new publishers established and improved distribution infrastructure. In 1980, poet Myrddin ap Dafydd founded the Welsh-language publisher Carreg Gwalch, which began by focusing on local history, amateur plays, and folklore. The company later diversified into general consumer publishing for both adults and children, initially adapting several international children's books into Welsh. While initially translating works from German, French, and Spanish, the publisher has more recently expanded to include adaptations from Irish literature (ap Dafydd, 2021). During this same period, two other significant publishers emerged: Poetry Wales Press (now Seren Books) in 1981, focusing on English-language literary works, and Honno, a women's press established in 1986. A key development for the industry's infrastructure came in 1982 with the opening of the Books Council's Distribution Centre, which centralised distribution to bookshops across Wales and continues to provide essential services to Welsh publishers today.

In 1988, the Welsh Education Act meant that Welsh as a second language became central to the national curriculum, with further support for Welsh-medium education. This was followed in 1989 by the introduction of Y Cwricwlwm Cymreig (the Welsh Curriculum), stipulating that material with relevance to Wales must be used in Welsh classrooms. As a result and as recommended by teachers, Gomer set up Pont Books in 1992, an imprint specialising in publishing original children's books in English set in Wales. The imprint went on to dominate the production of English-language children's books in Wales throughout the 1990s and 2000s until the children's publisher Firefly Press was established in 2013. Gomer ceased new publishing in 2018, with its backlist subsequently sold in 2021 (discussed in Section 5.4.3). Jonathan Lewis, Gomer's Managing Director, notes that, while Gomer Press maintained a sporadic presence at major international book fairs over the years,

including London, Frankfurt, and Bologna, their participation lacked strategic consistency and failed to yield successful negotiations for foreign language rights (J. Lewis, 2024).

The 1990s saw various experimental approaches to adapting international content for Welsh readers. One notable example is publisher Ashley Drake's ambitious partnership with major international brand Disney. In an interview, Drake (2023) recounts his experiences with Y Ddraig Fach's Disney co-edition programme between 1995 and 2001, which involved publishing eleven Disney titles in Welsh through co-editions arranged with Ladybird Books. According to Drake, the initiative required adherence to Ladybird Books's requirements, including minimum print runs of 5,000 copies per title and their logo on the front cover.

Significantly, Drake broke from traditional reliance on specialist bookshops and school suppliers by negotiating placement in major supermarket chains including Tesco and Safeway, while personally managing warehousing operations due to limited infrastructure in Wales at the time. Drake reports strong initial demand, with the first two titles proving particularly successful, leading to reprints. Across the full programme from 1995 to 2001, total sales reached approximately 44,000 copies across eleven Welsh language titles and one Scottish Gaelic title, from a total print run of approximately 70,000-75,000 copies, all while Drake, employed full-time with other organisations, ran his publishing house on a part-time basis. Following the publication of the final two titles in 2001, sales of the residual stock continued, in addition to the sales noted above, with several titles selling out and being placed out-of-print, and pro-active marketing activities effectively ceased when Drake was appointed as Director of the University of Wales Press in 2003. A very small number of copies of a couple of remaining in-print titles continue to be sold via the Books Council.

Verification of specific outcomes from this period is limited. Drake notes that at the time the Books Council didn't provide sales figures to UK wide industry databases and supermarkets similarly did not report their ad-hoc Welsh-language sales data. Nevertheless, his interview account provides valuable historical insight into the practical challenges of international licensing for minority-language publishers during the 1990s. His experience of navigating pricing strategies, distribution requirements, and international licensing agreements – particularly the innovation of supermarket distribution – illustrates the operational complexities facing Welsh publishers attempting to adapt global content for local markets

during this formative period. This case demonstrates both the entrepreneurial approaches attempted and the structural constraints facing Welsh publishers seeking international partnerships before the development of contemporary support infrastructure, with lasting influence visible in publishers like Rily acquiring Disney rights in the 2020s (see Chapter 6, Section 6.7 for more detail).

This historical perspective helps contextualise current efforts to internationalise Welsh children's literature and suggests that many of the challenges faced today have historical roots. It also highlights how the industry has had to be creative and adaptable in finding ways to serve its domestic market while attempting to reach international audiences.

The devolution of political power to Wales in 1999 marked another watershed moment for Welsh publishing, particularly in transforming its funding landscape. A significant change came in the funding mechanism for the Books Council – while previously all 22 local authorities had contributed funding, the Council now received direct funding from the newly established Assembly (later Welsh Assembly Government and today Welsh Government). Under Gwerfyl Pierce Jones as Director, this centralised funding approach enabled more strategic development of the publishing sector. This period saw publishers developing to produce more books for the growing Welsh medium school market as well as the emergence of a dedicated children's publisher and imprint in the English language market.

#### 4.5 Evolution of economic support structures

Developments in both Welsh- and English-language publishing in Wales have been dependent on significant investment from the Welsh Government, both to support the minority language publishing infrastructure within Wales and to bolster the emerging English-language publishing against a global language industry. Reflecting the complex nature of the publishing industry as both business and art form, as well as the impact of children's literature, funding comes from different departments: Arts and Sport, Education

and the Welsh Language, Health and Social Services, as well as International Relations and Trade.

There have been a number of reports into the merits of funding and professionalising the industry. The Kewley & Richardson review of the Books Council trade representation in 2005 recommended the need for strict publishing schedules and timely production and dissemination of sales materials but remained optimistic that 'Under the right circumstances, with appropriate funding and professional guidance, there is considerable growth potential for Welsh books in both languages' (Kewley & Richardson, 2005).

Funding for literature in Wales supporting both Welsh-language and English-language publishing grew steadily over the years between 1967 and the early 2000s, provided by the Arts Council of Wales Literature Office and the Books Council. In 2003, the Arts Council of Wales transferred English-language literature to the Books Council, making the organisation the key funder for both languages. In 2009, further investment from the Welsh Government was used on creative editors, book design and illustration and, by 2011, the budget had reached £2.7 million (M.W. Thomas, 2021).

Elwyn Jones, former Director of the Books Council, explains that over the subsequent five years there was a period of financial cuts as a result of the austerity measures coming from Westminster, resulting in a difficult period of restructuring and redundancies for the Books Council. In 2016, the Welsh Government threatened the Books Council with a further 10.6 per cent cut, which would have had a devastating impact on publishing in Wales. The writers and publishers of Wales united across both languages and wrote letters of support to the Welsh Government. A press release was picked up by the journalist Alison Flood at *The Guardian* and letters of support came from prominent writers Philip Pullman and Gillian Clarke. After the article in *The Guardian* was published, the Welsh Government reversed its decision on the funding cut (Flood, 2016). This was an example of unity in the industry across the board which resulted in protecting the industry (E. Jones, 2021).

Consequently, the Welsh Government commissioned a review into literature funding in Wales. The resulting *Independent Review of Support for Publishing and Literature in Wales*

(Hughes, 2017) proved controversial within the literature sector, leading to a Welsh Assembly inquiry (Raymond, 2018). The subsequent report from the Culture, Welsh Language and Communications Committee (National Assembly for Wales, 2018) examining these findings created significant tension within the literature promotion sector. However, these reports ultimately fostered improved collaboration between the Books Council and Literature Wales, with representatives from each organisation participating in the other's key meetings – Literature Wales representatives joining grants panels while Books Council representatives attended strategic meetings at Literature Wales. This enhanced cooperation led to joint initiatives, including a series of writing and illustration development courses at Tŷ Newydd Writing Centre, focusing on improving representation among writers and illustrators.

The publication of the *Independent Review of Support for Publishing and Literature in Wales* (Hughes, 2017) also catalysed a series of strategic meetings among key stakeholders in Welsh literature and publishing, including Literature Wales, the Books Council, the Arts Council of Wales, Literature Across Frontiers, Wales Literature Exchange, PEN Cymru, and British Council Wales. These collaborative discussions aimed to identify potential areas of partnership among the organisations. A significant outcome of these meetings was the successful reinstatement of the Wales stand at the London Book Fair in 2018 (E.H.G. Jones, 2024).

From 2017, there was a slight increase in funding of 1 per cent, with the Welsh Government keeping funding at this level until the Covid pandemic necessitated increased state support, with £108.4 million from the Cultural Recovery Fund (provided in three rounds in July 2020, March 2021 and January 2022) given to the creative industries in Wales and an additional £150,000 given to the Books Council to support bookshops and publishers in Wales. There was also additional funding from the Welsh Government Education Department for book programmes devised to improve children's well-being during the Covid lockdowns, including the Darllen yn Well – Reading Well programme for children (2020–21), the Welsh Read for Empathy book collection (2022), the Iechyd Da scheme (February 2021), and well-being packs for young carers in Ceredigion (2021).

In response to multiple economic pressures affecting the publishing industry in Wales, the Welsh Government and Creative Wales established a £300,000 support fund for the 2022/23 financial year. These pressures included rising costs of living, increased paper prices, and higher energy expenses, all exacerbated by supply chain disruptions stemming from both the war in Ukraine and Brexit's implementation. Individual publishers could apply for grants of up to £15,000 through a streamlined yet evidence-based application process, which mirrored the emergency funding mechanism previously used during the Covid-19 pandemic.

#### 4.6 Conclusion

This historical analysis demonstrates how Welsh children's publishing evolved from its religious and educational foundations through four distinct developmental phases to establish the infrastructure supporting contemporary internationalisation efforts. Several key patterns emerge from this historical perspective that continue to influence current strategies.

First, the persistent tension between cultural purpose and commercial viability has shaped publishing approaches across all periods, from the religious publishing of the nineteenth century through Dref Wen's pioneering European translations to Ashley Drake's innovative licensing arrangements. This ongoing challenge remains central to contemporary publishers' approaches to international markets.

Second, the development of institutional support structures, particularly through the Books Council, proved essential for enabling market development while protecting cultural objectives. The evolution from fragmented local authority funding to centralised Welsh Government support created the stable foundation that enables current publishing activity.

Third, approaches to international content have evolved from primarily importing works to emerging efforts at exporting Welsh literature, though this export development remains underdeveloped. The foundations established by pioneers like Dref Wen in building

international publisher relationships and Drake in developing distribution channels continue to inform contemporary international strategies.

By understanding these historical foundations and persistent challenges, we can better evaluate the contemporary landscape and current approaches to internationalisation examined in the following chapter. Chapter 5 analyses how publishers today build upon this historical foundation while developing new strategies for reaching both domestic and international audiences.

## 5. Contemporary Welsh Children’s Publishing Landscape

This chapter addresses Research Question 1 by examining how Wales’s contemporary publishing infrastructure enables and constrains international engagement. Building on Chapter 4’s historical analysis, this chapter analyses the current landscape to establish Wales’s position within international publishing discourse and to provide the operational context for understanding individual publisher strategies (Chapter 6) and specific international initiatives (Chapter 7). The analysis also provides the foundation for comparative assessment with other minority-language contexts in Chapter 9. Throughout, the chapter applies the Bourdieu-Sapiro framework established in Chapter 2, examining how Welsh publishers balance cultural priorities with market development within the sector’s distinctive bilingual context.

The chapter proceeds through eight interconnected sections that build a comprehensive picture of the sector. Sections 5.1–5.3 establish the structural foundations: examining publishing infrastructure and market structure (5.1), contemporary publishing developments and economic factors (5.2), and funding mechanisms and support structures (5.3). Sections 5.4–5.6 analyse strategic approaches: contemporary translation and adaptation strategies (5.4), educational publishing and curriculum development (5.5), and literary recognition and cultural impact (5.6). The final sections (5.7–5.8) examine diversity initiatives and innovation that shape future international opportunities.

### 5.1 Publishing infrastructure and market structure

#### 5.1.1. Welsh-language context and cultural landscape

Wales today has a significant bilingual population, with around 896,300 people (29.2% of the population aged three or over) able to speak Welsh, according to the Annual Population Survey (Welsh Government, 2024). This figure has been slowly growing since 2010, when it was 25.2% (731,000). Children and young people aged 3 to 15 years were more likely to report they could speak Welsh (49.9%, 245,400) than any other age group, though this

percentage has been decreasing since early 2019. Welsh became a compulsory subject in primary education in 1990 and has been mandatory through Key Stage 3, with GCSE provision strengthened since devolution in 1999.

Both Welsh and English are official languages in Wales, with Welsh having equal status in public administration, established by the Welsh Language Measure (Wales) 2010, which built upon the Welsh Language Act of 1993. The 2010 Measure created a new legislative framework for the Welsh language and established the role of Welsh Language Commissioner to promote and facilitate the use of Welsh. In 2016, the Welsh Government set a target to reach one million Welsh speakers by 2050, launching its strategy 'Cymraeg 2050: A million Welsh speakers' in 2017. This strategy currently shapes educational, cultural and health policy, alongside the Well-being of Future Generations Act 2015, which requires Welsh public bodies to consider the long-term impact of their decisions on future generations. With a population of 3,132,000, meeting this target would mean around one in every three people would have some ability to speak Welsh (Welsh Government, 2017).

However, the language campaign faces complex challenges in measuring Welsh language ability, with different surveys showing contrasting trends. While the 2021 Census recorded 538,300 Welsh speakers (17.8% of the population aged three and over), representing a decrease of around 23,700 people and 1.2 percentage points since 2011 (ONS, 2022), the Annual Population Survey (APS) has shown different patterns. According to the APS for the year ending September 2024, an estimated 851,700 people (27.7%) said they could speak Welsh, though these figures should be interpreted with caution due to methodological changes and differences in survey mode (Welsh Government, 2025). Particularly concerning is the trend among young people: the APS indicates that while children and young people aged 3 to 15 years remain more likely to speak Welsh (48.6%) than other age groups, this percentage has been declining since early 2019 (Welsh Government, 2025). Household surveys like the APS typically provide higher estimates of Welsh-speaking ability than the census, reflecting fundamental differences in how data are collected — the census being a statutory self-completion questionnaire and the APS relying on voluntary interviews (Welsh Government, 2025). Regional variations are significant, with the highest proportions of Welsh speakers found in Gwynedd (77.9%) and the Isle of Anglesey (63.6%), while areas like

Rhondda Cynon Taf (13.9%) and Blaenau Gwent (14.0%) show much lower rates. Among those who can speak Welsh, 13.9% use it daily and 5.6% weekly, highlighting the challenges in maintaining active language use (Welsh Government, 2025)

The Welsh language has gained increased visibility internationally in recent years through several significant cultural and institutional developments. During the 2022 FIFA World Cup, Wales's first qualification since 1958, brought the Welsh-language anthem 'Yma o Hyd' (Still here) to global attention (S. Morris, 2023). This international visibility was further enhanced by Netflix's acquisition of Welsh-language content, marking a significant step for Welsh-language media in reaching global streaming platforms.

A particularly notable development has been the systematic restoration of Welsh place names, illustrated by the reversion to Eryri from Snowdonia, Yr Wyddfa from Snowdon, and Bannau Brycheiniog from the Brecon Beacons. These changes represent more than mere toponymic adjustments; they reflect a broader cultural reclamation and acknowledgment of Welsh linguistic heritage. As the *Guardian* columnist Cosslett (2023) argues, these changes represent legitimate cultural restoration rather than political posturing, emphasising the importance of Welsh people using their language within Wales.

The Welsh Government's systematic approach to language development operates across multiple sectors. The Dysgu Cymraeg / Learn Welsh programme provides subsidised language instruction for adult learners in both domestic and professional contexts, while the education system offers Welsh-medium instruction from early years through to higher education. This comprehensive approach has created a substantial community of Welsh learners and stimulated the production of Welsh-language educational materials and literature for various age groups.

The linguistic dynamic created by these developments significantly influences the publishing sector's operational framework. Publishers must navigate a complex bilingual market while engaging with broader UK and international publishing structures. The Welsh-language market comprises several distinct segments: child learners in Welsh-medium schools represent the largest market, supplemented by adult learners and a smaller but culturally

significant market of first-language Welsh speakers. This market segmentation creates both opportunities and challenges, requiring publishers to balance local linguistic and educational needs with wider commercial market considerations.

The infrastructure and market structures outlined here create what Bourdieu (1993) would identify as a 'restricted field of production,' characterised by small-scale operations, geographic dispersion, and dependence on institutional support. This structural positioning has direct implications for international strategies: the decentralised model limits economy of scale but potentially enables more flexible, relationship-based international partnerships. How individual publishers navigate these structural constraints is examined in Chapter 6, while Chapter 7's case studies reveal how these conditions shape specific international initiatives.

## 5.2 The contemporary publishing landscape

### 5.2.1 Economic impact and employment

Creative industries in Wales demonstrate significant economic impact, with an annual turnover exceeding £2.2 billion and employing more than 56,000 people, contributing to job creation, wealth generation, and the promotion of Welsh culture and talent globally (Gov Wales, 2020). Within this broader creative sector, the publishing, printing and bookselling industry represents a smaller but culturally significant component. The *Publishing, printing & bookselling: Analysis of regional economy contribution* report (Munday, 2018) provides detailed insights into this sector's economic contribution to Wales, based primarily on 2015-2016 data.

The Welsh publishing sector operates within the broader context of the UK publishing industry, which makes a substantial economic contribution. The Publishers Association (2024) reports that the sector contributes £11 billion to the UK economy overall, with book publishing specifically generating £7.1 billion in revenue in 2023. Within this, the children's book market accounts for £839.3 million. The sector currently supports 84,000 jobs, projected to grow by 43,000 by 2033, and generates £6.5 billion in export value.

**Table 2: Economic Overview of Publishing, Printing and Bookselling in Wales**

Indicator	Value	Year	Source
<b>Sales/Turnover</b>			
Total publishing, printing & bookselling sales	£597 million	2015	Munday, 2018
Publishing sector sales	£75 million	2015	Munday, 2018
Printing sector sales	£522 million	2015	Munday, 2018
Bookselling sector turnover	£68 million	2015	CEBR, 2017 cited in Munday, 2018
<b>Employment</b>			
Total publishing, printing & bookselling employees	5,200	2016	Munday, 2018
Book publishing FTEs	140	2016	Munday, 2018
Estimated freelance workforce	1,000	2016	Munday, 2018
Average full-time salary in sector	£19,874	2016	Munday, 2018
<b>Gross Value Added (GVA)</b>			
Bookselling sector GVA	£29 million	2015	CEBR, 2017 cited in Munday, 2018
Publishing, printing & bookselling direct GVA	£106.8 million	2016	Munday, 2018
Publishing sector direct GVA	£32.7 million	2016	Munday, 2018
Publishing sector total GVA (including indirect)	£49.1 million	2016	Munday, 2018
GVA per FTE employee (publishing only)	£27,500	2016	Munday, 2018
<b>Infrastructure</b>			
Number of publishers in Wales	73	2017	Books Council of Wales cited in Munday, 2018
Number of bookshops in Wales	150+	2017	Books Council of Wales cited in Munday, 2018

As Table 2 demonstrates, within the publishing, printing and bookselling sector, employment of approximately 5,200 people is distributed across printing (19%), retail (23%) and newspaper publishing (36%), with the remainder working in book publishing and supporting services. Specifically in book publishing, there are approximately 140 full-time equivalent employees, though this figure does not capture the substantial freelance workforce of around 1,000 individuals, including writers, illustrators, translators and other publishing professionals (Munday, 2018). These enterprises are distributed across Wales, with employment supported widely across the regional economy, including in economically disadvantaged areas.

The Welsh publishing industry faces significant challenges in terms of remuneration. The average full-time salary of £19,874 falls notably below UK publishing industry standards at the time, which ranged from £24,000-£27,000 in the same period, with an even starker contrast to London-based publishing roles that commanded additional premiums of £3,000-£5,000. This wage disparity reflects several structural factors: the concentration of major publishing houses in London and the South East, the predominance of smaller independent publishers in Wales, and the specific economic challenges of operating in a bilingual market. While lower regional costs of living partially explain this difference, the significant gap raises questions about the long-term sustainability of the sector and its ability to attract and retain talent.

The economic multiplier effects of the publishing sector are notable. According to Munday (2018), while the defined publishing sector in Wales directly supports £32.7 million of GVA, once indirect economic activity is taken into account this total grows to an estimated £49.1 million. Every full-time equivalent employee in Welsh publishing directly and indirectly supports just over £27,500 of Welsh GVA, demonstrating the sector's broader economic ripple effects throughout the regional economy.

The Welsh Government has recognised the importance of its creative industries by establishing Creative Wales in 2020, a new agency which includes publishing in its portfolio. Creative Wales is currently conducting research into the economic impact of the creative industries in Wales, ensuring Standard Industrial Classification (SIC) codes are up to date and accurately reflect the situation in Wales. This work aims to address the crucial data gaps

that currently exist, making it easier to build evidence-based cases for government funding and policy support (M. Boswell, 2021).

More recent data collection efforts have been undertaken to update these figures. A 2024 survey conducted by Cyhoeddi Cymru Publishing Wales and funded by the Books Council, again led by Professor Max Munday of Cardiff Business School, focused specifically on Welsh book publishers. Initial findings released in press statements indicate that Welsh book publishers employ at least 100 people directly, with each full-time publishing role creating a further 0.6 jobs in the wider economy, and that publishers directly generate at least £2.6 million with a further £0.74 million generated for the Welsh economy (Cyhoeddi Cymru, 2024). However, the full report has not been publicly released, and these preliminary figures represent only the publishing segment rather than the broader publishing, printing, and bookselling ecosystem measured in the 2018 analysis. The lack of comprehensive, regularly updated economic data for the Welsh publishing sector remains a challenge for policy development and strategic planning. This contrasts with the approach taken in comparable small nations: Latvia's National Library, for example, publishes annual publishing statistics (National Library of Latvia, 2018), systematically tracking output, translations, and print runs — the kind of data infrastructure that enables evidence-based sector development and is notably absent in Wales.

### 5.2.2 Publisher distribution and infrastructure

The political institutions in Wales have been centred around the Senedd (Welsh Government building) in Cardiff since devolution in 1999 as well as many of the national arts and culture agencies, but prior to this, many cultural organisations were spread across Wales with the National Library of Wales (founded in 1907) and the Books Council (established in 1961) based in Aberystwyth and arts centres, art galleries and theatres located across the country. Significantly, the Books Council's offices and the National Library of Wales are both located on hills overlooking Aberystwyth. This decentralisation of culture in Wales is quite different to the more centralised models found in the capitals of England, Scotland, Northern Ireland and Ireland.

According to the Munday report (2018), there are currently around 73 publishers in Wales producing books, ranging from micro-publishers to medium-sized businesses like Y Lolfa. The Books Council regularly supports seventeen of these publishers with grants for Welsh-language and English-language books. Of these publishers, seven have a substantial children's programme and another six have smaller programmes or publish children's books very occasionally (A. Jones, 2022). The book publishers are diverse in terms of language, geographical location and business model. Traditional printer-publishers – 'gwasg' means press in Welsh – include Gwasg Carreg Gwalch and Y Lolfa, both maintaining dedicated office space and warehouses. Gwasg Gomer, historically the largest Welsh publisher, ceased new publishing in 2018, with its backlist subsequently redistributed to other Welsh publishers in 2021 (detailed in Section 5.4.3).

According to a survey questionnaire of Welsh publishers conducted in April 2021 (see Appendix A for details), several publishers began as small enterprises. Graffeg and Atebol originated as design, translation and content agencies, while Dref Wen, Rily Publications, Firefly Press and Broga Books all started as home-based businesses, operating from kitchen tables or attic offices, with domestic spaces serving as warehouses. Firefly Press has since established offices in Caerphilly.

Welsh publishing demonstrates a notably decentralised geographic structure that distinguishes it from centralised publishing models in London, Dublin, or Barcelona. As Figure 1 illustrates, key publishers are distributed across Wales: from Carreg Gwalch in north Wales to multiple publishers in mid-Wales (particularly Ceredigion), and clusters in southwest Wales (Carmarthenshire) and the southeast (Cardiff, Caerphilly, Bridgend). Atebol exemplifies this distributed model, maintaining offices in Aberystwyth, Tal-y-bont, Cardiff, and Carmarthen. This geographic spread reflects Wales's broader pattern of decentralised cultural institutions, with the Books Council and National Library of Wales both located in Aberystwyth rather than the capital.

From a Bourdieusian perspective, this decentralisation creates distinctive field dynamics. Unlike centralised publishing capitals where proximity facilitates intensive network effects and symbolic capital accumulation, Welsh publishers' geographic distribution necessitates

flexible operational models. All publishers work with networks of freelance professionals based throughout Wales and across the UK, enabling access to diverse talent while maintaining regional roots and eligibility for Welsh Government funding. This distributed structure shapes how publishers accumulate and convert different forms of capital, operating within what Bourdieu terms ‘restricted production’ across both linguistic fields while maintaining connections to local communities and cultural contexts. The reasons individual publishers establish themselves in specific locations – often driven by personal connections, cultural missions, or economic opportunities in particular regions – are explored through publisher profiles in Chapter 6.



Figure 1: Geographic distribution of Welsh book publishers and literary organisations

This decentralised infrastructure has direct implications for international strategy. While potentially limiting the network density and collaborative opportunities typically associated with publishing clusters, where proximity enables informal knowledge exchange, shared

services, and serendipitous partnerships, it creates alternative possibilities for international engagement. The distributed model enables flexible, relationship-based international partnerships that bypass traditional hierarchical publishing networks, while the necessity of operating across distances has already equipped Welsh publishers with skills in remote collaboration that transfer well to international contexts. How individual publishers leverage or compensate for this structural positioning is examined in Chapter 6, while the practical implications for specific international initiatives are analysed in Chapter 7.

### 5.2.3 Academic connections and publishing education

The Welsh publishing landscape is characterised by significant institutional connections, particularly within the higher education and cultural sectors. This relationship has historically manifested through both formal ownership structures and collaborative arrangements. The University of Wales Press (academic) and Peniarth (education) remain integrated within the University of Wales Trinity Saint David, representing a model of direct academic institutional engagement in publishing. Other publishers have traditionally maintained strategic partnerships through physical presence on university campuses: Honno Press at Aberystwyth University, which also hosted the literary magazine *New Welsh Review* until its 2024 acquisition by Parthian Books. The sector has undergone notable restructuring, with CAA Cymru, formerly part of Aberystwyth University's Centre for Educational Studies, being acquired by Atebol in 2020. Literary publishers Parthian and Seren previously maintained offices at Swansea University, while children's press Firefly was based at Cardiff Metropolitan University before relocating to larger premises in Caerphilly as their operations expanded. These university affiliations historically served a dual purpose: providing publishers with operational infrastructure while offering valuable industry experience to students, typically in exchange for nominal facilities costs. However, due to financial pressures in the higher education sector, many universities have withdrawn their support for publishers, with the exception of the University of Wales Trinity Saint David's continued relationship with its publishing arms. Beyond universities, other institutional publishers include the National Library of Wales and the National Museum Wales, which maintain their own publishing programmes as part of their cultural mission.

The provision for publishing education in Wales is limited, with formal education in this field having been offered through Bangor University's MA in Publishing and Book Culture in recent years. Currently, Aberystwyth University offers a Welsh-medium BA in Creative Writing and the Publishing Industry, representing the only dedicated publishing-related degree programme in Wales. This contrasts with the broader publishing education landscape in the UK, which includes well-established MA programmes at institutions like Oxford Brookes University, University College London, City University, Falmouth University, Manchester Metropolitan University, University of Lancaster and Edinburgh Napier University, as well as undergraduate publishing degrees at institutions such as Bath Spa University, Plymouth University and the University of Derby. The Books Council's current Director, Helgard Krause, has advocated for expanding this provision, specifically supporting the development of a dedicated publishing course at Aberystwyth University as part of its UNESCO City of Literature bid. Such development would align with broader efforts to decentralise publishing education from urban centres while addressing the specific needs of the bilingual Welsh publishing sector.

#### 5.2.4 Independent publishing industry and international context

Wales has developed an independent micro-publishing industry that has adapted to the country's unique linguistic and cultural situation. Unlike Ireland and Scotland, larger publishers outside of Wales have had no presence in the country to date, which is currently being advocated by some people in the industry, including Welsh literary agent Natalie Jerome (Bookseller, 2022). Penguin Random House (PRH) and HarperCollins have had offices in Ireland and Scotland in previous years with damaging consequences for the indigenous publishing industry. In Ireland, most of the English-language independent publishers which were thriving in the 1990s had disappeared by 2007 due to the economics of publishing in a small market and exacerbated by offices opening from PRH and HarperCollins (O'Sullivan, 2020). More recently, Bonnier Books UK launched its first Ireland-based imprint, Eriu, in 2022 under the leadership of publishing director Deirdre Nolan, who left Gill Books after a 20-year career in Irish publishing to establish the new venture. The imprint aims to publish 12 titles annually and represents a notable investment in Ireland-based publishing at a time

when other major publishers like HarperCollins are withdrawing their Irish editorial operations (Wood, 2022).

Scotland has also seen indigenous publishers grow and then be sold off to larger UK and international publishers uninterested in the cultural and linguistic impact on the publishing ecology (McCleery and Bold, 2012). With Covid-19 restrictions proving that staff can work from home and increased pressure on the publishing industry to be more diverse and less London-centred, the major publishers have been planning regional offices, with Hachette UK opening offices in Edinburgh, Newcastle, Manchester, Sheffield and Bristol in 2020 and 2021 and HarperCollins opening offices in London, Glasgow, Honley, Manchester and Dublin (Hachette, 2020).

A major publisher opening an office in Wales could potentially have a catastrophic effect on the fragile publishing ecology in Wales, taking valuable skills and creative talent away from the indigenous publishers. It could on the other hand provide the competition and access to the broader publishing networks that Wales needs. It would need to be handled with utmost care and respect for the local publishers. While the Welsh Government is interested in attracting a large commercial publisher into Wales as they have done successfully with the film industry, there are concerns that this strategy could make workers in Wales vulnerable to recession and redundancies.

These contemporary publishing developments establish a context markedly different from larger publishing markets. The absence of major commercial publishers (Section 5.2.4), combined with comprehensive institutional support (examined in Section 5.3), creates a field where cultural objectives and market pressures intersect differently than in mainstream UK publishing. This distinctive operational context fundamentally shapes how Welsh publishers pursue international opportunities, requiring strategies that leverage institutional support while compensating for limited commercial resources.

### 5.3 Funding and support mechanisms

The sustainability of Welsh children’s publishing relies on a complex network of funding streams and support mechanisms that reflect both governmental commitment and cultural priorities.<sup>3</sup> This section examines the financial structures, grant systems, and institutional support that enable the sector’s operation.

### 5.3.1 Books Council of Wales grants system

The Books Council administers a complex system of grants, with funding travelling from the Welsh Government administered through Creative Wales to the Books Council to publishers. The grant structure is notably more comprehensive for Welsh-language publishing compared to English-language publishing, reflecting the need to support and sustain Welsh-language literature. The grants system operates through two primary channels: production grants and creative grants. Production grants are allocated directly to publishers for the physical aspects of book production, while creative grants support authors, illustrators, editors, and marketing activities through the publishers (A. Jones, 2024).

A significant portion of the funding is distributed through block grants to ‘revenue publishers’ – established publishing houses that secure multi-year agreements through a tendering process. These publishers, such as Y Lolfa in Welsh and Firefly Press in English, receive guaranteed funding over three to four years and maintain considerable autonomy in their publishing programmes, subject to retrospective appraisal. Alongside these block grants, the Books Council offers individual literary book grants (ILBGs) and individual grants, which support both established publishers producing niche works and new publishers entering the market. These individual grants require more oversight, with manuscripts undergoing peer review and evaluation by subject-specific subcommittees comprised of industry professionals, academics, and other stakeholders. However, this rigorous assessment process creates significant operational challenges for publishers. The application

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<sup>3</sup> This analysis draws on Books Council of Wales annual reports (2018-2023), operational plans (2018-2023), and the strategic plan Wales: A Reading Nation (2021), which provided essential contextual data on funding, publishing output, and sector development.

process is time-intensive, requiring detailed proposals and documentation, while the evaluation and approval timeline can extend over several months. This delay in receiving decisions and subsequent funding critically impacts publishers' ability to compete for manuscripts, particularly in the English-language market where Welsh publishers compete directly with larger UK houses. Authors seeking timely contracts may opt for alternative publishers rather than waiting for grant approval, potentially limiting Welsh publishers' access to high-quality manuscripts. Furthermore, even when grants are approved, the funding levels available may not fully match commercial advances offered by larger publishers, creating an additional competitive disadvantage.

The Welsh-language grants system is particularly detailed, featuring both 'A' grants ranging from £4,000 to £12,000 that require individual subcommittee approval, and 'B' grants of up to £3,000 that publishers can access more flexibly from an annual allocation. This tiered approach allows publishers to support various activities, from major writing commissions to smaller translation projects. In contrast, the English-language grants system is considerably more limited, though specific details about grant amounts and structures for English-language publishing were not made available during this research. This disparity reflects the different market conditions and the specific need to sustain Welsh-language publishing as a minority language.

While these grant systems provide essential support for domestic publishing, they present particular challenges for international engagement. The current grant structures are designed primarily to support domestic publication rather than the additional costs associated with international market development, such as participation in international book fairs, rights negotiations, and translation of Welsh works into other languages.

Regarding internationalisation, an interview with Arwel Jones, Head of Publishing Development at the Books Council, reveals several important developments and challenges. The Books Council has recently supported Welsh publishers' participation in the Frankfurt Book Fair, though this initiative has been somewhat ad hoc due to last-minute funding arrangements. While the potential for international rights sales and partnerships is recognised as significant, Welsh publishers face considerable resource constraints in

pursuing these opportunities. The interview highlights the stark contrast between Welsh publishers' marketing budgets (often less than £1,000 per book) and those of major UK publishers (tens of thousands of pounds), which impacts their ability to promote their books effectively both domestically and internationally.

The Books Council has taken steps to address these challenges through capacity-building initiatives, such as providing social media marketing training to publishers, which has shown positive results in improving their promotional capabilities. However, the interview suggests that more sustained support and funding would be needed to fully develop the international potential of Welsh publishing. While the Books Council doesn't directly handle international translation grants (these are managed by Wales Literature Exchange with Arts Council of Wales funding), it plays an important role in supporting publishers' ability to engage with international markets through its various funding streams and professional development support.

These insights demonstrate both the sophistication of the Books Council's domestic support mechanisms and the opportunities and challenges facing Welsh publishing's international development. The interview suggests that while the infrastructure exists to support publishing, particularly in the Welsh language, additional sustained funding and capacity building would be needed to fully realise the sector's international potential.

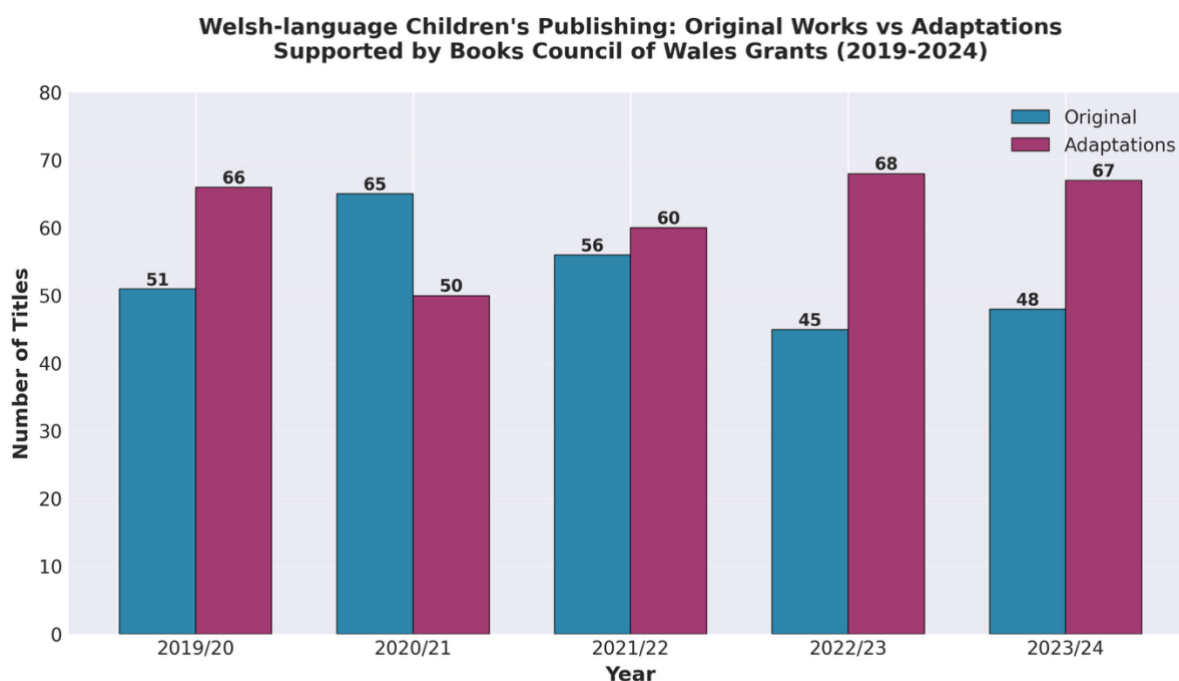
The grant system's impact can be clearly seen through analysis of the Books Council's support data from 2019-2024. This data reveals distinct patterns in how funding supports both original works and adaptations across the children's and adult literature sectors, with notable differences between Welsh and English language publishing. While Welsh-language publishing sees approximately 115 children's titles supported annually, English-language children's publishing receives support for roughly 35-40 titles per year through various grant schemes (A. Jones, 2024). Print runs also indicate careful market calibration, typically ranging from 700 to 2,000 copies for Welsh-language titles, with an average of approximately 1,250 copies (A. Jones, 2024). The following tables present a comprehensive view of the Council's Welsh-language grant distribution patterns, demonstrating the

strategic balance between supporting original Welsh-language content creation and adapted works.

**Table 3: Welsh-language books for children and YA supported by grants from the Books Council of Wales (2019-2024)**

Year	Total	Original	Adaptations	Early Years	Primary Age	Teen/ YA	Reprint	Special Content	New Editions
2023/24	115	48	67	66	30	3	15	0	1
2022/23	113	45	68	51	39	5	17	0	1
2021/22	116	56	60	35	52	9	7	12	1
2020/21	115	65	50	36	36	6	30	7	0
2019/20	117	51	66	56	42	6	0	13	0

Source: Books Council of Wales, 2025.



Source: Books Council of Wales, 2025

Figure 2: Welsh-language Children's Publishing: Original Works vs Adaptations (2019-2024)

**Table 4: Welsh-language books for adults supported by grants from the Books Council of Wales (2019-2024)**

Category	2023/24	2022/23	2021/22	2020/21	2019/20
Novels	24	22	25	23	27
Poetry	15	7	16	9	13
Biography	12	15	5	14	16
Short Stories	5	2	4	3	5
History/Local History	4	3	1	12	11
Essays/Discussions	0	1	12	3	4
Religion	1	2	7	1	4
Welsh Learners	3	6	10	4	3
Travel	2	0	0	0	0
Language	1	2	0	0	0
Studies	0	2	2	3	1
Drama	0	0	0	0	1
Other	15	16	10	9	11
Reprints	6	11	1	13	0
New Editions	1	0	0	0	0
<b>Total Original</b>	<b>89</b>	<b>88</b>	<b>93</b>	<b>94</b>	<b>94</b>
<b>Total Adaptations</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>2</b>
Total Publications	89	89	93	94	96

Source: Books Council of Wales, 2025.

**Table 5: Welsh-language books supported by grants from the Books Council of Wales (2019-2024)**

Year	Total Titles	Original	Adaptations
2019/20	213	145	68
2020/21	209	159	50
2021/22	209	149	60
2022/23	202	133	69

2023/24	204	137	67
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*Source: Books Council of Wales, 2025.*

The Books Council’s grant support data for Welsh-language books from 2019-2024 reveals distinct patterns in how original works and adaptations are funded across children’s and adult literature sectors.

In children’s publishing, the grant programme demonstrates a strong emphasis on adaptations, which have comprised approximately half or more of all supported titles in most years during the period, ranging from 43.5% in 2020/21 to 60.2% in 2022/23. The number of adaptations has varied over the five-year period, from a low of 50 titles in 2020/21 to 67-68 titles in the most recent two years. This strategy appears particularly pronounced in early years content, where adaptations play a key role in providing Welsh-speaking children access to internationally successful titles while maintaining cultural relevance. These adaptations are mostly sourced from English-language titles apart from the handful represented in the import case studies in Chapter 7.

The adult publishing sector presents a markedly different approach, with an overwhelming focus on original Welsh-language works. Between 2019 and 2024, adult titles have remained almost exclusively original content, with only three adaptations funded across the entire five-year period. This commitment to original work spans various genres, with novels, poetry, and biography consistently receiving the strongest support.

The overall grant distribution reflects these distinct sector strategies. While total supported publications have remained relatively stable, ranging from 202 to 213 titles annually, the balance between original works and adaptations has shifted. The most recent data shows 137 original works and 67 adaptations in 2023/24, demonstrating a sustained commitment to both creating new Welsh-language content and bringing English-language works accessible to Welsh readers.

This dual approach suggests a carefully considered strategy: supporting original adult literature to foster Welsh-language creative development while using adaptations in children’s publishing to ensure young readers have access to a broad range of reading materials in Welsh. The stability in total publication numbers, despite some internal variations, indicates a sustainable level of support for Welsh-language publishing across both sectors.

However, this grant-funded model predominantly supports frontlist development rather than sustained backlist management. In commercial publishing, a strong backlist provides stable revenue that enables investment in new projects; in the Welsh model, this dynamic is inverted, with new production driven by annual grant cycles rather than accumulated backlist income. This has implications for both long-term sector sustainability and international market development, where backlist titles with proven track records are often more attractive to foreign publishers seeking rights acquisitions.

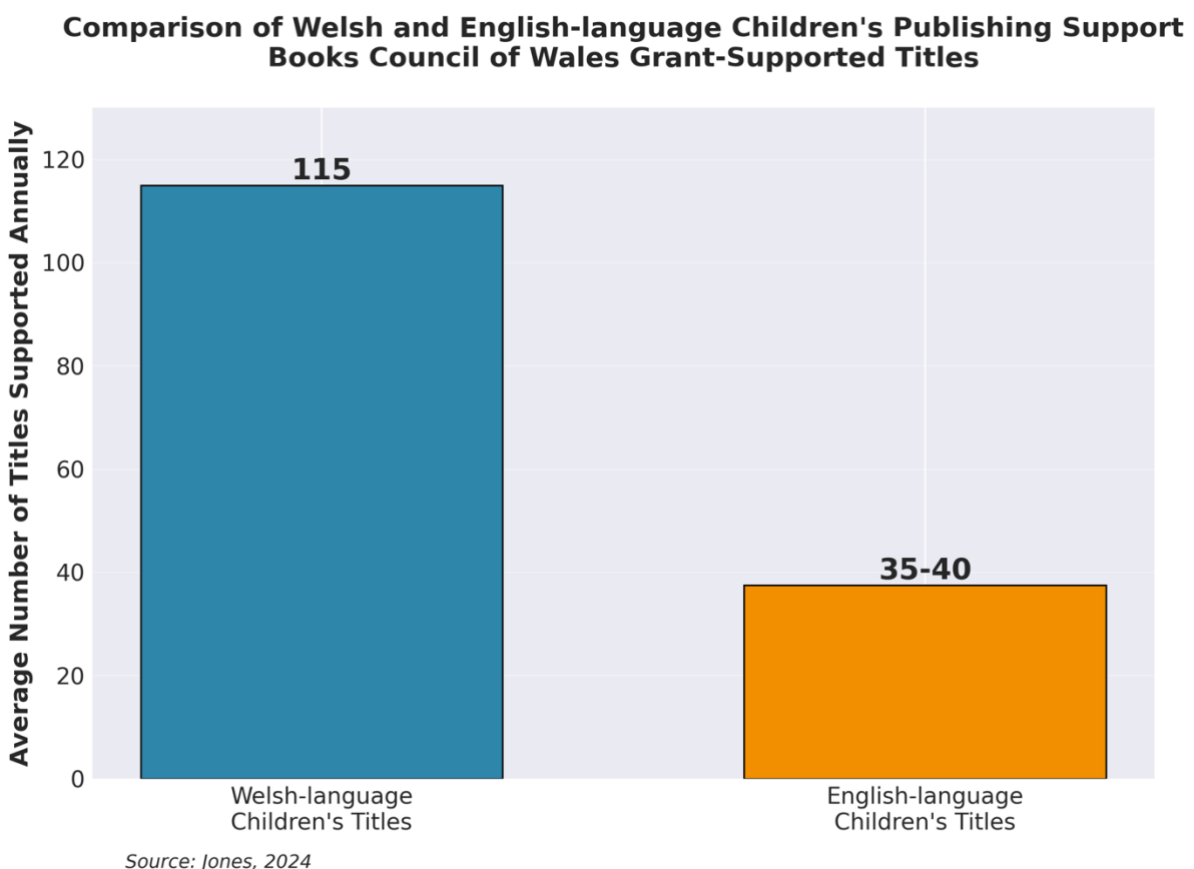


Figure 3: Comparison of Welsh and English-language Children’s Publishing Support

### 5.3.2 Book market and distribution

The book market in Wales operates through multiple sales and distribution channels. Books are sold through traditional retail bookshops (including independent bookshops and chain stores such as Waterstones and WHSmith), online retailers (primarily Amazon), direct sales from publishers, and through library suppliers. Distribution is handled through major UK wholesalers such as Gardners and Peters, who specialise in library supply and children's books.

In addition to these UK-wide channels, Wales has a unique bilingual service provided by the Books Council's distribution centre. Many book sales in Wales go through the centre, as publishers in receipt of grant funding from the Books Council are contractually obliged to distribute their books in Wales through it, although they can also sell through other UK wholesalers and retailers, including direct sales and online platforms. The Books Council has its own online bookshop, Gwales, as well as an e-book and audio book distribution service, Ffolio, launched in 2021. Pre-pandemic in 2019/20, the Books Council's distribution centre's turnover was £2.8 million in net sales, which fell to £2.34 million in 2020/21 due to COVID-19 pandemic disruptions, including bookshop closures and reduced retail activity (Books Council of Wales, 2022). These platforms, the distribution centre, Gwales, and Ffolio, represent what Klamet (2017) identifies as a deliberate effort by small nations to maintain cultural and linguistic infrastructure outside major international ecosystems. However, as Klamet warns, the scope of such local initiatives is significantly constrained by oligopoly structures in digital distribution. This tension is evident in Wales, where despite these national platforms, Amazon is a key business customer of the Books Council of Wales (Books Council of Wales, 2024), illustrating the degree to which even well-supported small-nation publishers remain dependent on the very platforms that threaten to marginalise them.

Regardless of which distribution channel bookshops use – whether ordering from the Books Council's distribution centre or from UK wholesalers like Gardners, the underlying discount economics create significant challenges for publisher sustainability. Bookshops typically require discounts of 40-50% off retail price for chain stores and 35-40% for independents. The Books Council's distribution service operates on terms of 55% of retail price on a full

sale-or-return basis with an initial stock of 30 copies (Books Council of Wales, 2024). The sale-or-return practice, standard across UK bookselling regardless of distribution channel, allows retailers to return unsold stock for full credit (Clark and Phillips, 2019). This means publishers effectively loan inventory to the market without guaranteed sales – whether books are distributed through the Books Council or Gardners – creating cash flow pressures particularly acute for smaller presses with limited working capital. These structural pressures make international rights income increasingly important for publisher sustainability, as examined in relation to internationalisation strategies in Chapter 7, since domestic sales alone struggle to cover both production costs and business development needs.

The Books Council's role extends beyond distribution to direct financial support for publishers. During 2020/21, the Books Council provided grant support to the publishing sector in Wales amounting to around £2.6 million. Of this, £0.7 million was provided in English-language grants (50 per cent going to support cultural periodicals and revenue grants for publishers), and £1.7 million provided in Welsh grants, with 64 per cent allocated to book publishers and 32 per cent to magazine publishers (Books Council of Wales, 2022). This represents a slight increase from the £2.3 million in grants provided in 2017, as documented in the Munday report (2018), which concluded that the total support being offered by the Books Council at that time represented a small proportion of the economic activity that is directly and indirectly supported by the publishing sector in Wales, at just over £49 million of gross value added (GVA). Not only is this seen as an excellent return on investment, but the report also highlights that the industry provides a critical cultural contribution to Wales both domestically and internationally (Munday, 2018). An earlier Welsh Government review of its support for books from Wales (Rolph, 2014) had similarly concluded that the Books Council's delivery model represented an effective use of public funding, while noting that marketing and distribution, both within and beyond Wales, required more focused investment, a finding that remains pertinent to the internationalisation challenges examined in this thesis. This financial investment is seen as critical to support Welsh-language publishing in a tiny market, and also important to support English-language publishing in Wales to help elevate it in a large international market.

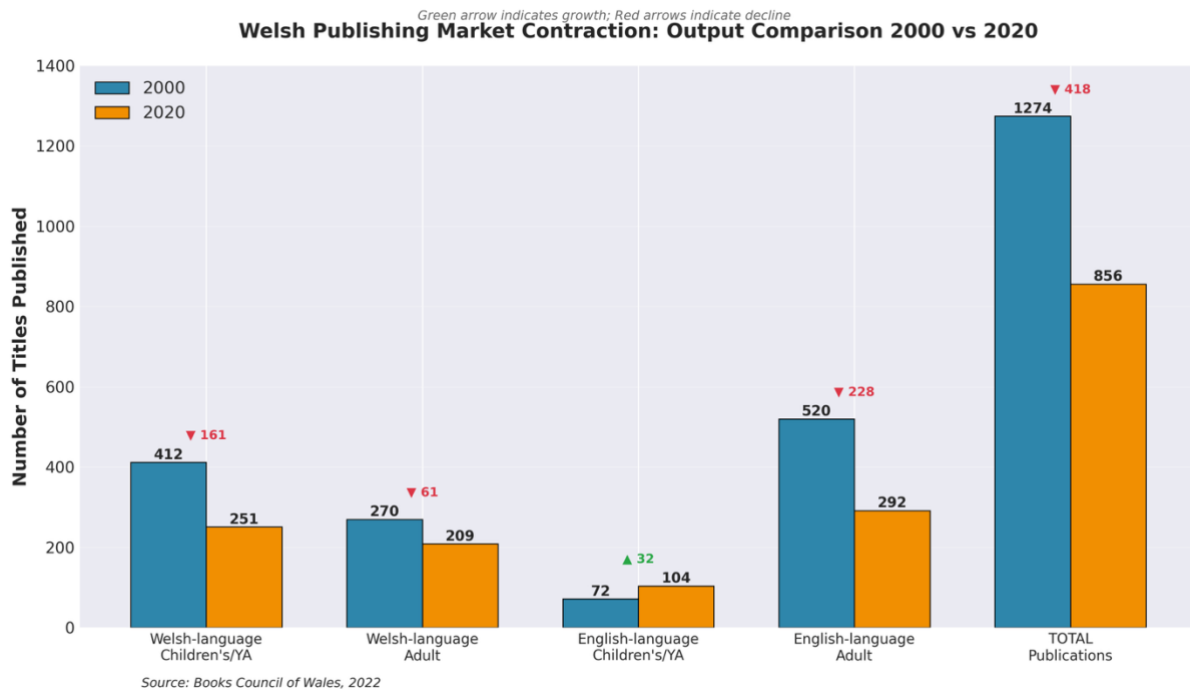
### 5.3.3 Historical market trends and contraction

The Welsh publishing sector has undergone significant transformation over the past two decades, with data from the Books Council revealing substantial market contraction. Table 6 presents a comprehensive comparison of publishing output between 2000 and 2020, highlighting notable changes across language categories and target audiences. Mairwen Jones's (2014) report to the Books Council Publishing Grants Panel had already identified this trajectory, documenting declining sales in Welsh children's books since 2008 alongside a growing gap in quality provision for readers aged nine and above, and highlighting severe underfunding of marketing relative to editorial investment.

**Table 6: Publishing market output comparison, 2000 and 2020**

Category	2000	2020	Change
<b>Welsh Language</b>			
Children's/YA	412	251	-161
- of which non-fiction/textbooks	281	94	-187
Adult titles	270	209	-61
<b>Total Welsh Language</b>	682	460	-222
<b>English Language</b>			
Children's/YA	72	104	+32
Adult titles	520	292	-228
<b>Total English Language</b>	592	396	-196
<b>Total Publications</b>	1,274	856	-418

*Source: Books Council of Wales, 2022.*



*Figure 4: Welsh Publishing Market Contraction: Output Comparison 2000 vs 2020*

This data reveals a dramatic market contraction of 32.8% (418 titles) between 2000 and 2020. Several key trends emerge from this analysis. First, the most significant decline occurred in Welsh-language educational publishing, where children’s non-fiction and textbooks plummeted by 66.5% from 281 to 94 titles, representing a crisis in Welsh-medium educational resources. Second, English-language children’s and young adult publishing emerged as the only growth area during this period, increasing by 44% from 72 to 104 titles, suggesting evolving market dynamics where English-language children’s literature found expanding opportunities despite broader market contractions. Third, both Welsh and English-language adult publishing experienced substantial declines, falling by 23% and 44% respectively.

This historical decline provides essential context for understanding the current grant system detailed in Section 5.3.1. The stabilisation evident in recent grant-funded output (approximately 200 Welsh-language titles annually from 2019-2024) suggests that while the market contracted significantly from its 2000 peak, targeted grant support has enabled the sector to find a more sustainable operational level. The dependence on grant funding reflects what Bourdieu terms ‘state consecration’—institutional support that confers cultural legitimacy while enabling production that might not be commercially viable.

However, this reliance on domestic funding creates structural challenges for international market development, as explored in subsequent chapters.

The contraction of the Welsh publishing market outlined above underscores the sector's dependence on state support and its limited commercial scale. Within this context, publishers have increasingly turned to creative and strategic approaches to sustain output and reach new audiences. One of the most significant of these has been the development of translation and adaptation strategies, which have not only helped to maintain a steady supply of Welsh-language children's books but also positioned Welsh publishers within wider cultural and linguistic networks. The following section examines how translation practices have evolved in contemporary Welsh publishing, exploring their dual role in reinforcing domestic language policy and facilitating international engagement.

#### 5.4 Contemporary translation and adaptation strategies

The Welsh publishing sector's approach to translation reveals sophisticated engagement with what Venuti (2008) identifies as the central tension between 'domestication' and 'foreignisation' in translation practice. Publishers consistently differentiate between 'translation', rendering text from one language to another while maintaining source culture markers, and 'adaptation', localising content through Welsh place names, cultural references, and idioms. Within Bourdieu's framework, this choice reflects different strategies for accumulating cultural capital. Welsh-language adaptations of English texts employ domestication to serve pedagogical functions while maintaining connection to recognisable international brands. Conversely, translations of Welsh works into English must balance sufficient Welsh cultural specificity to differentiate the work in competitive markets while achieving accessibility for non-Welsh readers. As Sapiro (2008) argues (see also Section 2.2), translation operates within asymmetric power relations between languages, and Welsh publishers' strategic use of adaptation versus translation reflects acute awareness of these dynamics.

The research findings reveal a consistent and deliberate pattern of differentiation across the sector. Publishers interviewed for this study draw a clear practical distinction between the

two modes: Tunnicliffe (Rily, 2021) describes adaptation as ‘a completely different skill set from translations,’ emphasising that a successful adaptation should ‘read as if it was written in the original language.’ Atebol similarly frames their approach as ‘cultural localisation rather than simple translation’ (O. Saunders-Jones, 2021), positioning adaptation as a creative act distinct from linguistic transfer. This sector-wide differentiation maps directly onto Venuti’s (2008) domestication/foreignisation spectrum: publishers producing Welsh-language adaptations of English texts are engaged in systematic domestication — prioritising cultural familiarity and pedagogical accessibility — while publishers like Firefly Press, in maintaining Latvian cultural elements in *Dog Town*, pursue a deliberate foreignisation strategy. Within Sapiro’s (2008) framework, this distinction also reflects publishers’ acute awareness of asymmetric power relations between languages: adaptation serves the needs of a minority language audience absorbing dominant-language content, while translation outward requires preserving sufficient cultural distinctiveness to achieve market differentiation internationally. How individual publishers have developed and operationalised these distinct approaches is examined in detail through the publisher profiles in Chapter 6, particularly Rily Publications (Section 6.7) and Atebol (Section 6.1).

As demand for quality books for children increased with the growth of Welsh-medium education in the post-devolution period, both for the classroom and in the home, new publishers emerged specialising in translating popular children’s books from English into Welsh, combining translation with original language publishing following strategic acquisitions.

As demonstrated in Section 4.3, publishers like Dref Wen, Rily and Atebol chose to adapt popular English children’s books into Welsh in a bid to meet the needs of children learning Welsh (first language (L1) and second language (L2)) by setting familiar books in Wales to make them more relevant and appealing to both the child reader learning Welsh, and the adult buying the book who would recognise well known authors such as David Walliams, Julia Donaldson and Roald Dahl. This was outlined in the Beaufort Research (2017) report that argued the need for strong brands to appeal to these audiences. This differentiation between translation and adaptation is prominent in Wales, where many of the translated

books from English are localised, using Welsh names, locations and idioms to appeal to children in Wales.

Some books are changed quite significantly to meet a linguistic, cultural, and sometimes political need. The Welsh adaptation of *The Lost Words* by Robert Macfarlane and Jackie Morris (Hamish Hamilton, 2017), *Geiriau Diflanedig* (Graffeg, 2019), is a good example of adding to the rich heritage of children's literature in Welsh through translation. The acrostic poems written by Macfarlane have been rewritten by the poet, children's writer and academic Mererid Hopwood. The title *Geiriau Diflanedig* translates as 'disappeared words' rather than 'lost words' as these words haven't been removed from the Welsh dictionary (*The Lost Words* was a creative response to common nature words being removed from the Oxford Children's Dictionary in 2016), but have a more charged meaning in a minority language context. This is not only a matter of losing touch with nature but also with the Welsh language. The adaptations of the poems highlight the fragility of both language and nature, reminding us that we need to remember and celebrate these 'lost words'. The Welsh-language edition was fully supported by Macfarlane and Morris, who also supported the successful Crowdfunder campaign run by the publisher to fund a copy of the book in every primary school in Wales.

A similar strategy can be seen from Welsh into English. When Manon Steffan Ros adapted or self-translated her best-selling YA novel *Llyfr Glas Nebo* (*Y Lolfa*, 2018) into English, she chose to add to the back story of the main character to explain her relationship with the Welsh language as well as changing most of the main characters' names (Farr, 2021). This is expanded on in Section 7.2.1.

Such strategic adaptations reflect individual authorial decisions, but the overall balance between original and translated content has been shaped by policy. During the 2000s, there was such a high number of translations and adaptations of English-language children's books published in Welsh that the Books Council commissioned a survey into the quantity and quality of Welsh-language children's books being published at the time. The resulting *Survey of Books for Children and Young People: Final Report* (S.M. Rosser, 2017) made a number of important findings. One key point raised was that an average of 70 per cent of

Welsh-language children’s books published between 2008 and 2014 were translations from original English-language books mostly published outside of Wales, with just 30 per cent of original titles funded, with an obvious impact on indigenous publishing and writer and illustrator development in Wales (S.M. Rosser, 2017).

S.M. Rosser’s recommendations went on to inform the Books Council’s strategic and operational plans and, by 2020, Welsh-language publishing had returned to a healthier balance of 50/50 when it came to original versus translated books. Recent data from 2020–2024, however, has seen an increase of adaptations from English.

**Table 7: Original vs adapted Welsh-language children’s books supported by grants (1978-2024)**

<b>Time Period</b>	<b>Original Content (%)</b>	<b>Adapted Content (%)</b>
1978-1998	35	65
2008-2014	30	70
2019	50	50
2023-24	42	58

*Source: Books Council of Wales, 2025.*

Arwel Jones from the Books Council suggests that this increase of adaptations can be partly explained by programmes run by the Books Council to diversify its literature with programmes like Darllen yn Well (Reading Well), which introduces books in Welsh to help with mental health and well-being (Books Council of Wales, 2024a). This programme translates books from the English programme into Welsh as well as including some original language books. Another programme is the Rhyngom project, funded by the Welsh Government to diversify children’s books available in Wales (Books Council of Wales, 2024b).

#### 5.4.1 Translating Welsh books into English

There have been many children's books translated from English into Welsh (and in the 1970s, thanks to Dref Wen, also from other languages) but where are the books translated from Welsh into English and other languages? Without Welsh-language books being translated into English, it is difficult for these books to be discovered internationally. Before the UK devolved power to the Welsh Government, the lack of translations from Welsh into English might have been seen as a political and cultural choice, encouraging people to learn the language to access Welsh literature. Indeed, many Welsh-language writers, including Manon Steffan Ros, would say they chose to write in Welsh rather than English for creative and political reasons (Ros via British Council, 2021).

Post devolution, we can see some evidence of Welsh-language publishers and authors beginning to translate their children's books into English to break into the English-language market. Y Lolfa has recently started publishing some of its more successful picture books into English (*The Quilt*, *Those People Next Door*, *Little Honey Bee*). Similarly, Carreg Gwalch, which publishes a mixture of original books and translations from English, has begun publishing its successful YA novels about Welsh history by Myrddin ap Dafydd into English for the schools market in Wales. Carreg Gwalch also successfully published *Hanes yn y Tir / History Grounded* by Elin Jones, a non-fiction book on Welsh history, as a co-edition funded through the Education Department with a copy of both editions provided for every school in Wales.

Caryl Lewis has achieved significant international success through both translation and writing in English. She is a best-selling author of books for children and adults in the Welsh language as well as a screenwriter for dramas on the Welsh-language channel S4C. Lewis' breakthrough best-selling novel *Martha, Jac a Sianco* (Y Lolfa 2004) won Wales Book of the Year in 2005 and went on to be translated into English by editor and translator Gwen Davies and published by Parthian in 2007 as well as being adapted into a feature film in 2008 by Lewis.

In 2021, Caryl Lewis achieved a significant breakthrough in English-language publishing, securing major deals with two prestigious London publishers: a contract with Doubleday for adult fiction (*Drift*, 2022) and a separate pre-emptive six-figure deal with Macmillan Children's Books for middle-grade novels (*Seed*, 2022), alongside a forthcoming title with Simon & Schuster (Chandler, 2021). These acquisitions, negotiated by Welsh literary agent Anwen Hooson of Bird Literary Agency, marked Lewis's successful expansion from Welsh-language publishing into the wider UK market. This transition demonstrated the potential for Welsh authors to maintain their cultural identity while reaching international audiences through English-language publishing. Hooson's representation strategy includes negotiating simultaneous Welsh-language editions where possible, though publishing timelines don't always permit parallel releases.

At a Firefly Ignite webinar (2023) addressing pathways to publishing for Wales-based writers, Welsh literary agent Anwen Hooson offered encouraging advice for Welsh-language authors considering English-language markets. Hooson drew on her experience representing Caryl Lewis, whose successful transition to English-language publishing highlights the potential for Welsh authors to reach broader markets. After establishing herself as a successful Welsh-language writer for screen, children, and adults, Lewis began writing in English at age forty, supported by Hooson through the transition.

Lewis's success in English-language publishing has garnered both commercial and critical recognition. In a profile for *The Bookseller*, her transition to English-language markets demonstrates the commercial viability of Welsh voices in international publishing (Sanderson, 2022).

Hooson articulates a nuanced perspective on Welsh authors writing in English, emphasising the potential for broader cultural impact. Speaking of Caryl Lewis's transition, she explains that Lewis 'wanted to tell Welsh stories not just in a minority language where the audience is going to be naturally smaller'. Significantly, Lewis found that her authorial voice, developed in Welsh, transferred effectively to English: 'Her voice is hers. It can be brilliant because you get to hone that in your mother tongue and then you get to look outwards' (Hooson cited in Firefly Press, 2023).

This approach to expanding Welsh literary voices into English markets reflects a broader strategic vision. 'I'm all for redefining the way the world looks at Welsh writing,' Hooson argues. 'What better way to expand the view of Welsh writers than to get genuinely Welsh stories out onto a bigger stage' (Hooson cited in Firefly Press, 2023). Her representation strategy includes advocating for simultaneous Welsh-language editions, as demonstrated with Lewis's *Seed* (Macmillan Children's Books) and *Hedyn* (Y Lolfa), ensuring equal prominence for both versions at literary and school events.

This model of literary development continues to create opportunities for Welsh authors. In 2024, Hooson negotiated a seven-book deal with Puffin for Welsh author-illustrator Huw Aaron. Aaron views his experience in Welsh-language publishing as valuable preparation for international markets, allowing creative experimentation with lower commercial risk. As Aaron stated in *The Bookseller* (2025): 'I must also add how indebted I am to all in the wonderful Welsh-language publishing world who have supported my career thus far and given my imagination wings'. Like Lewis, Aaron is grateful to the Welsh-language publishing sector for providing him with a platform to experiment with his creative art and voice.

The impact of these pathways to publishing extends beyond individual success stories. The Firefly Ignite webinar series, funded by Creative Wales and the Books Council's New Audiences Fund, aims to demystify publishing for underrepresented Welsh writers. Its effectiveness is evidenced by emerging authors like Megan Angharad Hunter, who credits the programme for enabling her connection with Hooson as her agent (Hunter, 2024). Hunter acknowledges the programme's role in empowering Welsh writers 'to tell the stories that need to be told' (Hunter cited in Firefly Press, 2024).

Several other Welsh authors have successfully employed self-translation to reach international markets. Manon Steffan Ros adapted her best-selling novel *Llyfr Glas Nebo* (Y Lolfa, 2018) into English as *The Blue Book of Nebo*, which subsequently facilitated translations into fifteen languages. Similarly, Fflur Dafydd adapted her prize-winning novel *Llyfrgell* as *The Library Suicides* (Hodder & Stoughton, 2023). The creative processes and theoretical frameworks underlying these self-translation approaches are examined in

Section 5.4.4, while Ros's novel provides a detailed case study of international rights sales in Section 7.2.1.

The translation and adaptation strategies outlined here reflect domestic market positioning and commercial objectives. However, the creative processes underlying these adaptations and the theoretical frameworks that inform self-translation are examined in Section 5.4.4. How publishers develop translation-focused business models is examined through publisher profiles in Chapter 6 (particularly Rily Publications, Section 6.7; Atebol, Section 6.1; and Dalen, Section 6.4). Export case studies in Chapter 7, Section 7.2 demonstrate how this domestic translation capabilities inform international rights sales, while the broader strategic implications of translation for international market access are analysed in Chapter 8, Section 8.4.

#### 5.4.2 Sourcing books from other languages today

In addition to recommending more original Welsh-language publishing, S.M. Rosser (2017) also advised sourcing titles from languages other than English to strengthen links with international publishers and diversify the Welsh market. At present, Dalen is the only publisher regularly translating children's books and comics from other languages, most notably *Tintin* and *Asterix*, into Welsh and other Celtic and minority languages, including Irish, Scots, Scottish Gaelic, Breton, and Cornish. Dalen's multilingual co-edition model, established by Alun Ceri Jones in 2005, illustrates how translation can sustain minority-language publishing across interconnected markets. This model and its evolution are discussed in greater detail in Chapter 6, Section 6.4.

Data from the survey questionnaire reveals that Welsh publishers express interest in acquiring rights from languages beyond Welsh and English, yet face several significant challenges in developing this area of their publishing programmes. These barriers reflect common issues identified in research on publishing translated children's literature (Lathey, 2016; O'Sullivan, 2005), including limited resources and language knowledge for identifying and evaluating foreign language titles, editors' reluctance to risk publishing a manuscript in

a language they are unfamiliar with, lack of access to readers in source languages, and challenges in promoting books without author presence for marketing activities. This last factor has become increasingly significant in contemporary publishing, where author engagement through social media and events plays a crucial role in book promotion. Conversely, advances in AI translation technology, particularly tools like DeepL, could reduce initial assessment barriers for publishers considering international acquisitions, enabling more informed decisions about manuscripts in languages beyond their current expertise.

The funding landscape presents additional complexities. While international literature promotion agencies often provide support for translation costs, publishers must secure separate funding from the Books Council to cover production expenses. This multi-stage funding process requires significant time investment and coordination, creating administrative barriers that can discourage publishers from pursuing international acquisitions. Consequently, rather than developing systematic strategies for publishing translations from other languages, Welsh publishers currently approach such projects on an experimental basis, undertaking occasional ventures when specific opportunities arise.

#### 5.4.3 English-language children's publishing in Wales

As we have discovered, the children's publishing industry in Wales developed over time to support the Welsh language but, in the 1970s and 1980s, there was a growing awareness of the importance of developing English-language publishing in Wales to enable all children to see themselves reflected in their literature. Before the 1970s, Welsh publishing lacked the expertise and resources to support English-language writing and writers writing in English from Wales had to seek publication in London until Barn Owl Press was established in the 1970s, specialising in children's books set in Wales. They published *The Prize* by Irma Chilton in 1983. There were very few other original English-language children's books published in Wales until Gomer Press set up its Pont Books imprint in 1992 under the editorship of John Spink (1992) in response to teachers lobbying the Arts Council of Wales for more good-quality original English-language children's books set in Wales. The Books Council supported this imprint through its editorial, design and marketing services and Pont Books dominated

English-language children's books through the 1990s and 2000s with direct access to schools, libraries and bookshops through the Books Council distribution service and marketing department, winning the Tir na n-Og Children's Book Awards English-language award seven years running between 2005 and 2012. With the closure of Gomer's publishing programme in 2018, including its Pont Books imprint, the company sold its publishing assets in 2021 while maintaining its printing operations. Atebol acquired the children's book list, including contracts, inventory, and the commercially significant *Sali Mali* brand and series, while Y Lolfa acquired the complete adult book catalogue with all associated contracts and stock (Comerford, 2021). This redistribution demonstrates strategic backlist consolidation examined in Sections 6.1 and 6.8. The funding was redistributed amongst other publishers funded by the Books Council to develop their lists, as well as to encourage new publishers like Broga (see Section 6.2).

There are now only two publishers in Wales dedicated to publishing original English-language children's books, Firefly Press and Graffeg (see Sections 6.5 and 6.6 for detailed case studies). Firefly Press was set up by editors Penny Thomas and Janet Thomas in 2013 after a successful tender from the Books Council to publish a series of chapter books set in Wales to encourage children to read for pleasure and address poor literacy levels as well as show children in Wales that they can have adventures in Wales. Their fiction list has developed year on year, with their books being shortlisted and winning a number of prestigious UK prizes, including the Branford Boase Award, the Tir na n-Og Children's Book Award in Wales and the Yoto Carnegie Medal, as well as the company winning the Small Press of the Year (Wales) category in the British Book Awards for consecutive years. They set the standards high for commissioning and editing good-quality stories for all ages from well-established and debut authors, many with a connection with Wales, with attractive covers that could stand out in the highly competitive UK market. The publisher has had a real impact on the publishing landscape in Wales, with former Director of the Books Council of Wales, Elwyn Jones, naming his support for the company as one of the highlights of his tenure (E. Jones, 2021). The online arts magazine *Wales Arts Review* included the establishment of Firefly Press as a key cultural moment that defined contemporary Wales (Wales Arts Review, 2023).

Graffeg was established in 2004 and grew out of the managing director Peter Gill's successful design agency, raising standards in illustration and design with high production values. Gill was joined by Matthew Howard in 2010, a former Books Council sales officer, and the company started up a children's imprint in 2017. The publishing programme included reissues of out-of-print books and new commissions from already established authors and illustrators such as Nicola Davies, Malachy Doyle, James Mayhew and Jackie Morris as well as debut authors and illustrators. The company launched the Welsh-language children's books imprint Graffeg Bach in 2021, a separate Welsh-language imprint of translations of their picture books into Welsh, as well as publishing translations of Irish, Czech and Estonian picture books into English and Welsh (Howard, 2021).

#### 5.4.4 Bilingualism and self-translation

Contemporary Welsh authors are increasingly engaging with self-translation as a means of reaching broader audiences while maintaining their cultural identity. Through examining five distinct approaches to self-translation, we can observe how Welsh-language writers are navigating the complex relationship between minority and majority languages in their work, demonstrating what Deleuze & Guattari (1986) would describe as a 'minor literature' – using the major language to express their minor-language culture and subvert from within.

These self-translation practices demonstrate the process Grutman & Van Bolderen (2014) describe, whereby self-translating authors possess both authority over their original text and the agency to reshape their work for different audiences. Rather than straightforwardly translating their original texts word for word, Welsh bilingual authors take the opportunity to adapt and 'improve' when presenting their work to a wider readership — exercising what Grutman & Van Bolderen call the 'poetic license to rewrite their originals' (2014). This approach enables them to preserve essential cultural elements while making strategic adjustments for international audiences. The following approaches illustrate how different authors employ this poetic license in distinct ways.

Caryl Lewis demonstrates how established Welsh-language authors can successfully transition to writing directly in English while maintaining their cultural voice. After building her career as a Welsh-language novelist and screenwriter, Lewis began writing in English at age forty, supported by her agent Anwen Hooson. Unlike other authors who adapt existing Welsh texts into English, Lewis writes new English-language works while her agent negotiates simultaneous Welsh-language editions where possible, translated by professional translators, as demonstrated with *Seed* (Macmillan Children's Books, 2022) and *Hedyn* (Y Lolfa, 2022). Her authorial voice, developed through the Welsh literary tradition, transferred effectively to English writing. In a profile for *The Bookseller*, Lewis credited the Welsh *eisteddfod* tradition for developing her creative voice, noting how the festival's culture of competitions and integration of multiple art forms helped shape her writing (Sanderson, 2022). This cultural grounding in Welsh enables what Hooson describes as a distinctive approach: 'Her voice is hers. It can be brilliant because you get to hone that in your mother tongue and then you get to look outwards' (Hooson cited in Firefly Press, 2023). Lewis's approach demonstrates that a distinctively Welsh cultural voice and perspective can be maintained when writing directly in English, rather than requiring translation from Welsh originals.

Manon Steffan Ros's post-apocalyptic novel *Llyfr Glas Nebo* (Y Lolfa, 2018) represents a significant breakthrough in exporting Welsh literature to international markets. Set in a post-nuclear fallout in North Wales, the novel follows a mother and son's survival as they maintain their language and culture while modern life crumbles around them. The novel, which won both the Eisteddfod Prose Medal in 2018 and Wales Book of the Year in 2019, demonstrates a domestication approach to translation strategy. Initially resistant to working in English, Ros came to embrace her dual linguistic identity: 'I previously battled against doing anything in English as I thought it was the majority language. I almost tried to deny my joy in the English language, before making peace with the fact that I have two languages' (Ros, via British Council, 2021).

This evolution manifests in her approach to adapting the novel into English as *The Blue Book of Nebo* (Deep Vellum, 2021; Firefly Press, 2022), where she chose to treat the English version as an original work rather than a translation. As a bilingual writer, Ros faced a

distinctive creative challenge: justifying why her characters would be speaking English in the English version. While adult monolingual English readers might typically approach translated literature with an understanding of its ‘foreignness’ – naturally assuming that Welsh characters in a translated Welsh novel would be speaking Welsh among themselves – Ros chose to address this challenge directly by transforming it into a thematic strength. ‘I became interested in language identity and ownership whilst writing *The Blue Book of Nebo* – why do so many people feel that their Welsh is substandard, and that there are degrees of quality to spoken Welsh?’ (Farr, 2021). Through this domestication approach, Ros took the opportunity to expand on themes of Welsh language and identity that were implicit in the original, making them more explicit for an international audience. In the English adaptation, Rowenna’s relationship with the Welsh language becomes a more prominent narrative arc, with her rediscovering her connection to Welsh through the books she salvages from the abandoned library.

This creative challenge is not unique to Ros. The bilingual children’s author Elen Caldecott encountered similar complexities when writing in English about Polish characters speaking their native language. As Caldecott discussed in an interview with Just Imagine (Gamble, 2020), bilingual writers in Wales often find simple attributive phrases like ‘speaking in Polish’ inadequate for capturing the nuanced linguistic dynamics of their stories. Interestingly, novels written in Welsh often feature English-speaking characters whose dialogue is presented in English within the Welsh text, highlighting the complexities of representing multiple languages within a single work.

Ros’s self-translation process exemplifies what Deleuze and Guattari (1986) term ‘deterritorialisation’ – the freeing of cultural elements from their original territorial boundaries to function productively in new contexts. Through her reimagining of *Llyfr Glas Nebo* as *The Blue Book of Nebo*, Welsh cultural concepts, linguistic identity markers, and post-apocalyptic rural Welsh landscapes become deterritorialised from their Welsh-language territory and reterritorialised within English-language literary space. Crucially, this is not cultural loss but strategic mobility: Welsh elements maintain their political charge and collective significance while gaining international reach.

Ros's approach goes beyond simple linguistic transfer. Her addition of explicit themes about Welsh language identity and her reconceptualisation of character relationships represent what Deleuze and Guattari would recognise as creative subversion – using the major language to articulate minor literature's collective political values. The novel's translation into multiple languages, along with its stage adaptation and ongoing film development, validates this strategy's international viability, as examined in detail in the case study in Section 7.2.1.

Fflur Dafydd's adaptation of her prize-winning thriller *Y Llyfrgell* as *The Library Suicides* (Hodder & Stoughton, 2023) illustrates how genre considerations can shape self-translation decisions. Like Ros, Dafydd chose to make substantial changes to the original text when adapting for an English-speaking audience. At a book launch event in January 2023, Dafydd explained that she adapted the book for readers who wouldn't necessarily understand the Welsh-language humour of the original. She also wanted to expand on the psychological background of the characters and was guided by her editor, an expert in editing thrillers, to make the narrative as taut and thrilling as possible. This approach demonstrates how self-translating authors adapt not only for linguistic differences but also for genre conventions and market expectations in the target language, exercising the creative agency that Grutman & Van Bolderen describe. Dafydd's strategic modifications exemplify the inherently political nature of minor literature, where every individual text becomes part of a collective project to maintain Welsh cultural presence within the dominant English-language market.

In contrast, Elen Caldecott's *The Short Knife* (Anderson Press, 2020) employs a foreignising approach, deliberately using Welsh idioms translated directly into English to create an authentic voice that bridges linguistic boundaries. Published by the London-based Anderson Press, this English-language YA historical novel emerged from Caldecott's creative practice PhD research exploring Welsh-English linguistic hybridity. Set in fifth-century Britain after the Romans' departure, the novel follows two sisters, Haf and Mai, as they navigate survival amid Saxon invasion. Caldecott's work directly addresses the historical power dynamics between Welsh and English through her protagonist Mai's experience: 'I had Saxon words forced on me, they still feel too sharp in my mouth ... I am the words I speak. Saxon Mai is

mouse-meek and scurrying. British Mai dreamed of fighting for her people' (Caldecott, 2020). This approach to language becomes a metaphor for cultural resistance, demonstrating how minor literature can retain power within a majority language context. As Caldecott explains: 'I didn't want any part of the novel to feel cliquey, or alienating to English-only readers ... I imagine saying to them, look, look, we're all mixed up, we're all touched by movement and migration and we always have been' (Caldecott, 2019).

Megan Angharad Hunter's *Tu ôl I'r Awyr* (Behind the Sky) (Y Lolfa, 2020) is described as a pioneering YA story about the experiences of two young adults in contemporary northwest Wales facing mental ill health alongside the challenges of school and family life. The novel offers insights into how the new generation of writers are approaching the challenges of bilingual authorship. According to Hunter the novel, which challenged conventions with its 82,000-word length in a Welsh YA market that typically favours shorter YA works, underwent significant changes in its English self-translation, including a modified ending to better suit market expectations as advised by her literary agent Hoosen. Her observation that 'Translation is inherently political, especially when translating from a minority language into one of the most widely spoken languages in the world' (Hunter, 2024) demonstrates an acute awareness of the power dynamics that Deleuze & Guattari (1986) identify in minor literature. However, her approach to these dynamics is pragmatic rather than resistant. When faced with market-driven changes to her work, Hunter reflects in an interview: 'When I started writing the book at 16, I was quite an angsty teenager who wanted to make people cry. Now, at 26, I've matured as a writer, and I understand that sometimes changes are necessary to reach a wider audience' (Hunter, 2024).

The challenges of preserving Welsh linguistic and cultural elements in English-language versions emerge as a common thread across all five approaches, illustrating the tension between domestication and foreignisation. Hunter notes the particular difficulty of translating dialect, observing that 'It's impossible to translate dialect that brings characters to life so strongly.' Her solution of ensuring her characters 'still speak Welsh in the English version' parallels Caldecott's approach of creating a deliberately hybrid language that exists in a liminal space between Welsh and English, both demonstrating how minor literature can assert itself within the majority language.

These approaches to self-translation reveal how Welsh authors are finding creative ways to assert their cultural identity within the constraints of the international publishing market. From Lewis writing directly in English to Ros's and Dafydd's reimagining of Welsh originals, from Caldecott's foreignising strategies to Hunter's pragmatic adaptations, these examples demonstrate the potential for Welsh literature to reach global audiences without sacrificing its cultural essence. Each approach represents a different strategy for deterritorializing Welsh cultural content – freeing it from its original linguistic boundaries while maintaining what Deleuze & Guattari identify as the three key characteristics of minor literature: the use of a major language by a minority, the inherently political nature of this literary production, and its collective value for cultural preservation.

This cultural grounding resonates with developing authors; emerging Welsh authors acknowledge how participation in local *eisteddfodau* – Welsh festivals featuring competitions across poetry, music, drama, and fine arts – shapes their literary development. As Hunter notes, traditional institutions like local *eisteddfodau* remain crucial for nurturing new talent: 'I would never have had the confidence to start writing my book if I hadn't had those *eisteddfodau* to compete in' (Hunter, 2024).

The evolution of attitudes toward translation among Welsh writers is particularly evident in Hunter's observation that 'we're seeing more Welsh authors embracing their bilingual identity and using it as a strength rather than feeling forced to choose between languages' (Hunter, 2024). This shift suggests a growing recognition that engagement with international markets through translation can serve to strengthen rather than dilute Welsh literary culture, effectively demonstrating how minor literature can thrive within major language markets. As the industry continues to develop, the varied approaches demonstrated by Lewis, Ros, Dafydd, Caldecott, and Hunter provide valuable models for how Welsh-language literature can maintain its cultural integrity while engaging with global audiences, combining traditional cultural grounding with international market engagement. The commercial pathways and market strategies enabling these creative approaches are examined in Section 5.4.1, while specific case studies of international rights sales and publication processes appear in Chapter 7.

## 5.5 Educational publishing and curriculum development

The educational publishing landscape in Wales has undergone significant transformation within the context of the new Curriculum for Wales (2022). The Welsh Government's commitment to this transformation was demonstrated in November 2021 when Jeremy Miles, the Minister for Education and Welsh Language, announced an additional £5 million in funding for reading for pleasure programmes across Wales to provide a book for every primary and secondary school pupil in Wales. The programme included 72,000 additional books for reception children at schools across Wales, 3,600 letterbox club packs for looked after children, books and training for practitioners to support learning, and one box of fifty books to every state school in Wales. The Welsh Government partnered with the Books Council and BookTrust Cymru to deliver the Schools Love Reading book-gifting campaign in spring 2022, launched by the education minister on 26 May 2022. Books were also delivered through community food banks, where parents were able to select a book for their child. Book selection for the book boxes was done in consultation with children carried out through events in schools (Gov Wales, 2021). Books were sourced in both the Welsh and English languages and these initiatives have provided great sales opportunities for publishers in Wales. Equally, the initiatives revealed gaps in the diversity of titles published in Wales, echoing concerns raised by the Welsh Government's working group on Black, Asian and minority ethnic communities' contributions in the new curriculum (Williams, C., 2021), which recommended embedding diverse histories and perspectives across all areas of learning. The Books Council of Wales addressed this through its Rhyngom Project, which funded 50 new books for children and young people to promote empathy, literacy, and reading for pleasure (Books Council of Wales, 2024b).

The Books Council mandated that all books for the programme come from Wales-based publishers, ensuring local businesses benefited from the funding. This strategy proved successful, producing a diverse collection selected by primary school children themselves that demonstrated the Welsh publishing industry's capabilities. Crucially, this initiative demonstrated that Welsh publishers could deliver both the quantity and quality of children's books needed to provide every child from Reception to Year 7 with a free book,

while maintaining high editorial and production standards – an essential requirement for Wales’s publishing industry to compete internationally.

Additionally, the Welsh Government funded a cross-sector Winter of Well-being initiative to boost people’s mood and build resilience through a series of creative resources and events to encourage young people to connect and get creative. The reading part of the initiative was delivered through Welsh Libraries, who appointed the Reading Agency to project manage the activity. Authors, including Manon Steffan Ros, Horatio Clare, Alex Wharton and Eloise Williams, were recruited to talk about the benefits of reading and sharing books. The aim of the initiative was to create a booklist of books recommended by young people and find a winning title. Books Council of Wales Project Development Manager Angharad Sinclair explains how these initiatives clearly show Welsh Government’s understanding of the importance of reading and books for young people’s mental health as well as the more obvious support for literacy skills. The emphasis has changed from reading for literacy and school to reading for pleasure (A. Sinclair, 2022).

Literature and reading for pleasure are a focus in two key areas of the new curriculum for Wales that was launched in September 2022 – not only in the Languages, Literacy and Communication Area of Learning and Experience (AoLE) as might be expected, but also in the area of Health and Well-being.

In addition to the funding provided through the Books Council for ‘leisure books’ for reading for pleasure (as opposed to educational books), Welsh Government also fund educational resources, including books, formerly through its Education and the Welsh Language Department and now through Adnodd. The Welsh in Education Resources Branch commissions Welsh-medium and bilingual educational resources, including books for all ages between three and eighteen. They have subject panels comprised of subject teachers and experts which meet twice a year and discuss gaps in provision. This information informs the commissioning programme, which is provided through a framework of providers in Wales as well as individual grants and buying Welsh-language rights to existing resources that will also fit the Welsh-language provision. The provision is wide-ranging, from early reader series, textbooks, resources to support vocational courses, and fiction and non-

fiction books that support the curriculum. The new curriculum has an emphasis on teaching the history of Wales, identity, language and culture, as well as ensuring books and resources that represent a wide range of people living in Wales and their history. This has revealed a significant gap in provision in Wales.

Ann Evans, former Head of Welsh in the Education Resources Branch, explained in an interview that further investment in educational publishing in Wales is much needed as it is currently being provided in an ad hoc way. Publishers publish in response to grant-supported activity and tenders as well as commissioning their own programmes. Fifteen years ago most materials would have been translated from English sources but there has been a move to more original publishing to meet the demands of a different curriculum.

In March 2022, Education and Welsh Language Minister Jeremy Miles announced plans to establish Adnodd, a government-funded bilingual educational resources company. This announcement coincided with a significant educational transformation in Wales, as the new Curriculum for Wales was being implemented from September 2022, beginning with primary schools and Year 7, with full rollout planned across all year groups by 2026. The curriculum marks a fundamental shift toward purpose-driven learning across six Areas of Learning and Experience, with particular emphasis on cross-curricular skills and Welsh culture.

Unlike WJEC, which focuses on examination and qualifications, Adnodd was created to oversee and coordinate educational resources supporting this new curriculum. The company does not create or publish resources directly, but rather coordinates with practitioners, providers, and suppliers to ensure coherent provision of bilingual educational materials for learners aged 3-19. Their mission emphasises equity and innovation, ensuring simultaneous availability of high-quality resources in both Welsh and English to support the curriculum's implementation.

The educational publishing frameworks outlined here influence how publishers position themselves both domestically and internationally. The new Curriculum for Wales creates opportunities for content that addresses Welsh history, identity, and diversity—themes that

potentially resonate beyond Wales while maintaining cultural specificity. How individual publishers integrate educational publishing within their broader strategies is examined through the Atebol and Carreg Gwalch profiles in Chapter 6, while the import, export, and co-production case studies in Chapter 7 reveal how publishers balance domestic market positioning with international opportunities.

## 5.6 Literary recognition and cultural impact

Within Bourdieu's framework, literary prizes and awards function as mechanisms for consecration — conferring symbolic capital that validates works and creators within the field of cultural production. Sapiro (2016) provides a structural history of how modes of consecration in the literary field have evolved, demonstrating how literary prizes and festivals have emerged as increasingly significant consecrating authorities alongside traditional institutions, while also highlighting the role of translation and international circulation in the consecration process. For minority-language contexts, these recognition systems serve dual functions: establishing internal hierarchies of literary value while potentially facilitating external recognition through translation and rights sales. The evolution of the Tir na n-Og Children's Book Awards (Section 5.6.1) and Wales Book of the Year children's category (Section 5.6.2), and National Eisteddfod literary prizes (Section 5.6.3) reveals how consecration mechanisms adapt to changing field dynamics, actively shaping what counts as literarily valuable and influencing publisher strategies and international positioning.

Pearson, Sands-O'Connor and Subramanian (2019) demonstrate how prize culture intersects with questions of diversity in British children's literature, providing important context for examining how Welsh literary awards both shape and reflect the sector's development. The impact of literary awards on internationalisation is complex and context-dependent, particularly for semi-peripheral languages. Alvstad and Borg's (2021) study of Hans Christian Andersen Award winners in Swedish and Maltese contexts reveals that while awards enhanced circulation, they did not decisively stimulate translation: 21 of 25 Swedish translations preceded the award, with the prize serving primarily as 'proof of consecration'

rather than translation trigger. Significantly, Swedish — like Welsh — occupies a semi-peripheral position with approximately 10 million speakers, a strong domestic publishing tradition, but limited international market for original works. This framework suggests Welsh awards like the Tir na n-Og Children’s Book Awards function primarily as domestic consecration mechanisms validating quality and sustaining library circulation rather than automatic international translation triggers. This clarifies rather than diminishes their value within Welsh children's literature’s ecology. Costa (2021) reinforces this finding through empirical analysis of Portuguese children’s publisher Planeta Tangerina, similarly concluding that while consecration contributes to visibility, it does not automatically translate into international dissemination.

#### 5.6.1 Tir na n-Og Children’s Book Awards

The Tir na n-Og<sup>4</sup> Children’s Book Awards were set up in 1976 by the Welsh Arts Council Children’s Literature Panel to encourage more original language children’s publishing in Welsh, and in English with an authentic Welsh background, in a bid to improve the quality of children’s books for Welsh children, to reflect their language and culture at a time when standards in Welsh publishing were not meeting those of the dominant English-language books in the market. This gap at the time was being met through Dref Wen’s Welsh co-editions of European picture books translated from languages other than English, but according to Geraint Lewis, the Chair of the Welsh Arts Council Children’s Panel at the time, there was little quality original Welsh language publishing. Both strategies were necessary to produce the required quantity of children’s books for children in Wales, encouraging the translator, writer and illustrator development necessary in a healthy bilingual publishing industry. As the judges also assessed the quality of the book and cover design as well as editorial standards, the awards also helped to improve publishers’ skills in these areas along with investment from the Arts Council of Wales and Books Council, who funded the training.

D. Geraint Lewis, Chair of the Welsh Arts Council Children’s Panel who helped set up the awards, explained how they hoped the awards would influence publishing in Wales:

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<sup>4</sup> ‘Tír na n-Og’ means ‘Land of the Young’ in Irish and is one of the names for the Celtic Otherworld.

An objective annual assessment of the year's output remains a vital check against indolence or complacency. But if this is true of publishing in Welsh, it is certainly not true about English-language books for the children of Wales. In this field, despite numerous attempts to influence the system, we remain at the mercy of the market forces which, in any given year, may or may not produce a work with an authentic Welsh background. In this case the award represents a tiny flicker of light which occasionally bursts into flame more by chance than design. (D.G. Lewis, 1988)

In fact the English-language award was withheld seven times between 1980 and 1993 due to a lack of suitable material, and in 1985 no award was given in either category, causing obvious concern within the industry. This led to Gomer Press, the largest printer-publisher in Wales at the time, to set up Pont Books, an English-language imprint which specialised in publishing original language children's books in English with a Welsh background (D.G. Lewis, 1988). Pont Books went on to dominate the awards in the 1990s and 2000s, winning the English-language award nine times. Indeed, Gomer Press published forty of the winning books in both languages until it stopped its publishing programme in 2018 due to financial difficulties.

The awards today are organised by the Books Council and sponsored by CILIP Cymru Wales and presented annually to celebrate the work of authors and illustrators published the previous year. Fiction and non-fiction of all genres are eligible, apart from translations and adaptations, and school textbooks. Separate judging panels are formed each year for the Welsh and English awards, comprised of librarians, teachers and children's book experts based in Wales, with a chair of judges who normally chairs for three years. Originally there were two awards, one for Welsh- and another for English-language literature, then, as Welsh-language publications increased in quantity and quality over the years, in 1987 the Welsh-language award was divided into two categories, fiction and non-fiction, which changed to primary and secondary age categories in 2006 and remains the same today (Farr, 2020).

The English-language winning novels of the Tir na n-Og Children's Book Awards often have contemporary or historical settings where characters and magical objects from Welsh myth

enter this world to challenge and help the protagonists with themes around family and belonging. In the first few years of the awards, English-language winners were by authors and publishers based outside of Wales. The American author Susan Cooper won the inaugural award in 1976 with *The Grey King* (Penguin, 1975), the fourth book in *The Dark is Rising* sequence, and again in 1978 with the last in the series, *Silver on the Tree* (Penguin, 1977). The American author Nancy Bond won with *A String in the Harp* (Atheneum, 1976). Wales-based English author Jenny Nimmo won for *The Snow Spider* (Egmont, 1987) and the TV adaptation by Nimmo and Welsh writer Owen Sheers (aired on CBBC and BBC Wales in April 2020) develops the 'authentic Welsh background' theme of the award by introducing the Welsh language. The protagonist Gwyn Griffith's *nain* (grandmother) explains that 'language is the key to the magic' and that it is his ability to speak Welsh that gives him the power to connect with the magic of his ancestor Gwydion, the magician from the Mabinogion. This premise, along with the inclusion of Welsh phrases in the screenplay which are not in the book, develops the authentic sense of place and makes a political statement about the power of minority languages.

Recent winners of the English-language award include *Storm Hound* by Claire Fayers (Macmillan Children's Books, 2020) and *The Clockwork Crow* by Wales's first Young People's Laureate Catherine Fisher (Firefly Press, 2019) – Fisher also won in 1995 for *The Candle Man* (Red Fox, 1995). *The Clockwork Crow* is the first in a historical magical fantasy trilogy set in a Victorian mansion in Wales, with an orphan from London trying to find a missing boy who has been taken by the Tylwyth Teg (fairy folk). Many winning stories feature children who have travelled to Wales to visit family and have an outsider's eye, including the perspective of immigrants to Wales. For example, Hayley Long who studied English at Aberystwyth University won with her YA novel *The Nearest Far Away Place* (Hot Key Books, 2018) about grief and healing set between the US and Wales. And G. R. Gemin, who was born in Cardiff to Italian parents, drew on his Welsh/Italian heritage to write a story about Italian immigrants in *Sweet Pizza* (Nosy Crow, 2017). He also won with his debut story *Cowgirl* (Nosy Crow, 2015). This evolution in the recognition of diverse Welsh voices represents a significant shift in how Welsh identity is portrayed in children's literature. The success of these narratives, which blend traditional Welsh themes with contemporary perspectives,

demonstrates how the awards have helped expand the definition of authentic Welsh storytelling while maintaining strong cultural connections.

The English-language award has been won for the past three years by Welsh writers published by publishing houses based outside of Wales. *Storm Hound* by Claire Fayers (Macmillan Children’s Books, 2019), a fantasy adventure middle-grade novel based on Welsh and Norse myth; *The Short Knife* by Elen Caldecott (Anderson Press, 2020), a YA historical novel set in the fifth century; and *The Valley of Lost Secrets* by Lesley Parr (Bloomsbury Children’s Books, 2021), an historical middle-grade novel set in the Welsh valleys during the Second World War. Firefly Press have had six titles shortlisted to date, with one winning title, *The Clockwork Crow* by Catherine Fisher (2018) in 2019, and Graffeg has yet to have any books reach the shortlist. This suggests that successful publishing from Wales has highlighted Welsh talent and shown that there is commercial and cultural value in publishing writing about Welsh themes. Publishers and agents outside of Wales are able to offer larger advances than Welsh publishers as well as more marketing and sales resource.

The following table demonstrates the evolution of English-language Welsh children’s literature from 1976 to 2024. The chronological record provides evidence of several key industry developments: the increasing sophistication of genre representation, the steady expansion of age-appropriate content, and the growing engagement of major publishers with Welsh themes. These trends reflect both the awards’ success in raising standards and the wider recognition of Welsh children’s literature’s commercial and cultural value.

**Table 8: Tir na n-Og Children’s Book Awards - English-language category award winners (1976-2024)**

Title	Author	Publisher	Publication Year	Age Group	Genre	Award Year
Where the River Takes Us	Lesley Parr	Bloomsbury Children’s Books	2023	9+	Fiction, Historical	2024
The Drowned Woods	Emily Lloyd-Jones	Hodder & Stoughton	2022	12+	Fiction, Fantasy	2023

The Valley of Lost Secrets	Lesley Parr	Bloomsbury Children's Books	2021	9+	Fiction, Historical	2022
The Short Knife	Elen Caldecott	Anderson Press	2020	12+	Fiction, Historical	2021
Storm Hound	Claire Fayers	Macmillan Children's Books	2019	9+	Fiction, Fantasy	2020
The Clockwork Crow	Catherine Fisher	Firefly Press (Wales)	2018	9+	Fiction, Fantasy, Historical	2019
Sweet Pizza	GR Gemin	Nosy Crow	2016	9+	Fiction, Contemporary	2017
The Search for Mister Lloyd	Griff Rowland	Candy Jar Books (Wales)	2015	9+	Fiction, Contemporary, Humour	2016
Cowgirl	GR Gemin	Nosy Crow	2014	9+	Fiction, Contemporary	2015
Welsh Cakes and Custard	Wendy White	Pont Books, Gomer (Wales)	2013	7+	Fiction, Chapter Book	2014
The Tree of Leaf and Flame	Daniel Morden	Pont Books, Gomer (Wales)	2012	9+	Myth, Fairytale and Folktales	2013
Three Little Sheep	Rob Lewis	Pont Books, Gomer (Wales)	2010	3+	Picture Book	2011
Merlin's Magical Creatures	Graham Howells	Pont Books, Gomer (Wales)	2008	7+	Myth, Fairytale and Folktales	2009
Dark Tales from the Woods	Daniel Morden	Pont Books, Gomer (Wales)	2006	9+	Myth, Fairytale and Folktales	2007
Tirion's Secret Journal	Jenny Sullivan	Pont Books, Gomer (Wales)	2005	9+	Fiction, Historical	2006
The Seal Children	Jackie Morris	Francis Lincoln	2004	7+	Picture Book	2005
Georgie	Malachy Doyle	Bloomsbury Children's Books	2001	12+	Fiction, Contemporary	2002
Arthur: The Seeing Stone	Kevin Crossley-Holland	Orion Children's Books	2000	9+	Fiction, Historical	2001
Alwena's Garden	Mary Oldham	Pont Books, Gomer (Wales)	1997	12+	Fiction, Contemporary	1998

Cities in the Sea	Siân Lewis	Pont Books, Gomer (Wales)	1996	5+	Picture Book	1997
Who's Afraid of the Bwgan Wood?	Anne Lewis	Honno (Wales)	1995	9+	Fiction, Fantasy	1996
The Candle Man	Catherine Fisher	Red Fox	1994	9+	Fiction, Fantasy	1995
Who Stole a Bloater?	Frances Thomas	Seren Books (Wales)	1991	9+	Fiction, Historical	1992
The Snow Spider (The Magician's Trilogy)	Jenny Nimmo	Methuen Children's Books	1986	9+	Fiction, Fantasy	1987
The Prize	Irma Chilton	Barn Owl Press (Wales)	1983	9+	Fiction, Contemporary	1984
The Grey King (The Dark is Rising Sequence)	Susan Cooper	Random House Children's Books	1975	9+	Fiction, Fantasy	1976

Source: Books Council of Wales, 2024.

This is a familiar pattern seen with literary publishers in Wales such as Seren and Parthian, who discover and nurture new voices to see them moving to larger publishers once they have proven their sales potential. The narrow criteria of the English award often prioritises books with more obvious Welsh settings. In 2022, the award selections reflected this emphasis on Welsh settings, as seen with titles like *10 Stories from Wales* by Ifan Morgan Jones (Rily 2021) and *Welsh Fairy Tales, Myths and Legends* by Claire Fayers (Scholastic 2021). Other notable works published that year included *The Song that Sings Us* by Nicola Davies (Firefly Press, 2021) and the short-story collection *The Red Gloves and other Stories* by Catherine Fisher (Firefly Press, 2021), which incorporated Welsh settings in two of its stories-

Although the awards have helped to improve the standards in publishing English-language children's books in Wales, the thematic limitations imposed on qualifying entrants can lead to the exclusion of high-quality works of literature. This has been addressed to some extent by the Wales Book of the Year Awards, which have recently included a children's and YA

category and which awards based on the author's connection with Wales rather than the book.

The Tir na n-Og Children's Book Awards shortlists and winners are promoted through schools, libraries and bookshops in Wales through promotional materials provided by the Books Council, and a marketing and communications campaign through the media and social media, along with school events with the winning authors, as well as award ceremonies held at the Urdd Eisteddfod and CILIP Cymru Wales Conference. In 2020 and 2021, due to Covid restrictions, the awards were announced on BBC Radio Wales and S4C. The adaptation of the awards ceremony to digital platforms during this period highlighted the awards' continued ability to maintain their cultural significance even during challenging circumstances, ensuring the continued recognition and celebration of Welsh children's literature.

Alongside the judging panel, the Tir na n-Og Reader's Choice Award has been recently created as a new shadowing scheme for children in the same vein as the CILIP Carnegie and Greenaway Medal shadowing scheme. The Books Council provides reading guides and funded copies to schools, where school children are encouraged to read and discuss the shortlist in the classroom and select their favourite books independently of the judges. Some of the children are invited to attend the award ceremonies to meet the winning authors. Today education and children's literature experts like Jo Bowers and Simon Fisher are proactive in highlighting and promoting children's literature from Wales or set in Wales to teachers, running initiatives such as Land of our Authors.<sup>5</sup>

With London presses increasing publication of books set in Wales, reflected in the shortlists and winners of recent book awards, the Books Council is encouraging English-language publishers to grow their output of books set in Wales. In 2021/22, the Welsh Government allocated funding to the Books Council to fund reading for pleasure initiatives, looking in particular for books in English set in Wales. This follows a pattern of funding books set in Wales. Gomer's imprint Pont Books was set up in 1991 with the main mission of publishing

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<sup>5</sup> <https://ourfp.org/eop/land-of-our-authors/> (last accessed March 2024).

original English-language books set in Wales. Firefly was set up on the back of a tender from the Books Council for £20,000 looking for an early reader series set in Wales. Huw Davies, the Education Minister at the time, was inspired by a trip to Scotland, where he had seen children's books set in Scotland and wanted to see something similar in Wales. Tenders went to new publishers Firefly and Atebol, opening out the market which had been dominated for so many years by Gomer's Pont Books imprint.

### **Tir na n-Og Children's Book Awards – Welsh-language categories**

In the Welsh-language awards, Welsh myth and history are also prevalent. T. Llew Jones, one of Wales's greatest children's authors, won the inaugural Welsh-language award with *Tân ar y Comin* (Gomer, 1975), a story about a Gypsy boy left alone to fend for himself after his grandfather dies. He won again in 1990 with his classic collection of Welsh legends *Lleuad yn Olau*, illustrated by one of the most important Welsh illustrators, Jac Jones (Gomer, 1990) and later adapted into English by the poet Gillian Clarke as *One Moonlit Night* in 2015 (Gomer). Other noteworthy winners of the Welsh-language awards include poet and translator Mererid Hopwood, for her children's book *Dosbarth Miss Prydderch* (Gomer, 2018). Gareth F. Williams won five times for his gripping stories *Y Gêm* (Gwasg Carreg Gwalch, 2015), *Cwmwl Dros y Cwm* (Gwasg Carreg Gwalch, 2014), *Eira Môn, Eira Mawr* (Gomer, 2008), *Adref Heb Elin* (Gomer, 2007) and *Dirgelwch Loch Ness* (Collins, 1997). Manon Steffan Ros has also won five times for *Pobol Drws Nesaf* (Y Lolfa, 2019), *Fi a Joe Allen* (Y Lolfa, 2018), *Pluen* (Y Lolfa, 2017), *Prism* (Y Lolfa, 2012) and *Trwy'r Tonnau* (Y Lolfa, 2010). Recent winners include beautifully produced non-fiction books *Pedair Cainc y Mabinogi* (Rily, 2017) and *Cymru ar y Map* (Rily, 2018), both illustrated by French illustrator Valerieane Leblond. These books were also produced as English co-editions which were shortlisted for the English-language award.

As demonstrated in Section 5.4, one of the key outcomes of the 2017 Rosser report was to encourage more original Welsh-language publishing and, perhaps as a result, we can see an increase in diversity in the books published as well as new writers and illustrators breaking into the market. Themes around diversity and mental health have become more prevalent, with examples including *Pobol Drws Nesaf* by Manon Steffan Ros and Jac Jones (Y Lolfa,

2019) and *Byw yn fy Nghroen*, edited by Sioned Erin Hughes (Y Lolfa, 2019), both of which were winners in 2020. In 2021, two authors won the award for the first time. Casia Wiliam won the primary school age category for her novel *Sw Sara Mai* (Y Lolfa, 2020), featuring a protagonist of colour, and *#helynt* by Rebecca Roberts (Gwasg Carreg Gwalch, 2020) won the top prize in the secondary school age category for a story including themes of poverty and domestic violence.

The evolution of the Welsh-language awards demonstrates several significant publishing developments over their history. The transition from a single category to separate primary and secondary awards reflects not just administrative change, but the increasing sophistication and specialisation within Welsh language children's publishing. This development has allowed publishers to target specific age groups more effectively while maintaining high editorial standards across different reading levels.

The awards also chart the development of a robust Welsh-language publishing ecosystem. Early winners often emerged from established houses like Gwasg Gomer, frequently in partnership with educational institutions. More recent years have seen greater diversification, with publishers like Y Lolfa, Gwasg Carreg Gwalch, and newer entrants like Atebol demonstrating the sector's ability to sustain multiple successful publishing houses. This diversification has contributed to broader representation in both themes and formats. The complete chronological record of Welsh-language winners can be found in Appendix F, providing detailed evidence of these developments. The record shows how Welsh language children's literature has maintained strong cultural connections while expanding to address contemporary issues and diverse perspectives. Multiple wins by authors such as T. Llew Jones, Gareth F. Williams, and Manon Steffan Ros demonstrate the awards' role in supporting sustained careers in Welsh language children's literature, while new winners continue to bring fresh perspectives to the field.

The evolution of the Tir na n-Og Children's Book Awards thus demonstrates their vital role in shaping Welsh children's literature across both languages. Beyond serving as a mark of literary excellence, the awards have functioned as a catalyst for publisher development and an important indicator of changing social and cultural priorities. The current landscape,

where Welsh themes and settings attract both major publishers and independent Welsh houses, suggests the awards have succeeded in their original mission while adapting to serve the needs of contemporary readers and the publishing industry.

### 5.6.2 Wales Book of the Year

Literature Wales, which has administered the Wales Book of the Year Awards since 1992, established a children and young people category in 2020, complementing the existing Tir na n-Og Children’s Book Awards administered by the Books Council. While both awards celebrate Welsh literature, they differ in their eligibility criteria: the Wales Book of the Year English-language category recognises authors with Welsh heritage or residency, whereas the Tir na n-Og Children’s Book Awards English-language category specifically require works to have a Welsh setting or theme.

The inaugural Welsh-language prize was awarded to Elidir Jones’s *Chwedlau’r Copa Coch: Yr Horwth* (Atebol, 2019), followed by Rebecca Roberts’s *#helynt* (Carreg Gwalch, 2020) in 2021. The English-language category demonstrated a significant pattern in its first four years: a consistent dominance of major non-Welsh publishing houses, with works published by Usborne, Canongate Books, and Bloomsbury respectively. This trend was notably disrupted in 2024, when Wales-based Firefly Press achieved the first victory for a Welsh publisher in the English-language category with Nicola Davies’s *Skrimslï*.

**Table 9: Wales Book of the Year Awards – Children and Young People Category award winners (2020-2024)**

Year	Welsh-language category	English-language category
2024	<i>Jac a'r Angel</i> by Daf James (Y Lolfa)	<i>Skrimslï</i> by Nicola Davies (Firefly Press)
2023	<i>Dwi Eisïau Bod yn Ddeinosor</i> by Luned Aaron & Huw Aaron (Atebol)	<i>When the War Came Home</i> by Lesley Parr (Bloomsbury)
2022	<i>Y Pump</i> by Various Authors (Y Lolfa)	<i>The Shark Caller</i> by Zillah Bethell (Usborne)

2021	<i>#helynt</i> by Rebecca Roberts (Carreg Gwalch)	<i>The Infinite</i> by Patience Agbabi (Canongate Books)
2020	<i>Chwedlau'r Copa Coch: Yr Horwth</i> by Elidir Jones (Atebol)	<i>The Girl Who Speaks Bear</i> by Sophie Anderson (Usborne)

Source: *Literature Wales, 2024.*

### 5.6.3 National Eisteddfod literary prizes

Unique to Wales are two literary awards for Welsh-language literature honoured through the National Eisteddfod of Wales each year in addition to the Crown and Chair awards for poetry. The Prose Medal was initiated in 1937 and is awarded to a volume of Welsh creative prose up to 40,000 words in length with a different theme each year. The award is publication and a £750 cash prize. The Daniel Owen Memorial Prize has been running since 1978 and is awarded to an unpublished novel with a strong storyline of 50,000 words or more. The award is publication and a £5,000 cash prize. According to an interview with former Books Council of Wales Director Gwerfyl Pierce Jones, the Prose Medal is regarded as the more literary prize and judged alongside the Crown and the Chair awards for poetry, which are the highlight of the National Eisteddfod. The Daniel Owen Memorial Prize is deemed more commercial but still held in high regard. The winners of both prizes enjoy widespread media coverage, and the books are published and available to buy at the National Eisteddfod and guaranteed high sales as most Welsh-language readers will buy both books (G.P. Jones, 2022).

In submitting entries for both the Prose Medal and the Daniel Owen Memorial Prize writers are allowed to name their preferred publisher although this is sometimes left to the Eisteddfod to decide. Gwasg Gomer and Y Lolfa are among the two most prominent publishers of these prizes over the years. Both awards are judged anonymously, allowing writers at all stages in their careers to compete alongside each other. Although the winning entries of both awards are published, the prize is on occasion withheld if the adjudicators feel the standards are not high enough. Entries are expected to be at a publishable standard without the input of a creative editor. G.P. Jones explains that, in her time, the Books

Council used to work closely with the Eisteddfod to publish the prize winner, copy-editing them and designing the covers to ensure the best possible standards. *Cyfansoddiadau a Beirniadaethau* ('Compositions and criticisms'), a volume comprising the adjudications and winning literary entries from the National Eisteddfod, is published after the ceremonies by the organisers of the festival each year. Although the majority of winners have been books for adults, there is nothing in the guidelines that prohibits a book for children being submitted. The children's writer Irma Chilton won the Prose Medal in 1989 with *Mochyn Gwydr*, when the criteria specifically called for a prose piece suitable for young adult readers, and more recently, in 2018, Manon Steffan Ros won with her crossover novel *Llyfr Glas Nebo*, which has been marketed for both adults and young adults.

#### 5.6.4 Other children's book awards

Another noteworthy children's book award is the Cogan Diversity Picture Book Awards run by Cogan Primary School in the Vale of Glamorgan which ran between 2018-2023 with a new theme around diversity each year. The award was eligible for English-language picture books only and open to all publishers in the UK. Initiated by the children's author and SEN primary school teacher Ruth Morgan, the children took part in the whole process, selecting the shortlists and winners through assessing and debating together in class. The inaugural English-language prize was awarded to *The Girls* (Little Tiger Press, 2019), illustrated by Cardiff-based Jenny Lovlie and written by Swansea-born Lauren Ace.

It is notable that translations and adaptations are currently ineligible in all these awards, thus not encouraging books in translation to be published. The only prize in the UK celebrating children's books in translation was the Marsh Award for Children's Literature in Translation, which ran between 1996 until 2017 and awarded the translator of an outstanding work of fiction for young readers translated into English. The CILIP Carnegie Medal started to include books in translation from 2015.

### 5.6.5 Promoting children's books and reading

Reading for pleasure, or 'leisure reading' as the Books Council describes it, represents the voluntary and self-directed engagement with texts that children undertake for enjoyment rather than educational requirements. In the children's publishing context, this concept encompasses both the act of reading and the broader ecosystem that supports it.

Publishers play an important role in fostering reading for pleasure by creating content that resonates with children's interests and experiences. This involves developing narratives that captivate young readers through compelling storytelling, relatable characters, and engaging formats. The focus extends beyond educational value to emotional engagement and personal connection with the material.

The industry recognises that reading for pleasure directly correlates with improved literacy outcomes and broader educational success. Publishers therefore emphasise creating books that balance entertainment value with accessibility, ensuring that young readers can engage with texts independently and confidently. This includes careful consideration of factors such as vocabulary level, narrative complexity, and visual elements that support comprehension while maintaining reader interest.

Furthermore, reading for pleasure in children's publishing encompasses the creation of diverse content that reflects different reading preferences and abilities. This includes various formats from picture books to novels, spanning multiple genres and subjects to ensure every child can find materials that spark their interest and motivation to read voluntarily.

The success of reading for pleasure initiatives relies heavily on the collaborative efforts of publishers, authors, illustrators, educators, and parents to create and promote books that children genuinely want to read, rather than feel obligated to read.

## **Festivals and events to promote reading for pleasure**

Initiatives run by the Books Council, Literature Wales and Welsh Libraries promoting children's books and reading for pleasure show there is an increasing understanding that inspiring a love of books and reading for pleasure in children helps improve important language, literacy, empathy and creativity skills. There are however challenges to delivering some key reading for pleasure programmes which are run by external agencies based in London who often misunderstand the needs of a bilingual nation. Challenges include surveys and questionnaires being sent out in English only to all schools and libraries in Wales, a lack of bilingual promotional materials and websites, and book selections not being representative in Wales. Issues also surround the lack of data into school library provision in Wales, making partnership and collaboration more difficult.

The Children's Laureate Wales, a new role created by Literature Wales in 2019 which sits next to the Bardd Plant Cymru (Welsh-language Children's Laureate established by the Books Council in 1999) are important ambassadorial roles, both in Wales and in the rest of the UK as well as internationally. The Books Council runs children's reading promotions and awards, including the Tir na n-Og Children's Book Awards, the Bookslam programme in schools, and children's book of the month promotions in independent bookshops. Welsh Libraries have created a new 'Author of the Month' online promotion and the Books Council provides a bilingual offer for key UK-wide reading for pleasure initiatives, World Book Day and the Summer Reading Challenge.

Wales hosts several children's literature festivals across the country. Hay Festival offers children's programming, featuring both public family events and dedicated school sessions. Cardiff Children's Literature Festival, the Spread the Word Festival in Merthyr Tydfil, and the Pontypridd Children's Literature Festival are also key events, with the latter two specifically serving more disadvantaged areas to increase children's access to books. Independent bookshops such as Griffin Books in Penarth run a monthly children's book group and many libraries run the popular Chatterbooks book groups for children. There is also some support from the Welsh- and English-language media in Wales, with *The Western Mail*, *S4C's Heno*, and programmes on BBC Radio Cymru and BBC Radio Wales regularly giving space for

interviews with children's authors and book reviews. Online book bloggers such as Simon Fisher (Family Book Worms) and Scott Evans (Mr E Primary), who are also primary school teachers, champion English language children's books from Wales with their book clubs and reviews, informing teachers and parents across the UK. Sôn am Lyfr ('Talk About Books'), a bilingual blog aimed at parents with children in Welsh-medium education, was established in response to S.M. Rosser's recommendations for increasing awareness of Welsh-language children's literature (S.M. Rosser, 2017).

### **Children's literature networks**

The marketing and promotion of children's and young adult (YA) literature in the UK operates within a complex network of professional organisations that extend throughout the UK and Ireland. These networks serve as essential channels for promoting English-language Welsh literature while facilitating valuable connections between publishers, authors, illustrators, librarians, and readers.

The Youth Library Group (YLG) Cymru Wales stands as a particularly influential organisation within this landscape. Comprising public librarians who specialise in children's literature, YLG Cymru Wales is a professional membership organisation that wields significant influence through its participation in prestigious literary awards. They are involved in hosting the English-language category of the Tir na n-Og Children's Book Awards and also nominate works for the Carnegie Medal. The nomination of *The Blue Book of Nebo*, for example, which went on to win the Carnegie Medal for Writing in 2023, demonstrates their capacity to bring Welsh literature to national attention. Through networking events and conferences and their integration with the broader UK-wide YLG network, they create valuable opportunities for marketing children's and YA books to key decision-makers in the literary sector.

The educational sector's engagement with children's literature is supported by two primary organisations: the Schools Library Group (SLG) and the School Libraries Association (SLA). However, a significant challenge exists in the form of insufficient data regarding Welsh school libraries. This information gap represents a strategic weakness that requires

attention to strengthen the educational infrastructure supporting children's literature and its promotion within school settings.

The Federation of Children's Book Groups (FCBG) extends the promotional network beyond professional librarians through its Wales branch. The annual UK-wide conference serves as a crucial platform for industry networking, bringing together members, publishers, authors, and illustrators. These interactions foster meaningful exchanges that strengthen the entire children's literature sector while creating additional marketing pathways for Welsh books. Wales has hosted this conference twice in recent years: Cardiff in 2016 and Monmouth set to host in 2025.

International promotion opportunities are enhanced through Wales's developing relationship with the International Board on Books for Young People (IBBY). The establishment of IBBY Wales through the Books Council in 2025 enabled, for the first time, the nomination of Welsh-language books for the prestigious IBBY Honour List.

The promotional infrastructure is further strengthened by numerous literacy organisations operating across the UK and Ireland. Organisations such as BookTrust, National Literacy Trust, The Reading Agency, Scottish Book Trust, and Children's Books Ireland offer extensive networks for promoting children's books to diverse audiences, including children, parents, carers, teachers, and librarians. These organisations provide additional channels for marketing Welsh literature beyond traditional publishing networks. However, Welsh publishers' engagement with these UK-wide platforms remains limited, with opportunities for more systematic inclusion of Welsh titles in national reading lists, promotional campaigns, and literacy initiatives.

### **Literature festivals and key events**

Due to the small market in Wales and its bilingual publishing and bookselling infrastructure, sales data tracked through bookshops via databases like Nielsen BookData do not accurately reflect sales figures, as outlined in a recent *Bookseller* article (Wood, 2018). Publishers of Welsh-language books in particular are dependent on the sales made through schools and

libraries as well as key cultural events such as the National Eisteddfod, the Urdd Eisteddfod, the Royal Welsh Show and Hay Festival. The Books Council and many Welsh-language publishers take bookstands to these events and sell a large quantity of books, typically accounting for a high percentage of a publisher's annual sales. For example, in 2019 the Books Council sold £16,060 worth of books (net value) through Hay Festival, £30,144 through the Eisteddfod, and £6,748 through the Royal Welsh Show. During the Covid-19 pandemic, the National Eisteddfod and Hay Festival events programmes went online, as the digital Eisteddfod AmGen and Hay Digital Festival in 2020 and 2021, with very limited book sales through Hay Digital Festival and no book sales through the Eisteddfod AmGen (Books Council of Wales, 2022).<sup>6</sup>

Cardiff Children's Literature Festival demonstrates a strong commitment to bilingual programming, hosting events in both Welsh and English languages. The festival actively promotes Wales-based talent by encouraging submissions from Welsh publishers alongside those from London-based publishing houses. While the pandemic necessitated cancellation in 2020, the festival successfully pivoted to a digital format in 2021, delivering both schools and public programming virtually. Following a temporary pause due to funding considerations, the festival resumed operations in 2025.

Hay Festival works in a similar way, running separate schools and family events on the public programmes, and has generally been good at representing talent from Wales, inviting pitches from publishers in Wales. The festival lost money in 2020 due to the pandemic but managed to raise a large amount of public support through a successful crowdfunding campaign, which meant they were able to provide a digital programme in 2020 which was well received and included a number of Wales-related events. The 2021 festival was also held digitally but the programme was criticised for including very little Welsh content with no Welsh-language events, and just four events out of 200 featuring Welsh talent. This phenomenon was highlighted by a personal piece written by writer and publisher Richard Davies in *Nation Cymru*. As Davies points out, 'I wonder how it would go down in Edinburgh if the festival went ahead without any Scottish writers' (R. Davies via Nation Cymru, 2021).

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<sup>6</sup> Data provided by the Books Council of Wales.

The festival subsequently enhanced its programming by balancing an increased representation of Welsh literary talent and high-profile guest appearances, notably including grime artist and publisher Stormzy in 2023, thereby broadening its cultural and commercial appeal.

However, Hay Festival offers much more than entertainment, serving as a vital networking hub for the literary community. The festival's success stems from its ability to foster connections through both formal initiatives like its writer development programme Writers at Work programme and informal gatherings in the green room, providing essential opportunities for established and emerging writers to build professional relationships. Although recent funding constraints have necessitated a reduction in its previously extensive children's and young adult programming, Hay Festival maintains its position as Wales's preeminent literary event, delivering a diverse range of programming that continues to make significant cultural impact.

While awards, festivals and promotional opportunities play a vital role in the Welsh children's publishing landscape, the sector's foundation rests on its literary merit and creative innovation. From reimagined myths and legends to contemporary fiction, Welsh children's literature demonstrates exceptional quality across diverse genres and formats. An examination of this literary excellence begins with one of Wales's greatest cultural assets - its mythological heritage.

## 5.7 Innovation and excellence

### 5.7.1 Welsh myths and legends: from the Mabinogion to *The Mab*

The Mabinogion and Welsh mythology stand as a cornerstone of Welsh children's literature, serving as both a cultural touchstone and a significant literary export. As S.R. Jones (1990) observes in her article on Anglo-Welsh children's literature, these ancient tales have become fundamental to the development of a distinct Welsh literary tradition.

Fimi (2017) demonstrates the enduring international significance of Welsh mythology in children's fantasy, tracing how authors from the 1960s onwards, including Lloyd Alexander, Alan Garner, Susan Cooper, Jenny Nimmo, and Catherine Fisher, have drawn on the Mabinogion and wider Welsh medieval literature to create acclaimed works for young readers. Her analysis reveals how these appropriations and adaptations of Welsh source material have shaped international perceptions of Welsh cultural identity, highlighting the Mabinogion's role as a major source text for children's fantasy well beyond Wales's borders.

The development of this tradition can be traced through what S.R. Jones (1990) identifies as three distinct strands: 'visitor' writers who came to Wales and incorporated Welsh elements, writers with distant Celtic heritage drawing on mythology, and native Welsh writers. This framework helps explain how Welsh mythology became accessible to international audiences through the 1890-1925 'first flowering' of English-language Welsh children's literature, when educational publishers began recognising the commercial potential of these narratives.

The adaptation of these mythological narratives into contemporary children's literature demonstrates remarkable versatility across different periods and cultural contexts. English and American authors have long drawn on this tradition, finding rich material in Welsh mythology's complex themes and characters. Alan Garner's *The Owl Service* (Collins, 1967) illustrates this adaptability, utilising the story of Blodeuwedd – the woman made from flowers who was turned into an owl as punishment for betraying her husband – to explore intersectional themes of class, gender, and Anglo-Welsh relations in a contemporary Welsh valley setting. The novel skilfully interweaves the ancient tale with modern teenage relationships, suggesting how mythological patterns repeat through generations.

Similarly, Susan Cooper's *The Dark is Rising* sequence (Penguin, 1965-1977) draws heavily on Welsh mythology, particularly in *The Grey King*, which is set in the Welsh mountains and features characters and concepts from Welsh legend, including the Mari Lwyd and Brân the Blessed. Jenny Nimmo's *The Magician Trilogy* (Methuen, 1986-1989) successfully integrates Welsh mythology into contemporary settings, creating sophisticated narratives that resonate with modern audiences while preserving traditional elements.

The role of translation in preserving and disseminating Welsh cultural heritage is particularly evident in works like *One Moonlit Night* (Y Lolfa, 2015). This collection, originally published in Welsh as *Lleuad yn Olau* by T. Llew Jones (Gomer, 1989), represents a significant achievement in cultural preservation through literary adaptation. The 2015 commemorative edition builds upon Gillian Clarke's 1991 translation, presenting twenty-six traditional Welsh tales in a format accessible to young readers. The stories range from magical tales of the Tylwyth Teg (fairy folk) to legends of Welsh heroes and saints, enhanced by Jac Jones's vivid full-colour illustrations that bring the Welsh landscape and its mythical inhabitants to life. The collaboration between Jones, who authored over fifty books including thirty-five for children, and Clarke, a renowned poet and translator, illustrates how established literary figures can facilitate cultural transmission across linguistic boundaries.

Contemporary adaptations continue to demonstrate the enduring relevance of Welsh mythology. The 2020 CBBC adaptation of Jenny Nimmo's *The Snow Spider* by Owen Sheers notably introduced an explicit connection between Welsh language and magical ability, emphasising the cultural significance of minority languages. The story follows Gwyn Griffiths, who discovers on his ninth birthday that he may be a magician like his Welsh ancestor Gwydion. Set against the backdrop of his sister Bethan's disappearance and his family's grief, the narrative weaves together domestic drama with magical elements, including the mysterious snow spider, Arianwen. Sheers' adaptation strategy effectively bridges traditional narratives with contemporary concerns about language preservation and cultural identity.

Recent contributions to the genre have garnered significant recognition. Catherine Fisher's *The Clockwork Crow* trilogy (Firefly Press, 2018–2020) integrates Welsh mythology and landscape through the story of Londoner orphan Seren Rhys, who arrives at a mysterious Welsh mansion to find her godfather absent and a magical mechanical crow as her only ally. As Seren becomes entangled with the Tylwyth Teg (Fair Folk), who have stolen her godfather's son, the trilogy explores themes of belonging and identity against a Welsh Victorian backdrop. The series' nuanced handling of linguistic and social hierarchies provides sophisticated commentary on historical class and language dynamics, with the servant

characters speaking Welsh amongst themselves while the upper-class characters exclusively use English.

The publication of bilingual works has become increasingly important in maintaining cultural accessibility. Clare Fayers' *Welsh Fairy Tales, Myths and Legends* (Scholastic, 2021), subsequently translated into Welsh by Siân Lewis as *Chwedlau Cymru a'i Straeon Hud a Lledrith* (Rily, 2022), presents a carefully curated collection of traditional tales, ranging from the Mabinogion to local legends and fairy stories. The collection includes lesser-known tales alongside famous stories, providing comprehensive coverage of Welsh folklore while making it accessible to contemporary young readers.

Similarly, Siân Lewis and Valériane Leblond's *Pedair Cainc Y Mabinogi / The Four Branches of The Mabinogi* (Rily, 2015) has achieved commercial success in both languages. The picture book format, enhanced by Leblond's atmospheric illustrations that capture the medieval Welsh setting, introduces young readers to the complex narratives of Pwyll, Branwen, Manawydan, and Math fab Mathonwy. The Welsh edition's Tir na n-Og Children's Book Award 2016 win acknowledges its significance in preserving these cultural narratives for new generations.

The innovative crowdfunding approach taken by *The Mab* (Unbound, 2022), initiated and edited by Matt Brown and Eloise Williams, represents a significant development in publishing Welsh children's literature. This bilingual collection features contributions from eleven prominent Welsh children's authors, including Sophie Anderson, Nicola Davies, and Rhian Ivory, alongside emerging voices like poets Alex Wharton and Hanan Issa. Each author was tasked with retelling one of the ancient tales in approximately 2,000 words, with translations by Bethan Gwanas incorporating both northern and southern Welsh dialects, depending on each story's origin. The project, championed by Welsh actor Michael Sheen, who wrote the foreword, exceeded its initial £29,000 crowdfunding target by securing £39,440 from 1,102 supporters. Max Low's distinctive illustrations provide a contemporary visual interpretation of these timeless tales.

The evolution of Welsh mythology in children's literature reveals a dynamic interplay between tradition and innovation, demonstrating how ancient narratives can be successfully adapted for contemporary audiences while maintaining their cultural significance. While international rights sales for works like *The Mab* have been limited thus far, the ongoing process of adaptation and translation ensures the continued relevance of Welsh mythology for new generations of readers, contributing to the preservation and evolution of Welsh cultural heritage in an increasingly globalised literary landscape. The success of these works within Wales and the broader UK market suggests significant potential for international appeal, though this remains largely unrealised in terms of translations into languages other than Welsh and English.

### 5.7.2 Illustrating Welsh children's literature

The development of illustration in Welsh children's literature reveals a complex evolution from early character brands to contemporary international exchange. In an interview, author and illustrator Aaron (2021) provides a critical assessment of Welsh children's publishing traditions, noting that beyond established characters like Super Ted, Sali Mali, and Rala Rwdins – brands developed during the 1970s and 1980s – Welsh publishing has historically struggled to create lasting children's characters with strong visual identities. While Super Ted achieved particular success, becoming Wales's first animated character to achieve significant international recognition through television adaptation and merchandising, such breakthroughs remained relatively rare in Welsh children's publishing.



Figure 5: Children's characters through history of Welsh-language children's publishing  
© Huw Aaron, image from *Ble Mae Boc?* (Y Llofa, 2018)

This historical context informed the establishment of Llyfrau Broga Books in 2019, a publisher set up by husband and wife illustrators Huw and Luned Aaron specifically focused on elevating the visual quality of Welsh-language children's books to match international standards. According to Aaron the relative scarcity of enduring Welsh children's brands highlighted a broader challenge in developing sophisticated visual narratives that could compete in both domestic and international markets.

As mentioned in Chapter 4, the 1970s and 1980s marked a transformative period in Welsh children's publishing through Dref Wen's translation programme (discussed in the case study in Section 7.1.1), which brought internationally acclaimed illustrators like Tomi Ungerer to Welsh-language audiences. Dref Wen's commitment to raising design and illustration standards established a precedent that would later influence publishers like Llyfrau Broga Books, who share similar aspirations to elevate Welsh children's book design to international standards. Aaron (2021) notes how exposure to these translated works during his childhood proved formative to his own development as an illustrator, demonstrating how international influences can enrich Welsh visual culture. This early exposure to sophisticated international illustration would later influence Aaron's approach

to both creative work and publishing, leading to his own success with major publishers like Puffin and the international rights sales of works like *Sleep Tight*, *Disgusting Blob* (Puffin, 2025) and *Unfairies* (Puffin, 2025).

The history of character development in Welsh children’s publishing offers particular insight into these dynamics. The publication of *Sali Mali* (Gomer Press, 1961) by Mary Vaughan Jones represents a significant milestone in Welsh children’s literature. However, Aaron’s critique notes that the original illustrations appeared stylistically dated even for their time, resembling work from the 1920s rather than the 1960s. This observation highlights the conservative visual approach prevalent in Welsh children’s publishing during this period, reflecting both economic constraints and cultural attitudes toward children’s book illustration.



Figure 6: The original *Sali Mali* cover (l) (Gomer) and a contemporary edition (r) (Atebol)

The contemporary landscape of Welsh children’s book illustration demonstrates increasing international exchange and influence. Broga Books’s recent publication of the (almost) wordless picture book *Yr Ardd Anweledig* (‘The invisible garden’) by Valérie Picard, illustrated by Marianne Ferrer and translated by Luned Aaron (2023), from Québec, demonstrates their commitment to bringing diverse international visual styles to Welsh audiences. The cloth-bound edition represents a willingness to take creative risks with production quality and format, even within the constraints of a small nation publishing market. This attention to physical quality and visual excellence reflects Broga Books’s broader mission to elevate standards in Welsh children’s publishing.

Within this evolving landscape, certain illustrators have played key roles in developing a distinctive Welsh visual style. Jac Jones stands as a particularly significant figure in Welsh children's book illustration, having illustrated numerous Welsh children's books since the 1970s. His contributions to *One Moonlit Night* demonstrate his ability to create vivid interpretations of Welsh stories that connect with young readers. His atmospheric renderings of Welsh landscapes and traditions have helped establish a visual language that is both distinctively Welsh and accessible to modern audiences.

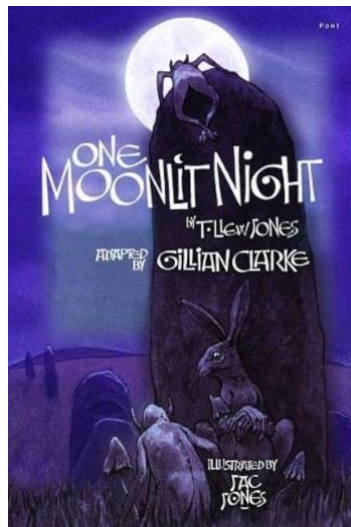


Figure 7: *One Moonlit Night* by T Llew Jones, illustrated by Jac Jones (Pont Books, 2015)

Luned Aaron's own creative career illustrates the growing sophistication of Welsh illustration practices. Her diverse background in television presenting, scriptwriting, and fine art has informed her approach to children's book illustration, demonstrated in works like *ABC Byd Natur* (Y Lolfa, 2020), which won the Children's Book Award in 2017. Her use of mixed media and collage techniques represents the increasing diversity of visual approaches in contemporary Welsh children's publishing.

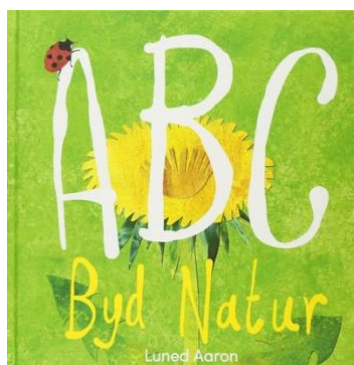


Figure 8: *ABC Byd Natur* by Luned Aaron (Y Lolfa, 2016)

The work of French Québécois illustrator Valérie Leblond represents another significant development in Welsh children’s book illustration. Beyond her acclaimed picture book *Y Cwilt / The Quilt* (Y Lolfa, 2020), Leblond has illustrated numerous important Welsh children’s books, including *Pedair Cainc y Mabinogi / The Four Branches of the Mabinogi* (Rily, 2015) with Siân Lewis, the Welsh version of which won the Tir na n-Og Children’s Book Award in 2016. *Y Cwilt* tells the story of a young girl who must leave her Welsh home for America, taking with her a quilt that embodies memories of her homeland. Through this narrative, Leblond demonstrates how cultural specificity can achieve universal appeal through sophisticated visual storytelling.

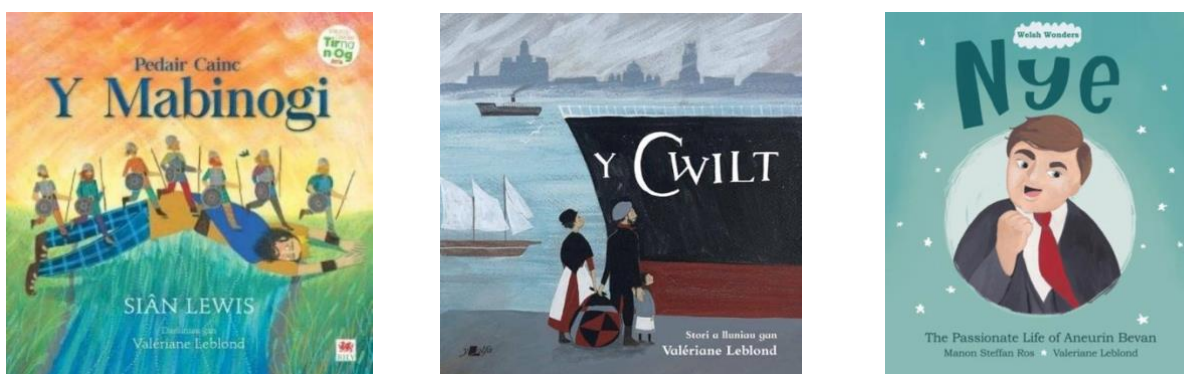


Figure 9: Valérie Leblond illustrated book covers (left to right: Rily Publications, Y Lolfa, Broga)

Leblond’s approach to visual storytelling offers particular insight into how illustration can transcend linguistic boundaries. Through the metaphor of quilting – a craft with deep

significance in both Welsh and American traditions – her illustrations explore themes of migration, belonging, and cultural preservation. Set in rural Wales in the late 1800s, her deliberately unspecified historical setting allows the story to connect with contemporary migration experiences while honouring Welsh historical contexts. The recurring motif of migrating birds creates a visual throughline that needs no translation, while specific cultural markers in architecture and landscape root the story in Welsh heritage without limiting its accessibility.

The establishment of Broga Books in 2019 by illustrators Luned and Huw Aaron specifically aimed to elevate illustration standards in Welsh-language children’s publishing (see Section 6.2 for detailed analysis of their publishing strategy).

The future of Welsh children’s literature reflects a dual approach to internationalisation. While earlier efforts focused primarily on exporting Welsh content through character brands like Super Ted, or more recently through international rights sales of works by Welsh creators such as Huw Aaron through major publishers like Puffin, contemporary Welsh publishers are increasingly recognising the value of importing and adapting international content from languages other than English for Welsh audiences. Broga Books demonstrates this balanced approach: while the Aarons pursue international ambitions as creators, their publishing house simultaneously enriches domestic publishing through careful translation and adaptation of works like *Yr Ardd Anweledig* (see Section 6.2 for details). This two-way cultural exchange, combining export of Welsh content with strategic import of international works, suggests a sophisticated model for small-nation publishing.

### 5.7.3 *Y Pump*: collaborative innovation in Welsh YA publishing

The *Y Pump* (The Five) series represents a groundbreaking development in Welsh-language young adult literature, demonstrating innovative approaches to both content creation and market engagement. Conceived as five interconnected 20,000-word novellas, the project breaks new ground through its collaborative authorship model pairing established Welsh writers with young co-authors who bring lived experience to the narratives.

## **Editorial strategy and youth voice**

Under the editorial direction of Elgan Rhys, the series addresses contemporary issues facing Welsh teenagers through five protagonists attending Ysgol Gyfun Llwyd. The collaborative writing process, undertaken during Covid-19 pandemic restrictions, ensures authentic representation of youth perspectives on topics, including mental health, race, gender, and sexuality. This approach moves beyond traditional authorship models to create narratives that resonate genuinely with their target audience while maintaining professional literary standards.

## **Market innovation and digital integration**

The project demonstrates sophisticated understanding of contemporary youth engagement through its integrated marketing strategy. The creation of dedicated social media presence, particularly on Instagram under #YPump, and the development of auxiliary content such as character playlists on the AM platform, represents an advancement in Welsh-language publishing's digital presence. This multi-platform approach provides a potential model for future youth-oriented publishing initiatives.

## **Structure and accessibility**

Each novella functions as a standalone work while contributing to a larger narrative mosaic. The 20,000-word format proves particularly effective for the young adult market, providing sufficient depth for complex themes while maintaining accessibility. The series' box set presentation creates additional marketing opportunities while emphasising the interconnected nature of the narratives.

## **International potential**

The English translation by Firefly Press (publishing in August 2025) represents potential for international market penetration. The series' handling of universal teenage experiences through a distinctly Welsh lens, combined with its innovative collaborative creation model,

positions it well for cross-cultural appeal. The consolidation of the five novellas into a single English-language volume suggests thoughtful adaptation of the format for international markets.

This project offers valuable insights into Welsh publishing's internationalisation efforts, demonstrating how innovative approaches to content creation and market engagement can create works that serve both domestic cultural needs and international market potential.

The systems of literary recognition described above provide context for understanding how publishers leverage awards and critical acclaim in their international strategies. Within Bourdieu's framework, awards function as mechanisms for consecration that confer symbolic capital domestically while potentially facilitating international market entry through translation and rights sales. However, the criteria for domestic awards (emphasising Welsh settings, language, and cultural themes) may not align with characteristics that enable international market success, creating tension between domestic cultural validation and international market requirements. How publishers strategically utilise award recognition in international contexts is demonstrated through case studies including *Llyfr Glas Nebo* (Chapter 7, Section 7.2.1) and *The Clockwork Crow* (Chapter 7, Section 7.2.2).

## 5.8 Diversity and development

The contemporary Welsh children's publishing sector faces important challenges in ensuring representation and developing new talent. Recent initiatives demonstrate both progress and continuing needs in these areas. The CLPE's Reflecting Realities surveys (Serroukh, 2022) have documented a gradual increase in ethnic representation across UK children's publishing, rising from 4% of children's books featuring characters of colour in 2017 to 20% in 2022, providing important benchmarks against which Welsh publishing's own diversity efforts can be measured. These challenges operate within a wider commercial context in which, as Chetty and Sands-O'Connor (2022) note, books featuring Black or brown protagonists remain harder to sell to publishers, while Welsh subject matter is often

considered niche — compounding obstacles for books set in Wales with characters of colour.

The past few years have seen efforts to diversify the industry. Literature Wales and Firefly Press ran the Rising Stars Wales Award in 2018. This was open to poets of colour in Wales and was won by Alex Wharton, who went on to publish his debut collection *Daydreams and Jellybeans*, illustrated by Katy Riddell (Firefly Press, 2021), to great acclaim, achieving strong sales and review coverage. The collection's illustrations by Katy Riddell depict diverse children throughout, including Black children and a child wearing a hijab (Chetty and Sands-O'Connor, 2022). Wharton was invited to key literature festivals in 2021 as well as speaking on an online panel discussion about children's publishing in Wales at London Book Fair 2021. While festivals running events online in 2021 due to Covid restrictions limited the usual networking opportunities with readers and children's literature champions, Wharton's subsequent appointment as Children's Laureate Wales (2023-2025) significantly raised both his profile and the visibility of diverse Welsh writing across the UK. The Laureate role provided platforms for promoting not just Wharton's work but also for showcasing Welsh diversity within the broader UK children's literature sector, demonstrating how institutional support and recognition can enable underrepresented voices to achieve national prominence. This observation of emerging creatives' networking challenges during the pandemic was also a key finding in the study *Impacts of Covid-19 on Children's and Young Adult Literature Creative, Cultural, and Reading Communities in Scotland and Ireland* (Bold, Kennon, Morrissey, 2022).

The evolution of diversity initiatives in Welsh publishing reveals complex tensions between expanding representation and sustaining established literary traditions. Firefly Press's initial attempt to publish an anthology of poetry by writers of colour from Wales, supported by Literature Wales, encountered challenges that highlighted systemic barriers in the sector. While the project's postponement due to insufficient submissions initially suggested a potential gap in Wales's literary ecosystem, it also raised important questions about traditional publishing approaches to reaching underrepresented writers. This experience contributed to broader institutional reflection on accessibility and outreach in Welsh publishing.

The project's eventual realisation in May 2024, under the editorship of National Poet of Wales Hanan Issa, demonstrated how initial challenges could lead to productive reconsideration of diversity initiatives Issa had previously co-edited *Welsh (Plural): Essays on the Future of Wales* (Repeater Books, 2022), establishing her profile in Welsh literary discourse on diversity and identity. ...*And I Hear Dragons* (Firefly Press 2024) expanded beyond its original scope to encompass a wider spectrum of diverse voices, while maintaining its core mission of amplifying underrepresented perspectives. The anthology's conceptualisation of Welsh youth as 'ferociously brave mythical beasts' created a framework for exploring contemporary challenges, including discrimination and environmental degradation, through the lens of identity and resilience.

Literature Wales runs a writing development programme, Representing Wales, providing opportunities for writers from underrepresented communities, including non-white and low-income backgrounds, to develop their writing. The organisation also ran a writing course at Tŷ Newydd Writing Centre, 'Books for All: Writing Characters of Colour for Children', in March 2022 tutored by the children's writers Patience Agbabi and Jasbinder Bilan. Agbabi's selection reflected her direct experience of Welsh settings; her novel *The Infinite* (Canongate, 2020) is set in multiracial North Wales and features an autistic, Nigerian-British protagonist. Literature Wales and the Books Council have also worked together to create writing and illustration courses at Tŷ Newydd Writing Centre. The Books Council, in response to the Rosser report (2017), instigated an illustrator prize in partnership with Urdd Gobaith Cymru to find new talent in the field of children's book illustration.

In February 2022, the Books Council received additional end-of-year funding (£186k) from the Welsh Government's Economy Department, establishing New Audiences Grants to develop ethnically diverse writers and audiences in Wales. This funding marked a significant institutional shift in priorities, aiming to diversify both children's publishing output and sector staffing in response to growing recognition of representation gaps. The initiative reflects the Books Council's evolving role in balancing support for established voices with the imperative to develop new ones from underrepresented communities, particularly within children's literature where diverse representation remains limited.

The implementation of Wales's new Curriculum for Wales in 2022 marked a significant milestone in representing diverse histories within education, shaped substantially by the report of the Black, Asian and Minority Ethnic Communities, Contributions and Cynefin in the New Curriculum Working Group, chaired by Professor Charlotte Williams. This groundbreaking curriculum development positioned Wales as the first UK nation to mandate the teaching of Black history, establishing a framework that explicitly recognises the contributions of diverse communities to Welsh heritage. The curriculum's emphasis on representing the experiences of people of colour in Wales has created new imperatives for educational publishing, particularly in developing resources that support this expanded historical narrative.

The Welsh Government's Department of Education and Welsh Language, through its Welsh in Education Resources Branch, has responded to these curricular changes by adapting its commissioning strategies. Under Ann Evans's leadership, the department has prioritised the development of materials that align with both the curriculum's diversity requirements and the government's broader anti-racist commitment targeted for 2030. As noted in Section 5.5, educational resource commissioning has since transitioned to Adnodd, though the strategic priorities around diversity and representation remain central. This strategic alignment between educational policy and publishing has created new opportunities and responsibilities for publishers, who must now produce resources that not only meet academic standards but also authentically represent Wales's diverse communities.

This institutional commitment to diversifying educational materials represents a significant shift in Welsh publishing priorities, creating new markets for inclusive content while challenging publishers to develop expertise in representing previously underserved narratives. The intersection of these educational reforms with publishing practice demonstrates how policy initiatives can drive substantive change in cultural production, particularly in materials designed for young readers.

O'Sullivan's (2011) imagological approach also has relevance here, as it provides tools for examining how Welsh national and cultural identity is constructed through children's

literature. As Wales diversifies its children's publishing output, imagological questions about how Welsh identity is represented, and for whom, become increasingly pertinent.

Collectively, these diversity initiatives address a critical dimension of Bishop's (1990) mirrors, windows, and sliding glass doors framework discussed in Chapter 2. While this thesis has primarily applied Bishop's framework to examine how Welsh literature functions as cultural mirrors for Welsh readers and windows for international audiences, the metaphor's original context concerned racial representation. For Welsh children's literature to function authentically as mirrors, it must reflect the full diversity of contemporary Wales — not only linguistic identity but also ethnic and racial diversity. The initiatives outlined here signal a broadening of this representational lens, recognising that children from all backgrounds need to see themselves reflected in Welsh stories. This evolution complements the broader representational shifts evident in literary recognition systems, where the Tir na n-Og Children's Book Awards have increasingly reflected contemporary issues and diverse perspectives (see Section 5.6.1).

## 5.9 Conclusion

This analysis of the contemporary Welsh children's publishing landscape reveals a sector operating within distinctive structural conditions that both enable and constrain international development. Three interrelated findings emerge as particularly significant for understanding internationalisation possibilities.

First, the infrastructure supporting Welsh children's publishing (Sections 5.1-5.3) creates what Bourdieu (1993) characterises as a 'restricted field of production,' where cultural objectives take precedence over commercial imperatives, and institutional support substitutes for market-driven revenue. This structure enables production of culturally significant works that might not achieve commercial viability but creates dependency on domestic funding mechanisms not designed to support international market development. The bilingual cultural context, comprehensive grant systems, and decentralised geographic distribution shape how publishers can accumulate and convert different forms of capital

when pursuing international opportunities. Educational publishing and curriculum development (Section 5.5) further shape this landscape, creating both market opportunities and additional dependencies on government commissioning.

Second, translation and adaptation strategies (Section 5.4) demonstrate sophisticated navigation of what Sapiro (2016) terms the ‘field of translation,’ where cultural and commercial objectives intersect within asymmetric language power relations. Welsh publishers’ strategic differentiation between ‘translation’ and ‘adaptation’ reflects conscious positioning within these power dynamics—domesticating English content for Welsh audiences while seeking to preserve cultural specificity when translating Welsh works outward. This bidirectional approach creates possibilities for international engagement but requires resources and expertise that remain unevenly distributed across the sector.

Third, systems of literary recognition (Sections 5.6-5.7) function as mechanisms for consecration within the domestic field while potentially facilitating international market entry. However, the criteria for domestic awards (emphasising Welsh settings, language, and cultural themes) may not align with characteristics that enable international market success, creating tension between domestic cultural validation and international market requirements.

Understanding these contemporary landscape features provides essential context for examining how individual publishers translate structural opportunities into specific business strategies. Chapter 6 presents detailed case studies of eight Welsh publishers, examining how they navigate the funding mechanisms (5.3), translation approaches (5.4), educational markets (5.5), and literary recognition systems (5.6) established in this chapter. Chapter 7 then examines how these publisher strategies manifest in specific international initiatives through import, export, and co-production case studies.

## 6. Publishers in Wales Producing Books for Children and Young People

Building on the landscape analysis in Chapter 5, which examined the structural foundations and support mechanisms of Welsh children's publishing, this chapter shifts focus to how individual publishers navigate these conditions in practice. Through detailed case studies of eight Welsh publishing houses, this chapter addresses Research Questions 2 and 3 by analysing how publishers balance cultural objectives with commercial viability, and how they approach domestic and international market development.

The publishers examined represent diverse operational models: established printer-publishers (Y Lolfa, Carreg Gwalch), design and translation agencies turned publishers (Graffeg, Atebol), specialist translation publishers (Dalen), and newer independent publishers (Firefly Press, Broga Books, Rily Publications). These eight publisher profiles are based on comprehensive survey data and in-depth interviews conducted with publishers who receive Books Council funding for children's and young adult literature. While twelve publishers were initially surveyed, the chapter focuses on the eight who responded in detail to both surveys and interviews. Two additional publishers represented in this study's broader scope – Dref Wen and Peniarth – did not participate in this phase of data collection but are examined through alternative approaches: Dref Wen through historical context from its founder in Chapter 7, Section 7.1.1, and Peniarth through an import case study in Chapter 7, Section 7.1.2.

Each profile examines how publishers position themselves within the contemporary Welsh publishing landscape, assessing their strategic decisions about content selection, market positioning, and resource allocation in relation to the funding mechanisms (Section 5.3), translation approaches (Section 5.4), and market structures (Sections 5.1-5.2) established in Chapter 5. Rather than providing descriptive organisational profiles, this analysis assesses each publisher's strategic approach to cultural mission, commercial sustainability, and international engagement. The analysis reveals diverse strategic patterns, from primarily domestic approaches to active international development, providing essential context for understanding the specific international initiatives examined in Chapter 7.

Due to Covid-19 restrictions during initial data gathering (2021-2022), interviews were conducted remotely via Zoom, email, and telephone, with follow-up discussions held in person with some publishers at the London Book Fair in 2022. Table 10 provides an overview of the ten Welsh publishers producing children’s books, with the eight examined through detailed case studies indicated. This overview helps contextualise the strategic analysis that follows, showing how different publishers represent distinct approaches to operating within the Welsh children’s publishing field.

**Table 10: Publishers in Wales that produce books for children. Publishers examined through detailed case studies in this chapter are indicated with an asterisk\***

Publisher	Year est.	Primary language	Annual Output	Type	Staff size	Key market focus
Atebol*	2003	Welsh	60	Educational & Trade	30	Children’s adaptations and some original titles
Broga*	2019	Welsh	9	Trade	2 (part-time)	Children’s illustrated original titles
Carreg Gwalch*	1980	Welsh	41 (35 Welsh, 6 English)	Trade	17	Children’s & adult original titles
Dalen*	2005	Welsh	18	Trade	8 (1 FT, 7 freelance)	Comics & graphic novels adaptations
Dref Wen	1980s	Welsh	Data not available	Trade	Data not available	Children’s adaptations
Firefly Press*	2013	English	17-18	Trade	7	Children’s & YA original titles
Graffeg Books*	2003	English & Welsh	Data not available	Trade	10	Children’s & adult original titles
Peniarth	2009	Welsh	Data not available	Educational	Data not available	Educational resources
Rily*	2001	Welsh	50	Trade & Educational	10 (mostly PT)	Children’s adaptations and some original titles
Y Lolfa*	1967	Welsh	70-80	Trade	22	Children’s & adult original titles

*Source: Publishers survey questionnaire, 2021. Note: All data current as of 2021. Staff sizes include full-time, part-time, and regular freelance contributors. Annual output figures represent total books published per year across all categories. Note these publishers are not exhaustive but engaged with the research.*

## 6.1 Atebol

Atebol represents a good example of how innovation and strategic growth can reshape Welsh publishing. Since its establishment in 2003 by Glyn Saunders-Jones, the company has evolved from a small Welsh-language educational publisher into a diverse media organisation that plays an important role in Wales's educational and cultural landscape. Their evolution highlights the potential for Welsh publishers to expand beyond traditional boundaries while maintaining strong connections to local communities and culture.

### **From local roots to national impact**

Atebol's founding reflects a dual mission that continues to shape its development: promoting the Welsh language while creating employment opportunities in rural Wales. This commitment to local communities, particularly in Ceredigion and Carmarthenshire, has remained central to the company's identity even as it has grown into a national player. The arrival of Owain Saunders-Jones, a former banker and the founder's son, in 2013 marked a turning point, leading to a threefold increase in business operations and introducing new strategic approaches to growth (O.S. Jones, 2021).

The company's expansion demonstrates how traditional publishing values can be combined with modern business practices. Atebol's commitment to providing employment in rural areas, now manifested through offices in Aberystwyth, Carmarthen, and Cardiff, shows how publishing can contribute to regional development while building national reach. With a staff of thirty across these locations, the company has become a significant employer in the Welsh cultural sector.

### **Strategic growth and market position**

Atebol's growth strategy has been marked by strong acquisitions that have transformed its market position. The 2020 acquisition of CAA Cymru (Canolfan Astudiaethau Addysg / Centre for Educational Studies) from Aberystwyth University established the company as Wales's largest educational publisher, while the subsequent purchase of Gomer's children's

backlist in 2021, including the acclaimed *Sali Mali* series (as detailed in Section 5.4.3), further expanded its portfolio.

The company's publishing output of sixty books annually, primarily focused on educational titles, reflects both its market strength and its commitment to supporting Welsh education. Recent successes in the consumer trade market, such as the Wales Book of the Year winner *Chwedlau'r Copa Coch: Yr Horwth* (Legends of Copa Coch: The Horwth) (Jones and Aaron, 2015) show how educational expertise can provide a foundation for broader cultural impact.

### **Innovation and adaptation**

Atebol's approach to business diversification reveals a sophisticated understanding of modern media markets. Beyond traditional publishing, the company has developed capabilities in translation, subtitling, website and graphic design, app development, filming, and audio services. This multi-platform approach positions Atebol at the intersection of publishing and digital media, suggesting new possibilities for Welsh cultural content.

The company's distinction between adaptation and translation demonstrates a nuanced understanding of cultural localisation. Their work with authors like David Walliams, adapting content to include Welsh locations and expressions, shows how international content can be meaningfully integrated into Welsh cultural contexts. This approach to adaptation could provide valuable lessons for other publishers working across cultural boundaries.

The company has expanded into original-language publishing in both Welsh and English. Recent titles include *The Flower Girl* by BBC Wales presenter Lucy Owen (Atebol, 2021), and the *Trio* series by Manon Steffan Ros, illustrated by Huw Aaron. Atebol demonstrated innovative marketing with the launch of *Trio ac Antur yr Eisteddfod* (Atebol, 2020), featuring an online murder mystery show at the digital Eisteddfod AmGen in 2020, with the three characters designed as suspects in a Zoom-based Welsh-language murder mystery. The company has also published *Y Soddgarw* (2021), written by Manon Steffan Ros and illustrated by Lily Mÿrennyn, an emerging talent identified through Books Council diversity

initiatives (discussed in Section 5.8), demonstrating commitment to developing new creative voices.

### **Technological integration and market development**

Atebol's embrace of technology, particularly in response to Brexit and Covid-19 challenges, demonstrates how Welsh publishers can adapt to changing market conditions. The implementation of print-on-demand services for English-language titles represents an innovative approach to international distribution challenges. This technological adaptation suggests ways that small-nation publishers can overcome traditional market limitations.

The company's relationship with Amazon, managed through the Books Council, indicates how traditional distribution systems can be combined with modern retail platforms. While core sales remain within Wales, Atebol's experimentation with new distribution methods suggests possibilities for market expansion.

### **Future directions and industry implications**

Atebol's interest in rights trading and international markets, though not yet fully realised, indicates potential future development paths for Welsh publishing. Their success in building a diverse media business while maintaining strong local connections provides a model for how publishers can grow.

The company's vision for industry development, particularly their advocacy for increased investment in Welsh publishing infrastructure and creativity, echoes successful models from other cultural industries. Their comparison to the TV industry suggests how strategic investment could transform Welsh publishing's international position.

### **Implications for sector development**

Atebol's trajectory from small educational publisher to Wales's largest educational publishing operation demonstrates how strategic acquisitions and service diversification can

build scale within small-nation publishing contexts. The company's success in maintaining cultural mission while achieving commercial growth demonstrates that these objectives can be mutually supportive rather than competing priorities.

The company's multi-platform capabilities, extending beyond traditional publishing to translation, digital services, and media production, position it advantageously for evolving content markets. This diversification provides revenue stability while potentially enabling international service provision beyond Wales. However, Atebol's international rights activities remain largely aspirational, suggesting that even well-resourced Welsh publishers face structural challenges in systematic international market development.

Their sophisticated approach to adaptation—what they term cultural localisation rather than simple translation—offers insights into how publishers can serve minority-language markets while maintaining content quality and cultural relevance. Yet this expertise, while valuable domestically, does not readily convert to international market advantage. The tension between Atebol's domestic success and limited international penetration exemplifies broader challenges facing Welsh publishing examined throughout this chapter and explored through specific case studies in Chapter 7.

## 6.2 Broga

The establishment of Llyfrau Broga Books in 2019 represents a significant development in Welsh children's publishing, particularly in its focus on visual quality and design excellence. Founded by Luned and Huw Aaron, both experienced authors and illustrators, the company emerged from a perceived need to elevate the production standards of Welsh-language children's books to match those of English and European publications. As mentioned in Chapter 4, the founders were directly influenced by Dref Wen's pioneering work in raising illustration standards (see Section 7.1.1 for detailed analysis of Dref Wen's historical impact). Broga's story provides valuable insights into how new publishers can influence quality standards and challenge established practices in small-nation publishing.

### **Operational model and resource management**

As a new entrant to publishing, Broga Books has developed an operational model that balances creative ambition with practical constraints. The founders maintain their work as illustrators and authors, dedicating one day per week to publishing operations. This approach, while limiting in some ways, allows them to maintain direct creative involvement while building the publishing business. Their funding structure demonstrates the complex ecosystem of Welsh publishing support, drawing on various sources, including Welsh Government funding, World Book Day commissions, and Books Council grants.

The company's initial success with the *Seren a Sbarc* series, which secured an advance order of 11,000 copies, validates their approach to quality and market positioning. Their target of nine titles per year represents a considered balance between ambition and capability, recognising the constraints of operating without additional staff while maintaining high production standards.

Broga's *Welsh Wonders* series further demonstrates their sophisticated approach to celebrating Welsh culture through high-quality illustration and storytelling. The series, illustrated throughout by Valériane Leblond, introduces young readers to significant Welsh cultural figures through carefully crafted biographical narratives. By featuring diverse personalities such as international singer Shirley Bassey, pioneering artist Gwen John, and influential politician Aneurin Bevan, the series demonstrates how children's publishing can contribute to cultural preservation while engaging contemporary audiences. Leblond's distinctive illustration style provides visual continuity across the series while capturing the unique character and historical context of each subject, creating books that function both as cultural documents and engaging reading material for young audiences.

### **Navigating challenges and change**

The company's early years have coincided with significant external challenges, including the Covid-19 pandemic and Brexit. While the pandemic caused publishing delays, Broga Books' status as a new company paradoxically provided some insulation from its worst effects. Their experience highlights how new publishers can potentially adapt more readily to market disruptions than established firms with fixed operational patterns.

Their interest in rights trading, both buying and selling, demonstrates an understanding of the importance of international market participation. However, their recognition of resource constraints in pursuing these opportunities reveals a realistic assessment of the challenges facing small publishers in international markets.

### **International positioning and market development**

Broga Books' international aspirations, though not yet fully realised, reveal sophisticated understanding of small-nation publishing opportunities. Their expressed interest in partnerships with publishers in other minority languages – Irish, Basque, and Catalan – demonstrates awareness of cultural affinities that could facilitate co-edition arrangements and rights exchanges. This focus on minority-language markets, rather than immediately pursuing major anglophone markets, suggests strategic recognition that cultural proximity may offer more sustainable pathways to international engagement than competing directly with major publishers in dominant language markets.

The planned release of English-language versions of their picture books indicates pragmatic acknowledgment that English serves as a bridge language for international rights sales. However, the company's limited capacity – operating with two part-time staff while maintaining parallel illustration and authorship careers – constrains their ability to develop systematic international strategies. This resource limitation is common among small publishers but particularly acute for those prioritising production quality, where attention to visual standards requires significant time investment.

Huw Aaron's subsequent success with Puffin, achieving rights sales into seven languages by December 2024 for works like *Sleep Tight*, *Disgusting Blob* and *Unfairies*, demonstrates both the international potential of Welsh creative talent and the advantages major publishers offer in reaching global markets. This development raises important questions about the relationship between domestic publisher development and international market access—whether small Welsh publishers can provide adequate platforms for internationally ambitious creators, or whether successful creators inevitably transition to major publishers to achieve global reach.

## **Impact and implications**

The significance of Broga Books extends beyond their direct publishing output. Their emphasis on visual quality and design excellence challenges established practices in Welsh children's publishing and potentially influences industry standards. The company's focus on nurturing illustrators and designers represents an important intervention in Welsh publishing culture, potentially helping to develop a new generation of visual storytellers.

Their operational model provides insights into how new publishers can enter and influence markets while managing resource constraints. The balance they strike between maintaining high production standards and operational sustainability offers lessons for other small-nation publishers.

## **Future directions and broader significance**

The temporary pause in Broga Books' publishing activities in 2023, coinciding with Huw Aaron's international publishing success, raises interesting questions about the relationship between domestic and international publishing opportunities for Welsh creators. This development suggests both the challenges and opportunities facing Welsh publishing in an increasingly global market.

The case of Broga Books illustrates several key themes in contemporary Welsh publishing: the importance of visual quality in children's publishing, the challenges of maintaining high production standards with limited resources, and the complex relationship between domestic and international markets. Their experience provides valuable insights into how new publishers can influence quality standards and market expectations while operating within the constraints of a small-nation publishing environment.

## **6.3 Carreg Gwalch**

Gwasg Carreg Gwalch has evolved from a small printer-publisher into a domestically established publisher now pursuing international opportunities, offering valuable insights

into the evolution of Welsh children's publishing. Founded in 1980 by Myrddin ap Dafydd, the company's development mirrors broader changes in Welsh publishing while highlighting unique approaches to the challenges faced by publishers in small nations. This profile examines how Carreg Gwalch has navigated the complex balance between cultural ambition and commercial success, offering insights into the internationalisation of Welsh children's literature.

### **The foundations of growth**

Carreg Gwalch's early focus on local history, amateur plays, and folklore established deep roots in Welsh culture that would later prove crucial to its development. From these beginnings, the company has evolved into a diverse publishing operation that produces thirty-five Welsh-language and six English-language titles annually. This evolution reflects both the opportunities and challenges inherent in Welsh publishing, where cultural mission and commercial viability must be carefully balanced.

The company's structure today reveals much about its approach to these challenges. With seventeen staff members spread across editorial, production, and marketing roles, Carreg Gwalch maintains a flexible workforce that includes both full-time and part-time positions. This staffing model enables the company to manage resources efficiently while maintaining professional standards across its operations. The mix of grant-funded Welsh-language publishing and commercial activities, including English-language publishing and printing services, provides a sustainable foundation for the company's cultural mission.

### **Cultural mission in a commercial world**

At the heart of Carreg Gwalch's operations lies a deep commitment to Welsh culture and literature. The founder, Myrddin ap Dafydd, was elected Archdruid of Wales from 2018 to 2024 and is committed to promoting the Welsh language through literature and culture. This commitment is evident in the company's approach to talent development, with 80 to 90 per cent of its authors and illustrators based in Wales. The recent collaboration with Welsh artist Elin Manon on *Dros y Môr a'r Mynyddoedd: Straeon Merched Dewr y Celtiaid /*

*Over the Mountains and the Sea: Tales of Brave Celtic Women* illustrates how the company nurtures local talent while creating content with international appeal. Manon, who studied illustration at Falmouth University and now lives in Cornwall, approached Carreg Gwalch with her work in 2020, leading to the creation of the anthology, a fully illustrated collection of Celtic stories available in Welsh and English that bridges Welsh heritage with broader Celtic traditions.

The company's status as a Books Council revenue publisher provides important support for its Welsh-language publishing programme. This public support enables Carreg Gwalch to maintain its cultural mission while developing commercial opportunities. The company's approach to educational publishing further demonstrates this balance, with many of its historical novels finding their way into Welsh schools, extending their cultural impact beyond the initial market.

### **International ambitions and cultural exchange**

Carreg Gwalch's approach to internationalisation reveals a thoughtful strategy based on cultural affinity and careful market selection. The company spent eighteen months researching and preparing a rights catalogue, focusing particularly on opportunities within Celtic nations and other small language markets. This approach recognises the unique challenges and opportunities presented by cultural and linguistic similarities.

The company's experience with adaptation and translation has evolved significantly over time. Early collaborations with publishers in Belgium, Spain, and England have given way to a more strategic focus on Celtic nations, particularly Ireland. The acquisition of rights to works like Patricia Forde's dystopian novels *The Wordsmith* and *Mother Tongue* from Little Island Books demonstrates how Carreg Gwalch identifies and adapts content that resonates with Welsh cultural concerns. These dystopian novels, dealing with themes of language control and preservation, take on new significance in their Welsh translations.

## **Navigating challenges and opportunities**

Recent years have presented both challenges and opportunities for Carreg Gwalch's international ambitions. Brexit has complicated the import of books from other countries, while the Covid-19 pandemic affected traditional retail channels, particularly for tourist-oriented publications. However, these challenges have also spurred innovation and adaptation. The company has used this period to strengthen its digital presence and develop new approaches to market development.

The company's experience highlights several persistent challenges in international publishing. The tendency of UK editors to be monolingual creates barriers to selling Welsh content into the broader UK market. Additionally, small publishers often face resource constraints that can limit their ability to pursue international opportunities. However, Carreg Gwalch has found inspiration in the success of other small language markets, particularly the Catalan experience, where focused support and strategic promotion have led to significant growth in international rights trading.

## **Building future foundations**

Looking ahead, Carreg Gwalch is actively developing new approaches to international market development. Plans for participation in major book fairs, including Bologna and Frankfurt, demonstrate the company's commitment to building its international presence. The company's interest in establishing a Welsh stand at these fairs, showcasing not just publishing but broader Welsh culture, indicates an understanding of the importance of cultural context in international markets.

The company's experience with translation and adaptation provides valuable insights into the development of international publishing strategies. From early adaptations of English-language content to more recent focus on Celtic-language publications, Carreg Gwalch has developed a nuanced understanding of how to select and position content for different markets. The success of translations from Irish publishers like O'Brien's Press, particularly in

genres like sports books that translate well across cultures, demonstrates the potential of carefully targeted content selection.

### **Lessons and implications**

Carreg Gwalch's approach offers several important lessons for understanding the internationalisation of small-nation publishing. The company's experience demonstrates the value of strategic market selection based on cultural affinity and the crucial role of public support in enabling cultural publishing. The company's approach to talent development, content selection, and market development provides a model for how publishers in small nations can maintain their cultural mission while building international presence.

The case study also highlights areas requiring further attention, including the need for better support mechanisms for international rights trading, the importance of developing professional capabilities in rights management, and the potential value of coordinated approaches to international market development. As Welsh publishing continues to evolve, Carreg Gwalch's experience provides valuable insights into how publishers can navigate the challenges and opportunities of an increasingly global market while maintaining their cultural foundations.

### **6.4 Dalen**

Dalen, a Welsh publishing house established in 2005 by Alun Ceri Jones, focuses on publishing translations of classic comics and graphic novels into the Welsh market. With a focus on bringing iconic series like *Asterix* and *Tintin* to Welsh readers, as well as expanding into other Celtic-language markets, Dalen has navigated the challenges of the publishing industry while staying true to its mission.

## Background and mission

Alun Ceri Jones, who had previously translated *Asterix* into Welsh in the 1970s for Dref Wen, founded Dalen with the primary goal of republishing these translations, which had been out of print since the early 1980s. Despite a complicated dispute between the authors, their families, and the previous publishers in France, Dalen finally secured the rights to publish *Asterix* in Welsh in 2012. The company's mission is to publish translations of European-tradition comic books into Welsh, and since 2013, it has expanded its languages to include Scottish Gaelic, Scots, Cornish, and Irish due to market demand. Additionally, they have two titles in Cornish and distribute two Breton Tintin titles published by third parties (A.C. Jones, 2021).

## Funding and staffing

Dalen is funded through a combination of private investment, retail sales, and grant funding. The company employs one full-time staff member and seven freelancers.

## Publishing output

While waiting for the *Asterix* rights to be granted, Dalen published an adaptation of the German adult-themed comic book *Die Bewgete Mann* by Ralf König, titled *Y Llyfr Mwya Beiddgar Erioed* (The Boldest Book Ever) in Welsh. The company also released several children's comic books, such as *Y Triawd Amser a Môr-ladron y Caribî*, *Y Triawd Amser: Congo, Llio!*, *Ofnau Tywyll: Y Meirw Byw*, and *Llywelyn Fychan*. Additionally, Dalen published two well-received graphic novel series, *Y Derwyddon* and *Chwedl Arthur*.

Dalen ventured into publishing other popular French comic book series, including *Lewsyn Lwcus* (Lucky Luke) and *Tintin*. While *Lewsyn Lwcus* had mixed success, with five titles published, *Tintin* has been a consistent success since its introduction in 2008, with almost the entire series now available in Welsh.

On average, Dalen publishes eighteen books per year, with 100 per cent of its publishing in consumer trade / leisure books. The company's publishing is split between Irish (50 per cent), Welsh (30 per cent), Gaelic (10 per cent), and Scots (10 per cent), with 100 per cent of its titles being translations. Approximately 20 per cent of Dalen's publishing involves Wales-based translators and editors. The company primarily publishes for the 9–12+ age group, with 100 per cent of its books in paperback format. Comic books make up 75 per cent of Dalen's output, while young adult titles account for the remaining 25 per cent.

### **Internationalisation and expansion**

In 2013, Dalen expanded into the Gaelic and Scots markets with *Tintin* and *Asterix*, initially as a rights licensee sub-licensing to local publishers. This move was driven by the high costs associated with publishing these series and the potential for cost reduction through co-edition arrangements. Dalen later began publishing directly in Gaelic and Scots, with the Scots edition of *The Black Island* in *Tintin* series becoming the company's bestseller.

The success of *Asterix* in Gaelic led to demand from Ireland, prompting Dalen to publish in Irish starting in 2014. The Irish market has become a significant source of sales and grant support for the company, with Alun Ceri Jones comparing it to the Welsh book market of the 1970s. Dalen sees selling books outside of Wales as important to its business and is interested in buying language rights or co-edition rights from other publishers if grants are available to assist with translation, printing, and marketing (A.C. Jones, 2021).

### **Printing and production**

Dalen has worked with printing houses in various countries, including Wales, England, Scotland, the Czech Republic, France, Lithuania, Poland, and even China through a co-edition with a Belgian publisher. However, the company has recently shifted its printing approach from lithographic to inkjet printing, taking advantage of technological improvements that allow for lower unit costs and smaller print runs without compromising quality.

## **Challenges and adaptations**

Like many publishers, Dalen has faced challenges related to the economic slump and increased fuel costs. In response, the company stopped publishing hardbacks and adjusted its price points to maintain sales. Brexit has also presented potential issues for Dalen, particularly in relation to retail and trade deliveries to customers in Europe, as well as additional duty charges and longer delivery times. As a result, the company has decided not to source print from the EU for the time being. However, the Covid-19 pandemic has not had a significant impact on Dalen's business.

## **Strategic significance and sectoral implications**

Dalen's multi-Celtic language strategy represents a distinctive approach to small nation publishing internationalisation, demonstrating how linguistic and cultural affinities can create viable market opportunities beyond domestic publishing alone. The company's success in building sustainable operations across Irish (50%), Welsh (30%), Gaelic (10%), and Scots (10%) markets illustrates how collaborative approaches to minority-language publishing can achieve scale unattainable within individual national contexts.

The publisher's specialisation in established comic and graphic novel properties – *Asterix*, *Tintin*, *Lucky Luke* – reflects strategic recognition that internationally recognised brands require less market development investment than original content while serving cultural localisation needs. This approach, while limiting creative development opportunities, has enabled Dalen to build stable revenue streams across multiple linguistic markets with minimal marketing expenditure.

Dalen's technological adaptation, particularly the shift from lithographic to digital printing, demonstrates how production innovation can enable smaller print runs across multiple languages without compromising quality or viability. This flexibility proves particularly valuable for minority-language publishing, where traditional print economics often constrain market participation.

However, Dalen's model also reveals limitations: the focus on adaptation rather than original content means the company develops translation capacity but not creative intellectual property. While commercially successful, this strategy positions Dalen as a cultural intermediary rather than a creator of new literary works. The contrast between Dalen's systematic multi-language approach and other publishers' more limited international engagement (examined in Chapter 7) highlights how different operational models serve different strategic objectives within small-nation publishing contexts.

## 6.5 Firefly Press

Firefly Press was established thanks to funding from a 2013 initiative from the Books Council of Wales. Editors Penny Thomas and Janet Thomas submitted a successful tender to the Welsh Government to develop an English-language early reader series set in Wales. The founders took this opportunity to establish a publishing business focused on quality children's and YA fiction. Over the following decade, Firefly Press has developed into one of Wales's most significant independent English-language children's publishing houses. Its trajectory offers valuable insights into the opportunities and constraints faced by children's publishers operating in small-nation contexts as they pursue international market penetration, illustrating the complex interplay between local cultural production and global publishing ambitions.

### **Origins and evolution**

Firefly's origins reflect the resourcefulness often required in small-nation and independent publishing. Beginning with Welsh Government and family funding for just five titles over eighteen months, the company's early days were marked by minimal compensation, with co-founder and publisher Penny Thomas recalling, 'We were basically working for free or for a tiny amount' (P. Thomas, 2024). Initially financed through small grants from the Books Council of Wales and family investment, the company operated with three part-time staff working from home, publishing eight books annually, with stock stored in Thomas's house. The company's fortunes improved following its acceptance into the Books Council of Wales's revenue portfolio, which provided guaranteed funding for eight titles annually over

a three-year period. This recognition, combined with additional investment from author and entrepreneur Robin Bennett, enabled the company's expansion into a professional operation, growing from those modest beginnings to a team of six or seven members with a small office producing seventeen to eighteen titles per year, demonstrating how careful development and strategic focus can build sustainable publishing operations from modest foundations.

### **Building the domestic foundation**

Firefly's market expansion has been grounded in its strategic focus on domestic publishing operations. The publisher has worked systematically to build credibility with UK trade customers, particularly through its sales and distribution partnership with Bounce Sales & Marketing. 'Bounce have been brilliant,' observes Janet Thomas (J. Thomas, 2024). 'Getting into Bounce was really crucial ... they can talk much better to Waterstones and to Foyles and to those other real big book chains that can afford to just ignore small presses unless they see a reason' (J. Thomas, 2024).

One of the primary challenges facing Welsh publishers is gaining recognition and visibility beyond the country's borders. Penny Thomas, Publisher at Firefly Press, articulates this issue 'The main challenge I see is being accepted as a UK publisher, i.e. a publishing house publishing for the whole of the UK, but from Wales instead of London. It's really no different, but the historically London-centric nature of publishing makes it seem so' (P. Thomas, 2021). This challenge is particularly acute when dealing with London-based head offices of major book retailers, who are more accustomed to working with large, established publishers.

This methodical strategy has produced good results. Where once Firefly struggled to be stocked in major chains, many of their titles are now taken as frontlist by key retailers with some titles selected for key promotional slots, for example *Welsh Giants, Ghosts & Goblins* (Firefly Press, 2024) by Claire Fayers was selected as the Waterstones Welsh Book of the Year 2024. However, this success has required persistent effort. Reviews, prizes, and media and social media coverage of the books have all helped to raise the profile of Firefly's titles

as gatekeepers acknowledge the quality of the literature. This domestic support is vital for securing translation deals with international publishers.

The domestic market remains challenging, particularly as baseline sales for titles without significant promotion continue to grow at an insufficient rate to provide the economies of scale needed to offset rising production costs. In response, Firefly has focused on excellence in marketing and promotion, regularly achieving sales in the thousands for successful titles and consistently exceeding the sales targets agreed with the Books Council. Yet despite these strong sales figures, profitability remains constrained by three key factors in the UK book market: the widespread discounting practices that emerged after the end in 1997 of the Net Book Agreement, the rising cost of production since the energy crisis, and the repping and distribution fees necessarily charged by Bounce Sales & Marketing. This challenging environment has led most UK publishers to rely on subsidiary rights sales as a crucial source of additional revenue.

### **International development**

While the UK market remains Firefly's primary focus, the company has pursued international opportunities through rights sales, book fair participation, and more recently export development.

The rights strategy initially centred on working with an experienced external agent, who successfully sold several titles into international markets. Notable early successes included *The Clockwork Crow* by Catherine Fisher (see Section 7.2.2 for case study) and the *Crater Lake* series by Jennifer Killick, which sold in multiple territories and performed particularly well in Germany. However, the agent's recent retirement has resulted in a transition to managing rights in-house, highlighting the challenges of maintaining specialist expertise in a small company.

Book fair participation, particularly at the Bologna Children's Book Fair, has been essential for building international connections. 'Bologna is key for us,' emphasises Penny Thomas. 'It's where everything happens for children's books' (P. Thomas, 2024). However,

maintaining this presence has become increasingly difficult as funding support has decreased. The company has sometimes resorted to creative solutions, such as buying space on the Publishers Association stand, but even this approach costs around £7,000 per fair. Most recently, Firefly has ventured into direct export, signing distribution agreements with Independent Publishers Group (IPG) in America, and Affirm Press in Australia. While promising, this expansion brings new challenges, particularly around cash flow, with payment terms extending up to ten months.

### **The Carnegie effect: international recognition and market impact**

The transformative potential of international recognition was demonstrated when Manon Steffan Ros's *The Blue Book of Nebo* (see Section 7.2.1 for case study) won the Yoto Medal for Writing in 2023. According to Penny Thomas (2024) sales jumped from around 2,000 copies to approximately 25,000, though she notes that the book still struggles for visibility in some UK chains and other prize-winning titles have sold more according to Nielsen BookScan figures. This experience illustrates both the possibilities and persistent challenges for Welsh publishers in reaching wider markets.

### **Structural challenges**

Despite its successes, Firefly's international development faces several structural challenges. Rights retention has become increasingly difficult, with agents typically preferring to retain rights for major markets. The company also struggles with limited access to rights training and development opportunities, making it difficult to build and maintain international expertise.

Funding structures often complicate international efforts. Support for attending book fairs tends to be confirmed late, making it difficult to plan effectively for major events. As Penny Thomas notes, 'We're going to Frankfurt next week ... it was so late that everything, all the flights and all the hotels in Frankfurt, was so much more expensive' (P. Thomas, 2024). It is also difficult to make meaningful appointments with international publishers, who finalise their meeting schedules months before the fairs.

## Conclusion

Firefly Press's trajectory offers valuable insights into both the potential and challenges of internationalising children's publishing from Wales. Their experience demonstrates that while it's possible to build international success from a Welsh base, sustainable growth requires several key elements: a strong domestic market foundation, sustained investment in international presence, access to specialist expertise, strategic support from funding bodies, and long-term relationship building with international partners.

The company's development through 2023-2024 particularly illustrates these dynamics, with initial rapid growth followed by the difficult decision to make their rights position redundant due to funding cuts at the end of 2024. This development underlines both the opportunities and vulnerabilities that Welsh publishers face in international markets.

Looking ahead, Firefly's experience highlights the need for more coordinated sector support, particularly around rights sales and international market development. Their story serves as both inspiration and cautionary tale for the Welsh publishing industry, suggesting that while some international success is achievable, it requires sustained institutional support and investment to maintain momentum. As the Welsh publishing industry continues to evolve, these lessons will be important for shaping future development strategies and support mechanisms.

### 6.6 Graffeg Books

Graffeg has evolved from its origins as a design agency to become a successful publisher with a strong focus on children's books, bringing distinctive visual and digital marketing expertise that differentiates it within the Welsh publishing landscape. Under the leadership of Peter Gill and Matthew Howard, Graffeg has established itself as a key player in the Welsh publishing industry, with a growing presence in the international market.

## **Background and history**

Graffeg was founded in 2003 when graphic designer Peter Gill set up Peter Gill & Associates, a design agency that published *Cardiff/Caerdydd* with a grant from Cardiff Council. Based on the success of this book, Gill developed other publishing projects like *Landscape Wales* to retain design talent at the agency, and in 2010, Matthew Howard, a former sales executive for the Books Council, joined the company. Howard became the publishing director in 2016 and, under his guidance, Graffeg launched its children's book list in 2017.

The children's list was initiated through the publication of Jackie Morris's *Cat Walks* book, which led to partnerships with acclaimed authors and illustrators such as Nicola Davies, Malachy Doyle, James Mayhew, Zeb Soanes, and Joyce Dunbar. Graffeg also fostered relationships with emerging talents like Karin Celestine and her son Max Low, as well as established figures like Roy Noble, Dom Conlon, Ian Brown, Nick Cope, Sarah KilBride, Jon Roberts, and Mark Llewelyn Evans.

## **Funding and staffing**

Graffeg is funded by its two directors, Peter Gill and Matthew Howard, who hold equal shares in the company. The company also receives support from Books Council grants for both English- and Welsh-language titles, including author advance and marketing grants for English titles and production and translation grants for Welsh titles.

Graffeg employs English-speaking and bilingual staff, including a designer, editor, children's editor / marketing specialist, social media manager, distribution manager, and office management and administration staff.

## **Publishing output and languages**

Children's books now constitute the largest part of Graffeg's publishing output, alongside adult titles and merchandise. The company publishes primarily consumer trade books, with a focus on original English-language titles. However, Graffeg is committed to making its

children's picture books accessible to Welsh readers and has been translating all of its English-language picture books into Welsh under the Graffeg Bach imprint. In 2024, Graffeg announced a further strategic expansion with the launch of Cadno, a new YA and middle-grade imprint, signalling the company's ambition to move beyond picture books into fiction for older readers (Vuong, 2024).

Graffeg has also ventured into publishing translated works from other languages, such as the *George the Wombat* series (translated from Czech), *I am an Artist* (translated from Estonian), and the *Rita* series (translated from Irish). Graffeg has also published the *Molly* series, co-publishing into English, Welsh and Irish with the help of grants from Ireland and the Books Council (see the case study in Chapter 7, Section 7.3.1 for further details).

### **Sales and distribution**

Graffeg's core sales come from within the UK, with Amazon being their biggest customer, followed by Combined Book Services, their own website, and the Books Council. The company has seen significant growth in online sales, particularly during the Covid-19 pandemic, when they experienced a 70 per cent increase in sales compared to the previous year (Howard, 2021).

The company's design agency origins also provide a competitive advantage in digital marketing, an area where many small publishers struggle. Graffeg's in-house capacity for professional visual content creation supports effective online engagement and direct-to-consumer sales, where the absence of retailer margins significantly increases profit per unit.

### **Challenges and opportunities**

Like many publishers, Graffeg has faced challenges related to Brexit and the Covid-19 pandemic. Brexit has led to delayed deliveries from printers, while the pandemic initially caused a significant disruption in the book buying industry. However, Graffeg adapted to these challenges by focusing on online sales and has seen remarkable growth since September 2020.

The company recognises the importance of selling books outside of Wales and is actively engaged in buying and selling translation rights. Graffeg has purchased Welsh-language licenses for high-profile titles such as *The Lost Words* (Hamish Hamilton, 2017) and *The Boy, the Mole, the Fox and the Horse* (Ebury Publishing, 2019), demonstrating their commitment to bringing seminal works to Welsh readers.

### **Strategic positioning and international development**

Graffeg's evolution from design agency to publisher reveals a distinctive approach to Welsh children's publishing that leverages visual expertise as both cultural and commercial capital. Their design-led strategy positions them uniquely within the Welsh publishing landscape, where production quality becomes a differentiating factor in both domestic and international markets.

The establishment of Graffeg Bach in 2021 demonstrates sophisticated understanding of bilingual market dynamics. Rather than simply translating their English-language picture books into Welsh as a secondary consideration, the dedicated imprint signals equal cultural commitment to both linguistic markets. This approach aligns with the Books Council's grant structures (Section 5.3.1) while potentially creating export opportunities through bilingual co-edition models that could appeal to other bilingual contexts.

Graffeg's international positioning strategy reveals both opportunities and constraints facing Welsh publishers. Their success in selling translation rights, particularly for the *Mouse and Mole* and *Fletcher* series through former rights agent Ruth Middleton, demonstrates how visual excellence can transcend linguistic boundaries. The picture book format, where illustration carries significant narrative weight, proves particularly suited to international rights sales, as visual storytelling requires less cultural adaptation than text-heavy works.

However, the company's venture into publishing translations from other languages – the *George the Wombat* series from Czech (see Section 7.1.3), *I am an Artist* from Estonian, and the *Rita* series from Irish – suggests a broader strategic vision. These acquisitions position Graffeg as a cultural bridge, bringing international visual excellence to Welsh audiences

while potentially learning from diverse publishing traditions. The *Molly* series co-publishing arrangement across English, Welsh, and Irish, supported by grants from Ireland and the Books Council, exemplifies how design-focused publishers can leverage visual content for multi-territory collaboration (see Section 7.3.1 for further details).

The company's growing online presence, including strong direct-to-consumer sales through its own website alongside Amazon as its largest customer, highlights a tension between platform dependencies and maintaining direct customer relationships. Amazon's position as their largest customer, while commercially significant, raises questions about long-term sustainability and brand control. This tension between digital distribution convenience and maintaining direct customer relationships reflects broader challenges facing independent publishers in contemporary markets.

Graffeg's trajectory illustrates how specialised creative expertise – in this case, design and visual production – can become a foundation for publishing success within small-nation contexts. Their ability to maintain high production values while operating from Wales demonstrates that geographic distance from traditional publishing centres need not compromise quality. However, their international development remains primarily reactive, responding to rights enquiries rather than systematically pursuing international markets, suggesting potential for more strategic international engagement as explored in the import and export case studies in Chapter 7.

## 6.7 Rily Publications

Rily Publications demonstrates how personal motivation can evolve into significant cultural enterprise. Founded in 2001 by Richard Tunnicliffe as a tool for his own Welsh-language learning, the company has grown into a major force in Welsh children's publishing, demonstrating how individual initiative can address broader cultural needs. This development highlights the complex interplay between language learning, cultural adaptation, and publishing innovation in small-nation contexts.

## **Strategic evolution and cultural mission**

The company's transformation from personal project to professional publisher accelerated in 2010 when Lynda Tunncliffe joined full-time following her redundancy. Lynda Tunncliffe, who came from a career in banking with no publishing experience, was dedicated to creating books that would help children and adults learn Welsh (Han Jin, 2022). Under her leadership as publishing director, with Richard Tunncliffe serving as part-time finance director, Rily has achieved consistent year-on-year growth. The company now employs a team of part-time staff, including editors, designers, and marketing assistants, supplemented by a network of freelance professionals.

Rily's approach to publishing, producing approximately fifty books annually, reflects sophisticated understanding of market needs and cultural dynamics. Their output, while primarily focused on leisure reading, strategically overlaps with educational markets, demonstrating awareness of how Welsh-language publishing must serve multiple purposes in a small-nation context.

Despite suffering from the fallout of the Covid-19 pandemic in 2020, Rily swiftly recovered with Welsh Government grants, and 2021 proved to be a record year in which the company released more titles than any year prior, with original titles growing to make up 15% of Rily's list and the company expanding into e-books and developing its first app (The Bookseller, 2022).

## **Innovation in adaptation and cultural transfer**

Rily's adaptation strategy, which Tunncliffe describes as 'Welshifying' content, offers insights into how publishers can culturally translate popular works while maintaining their appeal. Their work with series like *Tom Gates* and *Wimpy Kid* demonstrates sophisticated understanding of cultural adaptation. As Tunncliffe explains, 'Adaptations are a completely different skill set from translations ... when you create an adaptation ... you want it to read as if it was written in the original language. People underestimate what a skill it is to write a

good adaptation' (Tunncliffe, 2021). This approach aligns with domestication in translation theory, where texts are made culturally accessible to target audiences.

The late Welsh author Gareth F. Williams's translation work on the *Tom Gates* series illustrates this approach, incorporating Welsh humour and local references that resonate with Welsh readers. The practice of including 'in-jokes', such as naming characters after Books Council staff and Welsh politicians, demonstrates how adaptation can serve both entertainment and cultural localisation functions. This work has been continued by author and translator Gwenno Hughes, maintaining consistency in cultural adaptation through ten volumes.

### **Strategic market development**

Following a soft launch in 2021, the company fully launched Dragon Press in 2022, their English-language imprint, reflecting understanding of market dynamics and growth opportunities (Han Jin, 2022). As Tunncliffe notes, 'It's so much harder to compete in the English-language market. So this is sort of starting slowly and just working our way up' (Tunncliffe, 2021). This cautious approach to market expansion demonstrates awareness of the challenges facing small publishers entering larger markets.

Rily's success in securing rights to publish Disney and Bluey books in both Welsh and English represents significant achievement in character licensing. Their development of the *Del Does* series further shows how publishers can create original content while building protected intellectual property. In 2022, Rily also launched *Words All Around*, an illustrated language-learning book series beginning with *Welsh All Around* published in both Welsh and English, with interest from China for further multilingual editions (The Bookseller, 2022). This balance of licensed and original content suggests sophisticated understanding of market development in bilingual contexts.

The company's commitment to educational development is evident in their planned graded reading scheme using popular characters like Peppa Pig. Tunncliffe is critical of existing educational resources demonstrating how commercial publishers can address gaps in

educational provision. Their focus on Welsh second-language schools particularly shows understanding of market needs, with the incorporation of audio components to help non-Welsh-speaking teachers with pronunciation addressing specific challenges in the educational sector.

The company has also commissioned original non-fiction books about Wales, originated in Welsh and published simultaneously in English, produced as full colour high-quality hardbacks and paperbacks. Titles include *Pedair Cainc y Mabinogi* (The Four Branches of the Mabinogi) by Siân Lewis, illustrated by Valériane Leblond (Rily, 2017), and *Cymru ar y Map* (Wales on the Map) by Elin Meek, illustrated by Valériane LeBlond (Rily, 2018), both winners of the Welsh-language category of the Tir na n-Og children’s book awards. The English edition of *10 Stori o Hanes Cymru* (10 Stories from Welsh History) by Ifan Morgan Jones, illustrated by Telor Gwyn (Rily, 2021), published through Dragon Press, was shortlisted for the Tir na n-Og Children’s Book Awards alongside titles from major publishers such as Bloomsbury, Barrington Stoke and Scholastic.

Rily’s success in securing rights to publish Disney and Bluey books in both Welsh and English represents significant achievement in character licensing. Their development of the *Del Does* Welsh-language learning series further shows how publishers can create original content while building protected intellectual property. This balance of licensed and original content suggests sophisticated understanding of market development in bilingual contexts.

### **Production and distribution challenges**

Rily’s approach to production demonstrates the complexities facing Welsh publishers. Their use of multiple printers – from local Welsh Gomer Press to international providers in China, Hong Kong, Slovakia, Latvia, and Malta – shows how publishers must balance local support with commercial necessity. The praise for Gomer Press’s investment in new machinery indicates appreciation of domestic printing development while maintaining international options.

The company's distribution strategy is evolving from Welsh-focused to broader market reach. Discussions with major distributors like Macmillan Distribution Centre, HarperCollins, and Bounce suggest awareness of the need for professional distribution to support growth. As Tunnicliffe acknowledges, this requires shift from a production-focused mindset to greater emphasis on sales and marketing.

### **Challenges and adaptations**

Challenges from Brexit and Covid-19 have required creative responses. Brexit's impact on production costs has led to format adaptations to maintain pricing, while pandemic-related sales disruption was mitigated by Books Council and Welsh Government support. The reduction of Dragon Press output to three to four books following December 2022 funding changes demonstrates how Welsh publishers must constantly adapt to changing support landscapes.

### **International development and strategic expansion**

Rily's international positioning has evolved significantly from its origins as an adaptation-focused publisher. While primarily focused on Welsh and English markets, the company's exploration of rights opportunities through agent Gwen Bennett from The Rights Solution represents recognition that sustainable growth requires diversifying beyond domestic adaptation work, with The Rights Solution successfully securing publishing rights to Rily's original *Little Mouse* series by Leonie Servini in the US and New Zealand (The Bookseller, 2022).

Their success with *Y Lloches*, translated directly from the French picture book *L'abri*, demonstrates capability to source content from languages beyond English, though this remains exceptional rather than systematic within their publishing programme (see Section 7.1.2 for detailed analysis of this import case study). The purchase of rights to Australian title *Tomorrow is a Brand New Day* by Davina Bell further shows awareness of diverse content sources, though these remain opportunistic rather than representing a comprehensive international acquisition strategy.

The establishment of Dragon Press in 2021 as an English-language imprint reflects understanding that international market access requires English-language publishing capacity. As Tunncliffe notes, 'It's so much harder to compete in the English-language market. So this is sort of starting slowly and just working our way up' (Tunncliffe, 2021). However, the subsequent reduction of Dragon Press output to three to four books following December 2022 funding changes illustrates how dependent such initiatives remain on institutional support. This experience highlights a central challenge for Welsh publishers: English-language publishing offers potential international reach but requires resources and market access that remain difficult to sustain without major publisher infrastructure.

The company's character licensing success – securing Welsh and English-language rights to Disney titles and Bluey – demonstrates ability to negotiate with major rights holders, suggesting professional capacity for international engagement. However, this strategy primarily serves domestic market development rather than international sales, with licensed content adapted for Welsh audiences rather than original content exported to international markets. The development of the original *Del Does* Welsh-language learning series shows awareness of intellectual property value and potential export opportunities to other language learning contexts, though exploitation of these opportunities remains limited.

### **Significance and future directions**

Rily's experience demonstrates several key insights into publishing development within small nations. Their strategic approach to educational content development effectively serves market needs while building sustainable operations. Their work in educational markets has proven particularly significant, showing how curriculum support materials can provide crucial financial foundations for publishing operations. This foundation has enabled Rily to expand into original content development alongside their adaptation work, creating a balanced publishing programme that serves multiple market segments. The company's achievements were recognised in 2022 when it won the Wales category in the British Book Awards' Small Press of the Year.

Throughout their development, they have navigated the complex balance between fulfilling their cultural mission and maintaining commercial viability - a challenge common to publishers in small nation contexts. Their approach to these challenges offers valuable lessons for the Welsh publishing sector, demonstrating how publishers can successfully serve cultural needs while building sustainable enterprises through innovative approaches to adaptation, educational support, and market development.

## 6.8 Y Lolfa

Y Lolfa, a Welsh printing and publishing company based in Tal-y-bont, Ceredigion, has been a prominent figure in the Welsh publishing industry since its establishment in 1967. With a commitment to supporting Welsh artists and authors, Y Lolfa has adapted its publishing programme over the years to include a diverse range of titles in both Welsh and English.

### **Background and history**

Y Lolfa was founded by Robat Gruffudd in 1967, during a period of activism and protest when a new generation of Welsh young people were demanding official status for their language. The company's vision was to create a new kind of publishing that would be lively, colourful, and provocative, while taking advantage of the artistic freedom provided by the new, small offset litho printing process. The company's name, Y Lolfa ('The Lounge' or 'fun-place'), derives from *Lol*, the satirical magazine it started publishing in its early years.

Y Lolfa's publishing portfolio underwent strategic diversification, encompassing children's series, contemporary fiction, autobiographical works, pedagogical materials for Welsh-language learners, tourist-oriented publications, and sports literature. This expansion reflected both market opportunities and the publisher's evolving role in Welsh cultural production. The company has adopted a deliberate policy of not adapting books from other languages in order to support Welsh artists and authors.

## **Funding and staffing**

Y Lolfa is funded through its in-house printing press and grants from the Books Council for staff, printing, marketing, and editorial support. The company is a family-owned limited company employing twenty-two full-time staff in Tal-y-bont, Ceredigion.

## **Publishing output and languages**

Y Lolfa maintains a significant publishing output of seventy to eighty books annually, with Welsh-language titles comprising two-thirds of their catalogue and English-language works making up the remaining third. By 2021, their children's literature portfolio reflected this linguistic distribution, having published twenty original Welsh-language children's books compared to just two original English-language titles.

While the publisher remains dedicated to producing original content, primarily in Welsh, they strategically translate select works from their catalogue into English to reach a broader audience. However, citing challenges in the competitive anglophone market, Y Lolfa made the strategic decision in 2021 to cease commissioning new English-language fiction for both adult and children's markets (Gruffudd, 2021).

## **Sales and distribution**

Y Lolfa's core sales come from within Wales. The company acquired the rights and printed stock of Gomer's adult books list in 2021 (with children's books including the *Sali Mali* series acquired by Atebol), which are available for purchase on their website. Y Lolfa has been using Compass for sales and marketing support outside of Wales, but not for children's books specifically.

## **Rights and translations**

While Y Lolfa has not been proactively selling rights to their books, they are looking for an agent to assist with this process. The company has adapted a few of their Welsh titles into

English, particularly those they considered to be of high quality. Y Lolfa is interested in buying language rights or co-edition rights from other publishers if grants are available to assist with translation, printing, and marketing.

### **Challenges and opportunities**

Like many publishers, Y Lolfa has faced challenges related to Brexit and the Covid-19 pandemic. Brexit has led to delays in receiving equipment for their printing press, while the pandemic has disrupted the publishing industry as a whole.

Y Lolfa sees opportunities in collaborating with the Books Council of on rights support and is interested in comparing Wales's funding for publishing with that of other small countries. The company believes that Wales may be investing more in its domestic market, whereas other countries look to an international market. Y Lolfa also recognises the need to promote Welsh culture, heritage, and language to a global audience, drawing comparisons with the success of Ireland and Scotland in this regard.

### **Strategic challenges and market positioning**

Y Lolfa's 2021 decision to cease commissioning new English-language fiction for both adult and children's markets represents a significant strategic inflection point that highlights fundamental challenges facing culturally-driven publishers in competitive markets. This decision, citing difficulties in the anglophone market, reveals tensions between Y Lolfa's cultural mission – supporting Welsh artists and authors – and the commercial realities of competing against major publishers in English-language markets.

The company's commitment to publishing original Welsh-language content rather than adaptations distinguishes it from publishers like Rily and Atebol, reflecting a deliberate strategy to support indigenous creative development. This approach, while culturally valuable, constrains market size and creates dependency on institutional support mechanisms outlined in Section 5.3. The publisher's position as a Books Council revenue publisher provides crucial stability for Welsh-language operations but does not extend

equivalent support to English-language publishing, where competition with major publishers requires marketing resources that small Welsh publishers struggle to provide.

Y Lolfa's translation strategy – selectively translating successful Welsh-language titles into English (*The Quilt*, *Those People Next Door*, *Little Honey Bee*) – demonstrates pragmatic adaptation to market realities. This approach allows the publisher to test English-language markets with reduced risk, building on titles that have proven appeal in Welsh. However, the limited scale of these translation efforts, combined with the 2021 decision to cease new English commissioning, suggests recognition that sustainable English-language publishing from Wales requires resources beyond the company's current capacity.

The company's acquisition of Gomer's adult backlist in 2021 (discussed in Section 5.4.3) positions Y Lolfa as custodian of significant Welsh literary heritage. This role brings both opportunities and responsibilities: maintaining availability of culturally important works while managing inventory and marketing costs for backlist titles that may have limited ongoing commercial potential. The strategic decision to make these titles available through their website demonstrates commitment to accessibility even where profitability may be limited.

Y Lolfa's approach to international development remains largely opportunistic rather than systematic. While expressing interest in rights agency support, the company has not proactively developed international sales channels. This reflects broader resource constraints facing printer-publishers, where printing operations provide financial stability but may not generate surplus capital for international market development. The company's comparison of Welsh and international funding models – suggesting Wales invests more heavily in domestic markets while other small nations prioritise international engagement – reveals awareness of these strategic trade-offs.

The company's experience highlights a fundamental challenge for Welsh publishers: how to maintain cultural mission and support Welsh-language literature while navigating increasingly competitive and resource-intensive English-language markets. Y Lolfa's strategic retreat from English-language commissioning, while focusing resources on core Welsh-

language publishing, represents one possible response to these pressures. However, this approach also limits potential pathways for Welsh stories to reach international audiences, suggesting tension between cultural preservation and global engagement that remains unresolved within the sector.

This strategic positioning provides essential context for understanding the export case studies examined in Chapter 7, particularly the challenges Welsh publishers face in achieving international market penetration while balancing Welsh-language cultural mission with commercial sustainability.

## 6.9 Conclusion

The examination of these eight publishers reveals both shared challenges and divergent strategic responses within Welsh children's publishing. All operate within the complex bilingual market structure and institutional framework outlined in Chapter 5, yet their approaches vary significantly, demonstrating multiple pathways toward sustainable cultural publishing in small-nation contexts.

Three distinct operational models emerge, each navigating the institutional infrastructure outlined in Chapter 5 differently. Printer-publisher approaches (Y Lolfa, Carreg Gwalch) leverage the Books Council funding system (Section 5.3.1) while maintaining financial stability through dual revenue streams. Design-led strategies (Graffeg, Broga) capitalise on the visual culture and illustration trends identified in Section 5.7.2, applying specialised creative expertise to both domestic and international markets. Adaptation-focused models (Rily, Atebol) respond directly to the translation and educational needs documented in Sections 5.4 and 5.5, serving cultural localisation requirements. Firefly Press demonstrates how English-language publishers can pursue international rights development within the support structures described in Section 5.3, while Dalen's multi-Celtic language strategy illustrates how linguistic connections can foster collaborative market development beyond individual publisher capacities.

These varied models directly address Research Questions 2 and 3, revealing how publishers balance cultural commitments with commercial sustainability through different combinations of capital accumulation. Bourdieu's (1993) field theory helps explain why multiple viable models coexist rather than converging toward a single optimal approach. Each publisher occupies a distinct position within overlapping fields – the Welsh-language restricted production field, the English-language commercial field, and the educational publishing field – and develops strategies appropriate to their specific positioning.

The diversity of successful models reflects different priorities in capital accumulation. Publishers like Y Lolfa and Carreg Gwalch prioritise cultural and symbolic capital within the Welsh-language field, accepting limited economic returns in exchange for cultural authority and institutional support. Design-led publishers (Graffeg, Broga) leverage cultural capital in the form of visual expertise, converting it into both symbolic capital (design awards, critical recognition) and economic capital (premium pricing, international rights sales). Adaptation-focused publishers (Rily, Atebol) have developed sophisticated strategies for converting social capital (licensing relationships with major rights holders) into economic capital while serving cultural mission through Welsh-language provision.

This theoretical lens reveals that publisher 'success' cannot be measured by a single metric. What Bourdieu terms the 'rules of the game' differ across fields: success in the Welsh-language restricted production field requires accumulating cultural legitimacy and institutional recognition, while success in international markets demands economic capital and commercial viability. Publishers like Firefly Press demonstrate ability to operate under contradictory logics simultaneously, accumulating cultural capital while pursuing economic capital across different fields. However, even well-resourced publishers like Atebol, despite domestic success, face structural challenges in systematic international market development. These patterns of success and constraint are examined through specific international initiatives in Chapter 7.

Approaches to international market development further highlight differing assessments of opportunity and risk. Firefly Press's systematic pursuit of rights sales and export growth demonstrates English-language advantages, while Dalen's Celtic-focused expansion shows

how cultural networks can underpin sustainable internationalisation for minority-language publishers. Together, these strategies reveal that effective international engagement depends on aligning publisher capabilities, market opportunities, and available resources.

Several key success factors emerge: business models that balance cultural mission with commercial viability; strategic partnerships enabling market access; technological adaptation that enhances traditional production values; and the development of specialised expertise, particularly in rights management and international operations.

The range of international strategies – spanning Dalen’s Celtic networks, Firefly’s global rights sales, Carreg Gwalch’s cultural partnerships, and Graffeg’s design-led development - provides essential context for Chapter 7, which examines specific internationalisation case studies in depth. Building on the landscape analysis of Chapter 5 and the strategic overview of Chapter 6, Chapter 7 explores eight detailed examples of import, export, and co-production (2018–2022), revealing what happens when Welsh publishers engage with global markets and the practical limits of current approaches.

## 7. International Strategies in Welsh Children's Publishing

Building on the market landscape outlined in Chapter 5 and the publisher strategies examined in Chapter 6, this chapter focuses on the international dimensions of Welsh children's publishing. It addresses Research Questions 2 and 3 by analysing how publishers engage with global markets and how effectively these strategies balance cultural preservation with commercial viability.

Through eight case studies identified during publisher interviews and analysed using the mixed-methods approach detailed in Chapter 3, the chapter investigates three main forms of international engagement. Import strategies (Section 7.1) examine how publishers bring international content to Welsh audiences, as seen in *Early One Morning* and *Y Lloches*. Export initiatives (Section 7.2) explore the contrasting pathways for Welsh- and English-language books through *Llyfr Glas Nebo* and *The Clockwork Crow*. Co-production approaches (Section 7.3) analyse collaborative publishing through the *Molly* series. The chapter concludes (Section 7.4) with an assessment of strategy effectiveness and recommendations for sector development. This analysis examines how Welsh publishers can strengthen both the import of diverse international works and the export of distinctive Welsh literature.

### 7.1 Import strategies

To understand current international strategies in Welsh children's publishing, we must first examine how these approaches developed historically. Dref Wen's pioneering work in the 1970s established foundational models for bringing international content to Welsh readers while maintaining commercial sustainability.

Import initiatives across the sector demonstrate how the institutional infrastructure outlined in Chapter 5, particularly the Books Council's funding mechanisms (Section 5.3.1) and stakeholder networks (Section 5.1), enables publishers to bring international content to Welsh audiences. The following cases, from Dref Wen's historical model to contemporary approaches, reveal both the supporting infrastructure and the gaps in systematic approaches to discovering and acquiring international works.

### 7.1.1 Case study: importing picture books from Europe – Dref Wen (1970s and 1980s)

#### **Strategic context**

As demonstrated in Chapter 4, in 1970 Welsh children's publishing faced a critical shortage of high-quality books. An annual output of just thirty new titles severely limited resources for Welsh-language education, particularly affecting the availability of illustrated books suitable for young readers. Roger Boore established Dref Wen specifically to address this challenge through an innovative approach: systematically importing international children's literature to enrich Welsh-language children's publishing.

The founding of Dref Wen coincided with significant changes in the institutional support for Welsh publishing. The establishment of guaranteed purchase schemes through local education authorities, later consolidated under the Welsh Joint Education Committee (WJEC), created a stable market for children's books. Additionally, technological advances in lithographic printing made international co-editions increasingly feasible. Boore recognised these converging opportunities could enable a new approach to Welsh children's publishing.

#### **Methodology**

This case study draws on multiple primary and secondary sources to construct a comprehensive picture of Dref Wen's publishing strategy and impact. The research methodology included:

- An in-depth interview with Roger Boore, founder of Dref Wen, providing firsthand accounts of the publisher's strategic decisions and operational challenges
- Systematic analysis of the complete Dref Wen catalogue (1970-2001)
- Archival research at the National Library of Wales, examining physical copies of Dref Wen publications to analyse production quality, paratextual elements, and translation approaches

## **International acquisition strategy**

Boore developed an approach to sourcing international content through direct engagement with European publishers that evolved organically through his regular attendance at book fairs. His fluency in multiple languages, including French, Spanish, and German, enabled direct engagement with European publishers. He established a regular presence at the Frankfurt and Bologna book fairs, developing relationships with publishers from France, Spain, Belgium, East Germany, and Scandinavia. This multi-lingual approach was particularly strategic, as Boore used French, German, and Spanish not only for direct translations but as bridge languages to access content from Denmark, Norway, Sweden, and Czechoslovakia, significantly expanding the range of available international material.

This hands-on approach to building relationships with international publishers was unprecedented in Welsh publishing. As Boore explains, he would go ‘from stand to stand’ at book fairs, developing personal connections with publishers and selecting books that would meet WJEC requirements while maintaining high standards. Boore used German as a bridge language to access content from Eastern European publishers, expanding the range of available material. He focused particularly on identifying visually striking books that could transcend cultural boundaries while maintaining high literary standards.

The evolution of Dref Wen’s international acquisitions followed a clear pattern:

- 1970s: Focus on European folk tales and classic stories, introduction of major French comics (*Asterix*), and pioneering translations of Swedish children’s literature
- 1980s: Expansion of the *Asterix* series and increased focus on educational materials
- 1990s: Shift toward educational series and religious/cultural education materials, while maintaining select literary translations

## **Business model innovation**

Dref Wen’s business model balanced cultural ambition with commercial sustainability through several innovative elements. The publisher participated in international co-edition print runs, sharing production costs with other language editions to make high-quality

colour printing economically viable. The guaranteed purchase arrangement with the WJEC through schools provided stable income, while additional distribution through commercial bookshops expanded market reach.

Strategic pricing played an important role in market development. Dref Wen consistently priced its books below English-language equivalents, making international content accessible to Welsh readers. While this approach limited profitability, it established important precedents for market development and demonstrated the viability of bringing international content to Welsh readers. This educational focus was reinforced by Dref Wen's specific targeting of the second-language learning market, with books designed to support Welsh language acquisition through carefully structured vocabulary support and age-appropriate content selection.

### **Market impact and cultural influence**

The publisher's impact extended far beyond individual titles. By introducing Welsh translations of international classics like *Pippi Longstocking* and *Finn Family Moomintroll*, and works by celebrated illustrators like Philippe Fix and Tomi Ungerer, Dref Wen demonstrated that Welsh-language publishing could deliver sophisticated, culturally diverse content while meeting educational needs.

The publisher established several major international series that significantly impacted Welsh children's literature:

- The *Asterix* series (1976-1981), beginning strategically with titles featuring British connections
- The Richard Scarry series (from 1976), introducing educational picture books focusing on everyday vocabulary
- Works by Tomi Ungerer, including *Allumette* (1975)
- Astrid Lindgren's works, including *Pippi Hosan-hir* (1978)
- Religious education series (1999), demonstrating later diversification into multicultural educational content

Dref Wen’s early titles were specifically designed for children aged 9-11 learning Welsh as a second language. The publisher’s approach to vocabulary support evolved strategically over time, beginning with integrated vocabulary explanations on each page (as seen in *Peronnik*) and later shifting to consolidated vocabulary lists at the back of books (as in *Prentis y Dewin*), reflecting ongoing pedagogical discussions about optimal vocabulary presentation in second-language learning materials.

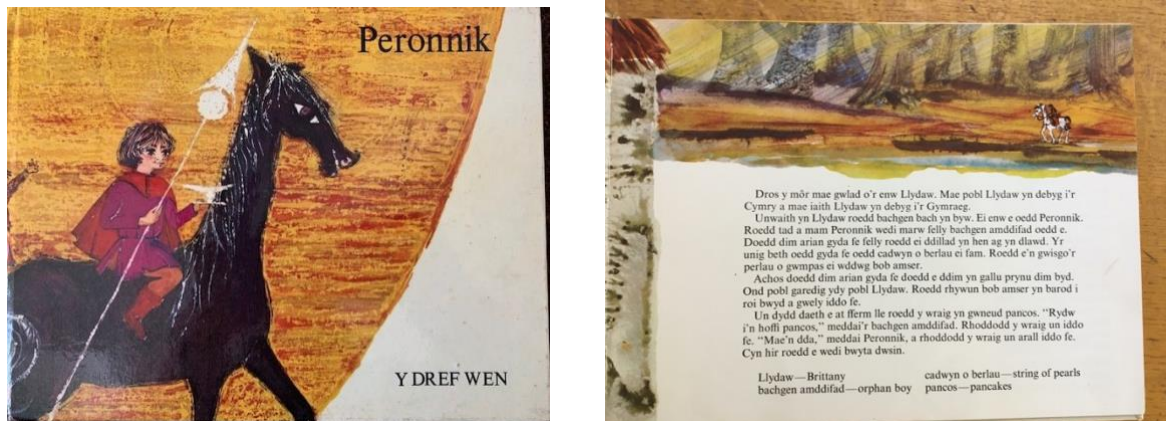


Figure 10: Cover and interior page from *Peronnik* (Y Dref Wen, 1970). Photos taken with permission from National Library Wales © Megan Farr

Dref Wen’s first title, published in 1970 under the Welsh Joint Education Committee (WJEC) book scheme, adapts a traditional Breton folk tale that had previously been published in Dutch. This work demonstrates the complex international pathways through which traditional stories reach Welsh-language education. Illustrated by Monique Michel-Dansac and published with funding from the Glamorgan Education Authority, this work was specifically designed for children aged 9–11 learning Welsh as a second language. The publication demonstrates the educational mission of Dref Wen to promote cultural heritage while supporting bilingual literacy, combining the rich storytelling traditions of Brittany – a Celtic region sharing cultural ties with Wales – with pedagogical objectives. The choice of a Breton folktale for Welsh-language instruction highlights the pan-Celtic cultural exchange that characterised Dref Wen’s mission in this period. We can see that a vocabulary list was added to the bottom of the page in this title to help Welsh-language learners.



## **Challenges and strategic adaptation**

According to Boore, market changes in the 1980s forced significant strategic adaptation. The WJEC's increasing focus on factual content aligned with the English and Welsh curriculum made continental European titles less suitable for educational markets. Simultaneously, growing consumer preference for Anglo-American cultural references challenged the viability of broader European content.

By the early 1990s, Dref Wen had substantially reduced its continental European translations in favour of English-language adaptations. This transition highlights persistent tensions between cultural diversification and market demands in minority language publishing. The shift also coincided with changes in WJEC procurement processes that moved toward competitive tendering, ultimately contributing to Boore's decision to retire in 1999. This evolution is clearly reflected in the publisher's catalogue, which shows increased focus on educational series and religious/cultural materials in the 1990s.

## **Legacy and contemporary relevance**

Dref Wen's pioneering work in international publishing offers key insights for contemporary Welsh children's publishing. The publisher established several enduring models: systematic engagement with international markets through book fairs, strategic use of co-edition printing to make international content economically viable, and effective leveraging of institutional partnerships to support market development.

The significance of Dref Wen's legacy extends beyond specific publishing strategies to broader questions of cultural exchange and market development. Their experience demonstrates how innovative approaches to international content can expand horizons for minority language readers while establishing new standards for quality and ambition in domestic publishing.

Dref Wen's import model represents an early example of what Sapiro (2008) identifies as the mediating role of political logic in cultural production: institutional support through the

Welsh Joint Education Committee's guaranteed purchase scheme created the economic conditions for culturally ambitious publishing that would not have been commercially viable on purely market terms. This institutional mediation between economic and cultural logics – enabling publishers to prioritise content quality and cultural diversity while maintaining financial sustainability – established a pattern that continues to characterise Welsh children's publishing's relationship with public funding (see Section 5.3).

Yet the context in which today's publishers operate differs profoundly from that of the 1970s and 1980s. Digital production technologies, expanded rights trading networks, and evolving institutional frameworks have reshaped both the opportunities and constraints of international publishing. The following case studies examine how modern Welsh publishers navigate these new conditions — building on the principles pioneered by Dref Wen while adapting them to the demands of a globalised and digitally mediated book market.

The first contemporary import case study (Section 7.1.2) explores how these dynamics manifest in practice through the import of two Spanish board books, *Pronto por la mañana* and *No es hora de jugar*, illustrating how contemporary publishers reinterpret earlier models of cultural exchange within today's interconnected publishing environment.

### 7.1.2 Case study: *Pronto por la mañana* and *No es hora de jugar* – importing board books from Spain

#### **Background**

*Early One Morning* and *Bedtime, Not Playtime!* represent a significant contribution to inclusive children's literature in minority languages. These board books originated from a creative collaboration between American author Lawrence Schimel, who lives and works in Spain, and Latvian illustrator Elīna Brasliņa. Originally published in Spanish by Egales under the titles *Pronto por la mañana* and *No es hora de jugar*, these books take an important approach to representing diverse families. Rather than making same-sex parents the central focus of the narrative, the stories present them naturally within everyday scenarios that

young children experience – morning routines and bedtime resistance. This narrative choice helps normalise diverse family structures by embedding them within familiar childhood experiences that all families share, regardless of their composition.

These books emerged from Schimel’s deep commitment to bringing diverse children’s literature to international audiences. As both an author and an experienced translator of children’s books, Schimel brought unique expertise to this project. His extensive work in literary translation had helped him build a robust network of international publishing contacts, which proved invaluable in securing language rights for these books across different markets. This professional background gave him insight into how stories can successfully cross cultural and linguistic boundaries while maintaining their core message.

The creation of these books reflects the increasingly interconnected nature of modern children’s publishing. The collaboration brought together diverse international talents: Schimel, an American author living and working in Spain; Elīna Brasliņa, a Latvian illustrator known for her engaging visual storytelling; and Egales, a Spanish publisher willing to take on innovative projects. This combination of perspectives enriched the books’ appeal across different cultural contexts.

The decision to create these stories as board books was particularly thoughtful. Board books, with their sturdy construction and simple narratives, are specifically designed for the youngest readers – typically children under three years old. This format choice matters because these early years are when children begin forming their understanding of family, relationships, and social structures. By presenting diverse families through familiar daily routines like bedtime and morning activities, these books help normalise different family structures during this crucial developmental period. The board book format makes the books accessible to very young children, ensuring they can withstand repeated readings and become part of daily family routines, while the sturdy pages enable children to handle books independently — turning pages themselves and developing early agency as book users.



Figure 12: Welsh- and English-language editions of *Pronto por la mañana* and *No es hora de jugar*



Figure 13: Inside spread from *Early One Morning* © Lawrence Schimel and Elina Brasliņa

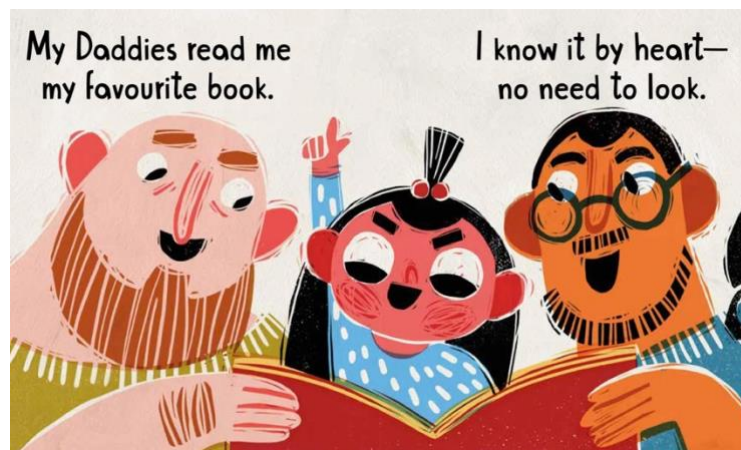


Figure 14: Inside spread from *Bedtime, Not Playtime!* © Lawrence Schimel and Elina Brasliņa

Schimel's motivation for creating these books reflects a broader trend in LGBTQ+ children's literature. In his email interview, he explained that he noticed existing children's books with

LGBTQ+ characters tended to focus on difference or addressing homophobia. Instead, he wanted to create stories that simply celebrated queer joy – a perspective shared by his collaborator, illustrator and graphic designer Elina Brasliņa. This deliberate move away from narratives of conflict or otherness represents a maturing approach in inclusive children’s literature. By embedding LGBTQ+ families within everyday situations like morning routines and bedtime rituals, these books help normalise diverse family structures through the lens of shared universal experiences rather than through explicitly addressing discrimination or difference. This approach aligns with contemporary understanding of how young children develop their awareness of family structures and social relationships.

### **Rights acquisition and translation**

How these books reached publication in Wales illustrates what Hellewell (2019) identifies as the academic pathway for translation — where scholarly networks facilitate literary exchange between markets. Professor Elin Haf Gruffydd Jones discovered the books at the London Book Fair in 2018 and recognised their potential to diversify the Welsh market from two perspectives: LGBTQ+ content, an area where Welsh-language literature has been notably underrepresented (Dafydd, 2022), and translation into Welsh from a language other than English. She approached two children’s publishers from Wales who were present at the same fair, but there was no interest in publishing the books in Welsh or in English, likely due to the higher production costs associated with board book formats. Determined to bring the books into the Welsh-language market, she instigated a conversation with Peniarth, the educational publisher based at her university, UWTSU.

According to Gareth Smith (2023), Projects Manager at Peniarth, the acquisition represented several significant developments in the publisher’s history. It marked their first venture into licensing rights from a non-English source language, demonstrating a willingness to expand beyond traditional Welsh publishing channels. The books’ themes of equality and inclusivity aligned with Peniarth’s values, while their strong storytelling and design made them commercially appealing.

The translation process highlights the complexities of cultural and linguistic adaptation in children’s literature. The books benefited from direct Spanish-to-Welsh translations by Mari Siôn and Elin Haf Gruffydd Jones, while the author Lawrence Schimel provided his own English translations. As rhyming texts, the Welsh and English versions required creative reimagining rather than straightforward translation — resulting in distinct versions that maintain the spirit of the originals while working within each language’s poetic conventions. This creative freedom extended to character names: the dog is Rex in English but Mot in Welsh, while the cat is simply Cat in English but Grwndi in Welsh. Peniarth took particular care in adapting the text for Welsh readers, working closely with both translators and the author. A notable example appears in *Early One Morning*, where the English translation uses ‘Mam and Mum’ rather than ‘my two mums’, while the Welsh edition uses ‘Mam a Mami’ — grounding the story firmly in Welsh cultural and linguistic contexts.

### **Production and funding**

Peniarth’s venture into board book publishing with these titles marked an important step into new production territory. Board books present unique production challenges – they require specialised printing techniques and materials that make them more expensive to produce than standard picture books. Understanding these challenges, Peniarth made their first move into international printing through a strategic partnership with Orca, a major Canadian publisher. This collaboration proved particularly valuable because Orca was coordinating a larger co-edition printing initiative publishing the English and French editions for the Canadian market. By joining this broader printing effort, Peniarth could take advantage of economies of scale, bringing down their production costs to a manageable level while maintaining the high quality needed for board books.

The financial approach to publishing these books also demonstrates how publishers of minority language children’s books can use creative funding solutions. Stonewall Cymru, an LGBTQ+ charity, played a key role by committing to purchase a set number of books before production began to provide copies for every primary school in Wales. This advance commitment provided Peniarth with guaranteed sales, effectively reducing their financial risk and giving them the confidence to proceed with the project. This kind of partnership

between publishers and community organisations shows how collaborative approaches can help make specialised publishing projects viable in minority language markets.

### **Reception and impact**

The launch of these books at the National Eisteddfod was particularly significant, as this festival represents one of Wales's most important cultural gathering points. By bringing together Welsh Government officials and Stonewall Cymru representatives as speakers, Peniarth positioned these books within both a cultural and social policy context. This strategic launch helped establish the books as important contributions to both Welsh-language children's literature and inclusive education.

The distribution strategy proved especially effective through two key bulk purchases that ensured widespread accessibility. By placing copies in every primary school and *cylch meithrin* (Welsh-medium preschool playgroup) across Wales, these books became available to a broad audience of young readers and their families. This wide distribution helps normalise diverse family structures within early education settings while supporting Welsh-language literacy development.

The success of *Early One Morning* and *Bedtime, Not Playtime!* has influenced Peniarth's thinking about future publishing strategies. While they maintain their commitment to developing original resources, their experience with these books has opened up new possibilities for international acquisitions. Peniarth's approach to future licensing decisions reflects careful business planning – they're looking for content that aligns with their brand values, demonstrates clear market potential, and offers financial viability. This balanced consideration of creative, cultural, and commercial factors shows how minority language publishers can successfully expand their publishing programmes through international partnerships while staying true to their core mission.

## Global reception

These board books have achieved remarkable international reach, with editions in forty-one languages across fifty-two different publications. As Schimel explains in his interview (2024), the total print run exceeded 100,000 copies, though he carefully distinguishes between books in print and actual sales. This distinction matters because several government institutions, like Portugal's Commission for Citizenship and Gender Equality, purchased editions for free distribution through educational systems rather than commercial sales channels.

The reception of these books reveals how attitudes toward LGBTQ+ representation in children's literature vary significantly across different cultural and political contexts. In several countries, the books received strong institutional support — Wales and Portugal both integrated them into their educational systems through government-backed initiatives. The books' literary merit gained recognition in the Basque Country, where the translator Angel Erro received the *Diario Vasco Premio Mejor Traducción* (Best Translation Award), while their inclusion in the American Library Association's 2023 Rainbow Book List acknowledged their contribution to LGBTQ+ children's literature.

However, these books have encountered varied legal and political responses that highlight the complex landscape surrounding LGBTQ+ content in children's literature. Legal challenges over the Hungarian and Russian language editions demonstrate how children's books can become focal points in broader societal debates about gender and sexuality. In Hungary, the county of Pest fined the bookstore chain Lira Könyv for displaying these titles without warning that they contained 'content which deviates from the norm'. Though the fine was later overturned, the case highlights the tension between cultural censorship and literary freedom. In Russia, where selling the books to minors would violate the country's 'gay propaganda' law, the charitable foundation Sphere and the Russian LGBT Network published the books with an 18+ label, deliberately highlighting the absurdity of labelling toddler board books as adult-only content (Flood, 2021). These contrasting experiences — from educational integration to legal suppression — reflect the widely divergent approaches different societies take toward LGBTQ+ representation in children's literature.

## Conclusion

The success of *Early One Morning* and *Bedtime, Not Playtime!* into Welsh and English in the UK offers valuable insights into how minority language publishing can engage with international children's literature. This case demonstrates that careful selection of international content, combined with thoughtful cultural adaptation, can enrich Welsh-language children's literature while addressing important social themes. What makes this example particularly instructive is how Peniarth navigated several publishing challenges simultaneously – entering board book production for the first time, working with international partners, and introducing inclusive content to their list.

The collaborative model used to bring these books to Welsh readers deserves special attention. The involvement of Stonewall Cymru provided crucial financial security through guaranteed purchases, while support from the Welsh Government helped ensure wide distribution through schools. This network of institutional support shows how publishers can reduce the financial risks of innovative projects while maximising their social impact. The model is especially relevant for minority language publishers, who often need to balance commercial viability with cultural and educational objectives.

Within Sapiro's (2008) framework, this case demonstrates how political logic can operate through non-traditional channels. The Stonewall Cymru partnership – providing guaranteed purchases that underwrote production costs – functions similarly to state translation grants identified by Sapiro as enabling culturally important publications that lack immediate commercial viability. The selection criteria reflect cultural logic priorities: these books were chosen not for commercial potential but for their contribution to LGBTQ+ representation in Welsh-language early years publishing, addressing what Bishop (1990) terms the need for 'mirrors' – books in which under-represented children can see their own family experiences reflected. The subsequent Basque translation and award demonstrates how cultural capital accumulated through distinctive content can generate international recognition, converting cultural logic investment into symbolic capital that enhances the profile of Welsh publishing more broadly.

Looking at the global reach of these books adds another dimension to their significance. Their translation into forty-one languages demonstrates the universal appeal of well-crafted stories that celebrate diverse families through everyday experiences. Yet the contrasting receptions in different countries – from educational integration in some nations to legal challenges in others – reminds us that children’s literature exists within broader social and political contexts. For Welsh publishing, this international perspective is valuable. It suggests that Welsh-language children’s books can participate in global conversations while maintaining their distinct cultural identity.

This case ultimately points to new possibilities for Welsh children’s publishing. It shows how publishers can move beyond traditional English-to-Welsh translation patterns to engage with a broader international literary landscape. Such engagement not only brings fresh perspectives to Welsh readers but also positions Welsh publishing within a global network of minority language publishers working to provide children with diverse, inclusive literature.

The translation of *Pronto por la mañana* and *No es hora de jugar* into Welsh demonstrates how an author’s personal expertise in translation and international publishing can drive a book’s success across multiple languages. Lawrence Schimel’s background as both author and translator gave him the connections and understanding needed to navigate international rights sales effectively. Moving from this example to *L’abri* shows us a different path to translation – one that starts with readers themselves recognising a book’s potential for their language community. This shift from author-driven to reader-initiated translation illustrates how different forces can bring international literature into minority language markets. While Schimel actively sought out opportunities to share his work across languages, *L’abri* found its way to Welsh readers through grassroots interest, showing how both top-down and bottom-up approaches can successfully bring diverse literature to Welsh audiences.

### 7.1.3 Case study: *L'abri* – importing a picture book from Québec

*Y Lloches* (*L'abri* in French or *Shelter* in English) demonstrates how non-traditional, reader-led engagement can help identify meaningful international books for translation. Created by French author Céline Claire and Shanghai-born, Montreal-based illustrator Qin Leng, the French-language picture book was initially published by Comme des géants, a Québec-based publisher. The book addresses universal themes of kindness, hospitality, and community support through its story of polar bears seeking shelter in a storm. This narrative resonates particularly well in the Welsh context, where themes of community support and mutual aid have deep cultural roots.

Rily's production choices for *Y Lloches* reflect a commitment to quality that extends beyond the text itself. The decision to print on uncoated paper with French flaps gives the book a distinctive physical presence, while the inclusion of a translator's note (in Welsh and English), discussion guide, and vocabulary list for Welsh learners helps readers understand the story's translation from French to Welsh while supporting educational use. These production values signal the publisher's recognition of children's literature as an important art form worthy of careful presentation.

The book's impact extends beyond individual readers through its use in Welsh schools, where workshops run by translator Aneirin Karadog focusing on its themes of kindness and inclusion help children engage with these important social concepts. This educational application shows how thoughtfully chosen international literature can enrich both the Welsh publishing landscape and classroom discussions of universal values.

#### **Discovery**

What makes this case particularly interesting is how the book came to Rily's attention. Unlike traditional publishing paths where translators, rights agents or publishers initiate contact, *Y Lloches* emerged from direct reader engagement. As Lynda Tunnicliffe, Rily's publisher, explains through personal communication, the suggestion came through their website's enquiries page from a reader named Siân Stephen. The publisher's decision to

acknowledge this contribution by including a dedication to Stephen in the book demonstrates how small-nation publishers can build meaningful connections with their reading communities. This recognition also serves as an encouragement for other readers to engage with publishers about books they believe would enrich Welsh-language literature.

This grassroots pathway to publication illustrates how digital accessibility - in this case, a simple website contact form - can create new opportunities for community members to influence publishing decisions. Such direct reader-to-publisher communication channels might be particularly valuable for minority language publishers, who often maintain closer relationships with their reading communities than larger mainstream publishers.

### **Québec publishing context**

Québec's publishing industry offers important insights into how minority-language publishers can build sustainable operations while reaching international markets. As a French-speaking province operating within predominantly anglophone Canada, Québec has developed strategies for supporting a minoritised language that prove particularly relevant for Wales's bilingual context.

The province's dual-funding structure combines performance-based support through the Canadian Book Fund with strategic development funding via the Canada Council for the Arts. What makes this system particularly effective, according to de Jocas (Farr, 2022), is its industry-led governance – publishers themselves help shape funding decisions through rotating committee membership, ensuring policies remain responsive to industry needs. This model contrasts with Wales, where the Books Council administers grants and retains control over funding decisions. The establishment of the publisher-led Cyhoeddi Cymru Publishing Wales group (CCPW) represents progress toward sector coordination, though funding decisions remain with the Books Council rather than with publishers themselves.

The translation support system proves especially relevant for Welsh publishers seeking to internationalise. By covering half of translation costs up to \$20,000 CAD and supporting promotional activities for international editions, the Canada Council for the Arts creates viable pathways for books to reach broader audiences. Québec publishers have developed

an additional strategic approach to facilitate internationalisation: deliberately pairing Québécois writers with international illustrators, making their books inherently positioned for cross-border appeal. *L'abri* itself demonstrates this approach, combining French text with illustrations by Shanghai-born, Montreal-based artist Qin Leng.

This collaborative model suggests possibilities for Welsh publishing. Currently, Welsh publishers tend to work repeatedly with the same illustrators – understandable given the need to sustain local creative talent – but greater international collaboration could benefit both illustrators and publishers. If Welsh illustrators were commissioned by international publishers while Welsh publishers engaged illustrators from other countries, this cross-pollination could strengthen international networks while raising the profile of Welsh creative talent. For instance, at Bologna 2022, a Québécois publisher expressed strong interest in Wales-based French/Québécois illustrator Valériane Leblond, suggesting demand exists for such exchanges.

Comme des géants, *L'abri's* original publisher, illustrates different strategic approaches to international markets. Their launch of Milky Way Picture Books as an English-language imprint demonstrates one expansion model, while publishers like Les 400 Coups maintain primary focus on French-language markets while selling international rights. Both approaches can balance cultural responsibility with commercial growth, though the mechanisms differ.

The success of Québec's publishing industry demonstrates that minority language publishing can thrive when supported by thoughtful funding structures that recognise publishing's temporal and financial realities – books require substantial time to create and sell, particularly in international markets, and additional rights income is important for publisher sustainability. While Wales and Québec operate at different scales, Québec's experience offers valuable lessons about balancing cultural objectives with commercial sustainability through industry-responsive support structures.

## Rights acquisition and translation

The acquisition of rights for *L'abri* demonstrates how publishers can leverage both digital platforms and professional networks to bring international literature to minority language readers. After receiving the reader's suggestion, Rily faced initial challenges in identifying the rights holders. As Tunnicliffe explains through personal communication, they ultimately made contact through social media, reaching illustrator Qin Leng via Twitter, who then directed them to Véronique Kirchhoff at VéroK Agency who held language rights in the book. This example shows how digital platforms can help overcome traditional barriers in international publishing, especially for minority language publishers seeking to acquire rights. The book had already found success in North America through Kids Can Press's English edition, *Shelter* (2017).

The selection of poet and translator Aneirin Karadog came through established literary networks in Wales, specifically through a recommendation from poet and translator Mererid Hopwood. Karadog's appointment proved particularly appropriate given his extensive linguistic background spanning Welsh, Portuguese, Spanish, Breton, French, and English. His professional roles - teaching Welsh to teachers at the University of Wales Trinity Saint David (UWTSD) and working for educational publisher Peniarth - combined with his previous experience adapting English books for Rily, made him especially well-suited for this project.

The translation process reveals important considerations in bringing international literature to Welsh readers and demonstrates the challenges of balancing artistic fidelity with accessibility. Karadog's decision to work directly from the French original rather than using the English translation as a bridge language demonstrates a commitment to maintaining linguistic authenticity. He described the challenges of translating a text that combined rhyme, alliteration, and dialogue, noting 'I used all the poetic tools' (Karadog, 2023). By employing sophisticated Welsh poetic techniques such as cynghanedd (a traditional Welsh system of sound correspondence and internal rhyme), alliteration, internal rhyme, cadence and rhythm, he created a translation that captured the original's literary qualities and ensured Welsh readers would experience the full richness of Claire's writing style. Karadog's

connection to the book's themes of refuge and sanctuary is reflected in the translator's note accompanying the Welsh edition.

### **Publication and reception**

The publication of *Y Lloches* in 2020 represents both innovative approaches and challenges in Welsh-language children's publishing. The Books Council supported this project through an Individual Publishing Grant (IPG), demonstrating institutional recognition of the value in bringing international literature to Welsh readers. While Rily marketed the book alongside their seasonal picture book offerings, Tunncliffe notes they could have better highlighted the distinctive nature of this translation project compared to their usual English-to-Welsh adaptations.

The publisher enhanced the book's educational value by including a discussion guide and vocabulary list for Welsh learners alongside the translator's note, adapting the international content for specific cultural and pedagogical needs in Wales. However, an important consideration emerged concerning linguistic accessibility. Tunncliffe (2021) reports anecdotal feedback suggesting that the Welsh translation, while successfully capturing the original's poetic qualities, may present comprehension challenges for some Welsh learners, though this feedback was not systematically documented and therefore cannot be independently verified within this study. This observation connects to a broader pattern in Welsh-language children's literature, particularly evident in works from the 1980s and 1990s, where linguistic complexity can create barriers for contemporary readers. Aaron (2021) identifies similar challenges in relation to classic Welsh children's literature, specifically citing T. Llew Jones's work as an example where linguistic sophistication, while literarily valuable, may present accessibility issues for modern young Welsh speakers. This tension between poetic artistry and readability in Welsh-language children's literature warrants further empirical investigation.

The sales figures for *Y Lloches* indicate solid market reception, with 900 copies sold from an initial 2,000-copy print run after the first year. This represents a strong outcome within the Welsh-language picture book market, demonstrating that the book has found an audience, particularly in educational settings. As Tunncliffe indicates through personal

communication, Rily plans to continue marketing efforts until they exhaust their remaining stock.

## **Conclusion**

The case of *Y Lloches* illustrates several dynamics in minority-language publishing. Reader-initiated discovery through Rily's website demonstrates how digital accessibility can create pathways for community members to influence publishing decisions. The rights acquisition process – navigating from social media contact with the illustrator to connection with VéroK Agency – shows the creative strategies minority-language publishers can use to access international content.

Aneirin Karadog's translation exemplifies how linguistic sophistication can preserve literary quality while engaging with cultural and poetic traditions, raising important considerations for translation strategy in minority-language contexts. The inclusion of a discussion guide and vocabulary list represents one approach to balancing artistic fidelity with accessibility.

Within the theoretical framework established in Section 2.2, this case illustrates the role of what Heilbron and Sapiro (2007) term informal networks in international literary circulation: the title was discovered through a personal recommendation rather than institutional channels, highlighting both the potential and the limitations of non-systematic approaches to content acquisition. Karadog's decision to translate directly from French into Welsh, bypassing English as a relay language, represents a foreignisation strategy (Venuti, 2008) that preserves the source text's cultural and linguistic character while asserting the capacity of Welsh to function as a direct recipient language from other minority-language traditions. Within Bourdieu's framework, this translation pathway accumulates symbolic capital for the Welsh-language publishing field by demonstrating linguistic sophistication and independence from English-language mediation.

Comparative insights from Québec reveal how supportive institutional structures, particularly translation funding and publisher-led governance, can enable minority-language publishers to pursue internationalisation without compromising artistic ambition. While

Wales operates at a different scale, these examples highlight opportunities to strengthen cross-border collaborations, enhance translation practices, and utilise digital tools to broaden the reach of Welsh-language literature.

Ultimately, *Y Lloches* points to new possibilities for Welsh children's publishing, demonstrating how publishers can move beyond traditional English-to-Welsh translation patterns to engage with a broader international literary landscape. Working directly with translators capable of translating from source languages into Welsh not only brings fresh perspectives to Welsh readers but also positions Welsh publishing within global networks of publishers working to provide children with diverse, inclusive literature from both minority and majority language contexts. The complexity of translating picture books – where visual and textual elements must work harmoniously – demonstrates the creative adaptation required when bringing books across languages, suggesting that vibrant children's literature in minority languages depends on both carefully chosen original creations and thoughtfully adapted translations, supported by publisher innovation, reader engagement, and thoughtful institutional frameworks.

The following case study presents a contrasting translation approach, revealing how different translator backgrounds and editorial processes can shape the final adaptation for Welsh children's literature.

#### 7.1.4 Case study: *Vombat Jirka* and *Vombat Jirka je statečný* – importing picture books from the Czech Republic

The translation of *Vombat Jirka* (George the Wombat) and *Vombat Jirka je statečný* (George the Brave) from Czech into Welsh and English illustrates how international book fairs continue to play a key role in connecting publishers across different markets. While *Y Lloches* came to Wales through direct reader recommendation, these books found their Welsh publisher through traditional industry channels when Matthew Howard, publisher of Graffeg, encountered them at international book fairs. This discovery highlights the ongoing importance of these professional gatherings in helping publishers from smaller markets identify promising international content.

The series itself demonstrates how children’s books can successfully address developmental milestones through engaging storytelling. Eva Papoušková’s narratives tackle universal childhood experiences – like potty training and dealing with fears – through the adventures of a young wombat. The choice of a wombat as the main character is particularly interesting, as this Australian animal would be equally unfamiliar to both Czech and Welsh readers, perhaps helping the stories maintain their ‘international’ feel across translations. Galina Miklínová’s illustrations support this approach by establishing consistent visual characteristics that help young readers connect with George regardless of their cultural background.

The original publication by Mladá Fronta, a Czech publishing house, as *Vombat Jirka* (‘Jirka the Wombat’) and *Vombat Jirka je statečný* (‘Jirka the Wombat is brave’) shows how children’s literature can successfully cross cultural boundaries when it addresses universal childhood experiences. The decision to change the protagonist’s name from Jirka to Watcyn in Welsh and George in English represents an early step in the cultural adaptation process, making the character more immediately accessible to Welsh and English readers while maintaining the story’s international origins.

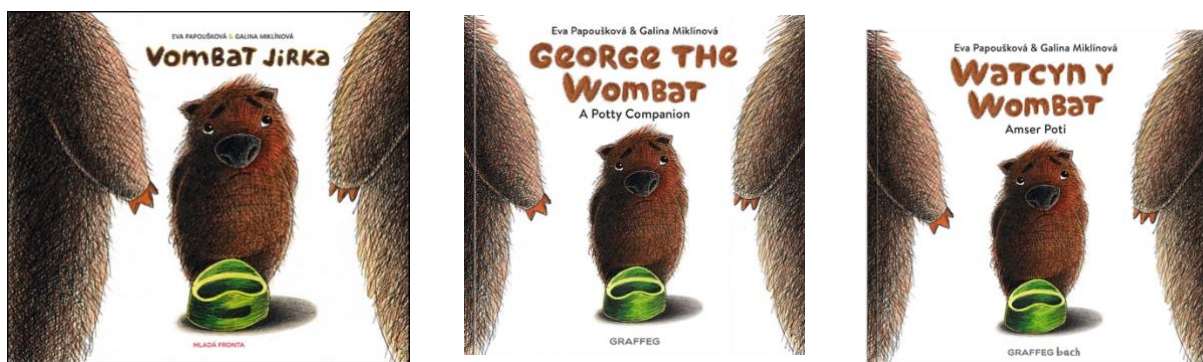


Figure 15: Czech, English and Welsh editions of *George the Wombat*

## Rights acquisition and translation

Bringing *George the Wombat* from Czech to Welsh readers reveals the intricate networks that facilitate international children's publishing, particularly in minority language contexts. Howard's initial attraction to the book's 'Western feel' and appealing protagonist at international book fairs demonstrates how visual elements can transcend language barriers in children's literature. However, the subsequent process of securing rights highlights the crucial role of cultural intermediaries in bridging linguistic and business divides.

The Czech translator and Director of LAF and Co-Director of WLE Alexandra Büchler's involvement proved pivotal, extending beyond simple translation to include cultural mediation. Büchler's multi-faceted role exemplifies what Hellewell (2019) identifies as the convergence of three distinct pathways through which translated books move between cultures: institutional discovery (through LAF and WLE organisational structures), personal networks (the face-to-face author meeting), and academic pathways (her scholarly expertise in translation studies). Her facilitation of connections between Graffeg and the literature promotion agency CzechLit, and her role in arranging Howard's visit to the Czech Republic's Children's Literature Book Fair in 2023, highlights how personal networks can overcome institutional barriers in international publishing. The face-to-face meeting with the author that resulted from this visit emphasises the continuing importance of personal relationships in rights negotiations, particularly in Eastern European markets where authors often retain subsidiary rights – a pattern that reflects different capital configurations than Western publisher-controlled systems, where publishers and agents typically accumulate economic and social capital through rights control (Bourdieu, 1993).

The translation process itself reveals the complex nature of adapting children's literature across cultures. Büchler's approach of creating a literal translation that could serve as a foundation for further adaptation acknowledges the unique requirements of children's literature. Howard's subsequent editorial work, combining Büchler's translation with one by the author's daughter and using illustrations as guides, demonstrates the collaborative nature of successful adaptation. This process navigated Venuti's (2008) domestication-foreignisation tension: Büchler's literal translation preserved Czech elements while

Howard's editing adapted references for accessibility. This multi-layered approach to translation – moving from literal rendering to cultural adaptation – proved particularly valuable in bringing the text to Welsh readers. The fact that the English adaptation was used for the Welsh translation connects to broader patterns in minority language publishing and what it reveals about translation pathways.

This translation approach, where the Welsh version was created from the English adaptation rather than the original Czech text, represents a common pattern in translation called 'relay translation' or 'indirect translation', with English functioning as a bridge language between Czech and Welsh.

While *Y Lloches* benefited from a translator who could work directly from French to Welsh, many minority language translations must rely on an intermediate language – often English – as a bridge between the source and target languages. This is partly practical (fewer translators work directly between languages like Czech and Welsh) and partly economic (the cost of finding and employing such specialist translators might be costly).

The role of state support in this publishing venture connects to broader questions about cultural production in minority language contexts. The Czech Ministry of Culture's grant support for printing costs reflects a wider pattern where state involvement helps facilitate international cultural exchange. This mirrors the Welsh publishing landscape, where state subsidies play a crucial role in maintaining publishing operations. Drawing on Sapiro's theoretical framework, this case illustrates the delicate balance between cultural integrity and commercial viability that publishers in small nations must navigate. Sapiro's (2008) three-logics model reveals how political logic (state intervention), economic logic (dual-language strategy), and cultural logic (adaptation quality) intersect—demonstrating how minority language publishers must balance state funding dependencies, market realities, and cultural preservation in ways that differ from dominant language contexts where economic logic predominates.

## Publication and reception

The publication strategy for *George the Wombat* reveals interesting dynamics in bilingual markets. Graffeg's decision to publish in both English and Welsh, supported by grants from CzechLit and the Books Council, demonstrates how minority language publishers often need to balance dual-market presence. The financial support from both Czech and Welsh cultural institutions shows how international collaboration can help facilitate cultural exchange in children's literature.

The books' reception offers valuable insights into the complexities of competing in different market segments. As Büchler notes through personal communication, the Welsh version has outperformed its English counterpart, likely due to the intense competition in the English-language children's book market. This observation aligns with a common pattern in bilingual markets, where minority language editions sometimes find stronger niches due to less market saturation.

The international rights sales of the series demonstrates how translation choices can influence a book's global trajectory. The Finnish edition's decision to translate from the English version rather than the Czech original particularly interested Büchler, who requested acknowledgment of this indirect translation path (Büchler, 2024). Her observation that direct Czech-to-Finnish translation was possible but would have resulted in 'a different book' raises important questions about how translation pathways affect the final product. This situation highlights how practical considerations often lead to English serving as a bridge language in international publishing, even when direct translation between languages might be possible so as to keep a uniform version of the story in each language.

Howard's reflection on the marketing challenges, particularly regarding the subtitle 'a potty companion', which was taken from the Czech original, highlights how subtle cultural nuances can affect book reception. While the subtitle aimed for playful suggestion, its potential ambiguity demonstrates the challenges of marketing translated children's literature across different cultural contexts. This marketing challenge connects to broader

questions about how publishers can effectively position international children's literature in new markets while maintaining the original work's charm and appeal.

The rights management aspect of the series reveals important distinctions in how different publishing markets operate. The author's retention of rights in Latvia illustrates the Eastern European model Büchler described, where creators often maintain more direct control over their work's international circulation than in Western markets (Büchler, 2024). This difference in rights management can affect how books travel between markets and how translation decisions are made.

## **Conclusion**

The translation approach used for these books highlights an evolving understanding of how children's literature moves between cultures. Rather than pursuing a single, direct translation, the publisher adopted a collaborative model that drew on multiple perspectives. Howard's combination of Büchler's more literal translation with the author's daughter's version, followed by careful editing guided by the illustrations, shows how children's book translation often requires a more nuanced approach than adult literature. Lathey (2016) explains this distinction through her concept of 'dual audience address'—children's literature must simultaneously engage child readers and adult mediators (parents, teachers, librarians), requiring translation strategies that differ from adult literature where foreignising approaches typically predominate. This process acknowledges that successful children's books must work on multiple levels – engaging young readers while also appealing to the adults who select and purchase books, whilst also serving children's literature's wider purposes of education, literacy development, entertainment, and the enhancement of imagination and empathy.

This case study suggests several important considerations for future international publishing initiatives in minority language markets. First, the value of building flexible networks that can facilitate both rights acquisition and cultural adaptation. Second, the importance of understanding how different markets approach rights management, particularly in Eastern

European contexts where authors often retain more direct control. Finally, the need to carefully consider how books are positioned and marketed in new cultural contexts, especially when working with less familiar source cultures.

These insights could prove particularly relevant as publishing continues to evolve, especially with the potential impact of new technologies like AI translation tools. While such tools might help address some initial language barriers, this case study reminds us that successful children's book translation involves much more than linguistic conversion – it requires careful cultural adaptation and an understanding of how young readers engage with stories in different contexts.

The discovery of *Das rote Paket* (The red package) reveals how changing circumstances can create new opportunities for connecting international children's literature with Welsh readers. How Carreg Gwalch discovered this book shows how cultural organisations can help forge new connections even when physical meetings become impossible, suggesting possible future models for international literary exchange in minority language publishing.

#### 7.1.5 Case study: *Das rote Paket* – importing a picture book from Switzerland

*Y Parsel Coch's* (*Das rote Paket*, 'The red package' in English) arrival in Wales exemplifies how digital innovation can create new pathways for international literary discovery. In 2020, when the Covid-19 pandemic prevented traditional book fair attendance, Wales Literature Exchange and Literature Across Frontiers developed an online panel for Eisteddfod AmGen (the virtual National Eisteddfod) focused on internationalising Welsh language children's books. The panel brought together international publishers and Welsh publishing professionals to discuss opportunities for bringing international literature to Wales, with each panelist recommending specific books for translation.

*Das rote Paket* was among the titles presented during this session. Myrddin ap Dafydd, publisher at Carreg Gwalch, attended the virtual panel and was immediately drawn to the book. This digital discovery pathway proved as effective as traditional face-to-face book fair

encounters. This exemplifies Hellewell's (2019) institutional discovery pathway, demonstrating how cultural organisations can facilitate connections that replicate traditional book fair functions through structured digital programming, potentially complementing rather than simply substituting for in-person events in future international engagement strategies.

## **Background**

*Y Parsel Coch* represents an interesting example of how timeless stories can find new relevance across decades and cultures. Originally published by Bohem Press in 1987 as *Das rote Paket*, the book's republication in 2017 suggests its themes continue to resonate with contemporary readers. The collaboration between Austrian author Linda Wolfsgruber and Italian illustrator Gino Alberti, both working within the Swiss German children's literature tradition, created a story that transcends its original cultural context.

The narrative follows a red parcel's journey through a village during Christmas, exploring themes of community connection, emotional awareness, and the ripple effects of kindness. By telling this story through the perspective of a child and her grandmother, the book creates multiple points of identification for young readers – they can relate to the child's observations while learning from the grandmother's wisdom and initiative.

The book's publication history demonstrates both its appeal and the challenges of maintaining international editions over time. Translated into various languages before going out of print in English, it had a complex lifecycle across different markets. The fact that the book was out of print in English when discovered for Welsh translation creates an interesting reversal – Welsh-speaking children gained access to this story when English-speaking children did not, demonstrating how strategic selection can allow minority languages to access works unavailable in dominant language markets.

The story's focus on community transformation through simple acts of kindness makes it particularly relevant for contemporary discussions about social connection. The grandmother's initiative to create and share the red parcel, with instructions for it to be

passed on, teaches young readers about active compassion and the power of individual actions to affect broader change – themes that resonate across cultural boundaries while remaining grounded in relatable situations.

### **Swiss publishing context**

Switzerland's children's book publishing operates within a distinctive quadrilingual market structure, with French, Italian, German, and Romansh linguistic regions maintaining distinct cultural ties with neighbouring countries. Major publishers like NordSüd and La Joie de Lire generate 70-80% of revenues from international markets, demonstrating successful navigation of their small domestic market through strategic international engagement (Bologna Children's Book Fair, 2019). The industry has produced internationally successful works from Johanna Spyri's *Heidi* (1880) to Marcus Pfister's *The Rainbow Fish* (1992), translated into 50 languages. This Swiss model of achieving international success through quality production and multilingual collaboration offers parallels for Welsh publishing, suggesting how peripheral markets can leverage cultural distinctiveness for international reach through strategic accumulation of symbolic capital (Bourdieu, 1993).

### **Rights acquisition and translation**

Carreg Gwalch's approach to translation reveals careful attention to cultural nuance within Wales itself. The decision-making around the Welsh word for grandmother illustrates how translation choices can enhance a story's connection with its target audience. As ap Dafydd explains through personal communication, they chose 'nain' (the northern Welsh word for grandmother) over 'mam-gu' (the southern variant) because it better suited the mountainous setting of the story. This dialect-specific domesticating strategy (Venuti, 2008) demonstrates how translation can create deeper local resonance while maintaining the story's foreignness at the thematic level, showing thoughtful consideration of how regional variations can enhance cultural connection.

The publisher's decision to acquire only Welsh-language rights reflects strategic focus on serving the Welsh-language market. This choice suggests recognition that Welsh-language

publishers can sometimes serve their audiences better by concentrating on their core market rather than attempting to compete in the more crowded English-language space. This approach differs from Graffeg's dual-language strategy with *George the Wombat*, highlighting how Welsh publishers take different paths in bringing international content to their readers.

### **Publication and reception**

Carreg Gwalch published *Y Parsel Coch* in 2021 as its lead Christmas title, supported by the Books Council. However, its production coincided with major changes in cross-border publishing relationships following Brexit. As ap Dafydd (2023) explains through personal communication, printing the book in Slovakia became significantly more complex due to new trade barriers, creating both logistical challenges and unexpected costs. This illustrates Sapiro's (2008) political logic in action—how state-level decisions about trade and borders directly impact minority language publishing economics, particularly affecting publishers dependent on international production partnerships for financial viability.

The book's sales trajectory is encouraging for building readership for translated works. While initial Christmas sales fell short of expectations, the book has demonstrated staying power, gaining momentum in subsequent Christmas seasons. Ap Dafydd's report that over half of the 2,000-copy print run had been sold by the time of the interview (2023), with expectations for continued Christmas sales, suggests how translated picture books can build their audience over time, reflecting how books need time to become established in new markets, particularly when competing with more familiar titles during the busy Christmas season.

The publisher's decision to maintain a relatively large print run of 2,000 copies, despite additional Brexit-related costs, shows confidence in the long-term potential of quality international content in the Welsh market. This strategic choice balances the higher per-unit costs of smaller print runs against the need to have enough stock to allow the book to find its audience over multiple seasons.

## Conclusion

*Y Parsel Coch* demonstrates how multiple pathways converge to enable peripheral-to-peripheral literary exchange. WLE's digital programming proved that virtual platforms can facilitate meaningful connections when traditional book fair attendance becomes impossible. The translation process revealed strategic navigation between local resonance (the dialect choice of 'nain') and cultural distinctiveness (maintaining the Swiss setting and universal themes).

The case reveals both structural constraints and strategic opportunities in minority language publishing. Brexit complications demonstrate how state-level political decisions directly impact publishing economics, particularly for publishers dependent on international production partnerships. Yet the book's availability in Welsh while out of print in English inverts typical patterns, showing how strategic selection enables minority languages to access content unavailable in dominant markets.

The book's gradual market success through seasonal repetition demonstrates how readership builds over time in smaller markets. Carreg Gwalch's patient investment in maintaining substantial stock despite higher costs suggests that quality international content can yield sustainable returns when publishers allow translated works time to establish themselves. This approach – where cultural distinctiveness and quality create appeal – offers a model for how Welsh publishers might build sustainable international engagement through careful selection and long-term commitment to translated literature.

While *Y Parsel Coch* came to Wales through a virtual literary event during the pandemic, the following case study demonstrates how traditional in-person networking continues to play a vital role in connecting publishers across borders. This contrast between digital discovery and face-to-face cultural diplomacy reveals multiple pathways through which international children's literature reaches minority language markets.

### 7.1.6 Case study: *Maskačkas stāsts* – importing middle-grade fiction from Latvia

*Maskačkas stāsts* ('The story of Maskachka', published in English as *Dog Town*)

demonstrates how culturally specific stories can achieve universal appeal through careful attention to themes that resonate across borders. The book's setting in Riga's Maskatchka district provides a distinct sense of place, while its core narrative about community preservation and unlikely friendships speaks to broader childhood experiences. The combination of realistic urban challenges with fantastical elements – talking dogs helping to save their neighbourhood – creates an engaging framework for exploring serious themes about gentrification and community identity in a way that young readers can understand regardless of their cultural background.

The book's success in Latvia, evidenced by winning the annual Latvian Literature Prize for the Best Children's Book in 2014 and its adaptation into multiple media formats, suggests its strong cultural resonance in its home market. For Welsh publishers like Firefly Press, *Dog Town* presented a compelling publication opportunity, combining strong domestic performance with narrative elements that would resonate in the UK market. The book's blend of magic realism and contemporary urban themes addressed universal childhood concerns. The protagonist's love of maps provides a clever device for helping international readers navigate an unfamiliar setting, while the universal experience of feeling out of place – represented by Jacob's temporary stay with relatives – offers an emotional anchor for readers from any culture.

#### **Rights acquisition and translation**

How *Dog Town* reached publication in Wales demonstrates how targeted cultural diplomacy can create meaningful connections between publishing markets. Literature Across Frontiers collaborated with Latvian Literature to organise strategic publisher visits ahead of the 2018 London Book Fair's Baltic Market Focus. This partnership created an important bridge between the two literary communities, facilitating Penny Thomas of Firefly Press's visit to Latvia in 2017. The timing of these visits was particularly significant – by bringing publishers to Latvia before the major spotlight of the London Book Fair, organisers gave participants

like Thomas the opportunity to develop deeper understanding of Latvia's literary culture and forge meaningful connections with local authors and publishers. This approach to cultural diplomacy, combining focused publisher visits with broader international events, demonstrates how smaller nations can effectively showcase their literary talent to international publishers. Thomas's existing interest in translations, combined with the opportunity to read a sample translation, shows how carefully planned cultural outreach can align with publishers' editorial interests. The comprehensive financial support provided by Latvian Literature, covering translation, production, printing, and marketing, significantly reduced the risk for an independent publisher like Firefly Press.

The translation process reveals sophisticated understanding of how books need to change to succeed in different markets. The publisher's decision to add a foreword explaining the local legend behind the story helps bridge cultural knowledge gaps, while the title change from *Maskačkas stāsts* ('The story of Maskachka') to *Dog Town* makes the book more immediately accessible to English-speaking readers while retaining its essential appeal. These changes demonstrate how thoughtful cultural adaptation can make international stories accessible without losing their distinctive character.

The cover redesign for the UK market offers particularly interesting insights into how visual elements must adapt to different market conditions. The UK edition maintains the original illustration but makes several strategic changes:

- The introduction of bright background colours and an enlarged, more engaging font makes the cover more visually striking
- The removal of the bare-chested male adult character reflects different cultural sensitivities around images of adults in children's books
- The addition of a strapline and cover quote follows UK marketing conventions

As previously noted (Farr via Outside In World, 2022), these differences reflect the more competitive nature of the UK market, where covers must work harder as marketing tools due to the larger number of competing titles. This contrasts with markets like Latvia where

'quieter' covers are more common, reflecting different competitive pressures and marketing traditions.

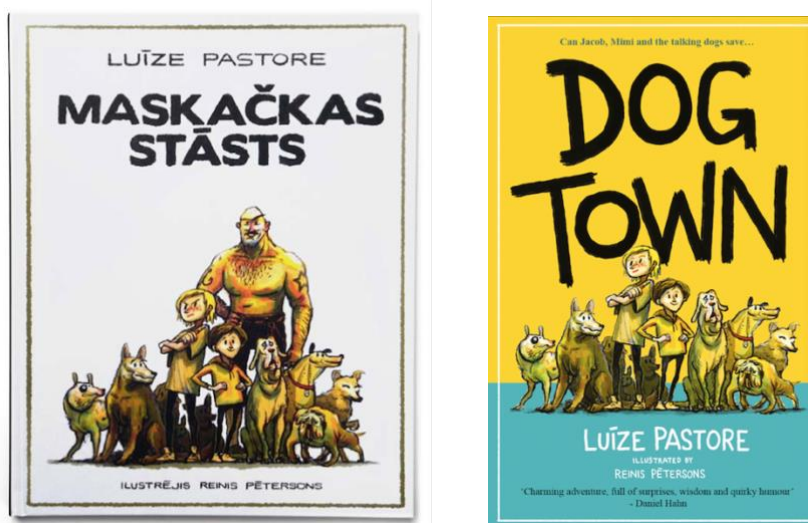


Figure 16: Latvian and English editions of *Maskačkas stāsts*

### Latvia's strategic approach to international literary promotion

Latvia's approach to international literary promotion demonstrates how smaller nations (Latvia has a population of just 1.884 million) can effectively share their cultural output on the global stage. The sophistication of Latvia's international literary outreach is particularly notable given the small scale of its publishing industry. With only 10-12 active publishers, operating without dedicated rights departments, and average print runs of just over 1,000 copies, the state-supported organisation Latvian Literature has become instrumental in facilitating international rights management and promotion (Pasqualini, 2023). This centralised approach has transformed what might have been a limitation into a strategic advantage, enabling coordinated international outreach despite the industry's modest size. Pasqualini (2023) explains that the organisation's strategic approach begins with innovative publisher engagement, bringing foreign publisher delegations to Latvia for immersive experiences with Latvian literature and culture. These carefully curated visits, now conducted twice yearly, include lectures and direct meetings with publishers, authors, and illustrators, with each literary agent inviting 2-3 carefully selected publishers who show potential interest in Latvian literature.

What makes Latvia's approach particularly interesting is their creative marketing strategy. In 2017, they launched the #IAmIntrovert campaign with illustrations by Reinis Pētersons, *Dog Town's* illustrator, initially targeting UK publishers ahead of the 2018 London Book Fair where the Baltic nations were the Market Focus. The campaign cleverly turned Latvia's perceived cultural introversion into a marketing advantage, proudly declaring that while 'Latvians can feel deeply confused when kissed on both cheeks or when suddenly talked to on a public bus', they let their books speak for them, positioning literature as 'the perfect world for introverts' (Publishing Perspectives, 2022). The campaign's success extended beyond marketing, winning multiple design awards and representing Latvia at the 2021 London Design Biennale.



Figure 17: Latvian Literature stand at Frankfurt Book Fair 2022 (left) and 2023 (right) © Latvian Literature

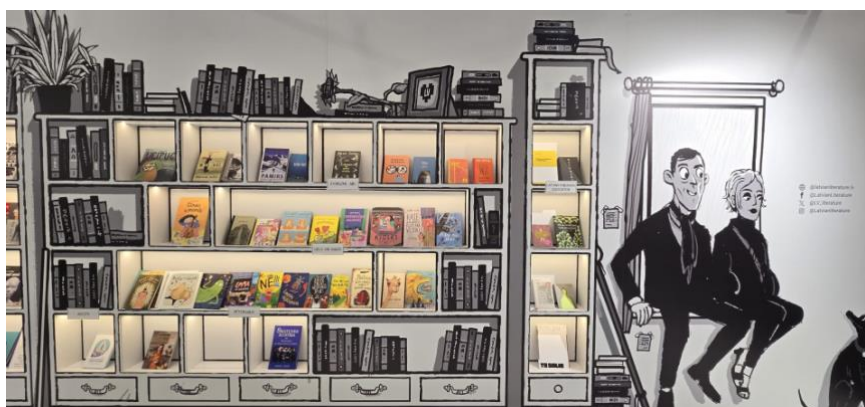


Figure 18: Latvian Literature stand at Frankfurt Book Fair 2024 © Latvian Literature



Figure 19: Latvian Literature stand at Bologna Children's Book Fair 2024 © Latvian Literature

### Latvia's children's publishing sector

Latvia's children's publishing sector demonstrates particular vitality, with 10-12 publishing houses producing 17-20% of the country's total published works. Translation plays a vital role, comprising 30-40% of children's publications, with English-language works representing over half of translated content, followed by Swedish and German works (Stikāne, 2018). This foundation is reinforced by strategic reading promotion initiatives, notably the Children's and Young Adult Jury programme. Established in 2001 by the Children's Literature Centre of the National Library of Latvia, this programme engages over 17,000 participants annually across four age groups, distributing selected works to approximately 700 libraries and cultural centres worldwide.

The country's commitment to children's literature has demonstrated significant international recognition. In 2022, the Latvian publishing house Liels un mazs received the award for Best European Publisher for Children at the Bologna Children's Book Fair<sup>7</sup>. This institutional success is complemented by comprehensive support for translations through substantial grant funding, covering not just translation costs but complete funding packages for copyright acquisition, production, printing, and marketing. By initially focusing on English-language publishers, Latvian Literature established a foundation for wider international reach, as English translations often serve as 'bridge' texts for other markets.

<sup>7</sup> List of Bologna Prize Best Children's Publishers of the Year (2013-2024)

<https://www.bolognachildrenbookfair.com/en/awards/bop-bologna-prize-best-childrens-publishers-of-the-year/winners-archives/2706.html>

The organisation has since expanded its focus to include Arabic markets as well as targeting German publishers in preparation for a potential Frankfurt Book Fair Guest of Honor bid (Pasqualini, 2023).

This robust domestic foundation, sophisticated international promotion, and comprehensive translation funding explain how books like *Dog Town* could emerge from a small market to find international success, published in English (UK), Italian, and Chinese markets to date. The strong support for children's literature creates pathways for Latvian children's books to reach readers in other languages while maintaining their cultural distinctiveness, demonstrating how strategic industry support can help small nations make a significant impact on the global literary stage.

### **Publication and reception**

The publication timing of *Dog Town* demonstrates how publishers can leverage international cultural events to maximise a book's visibility. Firefly Press strategically aligned the release with Latvia's featured nation status at the 2018 London Book Fair, capitalising on increased media attention and promotional opportunities, including the author's presence at the fair. This coordination demonstrates how smaller publishers can use international cultural platforms to enhance their books' profiles in a crowded market.

The book's reception presents an interesting case study in how critical success and commercial performance don't always align in translated children's literature. While achieving recognition as a *Times* Book of the Week represented a significant critical endorsement, the initial sales figures – approximately 1,000 copies from a 1,500-copy print run – tell a more nuanced story about market penetration. These numbers need to be understood within several contexts: first, the print run size was determined by grant requirements rather than market projections; second, Firefly Press typically expects higher sales figures, having established itself as a publisher that successfully reaches beyond Wales into the broader UK market via representation through the specialised children's book sales team of Bounce Sales & Marketing.

When considering the commercial prospects of such translations, it's important to understand the different scales of success in various markets. While a Welsh-language children's book selling 1,000 copies would be considered successful due to the market's size, the same number for an English-language title in Wales would be modest, as Firefly Press regularly sells thousands of copies of their titles. This disparity reflects the fundamental differences between minority language and majority language publishing economics. Publishers often maintain a diverse list of titles, hoping that occasional breakout successes will help support the broader publishing programme – a model that becomes even more pronounced when working with translations.

However, the eventual sell through the initial print run, leading to reprint plans, suggests a pattern common to translated children's literature – the gradual building of readership over time rather than immediate commercial success (P. Thomas, 2024). This trajectory aligns with observations from other case studies, where translated works often require longer periods to find their audience, particularly when introducing unfamiliar cultural contexts to young readers and in particular without the author to promote the book.

For Firefly Press, which has developed robust distribution channels and marketing capabilities that regularly achieve high sales figures by comparison with other English-language publishers in Wales, this experience offers valuable insights about the particular challenges of marketing translated children's literature in the UK. While institutional support from organisations like Latvian Literature can help mitigate financial risks, building market presence for translated works may require different strategies and timeline expectations compared to original English-language publications.

### **International rights**

*Dog Town's* international rights sales illustrates an important pattern in global children's publishing: how English translations often serve as gateways for books to reach other languages. While the original Latvian edition was recognised through domestic awards and adaptations, the English translation by Firefly Press has helped open new pathways for international sales. This demonstrates how English editions, even when published by smaller

independent publishers, can function as important ‘bridge editions’ that help books travel beyond their original language markets.

The Italian edition, *I cani di Riga* (‘The dogs of Riga’), scheduled for 2024, shows how translated works can continue finding new audiences years after their initial publication. Particularly interesting is the plan for a simultaneous comic book adaptation, suggesting how publishers in different markets might identify varied opportunities within the same source material. As Pasqualini notes through personal communication (17 May 2023), this multi-format approach in the Italian market represents a creative way to maximise the story’s potential for new readers.

The book’s translation into Chinese further demonstrates its cross-cultural appeal, showing how a story rooted in a specific Latvian neighbourhood can resonate with readers from vastly different cultural contexts. This success in reaching such diverse markets suggests that the book’s core themes – community preservation, friendship, and standing up for one’s neighbourhood – have universal appeal that transcend its specific cultural setting.

The continuing international interest in *Dog Town* also validates both Firefly Press’s initial decision to acquire the translation rights and Latvian Literature’s investment in supporting the English edition. It shows how strategic support for translations into major languages can create ongoing opportunities for books from smaller language markets to reach global audiences.

### **Implications for Welsh publishing**

Latvia’s approach offers three key lessons for Wales. First, their systematic presence at major book fairs (Frankfurt, Bologna) with eye-catching, professionally designed stands demonstrates how small nations with similar populations (Latvia 1.9m vs Wales 3.1m) can achieve visibility through consistent, coordinated presence. Second, their annual publishing industry reports provide comprehensive sector data that informs strategy – something Wales currently lacks. Third, Latvian Literature’s role as a centralised promotional body

parallels Wales Literature Exchange's function, suggesting that enhancing WLE's capacity for children's literature promotion could achieve similar results.

### **Lithuania: the 'Book Smuggler' model**

Lithuania offers a complementary model through its innovative 'Book Smuggler' approach – an independent literary agent who represents all Lithuanian publishers' international rights on commission rather than through state agency (Book Smugglers Agency, n.d.). This arrangement provides professional rights expertise to small publishers who cannot afford dedicated staff, while operating sustainably through percentage-based fees. The agent's presence at major book fairs and cultivation of international publisher relationships creates visibility for Lithuanian children's literature while aligning incentives: success comes through actual rights sales rather than grant achievement. This commission-based model offers a potential alternative for Wales, where no collective mechanism currently exists to represent children's publishers internationally.

### **Conclusion**

The case of *Dog Town* illustrates both the opportunities and challenges inherent in importing children's literature from smaller markets like Latvia into the UK, while also highlighting broader implications for international children's book publishing. While institutional support through organisations like Latvian Literature provides crucial financial backing for translation and production costs, the cultural specificity of such works can present challenges for achieving widespread commercial success in foreign markets.

Firefly Press's experience with *Dog Town* demonstrates several key strategic considerations for publishers engaging in international rights acquisition. The importance of establishing strong relationships with foreign publishers and maintaining presence at international events like the London Book Fair has proven key to discovering new titles and authors.

The project underlines the vital role that independent publishers can play in diversifying the UK children's book market by introducing new cultural perspectives and literary traditions.

While the commercial performance of translated works remains difficult to predict, the critical reception and international interest generated by *Dog Town* suggests enduring value in pursuing children's literature from smaller countries and less commonly translated languages. These insights carry particular relevance for the Welsh publishing industry as it seeks to expand its international reach, offering valuable lessons for rights acquisition, translation strategy, and promotional approaches.

#### 7.1.7 Importing children's literature into Wales: analysis and conclusions

The case studies examined in this section – one historical (Dref Wen) and five contemporary – represent the significant examples of international children's literature acquisition identified during this research, a finding that itself raises questions about the scope of import activity in Welsh publishing.

The analysis that follows examines these cases across five dimensions: the discovery pathways through which international titles reach Welsh publishers; the role and limitations of institutional support; translation and cultural mediation practices; editorial capacity within the broader UK context; and the cultural and commercial value of these imports.

#### **Discovery pathways and networks**

The pathways through which international children's books reach Welsh readers demonstrate the varied discovery mechanisms identified in Hellewell's (2019) theory of supply-driven translation. *Y Lloches* emerged through direct reader engagement, exemplifying personal network pathways, while *Dog Town*'s discovery through Latvian Literature's publisher visits, *Y Parsel Coch* via Wales Literature Exchange's virtual programming, and the *George the Wombat* series through book fair networking all represent institutional discovery channels. These diverse routes reveal that Welsh publishers access international content through multiple pathways, yet most discoveries occurred opportunistically rather than through systematic list-building strategies, reflecting what Hellewell terms the informal nature of translation flows from small nations.

## **Institutional support and its limitations**

Institutional support proved essential across all contemporary cases. Wales Literature Exchange's translation grants and international funding bodies – CzechLit, Latvian Literature – to enable commercially challenging publications. The *Early One Morning* case demonstrates how support can extend beyond traditional grants: Stonewall Cymru's bulk purchase guarantee enabled project viability while ensuring school distribution. This aligns with Sapiro's (2003) analysis of how state funding sustains cultural production that market forces alone would not support, reflecting the interplay between political, commercial, and cultural logics discussed in Section 2.3.

However, current funding structures reveal a gap in support for international acquisition. The Dref Wen case study (Section 7.1.1) demonstrates that systematic importing was historically viable when WJEC guaranteed purchase schemes provided stable demand for translated children's books. Under contemporary arrangements, the Books Council provides grants for production and marketing of books published in Wales, but not for international acquisition or translation costs. Wales Literature Exchange remains the sole source of translation funding, yet its remit covers all literature rather than children's books specifically. This structural shift helps explain why imports remain limited and opportunistic despite Wales's translation expertise and institutional infrastructure.

## **Translation and cultural mediation**

The case studies demonstrate theoretical concepts discussed in Section 2.4. Karadog's direct French-to-Welsh translation of *L'abri* to *Y Lloches* exemplifies what Cronin (2003) identifies as minority language translators exercising agency over how texts enter their languages. The *George the Wombat* relay translation through English reflects Heilbron's (1999) hierarchical system where English functions as a 'hypercentral' bridge language. Both approaches represent legitimate strategies within the tension Sapiro identifies between cultural and economic logics.

The paratextual adaptations undertaken for *Dog Town* – cover redesign, contextualising foreword, title modification – illustrate what Oittinen (2000) identifies as the challenge of presenting international children’s literature where market accessibility must balance against maintaining a source text’s distinctive character. These strategic choices reflect the mediation processes Lathey (2020) identifies as adaptive responses to market conditions rather than purely aesthetic decisions.

### **Editorial capacity and the UK context**

Successfully importing children’s literature requires specialised editorial skills: identifying culturally appropriate titles, evaluating content in unfamiliar languages, negotiating rights acquisition, and commissioning translators. This is fundamentally editorial work – acquiring editors build internationally diverse lists by assessing which titles will resonate with readers while balancing cultural value against commercial viability.

The cases reveal gaps in this editorial capacity within Welsh publishing, reflecting what Bourdieu (1993) terms insufficient ‘specific capital’. Lathey (2020) provides essential context, characterising the UK as a ‘resistant economy’ for translated children’s literature where the country remains ‘at a disadvantage in developing economic and cultural structures for the public reception of translations for children’. Within this broader context, mainstream conglomerates ‘issue single translations only sporadically’, with imports driven primarily by independent houses. Welsh publishers thus face a double challenge: operating within a UK market lacking systematic support for translated children’s literature while serving a bilingual readership whose distinct cultural needs represent an unrealised opportunity.

### **Value and implications**

The varied outcomes of these imports demonstrate what Bourdieu (1993) identifies as the inverse relationship between economic and symbolic capital in cultural production. While sales remain modest, these titles contribute to cultural diversity: *Dog Town* serves as a cultural bridge bringing Latvian life to Welsh readers; the rainbow board books address a

gap in LGBTQ+ content for young children. This tension between commercial and cultural value remains central to sustaining international exchange.

These findings point toward development priorities examined in Chapter 8: strengthening professional intermediaries who can facilitate systematic international exchange (Section 8.2); developing the availability of skilled translators who understand both source cultures and the specific requirements of children’s literature (Section 8.4); and addressing the funding gap that currently limits acquisition activity (Section 8.3). Significantly, some infrastructure already exists: Wales Literature Exchange can match publishers with appropriate translators, facilitate access to translation grants from other countries (which fund imports into Welsh), and has developed resources to help publishers discover international literature. However, survey data gathered for this research indicates that Welsh publishers are largely unaware of these resources. The primarily opportunistic nature of contemporary imports therefore reflects not only structural funding gaps but also a knowledge gap within the sector — suggesting that improved communication and coordination between existing institutions and publishers could unlock greater import activity without requiring substantial new investment. This conclusion is reinforced by the limited number of import cases identified despite Wales’s established expertise in translation into Welsh.

Having examined various approaches to bringing international content to Wales, we now turn to the export of Welsh literature to global markets.

## 7.2 Export strategies

These export cases assess how the stakeholder ecosystem identified in Chapter 5, particularly Wales Literature Exchange’s promotional role (Section 5.3) and publisher rights management capabilities (Section 5.2), enables Welsh literature to reach international markets. The contrasting pathways for Welsh-language and English-language works reveal how the bilingual infrastructure outlined in Section 5.4 creates different opportunities and constraints.

The previous section examined how Welsh publishers import international content for domestic readers. This section investigates the opposite challenge: expanding Welsh literatures reach to global audiences through strategic export initiatives. Through two case studies – *Llyfr Glas Nebo* and *The Clockwork Crow* – we explore distinct yet successful approaches to international market development. The Welsh-language YA novel *Llyfr Glas Nebo* demonstrates how literary networks and thoughtful adaptation can facilitate global market entry, while the English-language middle grade novel *The Clockwork Crow* showcases how effective rights sales management can generate value for both authors and publishers while achieving international distribution.

This study employs a comparative case study approach examining two successful examples of Welsh children’s and young adult literature exports, both published in 2018. The selection of both a Welsh-language and English-language text enables analysis of what Sapiro (2008) identifies as structurally different modes of international literary circulation, potentially offering replicable strategies for future publications.

The timing of these cases proved advantageous for research purposes. By early 2020 when this study commenced, both books had established domestic success and were implementing internationalisation strategies, allowing for real-time observation of their market expansion. The authors’ contrasting profiles provided additional analytical value: Manon Steffan Ros was well-established domestically in Welsh-language publishing but had no international presence before *Llyfr Glas Nebo* was published internationally, so Ros was positioned as a debut author within English and other languages while Catherine Fisher’s profile due to her prior international success in English-language markets offered different strategic advantages.

Both books achieved international success through multiple translations, though with varying levels of available performance data for research. While some sales data was accessible for *Llyfr Glas Nebo*, equivalent information for *The Clockwork Crow* proved more challenging to obtain despite employing identical research methodologies.

The research methodology centered on stakeholder interviews and documentary analysis. For *Llyfr Glas Nebo*, initial data collection involved consulting the Books Council, Wales Literature Exchange, and Ros's literary agent to map translation rights and establish contact networks. This was followed by structured email interviews with agents, the author, publishers, and translators. While most stakeholders provided detailed responses and engaged in follow-up correspondence, the French and Italian publishers proved non-responsive despite multiple attempts at contact. The French translator's participation partially mitigated this gap, particularly regarding the book's unique positioning as young adult literature in that market. See Appendix D for interview questions.

A parallel methodology was applied to *The Clockwork Crow*, beginning with consultation of the publisher's freelance Rights Manager to identify rights sales territories and contacts. The same interview protocol was employed, covering discovery, acquisition rationale, translation approach, publication strategy (including cover design), marketing efforts, and reader reception. See Appendix D for interview questions. However, response rates were lower than for *Llyfr Glas Nebo*, with notable gaps including non-response from the US publisher despite repeated outreach attempts.

### 7.2.1 Case study: *Llyfr Glas Nebo* – internationalising Welsh-language literature

*Llyfr Glas Nebo* (The Blue Book of Nebo) by Manon Steffan Ros has emerged as a remarkable success story in the internationalisation of Welsh-language literature. Published initially in Welsh by Y Lolfa in 2018, the novel has since been translated into multiple languages and achieved critical acclaim across various markets, culminating in winning the 2023 Yoto Carnegie Medal for Writing – the UK's most prestigious children's and young adult literature prize, and the first translated work to receive this award. This case study examines the novel's trajectory from its Welsh-language origins to its status as an internationally recognised work of literature, demonstrating how Welsh-language books can successfully reach global audiences through strategic support and rights management.

The significance of this case study extends beyond its commercial success to highlight the broader processes, challenges, and opportunities involved in exporting literature from minority language contexts. *Llyfr Glas Nebo* presents a particularly interesting example due to its complex publication history: initially positioned as a crossover novel in Wales, it was subsequently published primarily on adult literary lists internationally, with notable exceptions in the UK English and French markets where it was marketed as young adult fiction. This variety in market positioning, combined with different translation approaches – some working directly from Welsh, others from the author’s English adaptation – offers valuable insights into the flexibility required when internationalising literature from Wales.

The novel’s international expansion was enabled through close collaboration with Wales Literature Exchange (WLE), which facilitated the publication of Manon Steffan Ros’s self-translated first chapter in the international literary magazine *Words Without Borders*. This exposure led to Ros securing representation with literary agent Christopher Combemale of Sterling Lord Literistic, Inc. in the US. For *Llyfr Glas Nebo* specifically, Y Lolfa retained Welsh-language rights as the original publisher, while Sterling Lord Literistic managed world rights for translations. The agency now represents all language rights for Ros’s other literary work. Through targeted translation grants and publishing partnerships supported by WLE, combined with professional rights management, the novel secured multiple international markets.

Through detailed analysis of the novel’s translation and publication processes, publication processes, and market reception across multiple countries, this case study reveals both the opportunities and challenges in internationalising Welsh-language literature. The experience particularly highlights the potential for success when institutional support combines with professional rights management, while also indicating the need for more specialised networks in children’s and YA publishing to facilitate similar pathways for other Welsh-language works.

The following timeline traces the key milestones in *Llyfr Glas Nebo*’s international development, from its initial success in Wales through its various translations and publications across multiple markets. This chronological overview demonstrates the rapid

pace of internationalisation and the crucial role of strategic events and institutional support in facilitating the book’s global reach.

**Table 11: showing the internationalisation timeline of *Llyfr Glas Nebo* (up to 2023)**

Date	Activity
August 2018	<i>Llyfr Glas Nebo</i> wins the Prose Medal Prize at the National Eisteddfod
October 2018	<i>Llyfr Glas Nebo</i> is selected for the Wales Literature Exchange (WLE) Bookcase launched at Frankfurt Book Fair. A short extract is translated into English by Ros.
Autumn 2018	<i>Llyfr Glas Nebo</i> becomes a bestseller in Wales. Film and stage rights are sold.  WLE and Literature Across Frontiers (LAF) are invited by <i>Words Without Borders</i> to curate a special issue of literature from Wales to be published in Summer 2019. WLE/LAF select <i>Llyfr Glas Nebo</i> as one of five Welsh language titles to be included in the issue. A longer extract is translated into English by Ros for <i>Words Without Borders</i> before working on a full translation of the novel.
March 2019	<i>Llyfr Glas Nebo</i> shortlisted for the Tir na n-Og Children’s Book Award Welsh-language Secondary (ages 11-18)
June 2019	<i>Llyfr Glas Nebo</i> wins the Wales Book of the Year Award
August 2019	The Welsh language issue of <i>Words Without Borders</i> is published during the Eisteddfod week and is positively received. Includes extract from <i>Llyfr Glas Nebo</i> translated into English. Literary agent Christopher Combemale, Associate Agent, Sterling Lord Literistic, Inc signs Ros based on reading the novel extract in the magazine
Autumn 2019	Ros produces a full English translation of the novel. The literary agent acquires world rights (except Welsh) for <i>Llyfr Glas Nebo</i> and starts to sell language rights internationally
March 2020	It is announced that the US and Polish rights have been sold, with the agent making specific reference to the <i>Words Without Borders</i> issue
October 2020	<i>Llyfr Glas Nebo</i> published in Poland
2021	<i>Llyfr Glas Nebo</i> published in Egypt

October 2021	<i>Llyfr Glas Nebo</i> published in Spain in Spanish and Catalan
November 2021	<i>Llyfr Glas Nebo</i> published in the US
January 2022	<i>Llyfr Glas Nebo</i> published in the UK
May 2022	<i>Llyfr Glas Nebo</i> published in France
June 2022	<i>Llyfr Glas Nebo</i> published in Turkey
2022-2023	Rights sold in Italy, Egypt, Slovenia and India
March 2023	UK English edition shortlisted for the Yoto Carnegie Medal for Writing and Tir na n-Og Children's Book Award (English language)
June 2023	UK English edition wins the Yoto Carnegie Medal for Writing <i>Llyfr Glas Nebo</i> is published in Serbia

## Methodology

Data collection faced several constraints. The Arabic and Serbian publishers provided only minimal responses to enquiries, and no direct communication was established with the translators for these editions. While rich data was obtained from the French translator, neither the French nor Italian publishers responded despite multiple contact attempts, which restricted the available data for these editions. Additionally, the primary data collection phase concluded in 2023 before the sale of language rights for Malayalam, Vietnamese, Chinese, Korean and Greek editions, meaning these markets could not be included in the analysis. However, the language rights table and selected reception information have been updated to February 2025 to reflect the book's continued international expansion.

The case study selection of *Llyfr Glas Nebo* presents an interesting methodological consideration. While the novel was conceived as a YA/adult crossover text featuring a mother-son dialogue in diary form, its international publishing trajectory has been primarily shaped by the networks involved in its discovery and promotion. WLE and the author's literary agent both specialise in adult literature, leading to the book being published mainly

on adult lists internationally. Only the UK English and French editions have been published as young adult titles to date. This categorisation complexity does not diminish the case study's value for understanding international rights sales from Wales. Rather, it highlights how discovery networks and institutional connections can determine a book's market positioning, regardless of original intended audience, providing valuable insights into successful pathways for international rights sales that could be replicated for other Welsh titles.

## Publication and translation history

### A. Synopsis and key themes

*Llyfr Glas Nebo* is a post-apocalyptic young adult novel set in rural north Wales. The story follows Rowenna and her son Siôn (Dylan in the English version) as they navigate life in the aftermath of a nuclear disaster referred to as 'The End'. The narrative is presented through alternating diary entries written by mother and son in a blue notebook they find in an abandoned house.

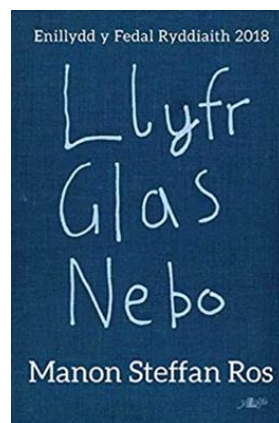


Figure 20: *Llyfr Glas Nebo* (Y Lolfa, 2018)

The novel explores themes of survival, motherhood, language, and cultural identity. Rowenna, once a struggling single mother, finds strength in her new role as protector and provider. Siôn, who was young when the disaster occurred, comes of age in this new world, grappling with questions of faith, purpose, and his Welsh identity. A key aspect of the story is the characters' relationship with the Welsh language. In the original Welsh version, this is

subtly woven into the narrative. In the English adaptation, it becomes a more prominent theme, with Rowenna rediscovering her connection to Welsh through the books she salvages from the library.

The books' setting in rural Wales and its engagement with Welsh language and culture make it distinctly Welsh, while its universal themes of family, survival, and hope resonate across cultural boundaries. This balance between local specificity and global appeal is a crucial factor in the book's international success.

### **B. Self-translation: Manon Steffan Ros's approach**

As discussed in Section 5.4.4, Manon Steffan Ros played a central role in the book's internationalisation by producing a full English adaptation titled *The Blue Book of Nebo*. Ros faced the distinctive creative challenge shared by bilingual Welsh writers: justifying why her Welsh characters would be speaking English in the English version. She transformed this challenge into a thematic strength, making language identity and ownership central themes in the English adaptation: 'I became interested in language identity and ownership whilst writing *The Blue Book of Nebo* – why do so many people feel that their Welsh is substandard, and that there are degrees of quality to spoken Welsh?' (Farr, 2021).

This creative approach led to significant changes from the Welsh original. Ros made conscious decisions about character names to differentiate between versions, keeping Rowenna's name consistent as 'the bridge between both versions' (Farr, 2021) while changing others to reflect the different thematic emphases. The exploration of Welsh language identity, less prominent in the Welsh original, became a more central narrative arc in the English version, with Rowenna rediscovering her connection to Welsh through books salvaged from the abandoned library.

Ros's self-translation process exemplifies what Deleuze and Guattari (1986) term 'deterritorialization' – the freeing of Welsh cultural elements from their original linguistic boundaries while maintaining their political charge and collective significance. As detailed in Section 5.4.4, this represents not a loss but strategic mobility: Welsh cultural concepts,

linguistic identity markers, and post-apocalyptic rural Welsh landscapes gain international reach while retaining their distinctive character. Despite these intentional changes, Ros emphasises allowing the translated work its own life: 'With any adaptation, though, I do believe that I have to be as hands-off as I possibly can be. Once a novel is published, I have to relinquish ownership of it to an extent' (Farr, 2021).

This dual-version approach had significant implications for the book's international circulation. Some translations worked from the Welsh original while others worked from the English adaptation, creating two distinct translation lineages with different emphases on language identity themes. These international pathways and how publishers in different linguistic contexts positioned the work for their audiences are examined in Section D.

### **C. Market reception in Wales**

*Llyfr Glas Nebo* was published in Welsh by Y Lolfa in August 2018 after winning the Prose Medal at that year's National Eisteddfod. The book's cover, featuring handwriting by the author's son, helped position it for both adult and young readers. This broad appeal was recognised through major literary prizes - the book won Wales Book of the Year in 2019, (before a children's category was introduced) and shortlisted for the Tir na n-Og Children's Book Awards that same year. The novel's success has extended beyond book publishing, with a stage adaptation produced by Welsh language theatre company Frân Wen, and a film adaptation currently in development by Fiction Factory Films. These adaptations demonstrate the story's potential to reach audiences across multiple media formats.

*Llyfr Glas Nebo* has achieved exceptional sales performance in Wales, with over 15,000 copies sold since its publication in August 2018 (Gruffudd, 2023). This significantly exceeds typical sales figures for Welsh-language novels, which according to Arwel Jones, Head of Publishing Development at the Books Council, usually reach around 1,000 or 2-3,000 copies for Eisteddfod prize-winning works (A. Jones, 2024). The novel's remarkable commercial success can be attributed to several factors. Its accessible language appeals to diverse reading audiences, serving both Welsh learners and first-language speakers who often prefer shorter texts. Its inclusion on the GCSE Welsh literature curriculum ensures sustained

educational market demand. Additionally, the narrative's sophisticated themes and character development have attracted a broad crossover readership spanning teens, young adults, and older readers, significantly expanding its market reach.

Lefi Gruffudd, Head of Publishing at Y Lolfa, noted the book's exceptional domestic performance: 'It has been one of the best received books in recent times, selling over 15,000 copies, also selling 700 e-books, and over 200 audiobooks. No other fiction title in Welsh has come close to these numbers in the last twenty years' (L. Gruffudd, 2023).

#### **D. International rights sales and translations**

Following Ros's representation by Sterling Lord Literistic (detailed above), the agent began actively pursuing international rights sales. The WLE Bookshelf promotion at Frankfurt Book Fair and the *Words Without Borders* feature had already generated significant publisher interest. Between 2020 and 2023, translation rights were sold to multiple markets, with WLE and Literature Across Frontiers (LAF) providing translation grants to support the majority of these international editions.

The translation pathway diverged significantly across markets. Early translations – Polish (2020), Spanish and Catalan (both 2021) – worked directly from the Welsh original, while later editions including French (2022), Arabic (2021), Serbian (2023), and Turkish (2022) used Ros's English adaptation as the source text. This split created two distinct translation lineages, each with different implications for how Welsh language and cultural themes were conveyed to international audiences.

This international rights management process highlights a critical challenge: publishers in Wales often lack the necessary contacts and networks to sell international rights effectively. While Y Lolfa had published a successful domestic title, they had limited capacity to pursue translation deals independently. The combination of institutional support (WLE/LAF), professional rights representation (Sterling Lord Literistic), and targeted funding (translation grants) proved essential for achieving the book's international reach – a model that requires better infrastructure and support within Wales to enable similar success for other titles.

The following sections examine specific translation cases, revealing the unique processes, challenges, and cultural negotiations involved in bringing a Welsh-language text to diverse international markets.

**Language rights sold for *Llyfr Glas Nebo* as of February 2025**

<b>Language</b>	<b>Publisher</b>
US English	Deep Vellum
UK English	Firefly Press
Arabic	Al Arabi
Polish	Pauza
French	Actes Sud
Catalan	Periscopi
Spanish	Seix Barral
Turkish	Nemesis
Italian	Neri Pozza Editore
Serbian	Partizanska knjiga
Malayalam	DC Books
Vietnamese	Saigon Books
Chinese	New Buds Publishing House
Korean	Dasan Books
Greek	Patakis Publishers

*(Data provided by Wales Literature Exchange)*

## Country-specific translation and publication processes

### A. Poland

The Polish edition, *Niebieska Księga z Nebo*, published by Wydawnictwo Pauza in October 2020, offers a particularly interesting case study in the international translation of *Llyfr Glas Nebo*.



Figure 21: Polish edition of *Llyfr Glas Nebo* (Wydawnictwo Pauza, 2020)

### Discovery and acquisition

The journey of *Llyfr Glas Nebo* to Poland began with a chance encounter. Anita Musioł, the owner of Wydawnictwo Pauza, met translator Marta Listewnik at the Poznań Book Fair in March 2019. Listewnik recalls:

I was wandering around the book fair in Poznań and came across the stall of a small publisher called Pauza. I talked to a lady who turned out to be the owner of the publishing house and asked her casually whether she knows any Welsh literature. She answered: 'As a matter of fact, I am about to publish a wonderful Welsh novel called *The Blue Book of Nebo* and I already have someone to translate it from an English translation.' (Listewnik, 2023)

This serendipitous meeting led to a change in plans. Initially, Musioł had intended to have the book translated from the English version. However, upon learning that Listewnik could translate directly from Welsh, she decided to change translators. This decision was significant, as it meant the Polish edition would be based on the original Welsh text rather than the English adaptation.

### **Translation process**

Listewnik's approach to translation was deeply considered. She explains: 'I was given both the Welsh original and the English adaptation by Manon Steffan Ros by the publisher. I read both and wondered which version would be better to translate into Polish. With little hesitation, I chose the Welsh original' (Listewnik, 2023).

This decision to translate from Welsh presented both challenges and opportunities.

Listewnik elaborates:

I used few domestication strategies, bearing in mind the target group: adults and young adults / teenagers. I retained all the allusions to Welsh literature, putting footnotes which explain literary contexts, especially about less well-known Welsh authors that the Polish reader cannot simply 'Google' even if they know English. (Listewnik, 2023)

Listewnik's approach to cultural references was particularly nuanced. As she explains:

I left the Welsh words that Rowenna put on her mantelpiece in the original with Polish translations:

*Adwaen* – poznać i zrozumieć

*Digofaint* – gniew

*Einioes* – całe życie (Listewnik, 2023)

She also had to navigate the challenge of conveying the linguistic dynamics present in the original: 'Some of my footnotes refer to the Welsh language itself (when the characters

discuss differences between literary and colloquial Welsh, which is hard to understand for a Polish person, because our language is very much standardised).’ (Listewnik, 2023)

### **Publication and marketing**

Wydawnictwo Pauza positioned *Niebieska Księga z Nebo* as adult fiction, aligning with the publisher’s specialisation in women’s literature featuring feminist themes and female experience. Yet the translator felt the book could crossover to YA and the book’s material design reveals strategic recognition of its crossover potential. The physical format functions as a paratextual extension of the narrative: French flaps, handwritten elements on the cover, and scribbled endpapers transform the book into a simulacrum of the protagonists’ diary. This design strategy blurs boundaries between children’s and adult fiction, creating an object that appeals to young adult and adult readers simultaneously. BookTuber Kaja Klimek (Kajutex) examined these material features in her review, demonstrating how the book’s physical form contributes to its market positioning.

### **Reception**

The timing of the publication, during the Covid-19 pandemic, presented unique challenges. Musioł notes: ‘The book was very well received, although at first some people were hesitant to read about something that reminded them of the pandemic (I published the book in October 2020 during lockdown).’ (Musioł, 2023)

Despite the challenges, the reception of *Niebieska Księga z Nebo* in Poland was largely positive. Listewnik translated several reviews into Welsh as a gift for the author, indicating the book’s impact. She notes: ‘Apart from a negative response from a well-known literary critic there were hardly any negative reviews on literary blogs and portals. There were also some video reviews and podcasts devoted to the novel, all very positive’ (Listewnik, 2023).

The book’s themes resonated with Polish readers in unexpected ways: ‘Many people saw the novel’s relevance during the pandemic and later during the war in Ukraine, which brought to the fore the question of nuclear war’ (Listewnik, 2023).

The Welsh dimension of the book was particularly appreciated: ‘Many reviewers paid attention to the Welsh dimension and commented that, thanks to the novel, they ‘discovered’ Welsh literature, learning much about it (quite a few mentioned the helpful footnotes in that respect). Some found the motif of the rediscovered Welsh language very moving’ (Listewnik, 2023).

This case demonstrates the potential for Welsh literature to find resonance in other cultures, particularly when translated directly from Welsh with careful attention to cultural nuances.

## B. Spain and Catalonia

The publication of *Llyfr Glas Nebo* in Spain presents a unique case study, as the book was simultaneously released in Spanish (*El Libro Azul de Nebo* by Seix Barral) and Catalan (*El Llibre Blau de Nebo* by Periscopi) in October 2021. This dual release offers interesting insights into the dynamics of translating from a minority language (Welsh) into both a major global language (Spanish) and another minority language (Catalan).



Figure 22: Spanish (left) and Catalan (right) editions of *Llyfr Glas Nebo*

## Discovery and acquisition

The publication path illustrates how agent networks can facilitate international rights sales. Barcelona-based MB Agencia Literària, acting as sub-agent for Sterling Lord Literistic, submitted the manuscript to María Escuin, Editor of Foreign Fiction at Grupo Planeta (Escuin, 2023).

The Spanish publisher recognised both universal appeal and specific relevance to Spain's multilingual context: 'As soon as we received it and started reading, we fell in love with the book and knew that it was a universal story that would resonate with Spanish readers' (Escuin, 2023). The Spanish edition was published by Seix Barral, a prestigious literary imprint with over a hundred years of history, positioning the novel alongside authors such as Virginia Woolf, Paul Auster, and Enrique Vila-Matas.

For the Catalan edition, Rafel (2023) explains they were introduced to the book through 'a literary agency we really rely on [who] told us enthusiastically about the book, which they recently had included in their rights catalogue.' Periscopi faced an immediate challenge in finding a suitable translator. As Saumell Santauegènia (2023) recalls, they initially reached out to Professor Montserrat Lunati, who had taught in Cardiff, hoping she might know someone capable of undertaking a direct Welsh-to-Catalan translation. This search led them to Emyr Gruffydd, a former student of Lunati's, demonstrating the importance of academic networks in facilitating minority language translation.

Both editions received significant institutional support. The Catalan publication was supported by multiple organisations, including the Catalan Department of Culture, Wales Literature Exchange Translation Award, and Arts Council of Wales National Lottery Funding. The Spanish edition also benefited from translation funding support, with the Wales Literature Exchange playing a key role throughout the process.

## Translation process

The translation approaches for both editions demonstrated a commitment to preserving the cultural and linguistic integrity of the Welsh original. The Spanish translation was undertaken by Sara Borda Green, a Patagonian translator whose fluency in both Welsh and Spanish allowed direct translation from the Welsh original, bypassing the typical English intermediary stage common in minor-to-major language translation. Borda Green identified specific challenges in this process: ‘There were some particular challenges related to the passage from a minority to a majority language. The most evident one is the fact that the novel is written according to the orality of people from a very specific area in Wales’ (Borda Green, 2023).

The Spanish translation presented unique challenges in rendering the novel’s complex linguistic dynamics. A key difficulty lay in translating the relationship between Welsh and English in the original text. As Borda Green (2023) explains: ‘Whereas in *Llyfr Glas Nebo* English was the ‘other’ language – not Rowenna’s nor Sion’s nor the community language – this dynamic could not be replicated when translating into Spanish, itself a majority language’. This observation highlights a fundamental challenge in translating between minority and majority languages: certain power dynamics and cultural tensions present in the original become impossible to preserve directly.

To help Spanish readers navigate these linguistic and cultural complexities, the publisher included supplementary materials in the peritext, including ‘a list with a brief synopsis of every literary work mentioned in the story’ (Borda Green, 2023). This editorial decision reflects the careful consideration required to make the novel’s rich cultural context accessible to a new audience while preserving its essential meaning.

The Catalan edition employed an innovative ‘four-hands’ translation approach that acknowledged and accommodated the translators’ linguistic backgrounds. Emyr Gruffydd, a Welsh speaker who had learned Catalan while living in Barcelona, provided the initial translation from Welsh to Catalan. As Gruffydd was not a first language Catalan speaker, Miquel Saumell Santa Eugènia then provided editorial oversight to ensure the translation

met native language standards. As Saumell Santaeugènia explains: ‘Once the rights were acquired and after requesting a sample page from Emyr... we decided that we would make a four-hand translation... with Emyr first translating a version directly from Welsh to Catalan. And next, I was doing a thorough review with the English version of the work (by the author herself) next to me’ (Saumell Santaeugènia, 2023).

This carefully structured collaboration ensured both fidelity to the Welsh original and naturalness in the target language. The process involved detailed communication between the translators, with Saumell Santaeugènia noting: ‘With Emyr we communicated by email and through comments on Word. I used them, for example, to indicate the discrepancies in the translation with regard to the English version, and he told me what the original literally said’ (Saumell Santaeugènia, 2023).

The translation team adopted a distinctly foreignising approach for the Catalan edition, making conscious decisions to preserve Welsh cultural elements. While Periscopi generally avoids footnotes in translations, they made an exception for *Llyfr Glas Nebo*, including four explanatory notes written by Gruffydd to elucidate specific cultural references such as the novel *Cysgod y Cryman* by Islwyn Ffowc Elis, the Welsh Women’s Institute Merched y Wawr, the Eisteddfod’s bardic chair, and Parry-Williams’ poetry. They maintained Welsh book titles in their original language with Catalan equivalents provided alongside, and preserved certain Welsh words, particularly from the Shipping Forecast, for their sonority and cultural significance (Santaeugènia, 2023).

This combined approach of collaborative translation and deliberate cultural preservation aligns with Venuti’s concept of foreignisation, maintaining the cultural specificity of the source text while making it accessible to the target audience.

### **Publication and marketing**

Both editions were marketed primarily to adult readers, emphasising the book’s literary qualities and its unique Welsh perspective although both publishers acknowledged the cross-over potential. For the Spanish edition, Escuin identified several resonant themes:

‘Topics such as a) the preoccupation for our planet and global warming, b) language and books and culture as a way to rebuild the world, c) maternity, d) survival in harsh conditions, e) the future of minority languages and the defence of one’s own culture’ (Escuin, 2023). The Spanish marketing campaign emphasised this cultural significance through its tagline: ‘Una novela sobre el poder de la palabra para reconstruir el mundo’ (A novel about the power of words to rebuild the world) (Escuin, 2023).

The Catalan market presented distinct challenges and opportunities. Aniol Rafel of Periscopi described the linguistic landscape: ‘The Catalan market is difficult, and it shares part of its space with the Spanish one, which is a huge market. Almost all our readers are bilingual, so it’s a complicated balance’ (Rafel, 2023). This situation mirrors the relationship between Welsh and English in Wales, adding another layer of relevance to the book’s themes of language and identity.

The reception of both editions demonstrates the success of their coordinated marketing approach, a high level of collaboration that particularly impressed the author (Ros, 2022). While the Catalan edition achieved notable sales figures for their market—‘around 1,600 copies in 2021’ with totals reaching ‘around 1,800 or 1,900 copies’ by the following year (Rafel, 2023)—both editions benefited from substantial media coverage and joint promotional activities. The publishers coordinated their marketing efforts effectively, with both editions receiving attention across ‘main newspapers, radio and also on TV’ (Escuin, 2023). A highlight of this joint promotion was the author’s participation in Festival 42, a prestigious sci-fi/fantasy festival in Barcelona, where both editions were showcased together. The Catalan edition was additionally highlighted during the Sant Jordi festivities<sup>8</sup>, where it was recommended as one of the notable science fiction/dystopian novels (E. Gruffydd, 2023).

This collaborative approach between a major publishing house (Seix Barral) and an independent publisher (Periscopi) represents a notable example of how publishers can work

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<sup>8</sup> The Sant Jordi festival, also known as the Day of Books and Roses, is a celebration of Catalan culture and love that takes place on April 23. It’s a day to exchange books and roses with loved ones.

together effectively in a multilingual market, potentially offering a model for future translations in similar contexts.

The simultaneous release in Spanish and Catalan created an interesting dynamic, mirroring the relationship between Welsh and English in the original context. This parallel publication allowed the book to reach both Spanish-speaking and Catalan-speaking (bilingual) audiences, fostering discussions about language, identity, and cultural preservation in both linguistic communities.

### **Reflections on minor-to-major language translation**

The Spanish and Catalan translations of *Llyfr Glas Nebo* offer valuable insights into the dynamics of translating from a minority language like Welsh. The decision to translate directly from Welsh, rather than using the English adaptation as a bridge, demonstrates a commitment to preserving the cultural and linguistic specificity of the original.

The challenges noted by both the Spanish and Catalan translators highlight the complexity of conveying nuances of orality, linguistic registers, and cultural references when moving between languages with different statuses and cultural contexts. While Venuti (2008) has noted the potential for cultural erasure in translation, particularly when moving from minority to major languages, both the Spanish and Catalan editions demonstrate how careful translation strategies can help preserve cultural specificity while making texts accessible to new audiences.

The Catalan translation represents an interesting case of minor-to-minor language translation. While facing similar challenges to the Spanish translation in terms of cultural and linguistic distance from Welsh, it also had to navigate the complexities of Catalan's own status as a minority language within Spain.

The success of both editions suggests that, with careful translation and thoughtful marketing, literature from minority languages like Welsh can find resonance even in markets where it must compete with both major global languages and other minority

languages. The Spanish and Catalan editions of *Llyfr Glas Nebo* thus serve as a useful example of how literature can bridge linguistic and cultural divides, fostering understanding and appreciation of minority cultures on a broader stage.

#### **D. France**

The French edition, *Le livre bleu de Nebo*, was published by Actes Sud Jeunesse in May 2022. This edition stands out for several reasons, including its marketing as YA literature and its translation process.

#### **Discovery and acquisition**

*Llyfr Glas Nebo* came to France through Manon Steffan Ros's literary agent. Lise Garond, the French translator, explains: 'I first read the book at the request of one of the French publishers I have been working with, who had received the book through Manon Steffan Ros's literary agent. She asked if I would do a book review for her, to see if the book would be of interest to the publishing house' (Garond, 2023).



Figure 23: French edition of *Llyfr Glas Nebo* (Actes Sud Jeunesse, 2022)

Garond's initial reaction was enthusiastic, but the publisher she initially reviewed it for only published adult fiction. This led to an interesting situation where Garond herself became an advocate for the book: 'I absolutely loved the book and told her it should be translated into French, but the publisher in question only publishes adult fiction. To me, the book isn't

necessarily “for” kids, or young adults: it is kind of ageless, it can talk to everyone’ (Garond, 2023).

Determined to see the book published in French, Garond took the initiative: ‘I still loved the book so much that I did a translation extract and sent it to several publishers, including YA ones. I only got a few answers, but an enthusiastic one from François Martin at Actes Sud Jeunesse, who hired me to do the translation’ (Garond, 2023).

### **Translation process**

Unlike the previous translations (Polish, Spanish and Catalan), the French edition was based on Ros’s English adaptation rather than the Welsh original. Garond found the translation process particularly enjoyable: ‘Very honestly, this was perhaps the most pleasurable translation experience that I’ve had so far. There was nothing that I felt like needed changing, even slight adaptations ... I just felt like I “just” had to do my job, and that was just wonderful’ (Garond, 2023).

However, Garond did face some challenges, particularly in maintaining the simplicity and emotional depth of the original: ‘There is a simplicity of language in this book that is also very refined, and the French language tends to use more words generally than the English, so it can be challenging at times to replicate that simplicity’ (Garond, 2023).

She elaborated on her approach: ‘But once I found the right tone, particular to each character, and remained concentrated in that atmosphere and emotion (both a kind of punch in the gut / softness of a pillow kind of mix, if I may say), I was on the right track’ (Garond, 2023).

### **Publication and marketing**

The decision by Actes Sud Jeunesse to publish *Le livre bleu de Nebo* as young adult (YA) literature marks a notable departure from its adult fiction positioning in other markets. This choice highlights both the book’s crossover appeal and the varying cultural perspectives on

YA literature. In alignment with their YA market strategy, the French publisher acquired cover rights from Firefly Press and opted to use the UK English edition's cover design.

Firefly Press similarly engaged in careful deliberation regarding the book's positioning as YA literature. Their decision was ultimately validated when the UK edition won the country's most prestigious children's and YA literary prize, the Carnegie Medal for Writing, in 2023. This success contributes to broader industry discussions about the publication of YA novels in the UK market, particularly given their substantial adult readership.

### **Reception**

While specific sales figures for the French edition were not provided, Garond notes positive reactions from various readers: 'Around me, I have had very enthusiastic reactions ... from people of all ages who have really been touched by the book' (Garond, 2023).

She shares an anecdote that illustrates the book's appeal across age groups: 'My step-daughter, who is 12, and usually doesn't read novels but a huge number of Mangas, disappeared in her bedroom with it for half an hour and returned, saying, well, it's not too bad actually, then disappeared again and finished it a week after saying she loved it, which she wouldn't say if it wasn't the case – anyway, to me that was already a huge victory' (Garond, 2023).

In December 2024, the French edition won the inaugural Entente Littéraire Prize (Le Prix de l'Entente Littéraire), a UK–France literary prize that celebrates writing and translation from France and the UK, focusing on a different genre each year.

### **Reflections on translation and cultural exchange**

Garond's experience with *Le livre bleu de Nebo* led her to reflect on the broader implications of translating Welsh literature: 'It is hard for a translator of English to find a good book that hasn't already been translated, and that you can suggest to a publisher in the hope that they

will of course hire you to do the translation. I was very lucky in this instance because it wasn't only a good book, but a book that I really loved' (Garond, 2023).

She also noted the significance of translating Welsh literature into French: 'To me, translating the *Blue Book* was also a chance for me to translate what I think is really good literature, and also in the end to work with a YA publisher which I hadn't had the opportunity to do before (even if to me again, this isn't necessarily a book "for" YA)' (Garond, 2023).

This case highlights the role of individual translators in championing works from minority languages, the challenges and rewards of translating between different linguistic structures, and the potential for Welsh literature to resonate with readers across age groups and cultures.

## **E. Arabic**

Methodology limitations: The Arabic publisher provided only brief responses to the structured interview questions sent via email, limiting the analysis of this translation's development and publication process.

### **Discovery and acquisition**

Al Arabi published the Arabic edition of *Llyfr Glas Nebo* in 2021 after a recommendation by Alexandra Büchler, Strategic Co-director of Wales Literature Exchange (WLE), who pitched the book to the publishers at the Abu Dhabi Book Fair.



Figure 24: Arabic edition of *Llyfr Glas Nebo* (Al Arabi, 2021)

### Translation and publication process

The Arabic translation was based on the English adaptation rather than the Welsh original. This decision was likely influenced by the availability of translators and the accessibility of the English text.

Hoda Fadl, editor at Al Arabi, elaborates on their approach to translation: ‘For the translation, we preferred to work with a young translator who would be more open to such a subject. At first of course we asked for translation samples from several translators until we found the perfect one for the book’ (Fadl, 2023).

This approach highlights the publisher’s commitment to finding a translator who could effectively convey the book’s themes and style to an Arabic-speaking audience.

The publisher also received funding support from Wales Literature Exchange, which played a decisive role in facilitating the translation and publication process.

### Challenges

Fadl noted two main challenges in bringing the book to Arabic readers: ‘The main two challenges were with the language itself – some expressions were misinterpreted by the translator, which is why we worked closely with her. The second challenge was to have our

readers understand this kind of topic because most of the books do not handle post-apocalyptic stories' (Fadl, 2023).

These challenges highlight the complexities of not only linguistic translation but also cultural translation, particularly when introducing a genre or theme that may be less familiar to the target audience.

The timing of the publication during the Covid-19 pandemic also presented unique challenges: 'However, at the time of publishing, what with all the effects corona left on people, they were hesitant to read something that has similar effects or stories' (Fadl, 2023).

### **Marketing and reception**

Despite these challenges, the book has found its way to readers across the Arabic-speaking world: 'The book has been sold in Egypt and all over the Arab world and some readers living outside ordered it as well' (Fadl, 2023).

### **F. Serbia**

Methodology limitations: The Serbian publisher provided only brief responses to the structured interview questions sent via email, limiting the analysis of this translation's development and publication process.

The Serbian translation, published by Partizanska Knjiga in 2023, represents one of the more recent international editions of *Llyfr Glas Nebo*.



Figure 25: Serbian edition of *Llyfr Glas Nebo* (Partizanska knjiga, 2023)

### Discovery and acquisition

Nataša Srdić, director of Partizanska knjiga and translator of the Serbian edition, discovered the book through strategic cultural networking. Her presence at the London Book Fair in 2022 was facilitated by the Ulysses Shelter exchange programme, where Literature Across Frontiers (LAF) and Wales Literature Exchange (WLE) were partners. At the fair, Alexandra Büchler introduced her to Manon Steffan Ros, and after attending an event about translating *The Blue Book of Nebo*, Srdić decided to publish it in Serbian (Srdić, 2023). This chain of events demonstrates how international literary translation often emerges through the interconnected actions of cultural exchange funding programmes like Creative Europe, strategic participation in literary events and book fairs, and the deliberate networking efforts of key industry professionals.

### Translation process

The Serbian translation was based on the English adaptation. Srdić, who translated the book herself, notes: 'Nothing insurmountable for a competent translator, I would say' (Srdić, 2023).

This comment suggests that, while there were challenges in the translation process, they were manageable for an experienced translator.

## Publication and marketing

Partizanska knjiga positioned the book as adult literature. This aligns with how the book has been marketed in several other countries, emphasising its appeal to adult readers despite its young protagonist.

## Funding

Like many other translations of *Llyfr Glas Nebo*, the Serbian edition received financial support from Wales Literature Exchange, demonstrating their ongoing commitment to promoting Welsh literature internationally.

## Reception

While the Serbian edition is relatively new, early indications suggest a positive reception: ‘The readers’ feedback has been extremely positive so far. A critical review has already been published in a prestigious literary magazine called *Polja*’ (Srdić, 2023).

## G. United States and United Kingdom

The publication of *The Blue Book of Nebo* in both the United States and the United Kingdom presents an interesting case study in how the same text can be positioned differently in two English-speaking markets.

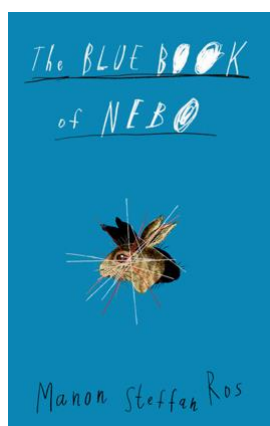


Figure 26: US (left) and UK (right) editions of *Llyfr Glas Nebo*

## United States edition

### Discovery and acquisition

The US edition was published by the literary publisher Deep Vellum in November 2021. Publisher Will Evans discovered the book through the Wales Literature Exchange website. His reaction was emotional:

In fall 2019, I discovered the book on the website of the Wales Literature Exchange, during a period of reflection on my own Welsh heritage and how little I knew about the land of my Evans forefathers ... When I read the full text, I wept. It has parallels with *The Road*, but this book hits me in a way *The Road* never could, all about building a new world centred on love, and the power of history and storytelling to shape the narrative of our lives into the future. (W. Evans, 2023)

### Publication and marketing

Deep Vellum positioned the book as adult fiction with YA crossover potential. Evans explained their approach: 'We published the book as a beautiful little hardcover with a dust jacket; it's one of my favourite designs we've ever produced, inside and out' (W. Evans, 2023).

This positioning as a literary work for adults, albeit with YA appeal, is significant in how it differs from the UK edition.

### Challenges

The US publication faced unique challenges, particularly due to the Covid-19 pandemic: 'The book ended up being published during the pandemic times, and even though that's a fitting parallel for the world evoked in the book, it made selling the book difficult as most

bookstores were closed down, and we have not had the chance to bring the author over to the US for events yet' (W. Evans, 2023).

Evans also noted challenges specific to being an independent publisher: 'The other challenges are selling a hardcover book when you're not a Big 5 publishing house, as independent bookstores in the US prefer to stock only bestsellers in hardcover, not wanting to take the chance on a debut (in the US) author from a small country originally writing in a small language' (W. Evans, 2023).

### **Reception**

Despite these challenges, the reception in the US has been positive: 'We've sold 1,500 copies so far: 1,350 in hardcover, 150 in e-book. The reception has been quiet but strong, and our plan is to keep working with the author, and to grow her audience and the reception for this timeless book through the years' (W. Evans, 2023).

### **United Kingdom edition**

The UK edition of *Llyfr Glas Nebo*, published by Firefly Press, a small children's press based in Wales, in January 2022, took a different approach in its positioning although there was discussion amongst the staff as to whether the novel was suitable for a children's and YA list (P. Thomas, 2024).

### **Publication and marketing**

Unlike the US edition, the UK version was explicitly marketed as YA literature. This decision to position it firmly in the YA category is a significant departure from both the US edition and other international translations (apart from the French edition), which were marketed to adult readers.

The publisher launched the novel as both a debut English-language release and a translated work in the UK market. Through Authors Aloud, an influential network that promotes

children's and YA literature in UK schools, they established strong connections with educators and librarians. This foundation expanded through engagement with the Youth Libraries Group (YLG) network and a presentation at their annual conference. The author's appearances at the Hay and Cheltenham Literature Festivals, along with reviews in key national newspapers, provided additional market visibility. The strategy proved highly successful when the book won the Carnegie Medal for Writing, validating the dual focus on educational channels and traditional literary promotion.

### **Reception and impact**

The UK edition of *The Blue Book of Nebo* achieved a significant milestone by winning the 2023 Yoto Carnegie Medal for Writing, marking the first time a translated work has received this prestigious award. The Yoto Carnegie Medal, established in 1936, is widely regarded as the UK's most esteemed children's literature prize. While the award has only been open to translations since 2015, this victory nonetheless represents a watershed moment for translated children's literature. The win generated considerable publicity, highlighting the growing recognition of translated works in the English-language literary landscape. This achievement has not only elevated the profile of Welsh children's literature internationally but also paved the way for increased attention to translated Welsh works. During her acceptance speech, Ros advocated passionately for the importance of both Welsh literature and literature in translation more generally, stating, 'Your favourite book might not yet have been translated into a language you understand' (Ros, 2023). This sentiment underlines the potential for linguistic diversity to enrich the global literary ecosystem.

### **Comparison and analysis**

Both publishers in the US and UK are small independent presses, one adult literary in the US and the other more commercial children's and YA in the UK, specifically Wales. Both publishers face similar challenges as small independent publishers of English-language fiction in large markets. Differing approaches to marketing and positioning *The Blue Book of Nebo* in the US and UK markets highlight several interesting points:

Market perceptions: The decision to market the book as adult fiction with YA crossover potential in the US, versus explicitly as YA in the UK, reflects different perceptions of the YA category in these markets. It may also indicate differing assessments of where the book would find its most receptive audience.

Publishing strategies: Deep Vellum's decision to publish a hardcover edition in the US contrasts with the typical approach for debut authors, especially those writing in or translated from minority languages. This strategy positions the book as a prestigious literary work compared to the paperback edition produced in the UK.

Cultural context: The UK edition, being closer to the Welsh context of the original, may have felt more comfortable positioning the book within the YA category, perhaps seeing it as more directly relatable to young British readers.

Impact of awards: The Yoto Carnegie Medal win for the UK edition demonstrates how literary prizes can significantly boost a book's profile and potentially influence its categorisation and reception.

Author perception: These different approaches may also reflect varying perceptions of Manon Steffan Ros as an author in these markets. Both in the US and in the UK, Ros had to be introduced as a debut writer to the English-speaking market, building the audience for the author. This was more successful in the YA market in the UK than in the adult market in the US.

The contrasting approaches to *The Blue Book of Nebo* in the US and UK markets demonstrate the complexities of publishing translated literature, even when the target language is the same. They show how factors such as market expectations, publishing strategies, and cultural context can influence how a book is presented and received, potentially shaping its reception and impact in different ways.

## H. Comparative analysis of translation approaches

A notable aspect of *Llyfr Glas Nebo*'s international translations is the variation in the source texts used for translation. While initial translations (Polish, Spanish and Catalan) were translated directly from the Welsh original, subsequent translations used Ros's English adaptation as their source text. This divergence in approach has implications for how the book's themes, particularly those related to Welsh language and culture, are conveyed to different audiences. Future research could explore how these different translation pathways impact on the reception and interpretation of the book in various cultural contexts.

### Analysis of translation and publication processes

The positioning of *Llyfr Glas Nebo* varied significantly across different markets. While the original Welsh edition was positioned as a crossover title for both young adult and adult readers, most international editions were marketed primarily to adult audiences. The French and UK editions stand out as exceptions, being explicitly marketed as YA literature. This variance in positioning reflects the complex nature of the book's themes and narrative, which resonate differently across cultural contexts. It also highlights the challenges in categorising literature that bridges the gap between YA and adult fiction in an international context.

The following table provides a comprehensive overview of the book's publications across different markets, highlighting the variations in source text selection, target audience positioning, and publishing strategies:

**Table 12: List of international editions of *Llyfr Glas Nebo* (up to 2023)**

Title	Publisher	Pub date	Source language	Target language	Market
Llyfr Glas Nebo	Y Lolfa	August 2018	Welsh	n/a	Adult/crossover

Niebieska Ksiega z Nebo	Wydawnictwo Pauza	October 2020	Welsh	Polish	Adult/female writers
كتاب نيبو الأزرق	Al Arabi	2021	English	Arabic	Adult/crossover
El Libro Azul de Nebo	Seix Barral	October 2021	Welsh	Spanish	Adult/literature in translation
El Llibre Blau de Nebo	Periscopi	October 2021	Welsh	Catalan	Adult/literature in translation
The Blue Book of Nebo	Deep Vellum	November 2021	Welsh	English US	Adult/literature in translation
The Blue Book of Nebo	Firefly Press	January 2022	Welsh	English UK	YA
Le Livre Bleu de Nebo	Actes Sud Junior	May 2022	English	French	YA
Nebo'nun Mavi Kitabı	Nemesis Kitap	June 2022	English	Turkish	Adult/literature in translation
Il libro blu di Nebo	Neri Pozza	February 2023	English	Italian	Adult/literature in translation
Plava knjiga Neba	Partizanska Knjiga	2023	English	Serbian	Adult/literature in translation

*Source: Wales Literature Exchange, 2024.*

The publication data reveals several significant patterns. First, there is a clear divide between earlier translations, which worked directly from the Welsh original, and later ones that used the English adaptation as their source text. Second, while most publishers positioned the book for adult audiences, specifically on literary translation lists, the UK and French editions took a different approach by marketing it as young adult fiction. This diversity in positioning demonstrates both the book's versatility and the influence of local market conditions on publication strategies.

The translation of *Llyfr Glas Nebo* into various languages revealed interesting patterns in terms of translation strategies. Most translators opted for a foreignising approach, seeking to preserve the distinct Welsh voice and cultural context of the original. This aligns with Venuti's (2008) concept of foreignisation, which aims to retain the cultural otherness of the source text.

However, this approach was not without challenges. The difficulties in translating from a minority to a majority language, noted by several translators, are not unique to Welsh but are common in translations from any minority language. These challenges include conveying cultural nuances, dealing with linguistic features specific to the source language, and deciding how to handle references that may be unfamiliar to the target audience.

The existence of two source texts – the original Welsh and the English adaptation – introduced additional complexities. This divergence reflects both practical considerations (availability of translators) and ideological stances regarding fidelity to the original versus accessibility for target audiences.

Institutional support played a key role in facilitating the book's international translations. All publishers received translation grants through Wales Literature Exchange (WLE). This financial support was instrumental in enabling smaller publishers to take on the risk of publishing a work from a minority language. The active role of WLE in promoting the book at international book fairs and connecting publishers with the agent was central in securing many of the translation deals. It is important to note that this network primarily focuses on adult literature, which explains the limited publication opportunities for children's literature in this context.

The case of *Llyfr Glas Nebo* also highlights the growing importance of self-translation for Welsh-language authors. Ros's decision to produce her own English adaptation allowed her to maintain control over how her work was presented to an international audience. This trend is becoming more common among Welsh authors, as exemplified by Megan Angharad Hunter, who self-translated her YA book, leading to her signing with an agent.

## Reception and impact

*Llyfr Glas Nebo* has achieved significant impact both domestically and internationally, with its reception shaped by changing global circumstances and varying cultural contexts. The novel's international translations spans a period of considerable global upheaval, with translations emerging during pivotal historical moments that influenced how different audiences engaged with its themes.

Initially published in Welsh in 2018 following the June 2016 Brexit referendum but before the UK's formal withdrawal from the European Union in January 2020, subsequent translations emerged during a period of unprecedented global challenges. The Polish edition appeared in October 2020 during the first wave of Covid-19 lockdowns, while the Spanish, Catalan, and US editions were published in autumn 2021 as countries navigated varying degrees of pandemic restrictions. Further translations, including the French and Turkish editions, were published in 2022 against the backdrop of Russia's invasion of Ukraine in February of that year and an escalating global economic crisis marked by rising inflation, supply chain disruptions, and increasing production costs in the publishing industry.

Publishers and translators report that while the novel's themes of survival and cultural preservation resonated strongly, reader response varied significantly across markets and time periods. As Hoda Fadl from *Al Arabi* observed, 'What with all the effects corona left on people, they were hesitant to read something that has similar effects or stories.' However, Will Evans of *Deep Vellum* noted that despite pandemic-era readers sometimes avoiding dystopian themes, the book's focus on 'building a new world centered on love, and the power of history and storytelling' offered hope in challenging times.

The reception across different markets has been largely positive, with critical reviews praising the book's themes, storytelling, and unique Welsh perspective. In the US, *Publishers Weekly* described it as 'A spare and intimate story of a family surviving a near-future global apocalypse ... In a time rife with and ripe for stories of the end, this one stands out' (*Publishers Weekly*, 2023). These global circumstances affected both publication processes and market reception differently across territories. In Poland, where the book appeared in

October 2020 during the early stages of the pandemic, Wydawnictwo Pauza navigated challenges with promotional events and bookstore closures while finding that readers drew new parallels between the novel's themes and current events. The Spanish and Catalan editions, published in October 2021, benefited from relaxed pandemic restrictions, enabling in-person promotion including the author's participation in a Barcelona science fiction festival.

Sales figures have varied across markets, reflecting differences in market size and positioning. In the US, Will Evans of Deep Vellum reported sales of 1,500 copies as of early 2023, noting, 'The reception has been quiet but strong, and our plan is to keep working with the author, and to grow her audience and the reception for this timeless book through the years' (W. Evans, 2023). In the UK, the impact of the Yoto Carnegie Medal for Writing had a significant effect, with sales reaching 25,000 by the end of 2024 (P. Thomas, 2024).

The book's themes have taken on new significance against this backdrop of global developments. María Escuin from Grupo Planeta highlighted how topics such as environmental concern and the preservation of minority languages felt particularly timely. The French publisher's decision to market the book to young adults, combined with the UK edition's Carnegie Medal win, suggests these themes equally resonate with younger readers processing global challenges.

The international success of *Llyfr Glas Nebo* has had a significant impact on Manon Steffan Ros's career and the visibility of Welsh literature more broadly. The UK publisher has gone on to publish several more of Ros's children's books self-translated by the author. Economic factors have influenced the book's trajectory, with rising production costs and pandemic-related retail disruptions affecting publishing strategies. Nevertheless, the continued acquisition of translation rights throughout this period demonstrates the enduring appeal of the book's core themes and its literary merit, even in challenging market conditions. The book's international success has demonstrated the potential for Welsh-language literature to resonate with global audiences, challenging assumptions about the limited appeal of minority language literature.

## Discussion

The success of *Llyfr Glas Nebo* demonstrates the potential of what Casanova (2004) calls 'peripheral literatures' to gain recognition in the 'world republic of letters'. Several key factors contributed to this success: the book's universal themes combined with its distinct Welsh perspective; the author's active involvement through self-translation; institutional support from organisations like Wales Literature Exchange and Literature Across Frontiers; the role of literary prizes in building the book's profile; the engagement of a US-based literary agent; and the growing interest in diverse voices in global publishing.

The case highlights a distinct pathway for Welsh-language literature internationalisation that differs notably from English-language Welsh literature. English-language works from Wales often rely primarily on traditional publishing networks and direct market access; *The Clockwork Crow*, for example, achieved international rights sales through professional agents (Section 7.2.2). In contrast, *Llyfr Glas Nebo*'s success showcases what Sapiro (2008) identifies as the essential role of institutional support and cultural intermediaries in sustaining literary production that market forces alone would not support. This institutional framework, including organisations like Wales Literature Exchange and the Books Council, provides important infrastructure for Welsh-language literature that compensates for market limitations. English-language Welsh literature can access international markets more directly but may face challenges in maintaining and communicating its distinct Welsh identity. Conversely, Welsh-language literature like *Llyfr Glas Nebo* must navigate more complex pathways to international markets but often maintains a stronger cultural identity through this process.

The role of self-translation emerges as a particularly significant aspect of this case. Ros's decision to adapt the English version aligns with what Grutman & Van Bolderen (2014) term 'self-translation as rewriting', where authors use the translation process as an opportunity to revise and reimagine their work for international audiences. This approach has implications for how minority language authors can shape their work's international reception while maintaining creative control.

The position of translators from Welsh deserves special attention within what Bourdieu terms the 'field of cultural production' (as discussed in Section 2.2). Drawing on Rosser's (2016) analysis of Welsh Dahl translations as a 'socially-situated practice,' translators from Welsh to English operate in a 'dominated position' within the broader literary field, often working outside mainstream publishing structures due to the minority status of their source language. This positioning creates both challenges and distinctive opportunities for creative agency.

However, this marginalisation can simultaneously represent a form of cultural empowerment. S.M. Rosser's (2016) concept of 'Welsh Dahl' versus 'Dahl-in-Welsh' demonstrates how translators working from minority languages can exercise creative freedom that challenges essentialised cultural identities, submitting source texts to 'the cultural and linguistic habitus of the target language'. Their intimate knowledge of both source culture and bilingual community realities enables more experimental approaches and direct engagement with Welsh cultural materials, potentially producing translations that reflect the complex sociolinguistic landscape of contemporary Wales while contributing to what Venuti describes as increasing 'the heterogeneity of minor culture' (cited in S.M. Rosser, 2016).

However, the case also reveals ongoing challenges in exporting Welsh children's and YA literature. These include limited translation resources, the need for expertise in children's and YA international markets in Wales, and the complexities of navigating between Welsh- and English-language literary fields. The key internationalisation networks in Wales currently lack specific connections and expertise in children's and YA literature, suggesting an area for future development.

## **Conclusion**

This complex positioning has implications for how Welsh literature reaches international markets. Success in children's and YA literature requires a hybrid approach that not only combines institutional support with commercial publishing expertise, but also acknowledges the potential for books to find different audiences across markets. The institutional

framework that enabled *Llyfr Glas Nebo*'s success could be enhanced by developing more nuanced approaches to age categorisation in international markets, particularly in building expertise specific to children's and YA publishing networks while remaining open to crossover potential.

This case study points to three interconnected areas for development. First, institutional support systems require strengthening, particularly in translator training, international book fair promotion, and specialised rights management for children's and YA publishing. Second, international connections need systematic development through hybrid networking strategies that combine institutional and commercial approaches, with dedicated support for children's and YA translation projects and stronger links between Welsh and international publishing networks. Third, author and translator development demands investment in self-translation resources, integration of Welsh-to-international language translators, and research into international market reception. These findings inform the strategic recommendations developed in Chapter 10.

The success of *Llyfr Glas Nebo* offers valuable lessons for both Welsh-language and English-language literature from Wales. While these two sectors have historically operated through different channels, this case study demonstrates how institutional support, cultural intermediaries, and author initiative can create effective pathways to international markets for Welsh-language literature. The novel's trajectory from Welsh literary prize-winner to international success, facilitated by organisations like Wales Literature Exchange and enhanced by the author's self-translation, represents one proven route to global readership. The following case study of *The Clockwork Crow* presents a contrasting approach, showing how English-language Welsh children's literature can reach global markets through professional rights management while preserving its linguistic and cultural identity. Together, these cases highlight the diverse strategies available for internationalising Welsh children's and YA literature.

### 7.2.2 Case study: *The Clockwork Crow* – internationalising English-language Welsh Literature

While the previous case study of *Llyfr Glas Nebo* demonstrated successful internationalisation through institutional support and self-translation, *The Clockwork Crow* trilogy by Catherine Fisher presents a contrasting pathway through publisher-led professional rights management. Published by Welsh independent publisher Firefly Press between 2018 and 2020, this middle-grade fiction trilogy illustrates how English-language Welsh literature can achieve international reach while maintaining strong cultural connections to Wales through different means than its Welsh-language counterparts.

Methodology limitations: The study faced several constraints regarding data collection. The United States publisher did not respond to the structured interview questions despite multiple attempts at contact. The Turkish publisher provided only brief responses to the interview questions, limiting the depth of analysis possible for this edition. Additionally, the data collection phase concluded before the publication of the Czech, Farsi, and Chinese editions, meaning these markets could not be included in the analysis.

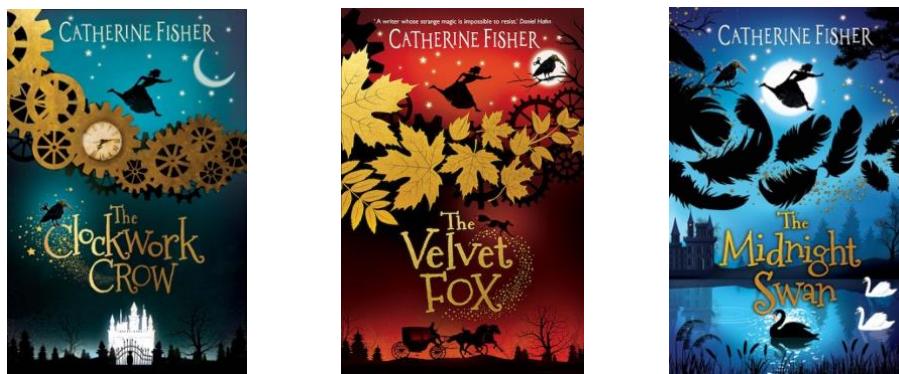


Figure 27: *The Clockwork Crow* trilogy (Firefly Press, 2018, 2019, 2020)

#### A. Origins and cultural context

Catherine Fisher is a best-selling writer from Wales (see Section 5.7.1 for analysis of her work's cultural positioning) who writes fantasy novels for middle grade and YA readers as

well as poetry for adults. Fisher has written a number of best-selling novels that have been published internationally. A strong advocate for Welsh writing and publishing, Fisher was invited to be on the Firefly Press board from the company's inception and has been a strong supporter of the publisher, selling exclusive world rights in her middle-grade *Clockwork Crow* trilogy to the publisher (P. Thomas, 2024). The first in the trilogy, *The Clockwork Crow*, was very well received and reviewed in the UK and shortlisted for the Blue Peter Book Awards in 2019 as well as winning the Tir na n-Og Children's Book Award (English language) in 2019 (see Section 5.6.1 for discussion of the awards system). This acquisition helped Firefly Press to establish its reputation both domestically and internationally and build key contacts with editors around the world. Additionally, *The Clockwork Crow* was one of the first books the publisher translated and published into Welsh (*Y Frân Glocwaith*, translated by Mared Llwyd, published in October 2022) after being encouraged by the Books Council to publish some of their books in the Welsh-language market.



Figure 28: English and Welsh editions of *The Clockwork Crow* (Firefly Press, 2018, 2022)

## B. Synopsis and key themes

*The Clockwork Crow* trilogy is a middle-grade Victorian fantasy series set in the landscape of mid-Wales, following the adventures of orphan Seren Rees and her unlikely mechanical companion. In the first book, Seren travels from London to her adopted family in Plas-y-Fran mid-Wales, home to the wealthy upper-class Jones family. On the way, she finds a mysterious package, leading to her first encounter with the enigmatic Clockwork Crow and her quest to find a missing boy named Tomos, who has been taken by the mysterious Telwyth Teg, dangerous fairies that steal children known as the Fair Family in English.

As the series unfolds across three interconnected stories, Seren's world expands from that initial winter mystery into a rich tapestry of magical encounters. In the second instalment, she faces the cunning Velvet Fox and a bewitched carousel during an autumn haunted by a suspicious new governess who threatens to separate the newly united Tomos from his family. The trilogy culminates in a midsummer adventure featuring invisible girls, a parliament of owls, and a magical self-writing pen, as Seren and Tomos work to help the Crow regain his human form while confronting the mysterious Midnight Swan and uncovering secrets about Seren's own past. See Chapter 5, Section 5.7.1 for a wider discussion of Welsh myths in children's literature.

Throughout the series, Fisher weaves together elements of Welsh folklore, particularly the dangerous and alluring Fair Family, with a Victorian Gothic atmosphere and clockwork magic. Each book shifts with the seasons – from winter to autumn to midsummer – creating a cycle of adventures that grow increasingly complex as questions about identity, belonging, and the nature of magic itself come to the fore. The trilogy combines the timeless appeal of a country house mystery with the wonder of Welsh mythology, all while following Seren's journey from a lonely orphan to a brave young girl at the heart of an expanding magical world. Key themes of belonging lie at the heart of the trilogy as Seren is accepted as a daughter in the Plas-y-Fran family home.

*The Clockwork Crow* series demonstrates the hybrid nature of contemporary Welsh publishing, being written in English while deeply rooted in Welsh mythology, particularly drawing on the traditions of the Tylwyth Teg (Fair Family), and continuing what Fimi (2017) identifies as the enduring tradition of authors drawing on Welsh medieval literature to create acclaimed works for young readers (see also Section 5.7.1). Fisher, who served as Wales's first Young People's Laureate, creates a cultural bridge through her work by deliberately integrating Welsh culture throughout the English-language narrative. As Seren enters Wales for the first time, she describes it as 'wild, she thought. A little scary' (Fisher, 2018, p.18). Fisher incorporates Welsh names, places, and common words like 'diolch' and 'bach' to establish authenticity while maintaining accessibility for non-Welsh readers. The story's Victorian setting provides a framework for exploring social and linguistic hierarchies,

with English-speaking upper classes contrasting with Welsh-speaking servants, reflecting historical Welsh-English dynamics within Wales itself.

Unlike *Llyfr Glas Nebo*, which required careful navigation of linguistic translation, *The Clockwork Crow* demonstrates how Welsh cultural elements can be integrated into English-language narratives from the outset. This approach presents different opportunities and challenges for international adaptation, as translators work with an already-mediated presentation of Welsh culture.

### C. International rights sales and strategy

Unlike *Llyfr Glas Nebo*'s path through institutional support and agent representation, *The Clockwork Crow* reached international markets primarily through professional rights management by the publisher, with key deals secured at the London Book Fair and Bologna Children's Book Fair.

The international distribution of *The Clockwork Crow*, managed by Firefly Press's freelance Rights Manager, Margot Edwards, demonstrates the potential for English-language Welsh literature to reach global markets. In an interview, M. Edwards notes that, despite initial concerns about the historical elements, 'they are such classical stories that – as you can see – they caught the imagination of the publishers' (M. Edwards, 2023).

**Table 13: Subsidiary rights sold for *The Clockwork Crow* (up to 2024)**

Language/Edition	Publisher
Audio	Oakhill Publishing (narrated by Deryn Edwards)
Chinese (Simplified)	Beijing Qianqiu Zhiye
Czech	Albatros Media
English (US)	Walker Books/Candlewick Press
Farsi (Iran)	Porteghaal
Finnish	Werner Söderström (WSOY)

<b>German</b>	Fischer Sauerländer
<b>Mandarin Chinese</b>	Beijing White Horse Time
<b>Norwegian</b>	Gyldendal Norsk Forlag
<b>Russian</b>	Eksmo Publishing
<b>Swedish</b>	Rabén & Sjögren
<b>Turkish</b>	Pegasus Publishing

Source: Firefly Press, 2024

## D. Country-specific publication processes

### US edition

The acquisition of North American rights for *The Clockwork Crow* series took place at the Frankfurt Book Fair in 2019, where Walker Books US secured the first two titles in a competitive auction managed by Margot Edwards. Walker Books US, under the leadership of President Karen Lotz and Executive Editorial Director Susan Van Metre, demonstrated particular enthusiasm for Fisher’s work, drawing parallels between *The Clockwork Crow* and classic children’s authors Joan Aiken and Rumer Godden. The publisher specifically praised Fisher’s ability to blend Gothic enchantment with engaging storytelling, positioning the work as an ideal holiday fantasy. This strategic acquisition aligned with Walker Books US’s editorial mission to publish literature that combines exceptional writing with compelling narratives (BookBrunch, 2019).



Figure 29: US editions of *The Clockwork Crow* and *The Velvet Fox* (Walker Books US, 2020 and 2021)

The US edition was released in hardback, paperback, and e-book, indicating a comprehensive publishing strategy for the North American market. While maintaining the core narrative, the US edition featured distinct cover artwork and made subtle adjustments in its marketing approach, notably in the peritext, where the Welsh Tylwyth Teg are introduced to American readers as ‘the Fey’ in the promotional copy, though the original Welsh terminology was preserved within the text itself. This approach illustrates the thoughtful adaptation of Welsh literature for the American audience. However, it is noteworthy that Walker Books US opted not to acquire rights to the trilogy’s final instalment, limiting their publication to the first two volumes.

### Translation processes and cultural adaptation

The translation process across different markets reveals fascinating insights into how English-language Welsh literature can be adapted for international audiences while preserving its cultural essence:

#### Nordic approach



Figure 30: Finnish, Norwegian and Swedish editions (left to right), published by Stabenfeldt (2021)

The Nordic editions of the work, published by Stabenfeldt in 2021, demonstrate how strategic distribution channels can complement sophisticated translation approaches. The publisher’s decision to sell the books exclusively through book subscription boxes (GIRL:IT aimed at girls) proved particularly effective, with initial print runs carefully calibrated to each market: 1,950 copies for Sweden, 1,700 for Norway, and 1,100 for Finland. This

distribution strategy, combined with careful translation work, helped establish the book's presence across the Nordic region. The editor explains that 'We try to include as many different cultures and traditions as possible in the books we publish' (Hallström, 2023).

The Swedish edition of the work benefited from a partnership between translator Sara Hartlow and publisher Christine Lundgren, demonstrating how nuanced cultural adaptation can enhance a book's market reception. While Sweden's position as Scandinavia's largest market naturally supported a larger initial print run, the success of the translation process played a key role in positioning the book for this market. Lundgren (2023) highlights the specific challenges in translating culturally embedded concepts, noting that 'Fae doesn't exist in quite the same way in Scandinavia, like in the UK. In Scandinavian folklore, when we talk about 'fairies' it's usually more of a goblin / household spirit.' 'We also talked about what to do with some of the Welsh words that are in the book, and we actually decided to keep them as they were and then we added a 'dictionary' at the back of the book, so our readers could learn some Welsh'. This cultural nuance required careful consideration to maintain the narrative's integrity while ensuring its resonance with Swedish readers.

The Finnish edition, translated by Elina Salonen, demonstrates a particularly elegant solution to the challenge of cultural translation. Salonen employed a hybrid approach, providing clear explanations of complex Welsh cultural concepts like the 'Tylwyth Teg' to support young Finnish readers' comprehension, while deliberately retaining select Welsh expressions such as 'bach' and 'diolch'. As Salonen notes, these carefully chosen Welsh terms served to 'effectively anchor the text to the place' (Salonen, 2023), maintaining the work's distinctive sense of place and cultural identity.

The Norwegian translation by Else K. Jacobsen represents yet another carefully considered strategy. Recognising Norwegian children's limited exposure to Welsh language and culture, Jacobsen adopted a more selective approach to linguistic elements. She chose to 'use only a few of the Welsh words, when it was obvious what they meant' (Jacobsen, 2023), prioritising reader comprehension while still preserving touches of the original work's cultural specificity.

The success of these varied approaches is reflected in the market response. Publisher Kajsa Hallström reports ‘great feedback on the book series’ and confirms ongoing reprints for future distribution (Hallström, 2023). This sustained market interest across all three territories validates both the translation strategies and the book club distribution model.

These Scandinavian editions illustrate how strategic translation strategies, combined with targeted distribution channels, can successfully bring culturally specific works to new audiences. The publisher’s commitment to both editorial excellence and strategic market placement has created a foundation for long-term success in these markets.

### German approach

The German edition by Fischer Sauerländer demonstrates how strategic marketing adaptations can help position Welsh literature effectively in new markets while highlighting the challenges of maintaining momentum for series publications. The publisher’s approach began with a fundamental decision regarding the book’s presentation to German readers: after consultation with the author, the title was changed to *Stella und der Mondscheinvogel* (‘Stella and the Moonlight Bird’), as a direct translation of *The Clockwork Crow* (‘Die Uhrwerk-Krähe’) would not have resonated effectively with the German market (Spiegel, 2023).



Figure 31: German edition, *Stella und der Mondscheinvogel* (Fischer Sauerländer, 2021)

The translation itself benefited from the expertise of Ulrike Ströbele, a renowned translator of children’s literature, who successfully maintained the integrity of the original work while

making it accessible to German readers. This careful balance of fidelity and adaptation provided a strong foundation for the book's introduction to the German market.

Editor Tina Spiegel's marketing strategy demonstrated insight in positioning the work within familiar literary contexts. By presenting the book as 'an Alice-in-Wonderland-like story for cosy winter evenings' (Spiegel, 2023), Spiegel created an effective bridge between Welsh literature and internationally recognised literary traditions, making the work more approachable for German readers.

However, the market response revealed the complex challenges of introducing international series to new markets. Despite receiving 'very good reviews', sales remained moderate (Spiegel, 2023). This response led Fischer Sauerländer to make the strategic decision not to publish the trilogy's final two volumes. Spiegel's assessment that 'parts 2 and 3 are less convincing as the story is very similar' points to a broader challenge in maintaining market momentum for series publications, particularly when introducing works from less familiar literary traditions.

### **Turkish edition**

Pegasus Publishing's approach in Turkey builds on existing author recognition, with Beyza Atatürk noting, 'The author is a very popular author among Turkish readers. We think that this book will attract as much attention as the others' (Atatürk, 2023). This suggests the potential for English-language Welsh authors to build international reputations that facilitate further market penetration.

### **Conclusion**

The international success of *The Clockwork Crow* offers significant insights into the potential for English-language Welsh literature in global markets. The case demonstrates the importance of professional rights management in achieving international market penetration. This success was notably achieved through the expertise of an experienced

rights professional whose established relationships with international editors and deep understanding of rights sales proved instrumental to the book's international rights sales.

The project's success hinged on several key factors: the maintenance of Welsh cultural elements within an English-language framework created distinctive market appeal, while flexible approaches to handling dual-language elements and cultural references enabled effective adaptation across different territories. Market-specific positioning strategies proved key, as demonstrated by the varied approaches taken by international publishers to integrate the work within their distinct cultural contexts.

This case study is particularly significant given the relative scarcity of international rights sales expertise within Wales, where publishers often lack the time and resources to pursue global markets. The success of *The Clockwork Crow* suggests that English-language Welsh literature can achieve international market success through its distinctive cultural setting and themes. This experience provides a valuable model for future internationalisation efforts of Welsh literature, regardless of original language, demonstrating that Welsh cultural settings and perspectives can support commercial success in international markets through strategic rights management and marketing.

### 7.2.3 Exporting Welsh children's literature: analysis and conclusions

The contrasting cases of *Llyfr Glas Nebo* and *The Clockwork Crow* highlight distinct yet complementary pathways for Welsh children's and YA literature to reach international markets. Both cases demonstrate that Welsh literature — regardless of original language — effectively functions as literature requiring cultural translation and mediation to reach broader audiences. This insight suggests the need for unified approaches to supporting Welsh literature's internationalisation while acknowledging the distinct paths required for Welsh- and English-language works.

## Structural features in practice

These case studies demonstrate how the structural features outlined in Chapter 5 manifest in practice. *Llyfr Glas Nebo*'s success depended on Wales's existing institutional support mechanisms (Eisteddfod's Prose Prize, Books Council's domestic funding, Wales Literature Exchange's networks and grant allocation) alongside a US-based literary agent and the translation infrastructure described in Section 5.4. *The Clockwork Crow* leveraged stakeholder networks (Section 5.1) through professional rights management. Both cases reveal the importance of domestic literary recognition (Section 5.6) — awards such as the Eisteddfod prizes, the Tir na n-Og Children's Book Award and Wales Book of the Year provided cultural consecration that facilitated international market entry. However, both also expose the gaps identified in Section 5.2.4: limited in-house rights expertise and reliance on external agents for international market access.

## Divergent pathways and networks

A key distinction lies in target readership demographics and the networks used to reach international markets. *The Clockwork Crow* represents middle grade literature originated in English and marketed through dedicated children's publishing channels — particularly the Bologna Children's Book Fair — via a specialist rights manager with established contacts in international children's publishing. *Llyfr Glas Nebo* functions as a crossover text originated in Welsh that reached international markets primarily through adult literary networks. Institutional support from Wales Literature Exchange and Literature Across Frontiers proved essential for *Llyfr Glas Nebo*, leveraging their established contacts with literary editors and translators internationally.

This distinction reveals a significant gap: Wales Literature Exchange's expertise and networks lie in literary fiction and books in translation, not in children's publishing specifically. *The Clockwork Crow*'s success demonstrates that it is possible to sell Welsh intellectual property internationally when publishers have access to appropriate children's publishing networks and contacts. However, such networks currently depend on individual publishers developing them independently rather than coordinated sector support.

## **Publisher sustainability and the economics of rights sales**

The cases reveal a fundamental structural challenge regarding publisher sustainability. The economics of UK book retail — with standard bookshop discounts of 40-50% and universal sale-or-return arrangements — make generating profit through domestic sales alone extremely difficult. Subsidiary rights sales, including international language rights, therefore represent crucial additional revenue for publishers. Importantly, since production costs have already been covered by domestic publication, rights income contributes directly to the bottom line.

In *Llyfr Glas Nebo's* case, the literary agent retained world rights and sold them independently to publishers internationally, with revenue split between author and agent. The original publisher, Y Lolfa, received no financial benefit from these international successes despite having developed the book domestically. By contrast, when Firefly Press secured world rights for *The Clockwork Crow* and managed international sales through their rights manager, the publisher created vital additional revenue streams benefiting the entire ecosystem — publisher, author, and rights professional alike.

This distinction matters profoundly for sector sustainability. Welsh publishers need these additional revenue streams to maintain viable operations, yet often lack the networks, expertise, and time to pursue international rights sales systematically.

## **Institutional support and the coordination gap**

While Wales has strong institutions supporting literary translation and author promotion, a disconnect exists between what these organisations do and what publishers commercially need. Wales Literature Exchange engages with international editors and can facilitate translation grant support — funds that could make Welsh publishers' rights offers more attractive to foreign buyers. However, survey data gathered for this research indicates that Welsh publishers are largely unaware of these resources and how they might support rights sales.

There is scope for closer coordination between literature promotion agencies and publishers' commercial activities. Currently, WLE's work with international contacts operates somewhat separately from publishers' rights-selling efforts. Greater alignment could help publishers leverage existing relationships and funding mechanisms to strengthen their international rights offers — making it easier for foreign publishers to take on Welsh titles when translation support is available.

### **Development priorities**

These findings point toward key development priorities examined in Chapter 8: strengthening publishers' capacity to acquire and manage international rights, including awareness of available translation grants that support rights sales (Section 8.2); developing specialised expertise and networks in children's publishing internationally (Section 8.3); and ensuring institutional support is aligned with publishers' commercial needs as well as authors' promotional opportunities. The diverse strategies these cases demonstrate — institutional support combined with agent representation for Welsh-language works, publisher-led rights management for English-language titles — highlight that multiple pathways exist for internationalising Welsh children's literature. However, addressing the gaps identified above — particularly in children's publishing networks and publisher-institution coordination — would enable more Welsh publishers to benefit from international success stories.

Beyond import and export, a third pathway exists: where publishers from different territories collaborate from a project's inception rather than trading rights after publication. The following section examines how this model operates in practice through Celtic language partnerships.

### **7.3 Co-production**

This case study examines an innovative co-production partnership between Graffeg Books in Wales and An tSnáthaid Mhór in Northern Ireland, which successfully brought the *Molly*

series to readers in three languages. The project represents a noteworthy example of cross-border collaboration in children's publishing, using funding mechanisms from both countries to create multilingual content (contrasting with the export models examined in Section 7.2, which relied on post-publication rights sales).

The series was written by Malachy Doyle, a Northern Irish writer with deep connections to Wales who has made significant contributions to children's literature in both countries. Doyle, who lived and worked in Wales for many years and maintains strong ties to the Welsh publishing industry through his position on the Firefly Press board and as an author published in Wales, brings a cross-Celtic perspective to the project. The illustrations were created by Andrew Whitson, who brought additional value to the project through his role as publisher at An tSnáthaid Mhór, a Belfast-based publishing house specialising in Irish-language children's literature. This dual position as both illustrator and publisher of the Irish-language edition created unique synergies in the project, particularly in coordinating visual and editorial approaches across linguistic boundaries while expanding market reach.

## **Methodology**

The research methodology for this case study draws on direct industry experience and structured interviews with key stakeholders. My professional relationship with Graffeg Books provided valuable initial insights into the project's development and implementation. Primary data was collected through in-depth interviews with two principal sources: author Malachy Doyle and Matthew Howard, Publishing Director of Graffeg Books.

The case study focuses particularly on how the publishers leveraged funding opportunities in both Wales and Northern Ireland to facilitate the series' publication in English, Irish, and Welsh. This approach offers insights into how strategic partnerships can overcome the financial challenges often faced by multilingual publishing initiatives in minority language markets.

### **7.3.1 Case study: co-production in Celtic children's publishing – the *Molly* series**

Beyond the binary of import and export, co-production offers a third path that combines aspects of both while creating new opportunities for sustainable international publishing. This case study examines how cross-border collaboration can serve multiple linguistic communities while maintaining commercial viability, with particular focus on the *Molly* series as an example of successful co-production between publishers in Wales and Ireland.

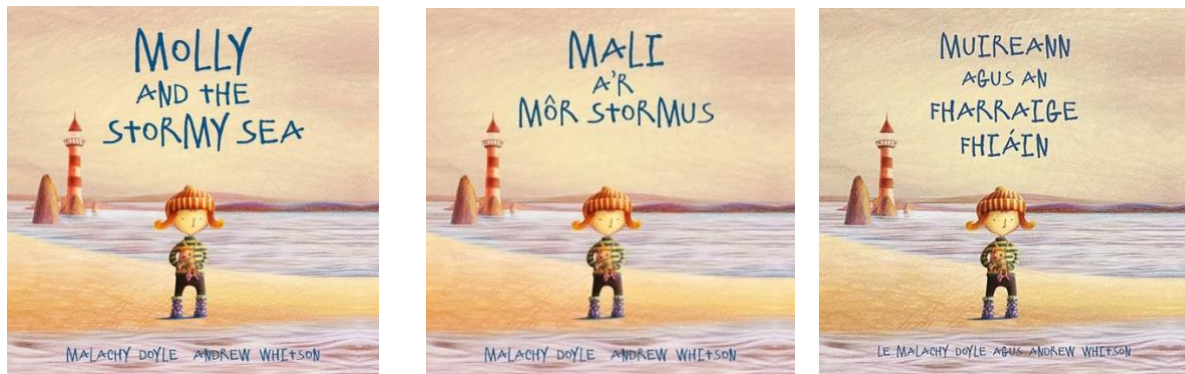


Figure 32: Left to right: English, Welsh and Irish editions of *Molly and the Stormy Sea* (Graffeg, An tSnáthaid Mhór, 2018)

The Molly series illustrates how co-production arrangements differ fundamentally from traditional rights sales or co-edition arrangements. Rather than one publisher creating the book and selling rights to others, the Welsh publisher Graffeg and Irish publisher An tSnáthaid Mhór were able to access grants from their countries and shared development costs and creative decisions from the project's inception. This arrangement created distinct financial advantages. While traditional publishing might require each partner to bear full production costs independently, the co-production model allowed partners to share content creation, production and marketing costs across English, Welsh, and Irish editions. The resulting economies of scale made high-quality production financially viable despite relatively small individual market sizes.

### **The co-production model**

This innovative co-production model emerged from initial market challenges. When mainstream publishers declined to publish what would become *Molly and the Stormy Sea*, Doyle (2023) first approached An tSnáthaid Mhór, recognising the potential for an Irish-

language edition despite the limited market size. As he notes, ‘I knew it meant a smallish market, and smallish sales, but I didn't mind – Molly (or Flora as she was originally called), was a story and a character close to my heart, and I just wanted to give her life.’

The expansion into a three-way co-production partnership materialised through professional networks within the Celtic publishing community. Illustrator and author Jackie Morris, based in Pembrokeshire, west Wales, introduced Doyle to Graffeg, an emerging Welsh publisher with whom she was working. This connection proved transformative, leading to a groundbreaking partnership that would establish a new model for multilingual publishing across Celtic languages.

The resulting co-production model established a novel approach to multilingual publishing in Celtic languages. A key innovation emerged from the funding constraints faced by An tSnáthaid Mhór. As Graffeg's Publishing Director Matthew Howard (2023) explains, since Whitson's Irish-language publishing funding specifically excluded translations from English, they structured the project to enable sharing of illustration assets across editions. This creative solution facilitated what Doyle (2023) identifies as a milestone in Welsh publishing: the first simultaneous trilingual release of a children's book across English, Irish, and Welsh languages.

### **Production process and creative development**

The co-production model operates through a strategically structured translation process that leverages diverse funding sources. Howard (2023) details how the workflow integrates multiple funding streams: Irish-language text is supported by grants secured through An tSnáthaid Mhór, while Welsh translations from Doyle's original English manuscript receive funding from the Books Council. This approach demonstrates how state funding mechanisms can be effectively combined to support multilingual publishing initiatives.

The *Molly* series distinguishes itself from traditional picture book co-editions through its uniquely collaborative creative process. Doyle (2023) describes a particularly close working relationship with illustrator Andrew Whitson, who made regular visits to the island setting

that inspires the series, based on where Doyle lives (an island off Donegal): ‘Andy has been to visit me here on the island where I live a number of times, and fed much of what he’s seen here into his artwork. He sends me artwork at every stage of development.’ This level of creative collaboration is facilitated by Graffeg’s editorial approach, which Doyle characterises as ‘less hands-on,’ allowing the creative team greater autonomy than typically found with larger publishers.

### **Economic model and series growth**

The series’ economic sustainability stems from a sophisticated funding strategy that combines public support with commercial revenue streams across multiple territories. This includes targeted funding from the Books Council for Welsh-language translations and Foras na Gaeilge for Irish-language editions, complemented by commercial revenue from English-language sales. By coordinating production across languages, the co-production model achieves economies of scale while maintaining linguistic authenticity in each market.

The business model demonstrates particular innovation in its distribution approach. Howard (2023) notes that while English-language editions generate the highest sales volume, the arrangement allowing An tSnáthaid Mhór to directly distribute Irish-language editions in their market illustrates how flexible commercial structures can effectively support minority language publishing. The consolidated printing approach for all editions further enhances cost efficiency, reducing per-unit production expenses across all language versions.

What began as a single story has developed into a comprehensive series that captures both traditional maritime life and contemporary challenges. From the first title, *Molly and the Stormy Sea*, the series has expanded to include adventures with whales, lighthouses, and dolphins, while also tackling contemporary issues through *Molly and the Lockdown* and *Molly and the Shipwreck* (refugees). Howard (2023) reports that the series has achieved some international reach, with rights sales secured in China and Russia with the help of a freelance rights agent. This expansion into two major international markets demonstrates the series’ broad appeal and the viability of Celtic co-production models for reaching global audiences.

## **Benefits and challenges**

The co-production model generates significant advantages for all publishing partners. The arrangement enables shared production costs and access to multiple territory-specific funding streams for minority language publishing (see Section 5.3 for detailed discussion of the Books Council funding mechanisms), creating efficiencies that would be unattainable for individual publishers. Beyond commercial benefits, this approach serves to preserve linguistic diversity while fostering connections across Celtic nations.

The project initially faced challenges, particularly regarding funding limitations for Irish-language translations. Through collaborative problem-solving, the partners developed flexible rights arrangements that respected individual needs while maximising the project's potential. Strategic use of public funding across territories, combined with shared illustration resources, established a sustainable production model.

## **Analysis and future implications**

The success of the Molly series as a co-production initiative stems from the strength of its creative and business partnerships. This partnership model demonstrates an alternative pathway to the agent-led (*Llyfr Glas Nebo*, Section 7.2.1) and publisher-led (*The Clockwork Crow*, Section 7.2.2) export strategies, addressing the sustainability challenges identified in Section 7.2.3. The unique relationship between Doyle and Whitson demonstrates the value of deep creative collaboration. As Doyle (2023) explains, 'unlike the usual separation between author and illustrator that is standard in children's publishing,' their partnership involved regular visits to the island setting and continuous artistic dialogue. Howard's (2023) description of the arrangement with An tSnáthaid Mhór further illustrates how innovative approaches to rights and distribution can effectively support minority language publishing.

This co-production model exemplifies what Heilbron and Sapiro (2007) identify as effective cultural mediation, where institutional support mechanisms enable creative partnerships across linguistic boundaries while maintaining commercial viability. While Berry (2013) demonstrates how personal relationships and cultural intermediaries facilitate market entry

in traditional translation contexts, the *Molly* series extends this insight by showing how such relationships can generate entirely new co-production models rather than simply enabling rights sales between existing publications.

## **Conclusion**

The *Molly* series demonstrates the potential of cross-border publishing collaboration in minority language markets. Unlike the export models examined in Section 7.2 — where one publisher bears all development costs before attempting to sell rights — co-production distributes both costs and risks from a project's inception. The model enables sustainable minority language publishing by integrating multiple funding streams (Books Council of Wales, Foras na Gaeilge) while sharing illustration assets and production costs across Irish and Welsh editions, creating commercial viability for both partners.

This model depends on cultural and linguistic affinity: the Celtic connections between Wales, Ireland, and their respective minority languages created natural partnerships that might not translate to other contexts. Nevertheless, the approach offers valuable insights for publishers considering similar ventures, particularly where shared cultural heritage or thematic interests could enable collaboration across borders. The broader implications of this co-production model for Welsh publishing sector development are examined in Chapter 8, Section 8.2.

## **7.4 Effectiveness analysis of international strategies**

The case studies examined in this chapter — spanning import, export, and co-production activities — reveal both the potential and the limitations of current approaches to internationalising Welsh children's and YA literature. Analysed through the Bourdieu-Sapiro framework established in Chapter 2, these cases demonstrate how small-nation publishers navigate the tension between cultural fidelity and commercial viability identified in Research Question 2, while pursuing the domestic and international market development strategies central to Research Question 3.

## Common success factors

Several factors characterise successful international engagement across all three modes. Institutional support proved essential: the Books Council's domestic funding mechanisms (Section 5.3.1), Wales Literature Exchange's translation grants (Section 8.4), and partnerships with international cultural bodies such as CzechLit and Latvian Literature, enabled activities that market forces alone would not sustain. This validates Sapiro's (2003) analysis of how state intervention enables cultural production in small markets. Professional expertise also proved critical — whether in editorial acquisition for imports, rights management for exports, or partnership coordination for co-productions. Where such expertise existed (as with Firefly Press's rights manager or Karadog's translation work), international activities succeeded; where it was absent, opportunities were missed or benefits flowed to agents rather than publishers.

## Structural challenges

The cases reveal persistent structural challenges that constrain internationalisation. Import activities depend on editorial capacity to identify, evaluate, and acquire international content. While Wales has strong English-Welsh and Welsh-English translation expertise, and increasing self-translation by bilingual authors (as examined in Section 5.4), there is limited capacity for translation between Welsh and languages other than English. The cases demonstrate this expertise exists — as shown by Karadog's French-Welsh work on *Y Lloches* and the Polish, Catalan and Spanish translations from the Welsh edition of *Llyfr Glas Nebo* — but it remains rare and underdeveloped. Using English as a bridge language offers a practical workaround, as demonstrated in the *George the Wombat* case, but this approach has limitations for preserving source text qualities.

Export success depends significantly on rights ownership and management. Crucially, whether publishers benefit from international sales depends on authors' and their agents' decisions about rights. Catherine Fisher chose to sell world rights for *The Clockwork Crow* to support Firefly Press — going against typical agent advice — enabling the publisher to generate revenue from international sales. By contrast, Manon Steffan Ros retained world

rights for *Llyfr Glas Nebo*, with her agent managing international sales; Y Lolfa, despite having developed the book domestically, received no financial benefit from its international success. This distinction reflects a broader structural weakness: for Welsh publishers to build sustainable revenue through subsidiary rights, they need authors to sell them world rights. However, agents typically advise authors to retain these rights as Welsh publishers don't have the expertise or contacts, and additionally Welsh publishers often struggle to afford the larger advances that world rights require — a challenge compounded by Books Council grant timing issues that create uncertainty during contract negotiations (discussed in Section 5.3.1).

These structural constraints are further compounded by the broader UK publishing context. Lathey's (2020) characterisation of the UK as a 'resistant economy' for translated children's literature provides important context. Welsh publishers operate within a broader UK market that lacks systematic infrastructure for international children's literature exchange. Moreover, this resistance extends beyond translation: the UK market has historically shown limited receptiveness to regional and devolved nation literature, even in English. Welsh publishers thus face a double barrier — their Welsh-language works require translation infrastructure that barely exists in the UK context, while their English-language works struggle to penetrate a London-centric market that often overlooks literature from Wales, Scotland, and other regions. This compounds the challenges facing a small-nation publishing sector already navigating bilingual production and limited market scale.

### **Comparing the three pathways**

Each internationalisation strategy offers distinct advantages. Import activities enrich Welsh children's literature, offering 'windows' onto other cultures (Bishop, 1990), and demonstrate editorial ambition, though they remain opportunistic rather than systematic. Export strategies provide 'mirrors' of Welsh culture (Bishop, 1990) and can generate crucial rights revenue for publisher sustainability, as demonstrated by Firefly Press's *The Clockwork Crow* sales, but require networks and expertise that few Welsh publishers possess. The co-production model examined through the *Molly* series offers an alternative that distributes

both risk and reward across partners, though it depends on cultural affinities (such as Celtic linguistic connections) that may not extend to all potential partnerships.

As demonstrated above, the contrasting rights arrangements illustrate a fundamental tension: Wales has institutions that effectively support author promotion internationally, but less infrastructure supporting publisher sustainability through rights income.

### **Implications**

The institutional support mechanisms examined throughout this chapter proved essential for enabling international activity, particularly for Welsh-language content. However, the cases reveal significant limitations: opportunistic rather than systematic import processes; variable rights management expertise; insufficient connection between existing support mechanisms and publishers' commercial needs; and limited children's-specific networks within Wales's otherwise strong literary translation infrastructure.

These findings point toward the need for coordinated sector-wide responses rather than individual publisher solutions. Chapter 8 examines how to strengthen this institutional framework, analysing current engagement patterns (Section 8.1), challenges and barriers (Section 8.2), book fair strategies (Section 8.3), translation frameworks (Section 8.4), and stakeholder coordination priorities for sustainable international development (Section 8.6).

## 8. Building International Links

While Chapter 7 examined specific international strategies through detailed case studies of import, export, and co-production initiatives, this chapter addresses Research Question 4 by analysing how the Welsh publishing sector can build sustainable international connections and what economic and cultural benefits such engagement offers. The chapter shifts focus from individual publisher strategies to the broader infrastructure, support mechanisms, and stakeholder coordination necessary for sector-wide international development.

The analysis of specific cases in Chapter 7 revealed both successes and limitations: import activities have developed primarily through informal networks; export successes like *Llyfr Glas Nebo* (Section 7.2.1) emerged through coordination between Wales Literature Exchange and a literary agent representing the author, while *The Clockwork Crow* (Section 7.2.2) achieved international sales through a publisher's rights agent. These different pathways – author/agent-focused versus publisher-focused rights representation – demonstrate the need for systematic examination of the institutional frameworks, professional capabilities, and strategic coordination that enable effective international engagement.

This chapter addresses the challenges identified in Chapter 7's case studies by examining how Welsh publishers can move beyond ad-hoc initiatives toward more coordinated approaches. The analysis draws on Sapiro's (2016) framework for understanding translation as operating within institutional fields that require strategic navigation, while considering how Bourdieu's concepts of social and cultural capital inform the development of sustainable international networks. By analysing current engagement patterns, institutional infrastructure, and potential development pathways, this chapter identifies concrete mechanisms for strengthening Wales's position in global children's publishing markets.

The chapter proceeds through six interconnected sections. Section 8.1 evaluates the current state of international engagement across the Welsh children's publishing sector. Section 8.2 identifies key challenges and barriers that limit international activity. Sections 8.3 through

8.5 examine specific mechanisms for international development: book fairs as strategic platforms (8.3), translation as a gateway to markets (8.4), and digital strategies for international reach (8.5). Section 8.6 explores future directions and opportunities, including stakeholder coordination requirements for sustainable international development. Together, these sections build toward practical recommendations for developing sustainable international engagement.

### 8.1 Current state of international engagement

The analysis across Chapters 5-7 reveals an industry making tentative progress in international engagement, but primarily through individual publisher initiatives rather than the coordinated sector-wide approach identified as necessary for sustainable development. The stakeholder infrastructure outlined in Chapter 5, involving the Books Council (Section 5.3), Wales Literature Exchange, Literature Across Frontiers, and British Council Wales; provides essential foundations. However, the case studies in Chapter 7 demonstrated that this infrastructure operates through largely informal networks, enabling individual successes like *Llyfr Glas Nebo* (Section 7.2.1) while lacking systematic coordination for sector-wide impact.

The establishment of Cyhoeddi Cymru Publishing Wales in 2021 represents progress toward unified industry representation, bringing together Welsh- and English-language publishers. This addresses the 'missing publisher voice' in sector coordination noted by multiple stakeholders (Carpenter, 2021). However, the Chapter 6 publisher profiles revealed that international engagement remains unevenly distributed: while publishers like Firefly Press and Graffeg have developed professional rights management (Sections 6.5, 6.6), others lack systematic approaches to international markets.

The professionalisation of rights management through freelance agents like The Rights Solution addresses immediate market access needs, but raises longer-term challenges for institutional capacity examined in Section 8.2.

Three key patterns emerge from the integrated analysis of Chapters 5-7:

First, infrastructure exists but coordination is fragmented. The Books Council's funding mechanisms (Section 5.3.1), Wales Literature Exchange's promotional activities, and Literature Across Frontiers' translation networks each provide value, but operate without the strategic coordination identified as necessary in the Arad Research report (2015). The Chapter 7 case studies demonstrated this fragmentation: *Llyfr Glas Nebo* succeeded through WLE coordination with the author's agent, while *The Clockwork Crow* relied on publisher-managed rights representation – two parallel systems with minimal coordination.

Second, recent diversification initiatives create new opportunities. The Books Council's New Audiences Grant (2022) and publishers' expansion into diverse, contemporary settings (noted in Sections 6.5, 6.6) position Welsh literature to appeal to international markets seeking authentic voices. However, these developments have not yet been systematically integrated into international marketing strategies.

The impact of coordinated stakeholder action is demonstrated by Literature Across Frontiers' pre-Brexit programme of international publishing delegations, facilitated through EU funding and Arts Council England support (Büchler, 2025). These visits to Hungary, Slovakia, the Czech Republic, the Baltic region, the Basque Country, Georgia, and China served as catalysts for lasting professional relationships: Richard Davies of Parthian reports that these delegations directly shaped the publisher's current international portfolio, while Penny Thomas's participation in the Latvia visit led to Firefly Press's acquisition of Dog Town (Section 7.1.6). The loss of EU funding for such programmes post-Brexit represents a concrete example of the coordination gap this chapter identifies.

Third, post-Brexit disruptions compound existing challenges. The Welsh Parliament Culture Committee report (2024) documents reduced EU cultural network access and increased trade barriers, affecting the sector's already-limited international capacity. These structural challenges reinforce the need for coordinated responses rather than individual publisher solutions. The Welsh Government's International Strategy for Wales (Welsh Government, 2020) provides a broader policy framework for such coordination, setting out ambitions to raise Wales's international profile and grow exports by 5%, with culture and creativity

identified as key components of Wales's global identity. The bilateral cultural programmes delivered through British Council Wales, including Wales in Germany 2021, Wales in France 2023, Wales in India 2024 and Wales in Japan 2025, and Creative Wales's coordination of a Welsh presence at Frankfurt Book Fair demonstrate the infrastructure for international cultural exchange, yet children's publishing has not been specifically addressed within these initiatives or the broader strategy, representing a missed opportunity to align the sector's internationalisation efforts with wider governmental objectives.

The contemporary situation represents what Bourdieu (1993) would identify as a field in transition: infrastructure and individual capabilities exist (Chapters 5-6), proven pathways to international success have been demonstrated (Chapter 7), yet systematic sector-wide coordination remains underdeveloped. The following sections examine specific mechanisms, book fairs (8.3), translation strategies (8.4), and digital strategies for international reach (8.5), through which this transition toward more effective international engagement can be supported, with stakeholder coordination priorities examined in Section 8.6.

## 8.2 Challenges and barriers to internationalisation

The challenges to internationalisation emerge from three sources: structural limitations revealed in Chapter 5's landscape analysis, operational constraints identified across Chapter 6's publisher profiles, and strategic gaps demonstrated through Chapter 7's case studies. This section synthesises these interconnected barriers, which operate at industry-specific, structural, and market-access levels.

Industry-specific challenges primarily centre around scale and resource limitations. The relatively small size of Welsh publishing houses creates significant operational constraints across the sector. As Penny Thomas (2024) observes, 'publishing works on economies of scale, and we're still very small, so the figures don't really work,' highlighting the fundamental profitability challenges facing small publishers in the English language market given high retail discounting. While selling rights internationally can provide additional

revenue streams to support publishers' operations, pursuing international expansion brings substantial costs including attending key book fairs in Frankfurt, London and Bologna. Publishers across Wales report that managing extended payment terms that can stretch to ten months for export deals creates significant cash flow pressures for smaller operations.

Market access presents another significant barrier for Welsh publishers, particularly in relation to rights management and international promotion. The current reliance on freelance rights agents, while providing immediate access to international markets, creates long-term vulnerabilities in building institutional expertise. Multiple publishers report that the lack of in-house rights departments means that critical relationships and market knowledge often remain external to their organisations, limiting their strategic development capabilities (L. Gruffudd, 2023).

The coordination fragmentation identified in Section 8.1 is compounded by the practicalities of the current support framework. Publishers report that late confirmation of funding from Welsh Government has resulted in increased costs and reduced strategic planning opportunities, particularly for international book fairs.

Welsh publishers operate within a system where state funding creates distinct power dynamics that affect their international competitiveness. Unlike major London-based international publishers, who can leverage their commercial success for industry advocacy and international rights trading, Welsh publishers often find themselves constrained by their reliance on public funding. This dependency affects their autonomy and negotiating power within the broader publishing ecosystem, with Cyhoeddi Cymru Publishing Wales working to strengthen the collective voice of Welsh publishers within this challenging environment.

The post-Brexit environment has introduced additional complexities for the sector, particularly affecting the logistics of international trade. Publishers report increased costs and administrative burdens in sending book samples abroad, with one noting that 'just to take samples in and out has become a nightmare now' (P. Thomas, 2021).

Language and translation present unique challenges across the Welsh children's publishing sector. Translation decisions must balance preserving Welsh cultural specificity with accessibility for young readers, particularly in picture books where visual elements must also translate effectively across cultures. The current translation support infrastructure, while valuable, requires strengthening to handle the specific needs of children's literature, including consideration of different age groups and reading levels.

Financial constraints remain a persistent challenge for Welsh publishers, particularly regarding the substantial investment required for effective international market development. The standstill and subsequent reduction in funding reported across the sector has limited publishers' ability to pursue international opportunities effectively. The Welsh Parliament's Culture Committee (2025) documented a 20% real-terms reduction in Books Council funding between 2014-15 and 2024-25, part of a broader 17% cut to culture and sport revenue funding over the same period, compounding the challenges facing publishers seeking to develop international markets while maintaining domestic output. This is particularly critical in the context of book fair participation, where the lack of consistent, long-term funding commitments hampers strategic planning and market development efforts throughout Wales. Recent commitments from Creative Wales (2024-2026) for London and Frankfurt representation suggest improving stability, though long-term funding remains uncertain beyond current allocations.

Market awareness and visibility represent additional challenges for Welsh publishers in establishing children's literature as a distinct and valuable offering in the international marketplace. While recent successes suggest growing recognition of Welsh content, building sustained market presence requires significant investment in promotion and relationship building, resources that are often stretched thin across smaller publishing houses in Wales.

These challenges, while significant, are not insurmountable. The experiences of publishers like Firefly Press and Graffeg demonstrate that successful internationalisation is possible with appropriate support and strategic approach. However, addressing these barriers requires coordinated action across the sector, combining enhanced institutional support with strategic development of publisher capabilities and market opportunities.

Understanding these challenges provides essential context for examining the role of international book fairs as strategic platforms for market development. These events offer potential solutions to many of the identified barriers, particularly in building market awareness and establishing crucial industry relationships, while also presenting their own set of operational and strategic considerations.

### 8.3 International book fairs as strategic platforms

International book fairs represent key opportunities for market development and industry networking in children's publishing, with three major events central to the global calendar: the Bologna Children's Book Fair and London Book Fair in the spring and Frankfurt Book Fair in the autumn. Each serves distinct strategic purposes - Bologna specialising in children's publishing and illustration, Frankfurt operating as the world's largest publishing trade event, and London providing an important platform for English-language publishing and multi-platform rights trading. In addition to the publisher exhibition spaces, these international book fairs offer specialised zones that serve distinct industry needs: dedicated translation centres, agent areas facilitate rights negotiations, and comprehensive events programmes provide market insights and literary trend analysis. The illustration element is particularly prominent at the Bologna Children's Book Fair, where exhibition spaces showcase emerging talent and current trends in children's book illustration.

While these fairs function as essential marketplaces where publishers, agents, and rights professionals gather to negotiate deals, establish industry trends, and build international partnerships, Wales's participation in these events has historically been inconsistent and fragmented. Analysis of the sector's engagement with major book fairs reveals both significant opportunities and persistent challenges in maximising these platforms' potential for Welsh publishing.

The Bologna Children's Book Fair, widely recognised as the most important international event for children's publishing, presents a notable gap in Wales's international presence. Despite its strategic importance for rights sales and market development, Wales has never

maintained a national stand at Bologna. As explored in Section 7.1.1, Roger Boore from Dref Wen regularly attended the fair in person in the 1970s and 80s to discover and buy Welsh rights in European picture books and there have also been occasional delegations of publishers and illustrators over the years. In more recent years, individual publishers like Firefly Press and Graffeg have secured representation through funding through the UK government Department for Business and Trade (DBT)<sup>9</sup> and Welsh Government, including space on the Publishers Association stand in 2018 and 2019 and Graffeg secured a place in the new BolognaBookPlus area in 2022, but this approach lacks the impact of a coordinated national presence.

Following sustained advocacy by Cyhoeddi Cymru Publishing Wales, Wales secured funding for its first coordinated national presence at Bologna in 2025, representing a significant milestone in the sector’s international development. This inaugural participation, managed by Cyhoeddi Cymru Publishing Wales, positions Wales alongside other small nations like Scotland, Ireland, and the Baltic Countries that have maintained consistent Bologna representation for years.



Figure 33: Graffeg and Firefly Press booth on the Publishing Association stand at Bologna Book Fair 2019

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<sup>9</sup> The Department for Business and Trade (DBT) is a UK government department formed in February 2023, bringing together the international trade responsibilities previously held by the Department for International Trade (DIT) with key business-facing functions of the former Department for Business, Energy and Industrial Strategy (BEIS).

Several independent small nations and autonomous cultural regions maintain consistent representation at the Bologna Children's Book Fair, including small independent nations like Ireland, Scotland, New Zealand, Latvia, and Lithuania, as well as distinct cultural regions with publishing autonomy such as Catalonia, the Basque Country, and Québec. Indeed several small nations have been Guest of Honour at Bologna Children's Book Fair over the years indicating the investment these countries invest in exporting their children's literature.<sup>10</sup>

**Table 14: List of Guests of Honour at Bologna Children's Book Fair (1999-2025)**

<b>Year</b>	<b>Country/Region</b>
2025	Estonia
2024	Slovenia
2022	Sharjah
2019	Switzerland
2018	China
2017	Catalonia and Balearic Islands
2016	Germany
2015	Croatia
2014	Brazil
2013	Sweden
2012	Portugal
2011	Lithuania
2010	Slovakia
2009	Korea
2008	Argentina
2007	Belgium, Wallonia, Brussels
2006	Hungary
2005	Spain
2004	Greece

<sup>10</sup> See list of Bologna Children's Book Fair Guests of Honour countries:  
<https://www.bolognachildrenbookfair.com/en/about/the-bcbf-guest-of-honour-countries/12900.html>

2003	Poland
2002	Arab countries
2001	Netherlands
2000	Italy
1999	Africa

*Source: Bologna Children's Book Fair, 2025.*

The Frankfurt Book Fair has seen more consistent Welsh representation over the years, though support has fluctuated significantly. Between 1997 and 2007, the Welsh Government funded a substantial national presence through its Business, Economy and Innovation Department, providing approximately thirty-six square meters of exhibition space with capacity for multiple meeting tables. However, this support was discontinued between 2007 and 2022, creating what former Books Council Director Elwyn Jones describes as a 'dark period' for international representation (E. Jones, 2022).

During this period, Wales's international literary presence was primarily maintained through two organisations: Wales Literature Exchange and Literature Across Frontiers who have attended Frankfurt every year since 1998 (with the exception of the pandemic period), holding meetings with publishers, writers, translators and other professionals and organising joint country stands and event programmes. Additionally, these organisations jointly present their annual Bookshelf showcase at Frankfurt, featuring contemporary Welsh writing in both languages. The showcase spans multiple genres, with a primary focus on adult fiction, creative non-fiction, and poetry, complemented by their Translation Grants Fund.

While the Bookshelf aims to present titles with strong international appeal, publisher interviews identified two significant structural limitations in its current approach. First, the selection process prioritises Welsh authorship over Welsh publishers' commercial interests, resulting in the showcase frequently featuring works represented by non-Welsh publishers. This arrangement limits the programme's effectiveness in supporting the

internationalisation of Welsh publishing houses. Second, the restricted inclusion of middle grade and young adult titles has constrained opportunities to fully engage with the children's and young adult literature markets.

Recent developments suggest renewed institutional commitment, with the Books Council and Cyhoeddi Cymru Publishing Wales securing Creative Wales funding for a dedicated Welsh stand at Frankfurt and London book fairs in 2023 and 2024, accommodating thirteen Welsh organisations including publishers and literary organisations. This coordinated approach has strengthened Wales's platform for international rights negotiations, though addressing the structural limitations identified above remains a priority for future development.

Wales's engagement with the Frankfurt Book Fair demonstrates a comprehensive approach that combines cultural exchange with commercial opportunity. Through Wales Literature Exchange and Literature Across Frontiers, Wales maintains active participation in the European Network for Literary Translation (ENLIT), while simultaneously fostering substantial business relationships with international publishers (Büchler, 2025).

The organisation conducts numerous publisher meetings throughout the year, both at the fair and through ongoing digital communication, which directly contributes to international rights sales. This engagement represents mainly adult fiction with some young adult titles. While Wales Literature Exchange does not function as a literary agency or handle rights directly, it plays an important facilitative role by connecting interested publishers, mostly small literary publishers who specialise in literature in translation, with the appropriate rights holders and providing information about available financial support for translations (Büchler, 2025).



Figure 34: Wales at Frankfurt Book Fair 2023 (left) and 2024 (right)

The London Book Fair serves as a strategically important and geographically accessible international platform for Welsh publishing. Prior to 2018, Welsh publishers had maintained individual presences through purchased display and meeting space on the Independent Publishing Guild (IPG) stand. A significant shift occurred in 2018 when Welsh Government funding enabled Wales's first coordinated national presence at the fair. This initiative, supported by seven key national organisations - Arts Council of Wales/Wales Arts International, British Council Wales, Literature Across Frontiers, Literature Wales, Wales Literature Exchange, Wales PEN Cymru, and the Books Council - established a professionally designed stand created by Ctrl Alt Design and Ongl. The stand represented eleven Wales-based independent publishers alongside the institutional partners.

The 2018 and 2019 fairs marked significant progress in Wales's strategic approach to international publishing. The Deputy Minister for Culture, Sport and Tourism's attendance reinforced governmental commitment, while a carefully curated events programme highlighted Wales's distinct literary identity. Two Insights Seminars formed the cornerstone of this programming: one exploring contemporary literature in UK indigenous languages, featuring National Poet of Wales Ifor ap Glyn in dialogue with Scottish authors, and another examining Welsh children's publishing through the lens of magical realism. The stand also facilitated commercial opportunities, notably enabling Firefly Press to launch *Dog Town* by Luīze Pastore as part of the Baltic Countries market focus in 2018.

However, Mordsley’s 2019 analysis suggested opportunities for improvement, particularly in serving publishers’ commercial interests through more focused rights trading opportunities and greater publisher involvement in planning. This is evidenced by the 2018 and 2019 Wales catalogue, which listed Welsh publishers but didn’t contain specific rights information, indicating room for strategic enhancement in rights trading approaches.

London Book Fair was forced to close due to Covid-19 restrictions in 2020 and 2021, along with other book fairs, where there was a limited online presence including a Welsh children’s publishing seminar organised by Firefly Press examining the advantages and challenges of publishing children’s literature from Wales.

After the establishment of Creative Wales in 2020 and Cyhoeddi Cymru Publishing Wales in 2021, the Wales stand was redesigned with a more practical focus for meeting and storage space including book displays. Wales Literature Exchange and Literature Across Frontiers continued to programme events in the translation centre with panels focused on translating from Welsh and self-translation highlighted by Megan Angharad Hunter’s participation in translation accessibility discussions.

This evolution reflects the Welsh publishing sector’s growing sophistication in international market engagement, while highlighting areas for continued development in rights trading and commercial strategy.



Figure 35: Wales at London Book Fair stand at London Book Fair 2022 (left) © Megan Farr and 2024 (right)

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Current developments reflect increasingly strategic coordination. Cyhoeddi Cymru Publishing Wales manages the budget and organisation for Wales's presence at London Book Fair and Bologna Children's Book Fair, while Creative Wales coordinates the Welsh presence at Frankfurt Book Fair. However, the Wales stand at Frankfurt is located in a separate hall from Scotland and Ireland, limiting the visibility benefits of Celtic nations' co-location. Cyhoeddi Cymru Publishing Wales continues to lobby for sustained funding commitments across all three fairs, with their business case to the Welsh Government proposing multi-year funding to enable more strategic planning and cost-effective participation (Drake, 2024).

Comparative analysis with other small nations suggests the value of sustained, strategic fair presence. For example, Publishing Scotland and Publishing Ireland maintain consistent representation through professional shell scheme stands (standardised exhibition booths) at international book fairs, demonstrating how smaller publishing nations can establish effective international presence through careful resource allocation and long-term planning. At their exhibition stands, Publishing Scotland and Publishing Ireland provide comprehensive rights catalogues that showcase both publisher lists and individual author profiles, effectively promoting their national literary talent to international markets. This approach of featuring catalogues – focusing on publishers' lists and highlighting key authors and illustrators - represents standard practice among small nation collective stands at international book fairs. Publishing Scotland enhances this approach by providing additional detailed information about the publishers present at their stand.

Looking ahead, several strategic priorities emerge for maximising fair participation: First, sustaining Wales's newly established presence at Bologna Children's Book Fair will be essential for developing meaningful international relationships and market knowledge comparable to nations with decades of participation. Second, strategic positioning at all international fairs – ideally co-locating Wales with Scotland and Ireland in the same halls – would significantly enhance discoverability and facilitate meaningful comparison among Celtic nations' publishing initiatives. Wales's current placement in a separate hall from Scotland and Ireland at Frankfurt Book Fair and London Book Fair represents a missed opportunity for such strategic positioning. Third, longer-term multi-year funding

commitments would enable more strategic planning and cost-effective participation. Fourth, greater coordination between stakeholders could enhance the impact of fair presence, particularly in developing comprehensive rights catalogues and focused rights trading opportunities.

The strategic value of book fair participation connects directly to the broader challenge of translation and market adaptation. Success in these international forums depends significantly on effective approaches to translation, particularly in children's literature, where cultural and linguistic nuances carry special importance in reaching target audiences.

#### 8.4 Translation as gateway to international markets

Translation plays a key role in the internationalisation of Welsh children's literature, serving not only as a means of reaching new markets but also as a vehicle for cultural exchange and representation. The unique challenges and opportunities in translating children's literature require specific consideration within the Welsh publishing context.

The current translation support infrastructure in Wales operates through several channels. Wales Literature Exchange receives £20,000 annually from Arts Council of Wales to fund translations of Welsh literature, in both Welsh-and English language, primarily showcasing recommended books through their annual Bookcase initiative at Frankfurt Book Fair. However, this programme has historically prioritised adult literature, with limited representation of children's and YA books.

Büchler (2024) explains that the £20,000 annual funding for translation grants from Wales from Arts Council of Wales, while valuable, is notably modest compared to similar organisations in other European countries which typically range from 20,000-500,000 euros. For example, the Dutch Foundation for Literature operates with a significantly larger budget for translation support, while Nordic countries typically invest several times this amount in translation initiatives. This funding gap particularly affects illustrated children's literature, where additional print and shipping costs can make translation projects more resource

intensive. A comparative analysis of translation funding models in other small-language markets suggests that increased investment could significantly boost Wales's international presence in children's literature.

When it comes to translating literature from other languages, Wales Literature Exchange, British Council Wales, and the Books Council collaborated to develop 'Translation Connect' (Büchler et al. 2021), a resource aimed at helping Welsh publishers navigate international rights trading with a focus on identifying international children's books for translating into Welsh and English. This resource specifically addresses children's and YA literature, outlining six key aspects of discovering books for translation: literature promotion agencies, book fairs and festivals, networks, publishers, translators, and prizes. However, research indicates implementation challenges. A survey questionnaire and publisher interviews conducted in 2021 as part of this research revealed limited awareness and uptake of this resource, even after its presentation at a Books Council online meeting in May 2021. This gap between resource provision and publisher engagement may indicate broader structural issues in the relationship between the Books Council, Wales Literature Exchange, Literature Across Frontiers, and Welsh publishers.

As outlined in the 'Translation Connect' resource, the discovery of international children's books for translation occurs through multiple channels, with book fairs playing a central role, particularly the Bologna Children's Book Fair. This fair serves dual purposes: discovering new illustrators and exploring international titles through publisher stands and country-focused literature promotion stands. These curated displays, often accompanied by rights catalogues, provide an efficient way to identify potential titles. The fair facilitates two types of meetings: exchange conversations where publishers share catalogues reciprocally, and specific rights negotiations where editors typically focus on acquisitions while rights professionals concentrate on sales. Beyond book fairs, discovery channels include:

- Professional networks and personal recommendations
- Curated international selections such as the White Ravens catalogue and IBBY Honour List
- Specialised resources like World Kid Lit and Outside in World

- Direct publisher-to-publisher relationships
- Country-specific promotional organisations

For Welsh publishers specifically, this discovery process needs to align with both market considerations and practical constraints. While international book fairs offer comprehensive exposure to potential titles, they require significant resource investment to attend the fair. Alternative discovery methods, such as utilising curated lists and professional networks, might provide more cost-effective approaches for identifying suitable titles for the Welsh market.

Commercial considerations significantly influence translation decisions. Publishers cite concerns about author availability for promotion, additional translation costs, increased production and shipping costs, and marketing challenges as key factors affecting translation choices. These challenges are particularly acute for picture books, where production costs can be significantly higher due to printing and shipping costs (Howard, 2023).

As demonstrated in Chapter 5, Section 5.3.1 (Table 5) data from the Books Council reveals that between 2019 and 2024, the organisation funded 265 original Welsh language children's and YA books alongside 311 adaptations. Notably, of these 311 adaptations into Welsh, only four titles were sourced from languages other than English – a mere 1.29% of all adaptations funded during this period. When broadening this to include English language books, there were approximately eight children's books translated into Welsh or English from other languages, representing less than 1% of the total children's books published in Wales during this period. This figure is even lower than the broader UK trend of limited translated literature, which has historically been cited as around 3%, though Donahaye's (2012) analysis for *Literature Across Frontiers* found the actual figure to be consistently above 4% when based on British Library data. This figure has expanded further in recent years with the growth in popularity of Manga titles and fiction from Japan (Tivnan, 2022).

Translating children's literature requires more than simply converting text from one language to another. Young readers, despite their limited life experience, are sophisticated in how they engage with stories. As established in Section 2.5, this creates unique

challenges in making translated works both accessible and authentic for young readers. The complexities extend beyond linguistic conversion to encompass cultural adaptation – even picture books, which might appear straightforward to translate, present difficulties when cultural differences in visual storytelling traditions must be considered alongside the role of adult intermediaries who typically read and share these books with children.

This adult intermediary role adds complexity to the translation process, as the text must work effectively at multiple levels - being readable aloud, visually engaging, and culturally resonant for both the adult reader and child listener. Cultural differences in parent-child reading practices, visual literacy traditions, and even page-turning conventions must be considered. For example, when translating picture books between languages that read in different directions (like Welsh to Arabic), the entire visual narrative flow may need reconsideration. Cotton (2000) identifies similar complexities in translating European children's literature, arguing that picture books present particular challenges when visual and textual elements must transfer simultaneously across cultural contexts — a consideration directly relevant to Welsh picture book publishers seeking international co-edition partners.

Research by Ahmedzai Kemp (2020) demonstrates that European languages feature prominently in translated children's literature in the UK market. This predominance, as Büchler (2024) explains, stems primarily from European countries' strategic investment in literary promotion and their established grant systems for translation support. While the quantitative data reveals limited translation activity, the qualitative success (in terms of critical reception and market visibility) of the few European language translations examined in Chapter 7 (Sections 7.1.2–7.1.6) reflects this broader pattern, driven by systematic promotional efforts and financial mechanisms that facilitate international literary exchange.

The concentration of translations within European languages appears less a matter of inherent market preference and more a result of institutional infrastructure. The limited representation of non-European languages in translation partnerships correlates directly with fewer systematic book promotion programmes and financial support mechanisms outside Europe. While *Llyfr Glas Nebo* (Section 7.2.1) has been translated into non-European

languages, time constraints meant these translations fell outside the scope of the present study. However, the post-Brexit landscape and the Welsh Government's developing partnerships with countries outside Europe suggest that such analysis would be a valuable direction for future research. This understanding suggests that expanding linguistic diversity in translation partnerships may depend more on developing comparable strategic support systems than on market potential alone.

Beyond the commonly represented French, German, and Spanish translations, opportunities exist for partnerships with publishers working in languages such as Catalan, Basque, Breton, and other minority languages that share similar challenges and market conditions with Welsh. These partnerships could create valuable reciprocal relationships for literary exchange while addressing the current imbalance in translated literature's linguistic diversity. The co-production model examined in Chapter 7 (Section 7.3.1) provides another example of how such partnerships can expand linguistic diversity beyond traditional translation approaches. As demonstrated in Chapter 7, there have been successful instances of translations involving these linguistic communities, including *Llyfr Glas Nebo* into Catalan (Section 7.2.1), *Early One Morning* into Basque (Section 7.1.2, which won an award), and Dref Wen's early adaptation of the Breton tale *Peronnik* (Section 7.1.1). Contemporary publishers like Dalen demonstrate the viability of serving Celtic language markets, suggesting potential for reciprocal partnerships between minority language publishers with shared cultural and market understanding.

Moving from import to export considerations, recent successful translations demonstrate the potential for Welsh children's literature in international markets. The translation of *Llyfr Glas Nebo* has shown how strategic promotion and support can facilitate successful market entry. However, such successes also highlight the need for more systematic approaches to translation support and rights management to enable further successes.

The development of translation expertise specific to children's literature remains a critical challenge. Wales has strong existing capacity for English-Welsh and Welsh-English translation, and self-translation by bilingual authors is increasingly common (as examined in Section 5.4). However, there is limited capacity for translation between Welsh and

languages other than English — the case studies in Chapter 7 demonstrate this expertise exists (as shown by Karadog’s French-Welsh work on *Y Lloches*) but it remains rare and underdeveloped. Current support structures primarily focus on literary translation broadly, with limited specialisation in children’s literature. This gap affects both the quality of translations and the ability to identify suitable translation opportunities. As demonstrated through the case studies in Chapter 7 (Sections 7.1.2–7.1.6), there is a need for more specialised translation expertise in children’s literature in Wales, both to accommodate translating from source languages into Welsh and English, and with translations of Welsh and English into target languages.

Looking forward, several strategic priorities emerge for strengthening translation as a gateway to international markets. Funding for translation of Welsh literature in both languages needs to increase to be more in line with other similarly sized small nations, accompanied by development of specialised expertise in children’s literature translation. Enhanced promotion of Welsh children’s literature via book fairs, catalogues, and children’s literature networks would increase visibility, while building stronger networks with international children’s translators would expand the sector’s capacity beyond its current reliance on a small number of individuals. The effective coordination of these translation initiatives requires strategic alignment among stakeholders, examined in the future directions analysis in Section 8.6. The next section examines how digital strategies can enhance international reach and complement traditional mechanisms.

### 8.5 Digital strategies for international reach

The digital transformation of publishing presents significant opportunities for enhancing the international reach of Welsh children’s literature, while also introducing new complexities in rights management and market development. It should be noted that digital practices are integral to all aspects of contemporary publishing — from rights negotiations conducted via email to digital catalogues, Title Information sheets, e-books, audiobooks, online sales materials, and the metadata systems essential for international discoverability — and as such underpin much of the activity discussed throughout this study.

The Covid-19 pandemic accelerated digital adoption across the sector, compelling publishers to develop more sophisticated digital capabilities for both promotion and distribution. Significantly, the shift to online events during the pandemic also facilitated new international discoveries: Carreg Gwalch's discovery of *Y Parsel Coch* through an online Eisteddfod webinar (Section 7.1.5) demonstrates how digital accessibility can overcome geographical barriers to rights trading. Similarly, the discovery of *Y Lloches* through a reader contacting the publisher via its website, leading to the publisher connecting with the author through social media (Section 7.1.3), illustrates how digital channels create unexpected pathways for international literary exchange.

Digital rights management has emerged as a key component of international strategy. Publishers have needed to adapt their rights management systems to handle increasingly complex digital licensing arrangements. The experience of Welsh publishers during the pandemic demonstrated both the necessity and challenges of digital rights administration. As noted by Penny Thomas (2021), 'The pandemic forced us to completely rethink our digital presence and how we manage international rights conversations when we can't meet face to face.'

Online promotion and discovery platforms have become essential tools for international market development. Publishers have enhanced their digital marketing capabilities, utilising social media, virtual events, and online content platforms to reach international audiences. However, the effectiveness of these efforts varies significantly based on publisher resources and expertise. Firefly Press's development of their Firefly Ignite online writer development programme showcases how digital platforms can extend international reach while supporting talent development. Across the sector, publishers utilise digital newsletter platforms and social media channels to maintain relationships with international customers and contacts, though the sophistication of this activity varies considerably, with Graffeg's design background enabling particularly effective digital marketing including promotional videos and audiobook development (Section 6.6).

The successful delivery of digital seminars at London Book Fair 2021, including Firefly Press's panel on 'Challenges and Benefits of Children's Publishing in Wales', demonstrated the

potential for virtual programming to reach international audiences cost-effectively. The continuation of hybrid event formats, combining in-person and online participation at book fairs and literary festivals, has maintained this increased accessibility for international discovery. However, industry feedback suggests these online efforts should complement rather than replace physical events, particularly for building new business relationships.

Technology platforms supporting international publishing have evolved significantly. Digital asset management systems, rights trading platforms, and virtual meeting tools now form an essential infrastructure for international business development. Welsh publishers have needed to invest in these capabilities while managing resource constraints. As Howard (2023) notes, 'The investment in digital systems is significant, and essential for competing effectively in international markets.' Industry-standard design tools such as Adobe Creative Suite are integral to producing professional-quality materials for international markets, though the cost of such software presents a barrier for smaller publishers. The Books Council could play a role in supporting publishers' investment in these essential tools. While some marketing departments rely on more affordable alternatives such as Canva, these offer more limited capabilities for producing materials to international professional standards.

Data analytics and market intelligence capabilities have become increasingly important for identifying international opportunities. In Wales, the Books Council provides publishers with sales data through both Nielsen BookData and Gwales, the Welsh bookstore where publishers also upload metadata. These tools offer valuable market intelligence for tracking sales performance, though the extent to which publishers fully utilise this facility varies across the sector. More consistent use of available data could strengthen publishers' ability to identify international opportunities and measure the effectiveness of their international initiatives.

The digital landscape also presents opportunities for innovative publishing formats. Enhanced e-books, digital-first publishing, and multimedia content offer new ways to reach international audiences, though children's publishing presents specific challenges in digital

adaptation. Publishers must carefully balance digital innovation with the particular requirements of young readers and educational markets.

Looking forward, strengthening digital capabilities requires development of more sophisticated rights management systems alongside enhanced digital marketing and promotion. Investment in data analytics and market intelligence would enable publishers to identify international opportunities more effectively, while exploration of innovative digital publishing formats and improved digital asset management could expand international reach. These digital considerations feed directly into broader strategic planning for future opportunities in international markets. The next section examines emerging trends and opportunities that could shape the future development of Welsh children's publishing internationally

## 8.6 Future directions and opportunities

The internationalisation of Welsh children's publishing stands at a pivotal moment, with emerging opportunities that could significantly enhance the sector's global presence. Analysis of current developments reveals several promising directions for strategic development, many of which have been successfully implemented by comparable small nations.

The growing global interest in diverse voices and regional perspectives creates favourable conditions for Welsh content, particularly in children's literature. As Penny Thomas (2021) notes, 'Welsh identity in publishing has evolved from a potential drawback to a marketable asset, particularly as readers seek authentic regional voices.' This shift suggests opportunities to position Welsh children's literature within the broader movement toward cultural diversity in international publishing, following successful models established by other small nations (examined in detail in Chapter 9).

Addressing the translation infrastructure gaps identified in Section 8.4, particularly the limited funding compared to Nordic and Dutch models, and the shortage of children's

literature translation expertise beyond English-Welsh, will be key for sustainable international growth.

As outlined in Section 8.3, strategic presence at international book fairs remains a key priority. Sustaining the newly established Bologna presence beyond its 2025 inaugural year will be important for building the international relationships and market knowledge that comparable nations have developed through decades of participation.

New business models are emerging that could benefit Welsh publishers, particularly through strategic partnerships with publishers in other small nations. Co-production partnerships, as demonstrated by the Molly series collaboration between Welsh and Irish publishers (Section 7.3.1), offer ways to share costs and risks while building international presence. Similarly, coordinated Celtic nations representation opportunities at international book fairs—featuring market focus, collective stands or joint programming with Scottish, Irish, and potentially Breton publishers—could increase visibility while sharing exhibition costs.

### **Stakeholder coordination priorities**

Realising these opportunities requires enhanced coordination among key stakeholders identified in Section 1.3. The Books Council could evolve funding mechanisms to incentivise systematic international business development and provide rights management support through training programmes or dedicated professional support, addressing the external agent dependency identified in Sections 6.5 and 6.6. Wales Literature Exchange’s capacity for children’s literature requires expansion through dedicated children’s rights catalogues and enhanced translation support within current funding constraints (Section 8.4). Cyhoeddi Cymru Publishing Wales provides infrastructure for coordinated publisher engagement including systematic book fair presence and professional development in rights management. Supporting authors and illustrators as cultural ambassadors through structured programming would enhance international engagement currently developing ad-hoc rather than systematically, as demonstrated by successful examples such as Latvian author support for *Dog Town*’s UK launch (Section 7.1.6).

Infrastructure improvements are also needed across several interconnected areas: development of a comprehensive rights trading strategy including dedicated catalogues for Welsh children's literature; enhanced coordination between support organisations; investment in specialised expertise in children's literature translation and rights management; establishment of consistent national presence at key international book fairs; and creation of sustainable funding models for international initiatives. These priorities inform the strategic recommendations consolidated in Chapter 10.

The strategic approaches examined in Chapter 7's case studies provide initial comparative insights from these territories. Québec's dual-funding model with industry-led governance (Section 7.1.3) demonstrates how minority-language publishing can thrive through systematic translation support and strategic illustrator collaborations, while Latvia's experience (Section 7.1.6) shows how centralised coordination through organisations like Latvian Literature enables very small nations (population 1.9 million) to achieve disproportionate international impact. Both invest substantially more in translation support than Wales's current £20,000 annual allocation and maintain consistent presence at key international book fairs despite resource constraints.

The following chapter examines how other small nations – specifically Ireland, Scotland, New Zealand, and Catalonia – have addressed similar challenges in developing their international children's publishing presence. Together with the Québec and Latvia models examined in Chapter 7, their collective experiences in areas such as translation funding, fair representation, and stakeholder coordination provide valuable models that could be adapted to the Welsh context.

## 9. Comparative Analysis: Small-Nation Publishing Models

This chapter directly addresses Research Questions 3, 4, and 5 by examining what international strategies have proven effective in comparable contexts (RQ3), how these small nations have built international publishing links (RQ4), and what conditions were necessary to overcome challenges (RQ5).

While these territories vary in size and context, from Scotland's population of 5.5 million to New Zealand's 5.1 million, Ireland's 5 million, and Catalonia's 7.7 million compared to Wales's 3.1 million, each offers valuable insights for different aspects of publishing development. Catalonia's robust institutional support and sophisticated rights management have created sustainable pathways to international markets, generating annual revenues of €2.5 billion and achieving over 1,500 translations within a five-year period (Institut Ramon Llull, 2022). Ireland, sharing Celtic language heritage, provides valuable lessons through innovative approaches to translation and market development, particularly in children's publishing where Irish-language publishers like Futa Fata have sold rights to over fifteen territories (Tivnan, 2021). Scotland's publishing sector, comprising approximately one hundred publishers producing around 2,000 books annually (Publishing Scotland, 2023), shows how to assert a national literary identity while competing effectively in English-language markets. New Zealand's success in indigenous language integration and bilingual publishing, with total publishing revenue reaching NZ\$292.0 million (£139.1 million), offers important perspectives for supporting language revitalisation while maintaining commercial viability (Daly, 2024).

The chapter proceeds through four case studies: Section 9.1 examines Catalonia's institutional support model; Section 9.2 investigates Ireland's bilingual publishing strategies; Section 9.3 explores Scotland's approach to sustaining a distinct national voice in English-language markets; and Section 9.4 analyses New Zealand's indigenous language integration. Section 9.5 then synthesises these findings to identify approaches adaptable to the Welsh context, directly informing the strategic recommendations developed in Chapter 10.

This comparative analysis applies the integrated Bourdieu-Sapiro framework established in Chapter 2 (Section 2.2), examining each nation's publishing field through the interplay of economic, political, and cultural logics. Rather than providing comprehensive market overviews, the chapter examines these markets through specific lenses relevant to Welsh publishing: institutional support structures (political logic), rights management strategies (economic logic), and approaches to language integration and cultural positioning (cultural logic). This targeted analysis aims to inform practical recommendations for strengthening Welsh children's publishing's international presence while supporting broader cultural and linguistic objectives.

## 9.1 Catalonia

### **Introduction**

The internationalisation of Catalan literature represents a useful example of how a so called minority language publishing sector can achieve global reach through strategic institutional support and market positioning (Mansell, 2020). This case study examines how Catalonia has developed one of Europe's most successful minority language publishing sectors despite historical challenges and ongoing sociolinguistic pressures. Barcelona is a significant global player in Spanish language publishing and Catalonia is one of the richest regions in Spain. Applying Bourdieu's field theory and Sapiro's three-logics model reveals that Catalonia's success stems from integrated strategic alignment: robust institutional coordination through the Institut Ramon Llull creates field autonomy, sophisticated navigation of economic, political, and cultural logics enables strategic market positioning, and quality translation and cultural practices maintain authenticity while achieving commercial appeal.

### **Historical context and language revitalisation**

The current success of Catalan literature's international presence cannot be separated from its historical context. Following decades of suppression during the Franco dictatorship (1939–1975), the restoration of democracy brought crucial institutional support through the 1978 Spanish Constitution and the 1982 Statute of Autonomy. The subsequent Language

Normalisation Law (1983) and Linguistic Policy Law (1998) provided the legal framework for what would become a remarkable cultural renaissance (Mansell, 2020).

This institutional revival was particularly key given the dramatic decline in native Catalan speakers throughout the twentieth century. As Byrne, Bertran and Tudela Isanta (2022) note, native Catalan speakers declined from over 95 per cent native speakers at the start of the century to 34.3 per cent by 2020. However, language policy initiatives, including education policy, have achieved significant success in developing linguistic competency: current data shows that 97 per cent of Catalonia's population understand Catalan, with 81 per cent speaking it, 86 per cent reading it, and 65 per cent writing it. Among the younger demographic (15–29 years), these figures are even more promising, with 91 per cent speaking and 89 per cent writing proficiency (Byrne, Bertran & Tudela Isanta, 2022).

### **Market structure and business model**

The unique strength of Barcelona's publishing industry can be traced to its evolution in the post-Franco period, which fostered the development of a sophisticated bilingual market structure. According to Daniel Boswell's analysis (2013), publishers based in Barcelona cultivated distinctive capabilities that differentiated them within the broader publishing landscape. Their ability to operate simultaneously in both Catalan and Spanish markets created a dynamic business model that leveraged dual market opportunities.

The industry further distinguished itself through the emergence of medium-sized enterprises that built strong backlists, providing a stable foundation for ongoing operations. These publishers developed particular expertise in managing international rights sales and translation processes, skills that would prove crucial for their future global expansion (D. Boswell, 2013). This combination of bilingual market presence, strategic cost management, and international rights expertise created a resilient industry structure that continues to support Catalan literature's growth in both domestic and international markets.

This dual-language capability is key to the sector's sustainability, allowing publishers to maintain cultural objectives while ensuring commercial viability. The geographic

concentration in Barcelona, while creating some inefficiencies in rural distribution, has fostered a robust publishing cluster with established networks and infrastructure (D. Boswell, 2013).

### **Barcelona: the publishing hub**

Central to understanding Catalan literature's international success is Barcelona's position as Spain's publishing epicentre (D. Boswell, 2013). The city's dominance is reflected in statistics showing it accounts for more than 50 per cent of Spain's publishing production and turnover, with Catalan literature representing 24 per cent of Spain's literary output (Camel, 2023). This concentration has fostered what the Institute Ramon Llull (2014) describes as a 'dynamic publishing industry and experienced network of literary agents', creating a unique environment that distinguishes the Catalan case from other minority language contexts.

### **Institutional framework for international promotion**

#### **Core institutions**

The promotion and development of Catalan literature internationally is supported by several key institutions working in concert (Mansell, 2020). The Institut Ramon Llull (IRL) is the primary agent for international promotion, managing comprehensive translation grant programmes that have successfully facilitated over 1,500 translations within a five-year period. The IRL's role extends to coordinating relationships with international publishers, ensuring a steady pipeline of Catalan works reaching global markets (D. Boswell, 2013).

#### **Strategic tools and infrastructure**

The international promotion of Catalan literature is underpinned by a sophisticated digital infrastructure and comprehensive support mechanisms that work in tandem to facilitate global outreach (D. Boswell, 2013). The digital resources are central to this framework, featuring the Trac database, which tracks translations, alongside the specialised Traducat database, which maintains detailed records of qualified translators.

## **Market development challenges**

The Catalan publishing sector navigates a complex landscape marked by both structural challenges and sociolinguistic dynamics that influence its development and market reach (Mansell, 2020). The sector's international growth faces notable obstacles, particularly in English-language markets, where penetration remains limited to approximately twenty books annually. These challenges operate within a distinctive sociolinguistic context that adds further complexity to the publishing landscape. Contemporary Barcelona illustrates these dynamics, with only 28.4 per cent of young people aged 15–34 using Catalan in their daily lives (Byrne, Bertran & Tudela Isanta, 2022).

## **Cultural response**

The response to these challenges has varied within the literary community (Mansell, 2020). Some authors, like Julia Bacardit, have taken strong positions on language preservation, refusing Spanish translation rights while accepting other language translations. Bacardit's stance, viewing such refusal as 'the only small thing that we writers can do for our language', reflects broader tensions between cultural preservation and market expansion (McDonald, 2023).

## **Key success factors**

The international success of Catalan literature can be attributed to a synergistic combination of geographic, institutional, and strategic factors (Mansell, 2020). Barcelona's position as a global publishing hub provides the sector with significant strategic advantages, offering a well-established publishing infrastructure and facilitating access to international markets (D. Boswell, 2013). From a field theory perspective, this geographic concentration creates unusual field autonomy for a minority language publishing sector. Barcelona functions as a field-structuring centre where Catalan publishers accumulate cultural capital that converts effectively into economic and symbolic capital in international markets, enabling them to operate with institutional logics distinct from Spanish or broader European publishing fields.

## Conclusion

The internationalisation of Catalan literature demonstrates how coordinated institutional action, strong publishing infrastructure, and strategic market positioning can create successful pathways for minority language literatures in the global marketplace (Mansell, 2020). While challenges remain, particularly in English-language market penetration and digital transformation, the Catalan model offers valuable lessons for other small nations seeking to promote their literatures internationally (D. Boswell, 2014).

Framework analysis reveals that Catalonia's success stems from exceptional alignment across all three levels of the publishing field. At the institutional level, the Institut Ramon Llull functions as what Bourdieu terms a 'consecrating instance' — an organisation with the authority to confer value on cultural products and facilitate their movement between fields. This institutional coordination creates field conditions where publishers can navigate Sapiro's three logics effectively: political support through translation grants addresses economic constraints, enabling publishers to pursue cultural logic priorities while maintaining economic viability. The critical mechanism is capital conversion: Catalan publishers accumulate cultural capital through quality literary production, which institutional support helps convert into economic capital through international rights sales. Other small nations may lack Catalonia's economic scale or publishing traditions, but can adapt this strategic alignment of institutional support, capital accumulation, and three-logics navigation to their own contexts.

While Catalonia demonstrates how robust institutional support and sophisticated rights management can enable international market development, Ireland's experience offers particularly valuable insights for Welsh publishing, given shared Celtic language heritage and similar market challenges. The Irish publishing sector has developed innovative approaches to minority language publishing that directly address issues facing Welsh publishers. Their success in children's publishing, particularly through publishers like Futa Fata, demonstrates how careful market positioning and strategic content development can create sustainable operations in minority language contexts. Ireland's experience with translation strategies,

educational market development, and international rights management provides especially relevant lessons for strengthening Welsh publishing's global presence.

## 9.2 Ireland

Ireland's children's publishing landscape presents a unique case study in dual-language market dynamics, where English- and Irish-language traditions operate under distinctly different conditions while sharing institutional frameworks and support mechanisms. This complex ecosystem demonstrates how publishers navigate linguistic, cultural, and commercial challenges in an increasingly globalised marketplace (O'Sullivan, 2020). Ireland's dual-language publishing ecosystem provides an excellent case study for applying the three-logics framework, as publishers must navigate economic pressures from UK market dominance, political imperatives around Irish-language preservation, and cultural logic concerns around literary quality and cultural representation, often simultaneously within publishing strategies.

### **Market structure and publishing dynamics**

The Irish publishing market, valued at £165 million, exhibits distinctive characteristics in both its English- and Irish-language sectors (O'Brien, 2022). While UK publishers dominate the overall market, with an 80 per cent share, independent Irish publishers have carved out significant niches, particularly in children's literature. The market structure is characterised by the presence of major UK publishers maintaining Dublin editorial offices while centralising sales operations in London, creating a dynamic environment for talent acquisition and content development (O'Brien, 2022).

Within this framework, children's publishing has emerged as a key sector. English-language children's publishing is led by established independents such as O'Brien Press and Gill Books, who compete effectively with UK publishers through strong local commissioning and market understanding. These publishers have developed sophisticated approaches to balancing distinctively Irish content with international appeal, enabling them to maintain

competitive positions despite significant market pressures from UK publishers (O'Brien, 2022).

The Irish-language children's publishing sector, despite operating within a much smaller market of approximately 73,803 daily speakers (O'Brien, 2022), has demonstrated innovation in addressing market challenges. This sector operates through a specialised infrastructure of between five and six nationwide bookshops and the Irish wholesaler Arhósy's dedicated Irish-language distribution system, complementing the mainstream retail channels dominated by Easons, which controls 70–80 per cent of general book distribution (O'Brien, 2022).

### **Innovation in minority language publishing: the Futa Fata case study**

The experience of Futa Fata, established in 2005, provides valuable insights into successful minority language publishing strategies. Their approach to children's publishing demonstrates how careful market positioning and innovative content development can create sustainable operations in a minority language context. The publisher has developed a sophisticated three-pronged translation strategy that effectively addresses different market segments (Mac Dhonnagain, 2024).

Their inward translation strategy involves careful selection of established English-language titles, including successful brands like David Walliams and *Diary of a Wimpy Kid*. Unlike similar publishers in Wales, Futa Fata preserves source text cultural contexts by limiting localisation to unavoidable cultural references rather than relocating narratives into Irish settings. This foreignising approach demonstrates that minority language content can succeed without extensive domestication, maintaining linguistic integrity while leveraging brand recognition in mainstream retail channels (Mac Dhonnagain, 2024). The publisher's outward translation strategy demonstrates innovative approaches to international market development. By creating English-language proofs specifically for rights fairs and developing 'bridge language' editions, they have successfully sold licences in over fifteen territories (Tivnan, 2021). This achievement is particularly noteworthy for a publisher operating in a

minority language market and demonstrates the potential for global reach regardless of original language (Mac Dhonnagain, 2024).

### **Educational market innovation**

A particularly successful aspect of Irish children's publishing has been its engagement with the educational market. Futa Fata's collaboration with Barrington Stoke illustrates this approach, adapting dyslexia-friendly formats for Irish-language learners. Their translations of these specialised 5,000–7,000 word stories effectively aligns content with both cognitive development and language acquisition needs, creating materials that serve both pedagogical and commercial objectives (O'Sullivan, 2020).

### **Institutional support and market development**

The sustainability of both English- and Irish-language children's publishing relies on a network of institutional support. The Arts Council / An Chomhairle Ealaíon, Foras na Gaeilge, and Culture Ireland between them provide cultural funding for both languages, while Enterprise Ireland offers commercial development support. This comprehensive support framework enables publishers to maintain viable operations despite a relatively small market size (The Arts Council / An Chomhairle Ealaíon, 2022).

A key institution supporting the internationalisation of children's books in Ireland is Children's Books Ireland (CBI). Based in Dublin, CBI plays a key role in connecting Irish children's literature to the international market while bringing international children's books to Irish readers. As the national children's books organisation, they serve as an important intermediary in the global promotion of children's literature through several initiatives. Their review publication *Inis* magazine covers both domestic and international titles and is distributed annually at *The Bookseller* Children's Conference in London, demonstrating their international reach. The KPMG Children's Books Ireland Awards, established in 1990, identify, honour and promote excellence in books by Irish authors and illustrators.

CBI's international engagement extends to professional development and events, including the Children's Books Ireland International Conference, a weekend-long celebration of children's books held annually in September. They also manage the Laureate na nÓg position, an initiative of The Arts Council / An Chomhairle Ealaíon, supported by the Arts Council of Northern Ireland and the Department of Children, Equality, Disability, Integration and Youth. This position champions children's literature by honouring artists of exceptional talent, with current Laureate Patricia Forde (2023-2026). Forde's speculative fiction novel *The Wordsmith* (Little Island Books, 2015), winner of a White Raven Award (2015) and shortlisted for the Children's Books Ireland Awards, follows a young apprentice fighting to preserve language in a post-apocalyptic world. This internationally recognised work and its sequel *Mothertonge* (Little Island Books, 2019) have been translated into Welsh by Carreg Gwalch.

### **Ireland's presence at international book fairs**

Ireland's presence at international book fairs operates through a structured framework of institutional support and coordinated management. Literature Ireland, funded by Culture Ireland and The Arts Council / An Chomhairle Ealaíon, serves as the primary coordinator for Ireland's national stands at the Frankfurt and London book fairs, while specialised events receive targeted support through sector-specific organisations (Literature Ireland, 2024).

Ireland's presence at the Bologna Children's Book Fair represents a collaborative effort with clearly defined management and funding structures. Children's Books Ireland leads the coordination of the Ireland stand, working alongside Illustrators Ireland, Irish publishers, authors, and illustrators to create a cohesive national showcase. Culture Ireland serves as the primary financial supporter of this participation, with additional backing from the Embassy of Ireland in Italy. This strategic combination of organisational leadership, financial support, and diplomatic engagement enables Ireland to maintain a consistent and impactful presence at this significant international publishing event. (*The Irish Times*, 2019, Marlowe, 2024).

The funding structure, flowing through Culture Ireland and The Arts Council / An Chomhairle Ealaíon to organisations like Literature Ireland, enables sustained international engagement (Literature Ireland, 2024). This support extends beyond simple representation to encompass a comprehensive approach to literary promotion, including translation grants, translator residency programmes, and international author events. Through these varied initiatives, Irish literature gains global visibility while the domestic market is enriched by international perspectives.

This integrated approach to international representation has yielded significant results, with Literature Ireland supporting the translation of over 2,500 works of Irish literature into 58 languages worldwide since 1995 (Literature Ireland, 2024). The success particularly evident in children's publishing demonstrates the effectiveness of Ireland's coordinated strategy for cultural promotion and international literary exchange (Marlowe, 2024).

### **Digital innovation**

Digital innovation has become increasingly important in both language sectors, with publishers leveraging virtual events and online platforms during the Covid-19 period to expand market reach and build community engagement. This digital transformation has proven particularly valuable for minority language content, enabling publishers to reach dispersed language communities and build global audiences (O'Brien, 2022).

### **Future challenges and opportunities**

The Irish children's publishing sector faces ongoing challenges in sustaining Irish-language and culturally distinctive publishing while ensuring commercial viability. English-language publishers like Little Island must compete with well-resourced UK publishers while developing distinctive Irish content. Irish-language publishers face additional challenges of limited retail infrastructure and smaller market size, necessitating continued innovation in market development and content delivery (Mac Dhonnagain, 2024).

## Conclusion

The Irish children's publishing sector presents a sophisticated model of dual-language publishing that effectively integrates cultural priorities with commercial sustainability. Through key institutions like Children's Books Ireland and strategic support from The Arts Council / An Chomhairle Ealaíon, Foras na Gaeilge, and Culture Ireland, the sector has developed robust frameworks for both domestic and international development. The sector is particularly notable for how it manages its dual-language market dynamics, with English- and Irish-language publishers developing distinct but complementary approaches to reach international markets.

The success of publishers like Futa Fata in the Irish-language sector demonstrates how minority language publishers can achieve international reach through innovative translation strategies and market development, while English-language publishers like Little Island and O'Brien Press compete effectively with UK publishers through strong local commissioning. The sector's sophisticated institutional support network, illustrated by CBI's international engagement through book fairs, awards, and conferences, has been key to positioning Irish children's literature globally while maintaining its cultural distinctiveness.

These experiences offer valuable insights for other markets managing linguistic and cultural complexity while seeking commercial sustainability, particularly in how institutional support and innovative market strategies can help publishers navigate the challenges of operating in both majority and minority language contexts. The Irish model demonstrates how dual-language publishing can successfully engage with international markets while advancing linguistic preservation and cultural representation goals.

Framework analysis reveals that Ireland's success stems from institutional support structures that enable sophisticated three-logics navigation at the publisher level. The Arts Council / An Chomhairle Ealaíon, Foras na Gaeilge, and Culture Ireland create field conditions and resources that allow publishers like Futa Fata to develop strategies balancing economic viability, political/institutional objectives, and cultural logic priorities. Futa Fata's three-pronged translation strategy demonstrates effective capital conversion: inward

translations transfer symbolic capital from established brands (Walliams, Wimpy Kid) into the Irish-language field, generating economic returns while accumulating cultural capital through association with recognised literary properties. Their outward translations convert this accumulated cultural capital into international market access, demonstrating that minority-language publishers can achieve global reach when institutional support addresses the economic logic sufficiently to allow cultural logic to drive content decisions.

While Ireland demonstrates successful strategies for dual-language publishing and international rights development, Scotland's experience offers insights into how publishers operating predominantly in English can assert cultural identity within majority-language markets.

### 9.3 Scotland

Scotland's publishing landscape presents a distinctive model of small-nation publishing that has evolved unique approaches to international market development while asserting Scottish cultural identity. Operating predominantly in English, with very limited but growing indigenous language publishing in Gaelic and Scots, the sector has developed strategies for differentiation and global reach despite significant market pressures.

#### **Historical development and market structure**

The foundations of Scotland's contemporary publishing sector were established by major publishers like HarperCollins (1819) and DC Thomson (1884), with a significant cultural renaissance in the 1970s introducing influential players like Canongate and Floris Books. This historical evolution has created a sector now comprising approximately a hundred publishers producing around 2,000 books annually. While demonstrating gender parity in ownership, the industry remains predominantly composed of SMEs characterised by limited promotional opportunities and modest salaries (M. Sinclair, 2022).

Scotland's predominantly English-language approach offers a different theoretical perspective, demonstrating how cultural capital conversion can occur through strategic

positioning rather than linguistic translation. Operating within the dominant English-language market, Scottish publishers must achieve cultural differentiation through content curation, market framing, and symbolic positioning.

The sector benefits from robust institutional support, with Creative Scotland providing £1.8 million to English-language publishing in 2024/25, a significantly higher per capita investment than comparable small nations. This funding supports a sophisticated network of organisations, with Publishing Scotland serving as the primary trade body since 1974, receiving 75 per cent of its funding from Creative Scotland and supplemented by membership fees from eighty publisher members and thirty network affiliates (Feather, 2022).

### **International market development and cultural exchange**

Scottish publishers have developed particularly innovative approaches to international market engagement. Publishing Scotland coordinates collective stands at major international book fairs, including Frankfurt, London, and Bologna, creating opportunities for Scottish publishers to showcase their work collectively on the global stage. Their International Fellowship programme has proven especially effective in fostering relationships between international and Scottish publishers, facilitating both cultural exchange and business opportunities in the global publishing market (M. Sinclair, 2022).

The sector's international strategy demonstrates sophisticated understanding of market dynamics through three key approaches: creative relationship marketing through storytelling, effective leveraging of Scotland's place brand, and targeted marketing to specific reader communities, particularly the Scottish diaspora. This last element has proven especially valuable, with research identifying distinct reader types based on their connection to Scotland and level of cultural interest (Noorda, 2016).

This institutional support demonstrates how macro-level coordination can enable micro-level cultural practices even within majority language markets. Publishing Scotland functions as a field-structuring organisation that helps publishers navigate the challenge of

maintaining Scottish cultural identity while competing in English-language markets dominated by much larger publishers.

### **Indigenous language publishing and cultural identity**

Unlike some small nations where language serves as a primary differentiator, Scottish publishing has developed alternative strategies for establishing cultural distinctiveness. While Gaelic publishing remains limited despite a speaker base of approximately 60,000, and Scots lacks official recognition, publishers have focused on subject matter specialisation and cultural commodification. Local history, Scottish interest non-fiction, and tourism-oriented publications have become key distinguishing features in the international marketplace (D. Boswell, 2014).

### **Children's publishing in the international market**

The children's publishing sector faces particular challenges and opportunities in international markets. Market consolidation and bestseller dominance create significant pressures, requiring substantial investment in illustration and marketing while competing with major UK publishers. However, Scottish children's publishers have developed creative approaches to these challenges, often leveraging Scotland's strong cultural brand and distinctive storytelling traditions to create unique market positions (Bold, Kennon & Morrissey, 2022).

Despite operating predominantly in English, Scottish children's publishers have demonstrated international success through careful attention to cultural representation, strategic use of Scottish themes and settings, and innovative approaches to marketing and distribution (McCleery & Ramdarshan Bold, 2012).

### **Key institutions**

Publishing Scotland plays a comprehensive role in connecting Scottish publishing to international markets through several key initiatives. Their International Fellowship

Programme builds relationships between Scottish and international publishers, while their Translation Fund encourages international publishers to translate Scottish works. This is a transparent process as they publish a list of all the publications that receive grants from the fund.<sup>11</sup> They support authors directly through the Author International Travel Fund, enabling Scottish writers to promote their work overseas.

The organisation maintains a strong international presence through participation in global book fairs and events, representing Scottish publishing interests year-round although they last exhibited at Bologna Children's Book Fair in 2022. Their digital platform BooksfromScotland.com serves as a curated showcase of Scottish books for international audiences. Through Scottish Books International, supported by Creative Scotland, they create focused opportunities for Scottish writers and publishers to reach international markets.

Their networking extends across multiple channels, including digital promotion through online showcases and films, physical presence at international trade fairs, professional development and industry connections, support for audiobook development and digital formats, regular industry events like the Scottish Book Trade Conference, and publication of resources including New Books Scotland.

The Scottish Book Trust and Edinburgh International Book Festival serve as key meeting points for the international children's literature community. The Scottish Book Trust, as Scotland's national agency for reading and writing, creates significant international connections through several key initiatives. Their Scottish Friendly Children's Book Tour takes authors and illustrators from across the UK and internationally to schools, libraries and public venues throughout Scotland. Through their partnership with BBC Scotland Learning, they produce Authors Live, featuring online reviews, interviews, and features with both Scottish and international children's authors and illustrators. Their broader media presence,

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<sup>11</sup> Complete record of Publishing Scotland Translation Fund recipients (2015-February 2024)  
<https://www.publishingscotland.org/wp-content/uploads/2024/09/Translation-Fund-Awardees-doc-09-09-24.pdf>

including children's and YA reviews for *The Scotsman*, helps position Scottish and international children's literature within international conversations.

The Edinburgh International Book Festival serves as a significant hub for international exchange in children's literature. As the world's largest literature festival of its kind, it functions as an annual gathering point where Scottish publishers meet international counterparts, authors and illustrators forge new creative connections, and editors discover new talent. The festival's integrated industry programme provides networking spaces where international publishing partnerships are formed, while the Children's Programme creates an environment where Scottish children's literature professionals engage directly with their international counterparts although the children's programme has been reduced over the years due to funding restrictions.

Together, these institutions position Scottish children's literature within international networks while facilitating the flow of ideas and creative partnerships between Scotland and the global children's publishing community.

### **Indigenous languages and global reach**

Scotland's children's literature demonstrates a unique dynamic between local language preservation and international reach, particularly through the vehicle of translation and adaptation. The country's publishing landscape reveals both the challenges and opportunities in promoting indigenous languages while achieving commercial success in a global market dominated by English-language content.

The situation of Gaelic in Scottish children's publishing presents a notable contrast to Scots. While Scots-language publishing has seen significant growth through initiatives like Itchy Coo, Gaelic children's literature faces distinct challenges. As Kidd (2019) notes, despite Gaelic's status as one of Scotland's three indigenous languages, with approximately 60,000 speakers, its development in children's literature has followed a different trajectory. During the 1970s and 1980s, there was a concentrated effort to create original picture books, fiction, and other materials in Gaelic for young readers. However, this initial push has

‘gradually fallen by the wayside’ (Kidd, 2019, p.10). Instead, the current landscape is dominated by translated picture books. While some of these translations are highly regarded – Kidd specifically mentions the Gaelic version of *Hugless Douglas* as ‘a masterpiece’ – there are significant gaps in the overall offering for young readers.

The disparity between Gaelic and Scots publishing is particularly evident in the availability of materials for different age groups. While Scots has developed a broad range of materials across age groups, Gaelic faces ‘significant gaps in terms of early readers, 8–12s and teens’ (Kidd, 2019, p.10). This limitation is particularly concerning given the importance of having age-appropriate reading materials for language development and maintenance.

Gaelic enjoys stronger legal protections than Scots in Scotland. As Robertson (2019, p.18) points out, ‘Although Scots is recognised as a language by both the Scottish and UK governments, it does not yet have the full legal rights enjoyed by Gaelic.’ However, these legal protections have not necessarily translated into a more robust publishing environment for children’s literature.

The situation highlights the need for what Kidd (2019, p.10) describes as ‘a strategic framework that articulates and works towards an offer spanning what children need to become readers’. This suggests that successful indigenous language publishing requires more than just legal recognition – it needs sustained support for creating and publishing original works across all age ranges, rather than relying primarily on translations.

These contrasting experiences of Gaelic and Scots in children’s publishing demonstrate the complexity of supporting indigenous languages in contemporary Scotland. While Scots has found success through a combination of original works and strategic translations of popular texts, Gaelic children’s literature still requires significant development to provide a comprehensive offering for young readers of all ages.

The preservation and promotion of Scots-language literature illustrates this tension. Robertson and Fitt’s Itchy Coe imprint, established in 2002, successfully published over seventy titles in Scots, including translations of internationally renowned works (Robertson,

2019). Their strategy of translating popular texts like Roald Dahl's works and Julia Donaldson's *The Gruffalo* into Scots created a bridge between global children's literature and indigenous language preservation. This approach proved commercially viable, with translations like *The Eejits* (*The Twits* in Scots) becoming bestsellers while simultaneously raising the status of Scots in educational settings.

The significance of this achievement becomes clear when considering that Scots was historically suppressed in education, with students facing 'humiliation, derision or "correction" for speaking in their own tongue' until the 1980s (Robertson, 2019, p.14). The successful internationalisation of Scottish children's literature has thus served a dual purpose: preserving indigenous language while creating global connections through familiar texts.

Kidd (2019) notes that Scotland's children's literature scene demonstrates both local strength and international appeal, citing examples like Claire McFall's *Ferryman* achieving significant success in China. However, she also highlights the challenges Scottish publishers face in breaking into the 'conglomerate-dominated publishing market' (Kidd, 2019, p.9). This suggests that while Scottish children's literature can achieve international success, structural barriers in global publishing continue to affect its reach.

The translation movement works in both directions. While Scottish publishers translate international works into Scots, Scottish works are increasingly finding international audiences. This bilateral flow creates what Kidd (2019) describes as a 'vibrant ecology of books and writing' that retains its cultural character while engaging with global markets. The establishment of Moat Brae House as Scotland's centre for children's literature and storytelling further institutionalises this dual focus on local heritage and international engagement.

However, challenges remain in balancing commercial viability with linguistic heritage. Robertson (2019) acknowledges the enormous power and reach of English in a globalised world, while emphasising the importance of maintaining Scots as a living, published language. This tension reflects broader challenges facing indigenous language publishing:

balancing international market access (often requiring English) with the preservation of minority languages as viable literary languages.

The Scottish experience offers valuable insights into how children's literature can serve both local cultural vitality and international market engagement. Through strategic translation choices, institutional support, and careful attention to educational applications, Scottish publishers have created a model for internationalising indigenous language children's literature while strengthening rather than diminishing local linguistic heritage.

### **Market challenges and innovation**

The sector faces several significant challenges in international markets. The lack of regional breakdown in Nielsen BookData statistics complicates market analysis and strategic planning. Scottish books often struggle against perception as 'regional' in the wider UK market, and many successful Scottish writers ultimately publish through London-based houses. These challenges have spurred innovation, particularly in digital technologies and collaborative approaches to market development (M. Sinclair, 2022).

The Covid-19 pandemic highlighted both vulnerabilities and opportunities within Scottish publishing, accelerating digital transformation and encouraging new collaborative approaches to international market engagement. The sector's response demonstrated remarkable resilience and adaptability, with publishers developing innovative digital solutions for maintaining international connections and market presence (Bold, Kennon & Morrissey, 2022).

### **Conclusion**

The Scottish publishing sector, particularly in children's literature, demonstrates a sophisticated approach to internationalisation that asserts Scottish cultural identity within global anglophone markets. Through key institutions like Publishing Scotland, Scottish Book Trust, and the Edinburgh International Book Festival, the sector has developed robust frameworks for international promotion and exchange. The unique handling of indigenous

languages - with contrasting experiences between Scots and Gaelic publishing - showcases both the challenges and opportunities in promoting local language literature while achieving commercial success in a global market.

The sector's distinctive strengths lie in its institutional support networks, innovative international engagement strategies, and creative approaches to market differentiation. Particularly notable is how Scottish children's publishers have leveraged Scotland's cultural brand and storytelling traditions while developing new approaches to reach international markets. The success of initiatives like Itchy Coo's Scots translations alongside achievements of Scottish works in international markets demonstrates how small-nation publishers can successfully navigate global markets while retaining a distinct national voice.

These experiences offer valuable insights for other small-nation publishers, particularly in developing alternative strategies for cultural distinction when language differentiation is not primary. As the sector continues to evolve, its future success will likely depend on continued innovation in digital engagement, strategic use of Scotland's cultural brand, and further development of collaborative approaches to market development through its key institutions.

Framework analysis reveals that Scotland's approach offers valuable insights for Welsh bilingual publishing. While operating primarily in English, Scottish publishers demonstrate how cultural positioning strategies can maintain field distinctiveness through content selection and market framing rather than linguistic translation. This represents what Bourdieu terms 'position-taking' within a crowded field: rather than competing directly with larger London publishers for mainstream market share, Scottish publishers occupy distinctive positions based on accumulated symbolic capital (Scotland's literary heritage, place brand, storytelling traditions). Creative Scotland's substantial funding (£1.8m annually) creates field autonomy — the capacity to pursue cultural objectives without complete dependence on market returns. This suggests alternative pathways for Welsh publishers operating in English-language markets, showing how symbolic and cultural capital can convert into market differentiation and commercial sustainability through strategic positioning rather than translation alone.

New Zealand's publishing sector offers a contrasting model to Scotland's predominantly English-language approach, demonstrating how indigenous language integration can drive both cultural and commercial success in children's publishing

#### 9.4 New Zealand

New Zealand's children's publishing sector presents a unique model of indigenous language integration and cultural representation within a predominantly English-language market. This distinctive approach has established the country as a leading example of how children's literature can support language revitalisation while maintaining commercial viability.

New Zealand's approach offers valuable insights for applying the three-logics framework to indigenous language integration, demonstrating how publishers can navigate economic, political, and cultural imperatives simultaneously.

##### **Market overview and structure**

The New Zealand publishing industry demonstrated resilience in 2022, with total revenue reaching \$292.0 million (£139.1 million GBP). While fiction and children's literature together comprise 39 per cent of published units, the sector's influence extends beyond raw numbers, particularly in its pioneering approach to bilingual content (PANZ, 2022). The industry supports 557 employees and continues to grow, with digital book revenue reaching \$13.6 million, indicating successful adaptation to changing market conditions.

##### **Indigenous publishing leadership and integration**

At the forefront of New Zealand's children's publishing innovation is the integration of Māori language and cultural perspectives. Huia Publishers exemplifies this approach as a key indigenous-led publishing house, demonstrating how Māori worldviews can be comprehensively integrated throughout the publishing process (Daly, 2024). This

indigenous-led approach positions Māori content as distinctive in international markets, with community-based content development ensuring cultural integrity supports rather than constrains market appeal.

### **Multilayered language approach**

The sector has developed a nuanced approach to language integration, evidenced by the 2022 statistics (Publishers Association of New Zealand, 2022), which show 25 te reo Māori-only titles, 94 English to te reo Māori translations, and 221 bilingual works.

This layered approach reflects what Daly (2024) identifies as a distinctive strength of New Zealand's children's literature sector, noting it is 'very well developed in Aotearoa' compared to other countries. The strategy of weaving Māori words into English texts has proven particularly effective, creating natural pathways for language acquisition among young readers.

### **Educational impact and language revitalisation**

The sector's success in supporting language revitalisation is demonstrated through children's natural adoption of Indigenous vocabulary from bilingual texts. Daly's (2024) research reveals how young readers independently incorporate Māori words into their everyday language, suggesting the effectiveness of this integrated approach to bilingual publishing. This success is supported by a comprehensive infrastructure that bridges the needs of both Māori-medium educational settings and English speakers learning te reo.

### **Key institutions**

Read NZ Te Pou Muramura is the national reading promotion organisation in New Zealand, focusing primarily on fostering a reading culture within New Zealand through their Writers in Schools programme and various literacy initiatives. They maintain a comprehensive database of New Zealand writers and play a key role in connecting readers with books domestically.

The Publishers Association of New Zealand (PANZ) Te Rau o Tākupu drives the international promotion of New Zealand literature through several key initiatives. They manage collective stands at major international book fairs, particularly the Bologna Children’s Book Fair, where they create opportunities for New Zealand publishers to showcase their children’s books to international publishers. Their international engagement includes providing reduced exhibition rates for members, maintaining a rights portal at [newzealandbooks.com](http://newzealandbooks.com), and creating virtual stands for international book fairs.

PANZ administers two significant funding schemes that support international reach. The Translation Fund, supported by Creative New Zealand, offers grants of up to NZ\$5000 per title, covering up to 50% of translation costs, directly facilitating the translation of New Zealand literature into foreign languages. Additionally, funding from Manatū Taonga Ministry for Culture & Heritage supports audiobook production, helping create alternative formats that can reach broader audiences.

This systematic approach to international market development, supported by both Creative New Zealand and Education New Zealand, has been particularly significant following New Zealand’s role as Guest of Honour at the 2012 Frankfurt Book Fair, which helped establish stronger global recognition for New Zealand literature, including children’s books.

### **Future development and international relevance**

Looking ahead, the sector emphasises increased Māori *rangatiratanga* (sovereignty) in publishing processes and greater representation of *mita* (dialects). With growing digital infrastructure supporting diverse linguistic formats, the industry is well-positioned to expand its innovative approach to bilingual children’s publishing (PANZ, 2022).

The success of this model, evidenced by both market metrics and pedagogical outcomes, offers valuable insights for other nations working with minoritised languages. The sector’s ability to maintain commercial viability (\$292.0 million in total publishing revenue) while advancing language revitalisation goals demonstrates the potential of Indigenous-led publishing approaches.

## Conclusion

New Zealand's children's publishing sector demonstrates a sophisticated and multifaceted approach to both domestic and international markets. At home, it has successfully developed a model that integrates te reo Māori and English publishing, supporting language revitalisation while maintaining commercial success. This is achieved through Indigenous leadership, multilayered language strategies, and robust educational support.

Internationally, through the work of PANZ and support from Creative New Zealand, the sector actively promotes New Zealand children's literature globally through strategic presence at international book fairs, translation funding, and digital initiatives. This dual focus on indigenous language revitalisation and international reach creates a distinctive model that could inform similar efforts in other multilingual publishing contexts, particularly in markets seeking to balance indigenous language preservation with commercial viability and international growth. Cotton and Daly (2015) reinforce this analysis, demonstrating how New Zealand picture book collections function as both mirrors reflecting indigenous Māori cultural identity and windows into unfamiliar worlds for international readers, a dynamic that parallels how Welsh picture books serve dual cultural and market functions.

Framework analysis reveals that New Zealand's success stems from a distinctive field structure where indigenous leadership has achieved what Bourdieu terms 'field autonomy' — the capacity to set standards and consecrate value according to cultural rather than purely commercial criteria. Huia Publishers exemplifies this autonomy, operating as what Sapiro would identify as a culturally-driven institution that nonetheless achieves economic sustainability. This autonomy enables sophisticated three-logics navigation: political support for language revitalisation creates conditions for economic sustainability, while indigenous-led content development ensures cultural distinctiveness commands market respect rather than limiting commercial appeal. The critical mechanism is capital conversion: Māori cultural capital, accumulated through community-embedded publishing practices, converts into symbolic capital (authenticity, distinctiveness) that differentiates New Zealand children's literature internationally. For Wales, this suggests that strengthening Welsh-language publishers' field autonomy may be prerequisite to sustainable international success.

## 9.5 Adaptable approaches for the Welsh context

Strengthening Welsh children's publishing in the international marketplace requires careful consideration of what has worked for other small nations, while remaining mindful of Wales's unique position and resources. Looking across the experiences of Catalonia, Scotland, Ireland, and New Zealand reveals a variety of approaches, some of which offer particularly promising pathways for Welsh development.

When we examine Catalonia's impressive achievements in international publishing, we see what's possible with extensive resources and institutional support. Their success story, built on Barcelona's position as a major publishing hub and supported by sophisticated rights management systems, represents an inspiring vision of what Welsh publishing might aspire to in the long term. Framework analysis explains why Catalonia's model requires adaptation rather than replication: their macro-level institutional resources exceed what Wales could immediately develop, but their demonstration of three-logics integration provides a strategic template that could be implemented at smaller scale.

The experiences of Ireland and Scotland offer more directly applicable lessons for Welsh publishing. The framework reveals why these Celtic models transfer more readily: Ireland and Wales share similar macro-level challenges (minority language status, proximity to dominant English-language markets, comparable institutional scales) and could benefit from comparable three-logics navigation strategies. Scotland's cultural positioning techniques offer micro-level practices for maintaining distinctiveness within English-language markets, directly relevant to Welsh bilingual publishing contexts.

Futa Fata's three-pronged approach to translation offers a particularly promising model for Welsh-language publishers. Their strategy of carefully selecting established English-language titles for inward translation, while maintaining linguistic integrity rather than over-localising content, shows how minority language publishers can leverage existing market success. Their creation of English-language proofs specifically for rights fairs, combined with the development of 'bridge language' editions, has enabled them to sell rights in over fifteen

territories (Tivnan, 2021) – an achievement that demonstrates the potential for global reach regardless of a book’s original language.

The Scottish publishing sector’s experience offers valuable insights into how publishers can sustain a distinct cultural voice in a market dominated by English-language content. Their success in leveraging Scotland’s cultural brand and storytelling traditions, while developing innovative approaches to market development, provides a useful template for Welsh publishers. The Scottish sector’s collaborative approach to international market presence, particularly in coordinating collective stands at major book fairs and developing shared resources for rights promotion, offers a model that Welsh publishers could adapt to maximise limited resources.

The import case studies in Chapter 7 revealed additional models worth noting. Latvia’s centralised coordination through Latvian Literature (Section 7.1.6), with comprehensive industry reporting and creative marketing campaigns, demonstrates how nations smaller than Wales (population 1.9 million) can achieve disproportionate international impact. Lithuania’s independent agent model and Québec’s industry-responsive governance and illustrator collaboration strategies (Section 7.1.3) offer alternatives to purely institutional approaches. These models suggest that Wales might benefit from combining elements: institutional coordination (as examined in Catalonia and Ireland) with market-responsive mechanisms like commission-based professional representation.

Wales has established itself as a leader in bilingual children’s publishing, with extensive expertise in creating sophisticated dual-language content. While New Zealand’s approach of weaving Māori words into English texts mirrors some existing Welsh practices, it reinforces an opportunity to expand this integration further. By incorporating more Welsh words and phrases into English-language publications, publishers could create additional entry points for language learning that complement Wales’s already strong dual-language publishing programme. This approach would build upon Wales’s established bilingual expertise while potentially reaching new audiences through mainstream English-language titles.

Looking at these experiences together, we can envision a path forward for Welsh children's publishing that builds on existing strengths while strategically developing new capabilities. In the current economic climate, Welsh publishers can focus on strategic initiatives that maximise existing resources while building incrementally toward larger goals. This might begin with developing a coordinated translation strategy similar to Futa Fata's model, combined with careful attention to educational market opportunities and digital innovation.

The educational market offers particularly promising opportunities for Welsh publishers, especially when we examine successful innovations from Ireland and Scotland. The collaboration between Ireland's Futa Fata and Barrington Stoke provides an especially useful example of how specialised publishing formats can serve multiple objectives simultaneously. Barrington Stoke has developed expertise in creating books that are accessible to dyslexic readers, using carefully chosen fonts, paper colours, and text layouts to reduce visual stress and improve readability. When Futa Fata adapted these specialised formats for Irish-language learners, they discovered that the same features that help dyslexic readers also support second-language acquisition. The carefully controlled vocabulary and sentence structure, combined with the visually accessible format, creates an ideal reading experience for both language learners and those with reading difficulties.

This dual-purpose approach to educational publishing offers a particularly promising model for Welsh publishers. By developing specialised formats that address both language acquisition and learning support needs, publishers could create materials that serve multiple market segments while supporting broader educational objectives. For instance, books designed with dyslexia-friendly features could be adapted for Welsh-language learners, creating resources that work effectively in both mainstream and Welsh-medium educational settings. The success of Futa Fata's translations of these specialised 5,000–7,000 word stories demonstrates how content can be carefully aligned with both cognitive development and language acquisition needs.

Furthermore, this approach offers opportunities to develop materials that bridge the gap between classroom and home reading. By creating books that are both educationally sound and engaging as leisure reading, publishers can strengthen their market position while

supporting language development across different contexts. This strategy could be particularly valuable in supporting Welsh-language acquisition in families where not all members speak Welsh, providing accessible entry points for language learning through shared reading experiences.

Digital innovation represents another key area for development. The lessons learned from Scotland's response to Covid-19 and New Zealand's digital initiatives suggest opportunities for Welsh publishers to expand their reach through virtual events, online community engagement, and digital distribution channels. These approaches could be particularly valuable for reaching dispersed Welsh-speaking communities and building international connections.

The development of collaborative approaches to market presence could help Welsh publishers maximise limited resources. Following Scotland's example, Welsh publishers could coordinate their presence at international book fairs, share resources for rights promotion, and develop joint digital marketing initiatives. This collaborative approach could create a stronger collective presence in international markets while sharing the costs of market development.

Looking toward the future, Welsh publishers can work gradually toward building more sophisticated institutional support structures, drawing selective lessons from Catalonia's example while maintaining a scale appropriate to Welsh resources. This might include developing coordinated grant programmes for translation and market development, creating centralised resources for rights management, and establishing professional development programmes for publishers and agents.

The key to success lies in careful implementation, focusing on sustainable development rather than rapid expansion. By building on existing strengths while strategically addressing structural weaknesses, Welsh children's publishing can develop a distinctive and sustainable position in the international market. This approach recognises that success will come not from trying to replicate the scale of larger markets, but from carefully adapting proven strategies to create a uniquely Welsh path to international engagement.

Through this measured approach to development, Welsh children's publishing can work toward increased international presence while maintaining its essential cultural role. The experiences of other small nations show that it's possible to achieve commercial sustainability while supporting language revitalisation and cultural preservation. By carefully selecting and adapting strategies that align with Welsh capabilities and objectives, the sector can build toward a future that honours its cultural heritage while engaging successfully with global markets.

The evidence from these comparative examples demonstrates that Wales has multiple proven pathways available for international development. The challenge lies not in identifying successful models but in selecting and adapting those approaches that best align with Welsh resources, capabilities, and cultural objectives. The strategic recommendations in Chapter 10 build on these comparative insights, proposing a coordinated approach that combines institutional support (drawn from Catalonia and Ireland), market-responsive mechanisms (inspired by Baltic and Québec models), and collaborative sector development (following Scottish examples) to create a distinctly Welsh path to sustainable international presence.

## 10. Conclusions and Recommendations

This chapter synthesises the empirical findings from Chapters 4–9 to address the central research question and six supporting areas of enquiry. Drawing on the integrated theoretical framework outlined in Chapter 2, it presents a summary of the research, key thematic findings, five strategic recommendations for the Welsh children’s publishing sector, study limitations, and directions for future research.

### 10.1 Research summary

This thesis provides the first comprehensive, theory-informed examination of internationalisation strategies in Welsh children’s publishing. Through an integrated theoretical framework combining Bourdieu’s field theory, Sapiro’s three-logics model, and concepts from minor literature studies, the research has analysed successful and unsuccessful internationalisation attempts across detailed case studies, supported by extensive industry interviews and comparative analysis of four small nations and additional international contexts.

The central research question, ‘What strategies should the Welsh publishing sector adopt to operate successfully at international level in children’s and young adult books across both Welsh and English language publishing?’ has been addressed through systematic examination of field structures and institutional coordination (Bourdieu), strategic navigation of economic, political, and cultural logics (Sapiro), and translation strategies and cultural practices. The research reveals that successful internationalisation requires alignment across these interrelated theoretical dimensions, with institutional field coordination serving as the foundation for effective publisher strategies.

The six supporting areas of enquiry (sector development and economic support, literary production and cultural capital indicators, international strategies to date, building international links, challenges and necessary conditions, and stakeholder roles) have been systematically addressed through the empirical investigation detailed in Chapters 4-9. The

findings presented in this chapter directly respond to these enquiries, providing a comprehensive answer to the central research question.

## 10.2 Key findings

### **Structural position and international potential**

Welsh children's publishing possesses significant but underdeveloped international potential. Barriers stem primarily from structural challenges rather than creative limitations: inadequate institutional coordination, limited professional development opportunities, and funding mechanisms that prioritise domestic production over international market development. External validation confirms the sector's quality achievements: a Welsh novel winning the Carnegie Medal and industry recognition in publications such as *The Bookseller* demonstrate that Welsh children's publishing produces work meeting international standards (Eyre, 2024). Structural barriers persist nonetheless: translation capacity beyond Welsh-English remains limited, and UK market resistance to both translated and regional literature creates a double barrier for Welsh content regardless of language.

### **Successful internationalisation models**

Multiple viable pathways exist for international development. *Llyfr Glas Nebo's* international success demonstrates how Welsh-language literature can achieve global recognition through coordinated institutional support. The *Molly* series co-production shows how innovative partnerships create sustainable international presence. Rights-led export strategies, co-production partnerships, adaptation models, and design-led hybrid approaches each offer distinct advantages depending on publisher capacity and market opportunity.

### **Comparative insights**

Comparative insights emerged through two complementary research pathways: the formal comparative analysis in Chapter 9 (examining Catalonia, Scotland, Ireland, and New Zealand's strategic approaches) and observations of source country practices during import

case studies in Chapter 7. Successful small nations – particularly Ireland and Scotland – achieve international presence through integrated approaches combining institutional support, strategic three-logics navigation, and quality cultural practices. Latvia’s systematic sector coordination, including comprehensive annual industry reports, consistent book fair presence with professional stands, and centralised promotional infrastructure despite a population of only 1.8 million, demonstrates how smaller nations can achieve disproportionate international visibility through coordinated institutional action. Wales currently lacks the macro-level coordination evident in these markets, limiting publisher effectiveness despite sophisticated micro-level capabilities. These observations reinforce the finding that success stems from integrated institutional approaches rather than resource abundance alone.

### **The bilingual advantage**

Wales’s distinctive strength lies in integrated bilingual approaches that leverage Welsh-language and cultural distinctiveness for market differentiation. Rather than creating separate sectors, the research reveals increasing convergence toward publishing strategies that serve both languages strategically.

### **Institutional support**

The Books Council and Wales Literature Exchange play foundational enabling roles, particularly for Welsh-language publishing. However, current arrangements often emphasise production support over market development, contributing to short-term project delivery rather than the sustained market presence required for rights sales and export performance.

### **Professional capability gaps**

Specialised expertise in rights management, market intelligence, and international business development remains concentrated in a few publishers. The lack of professional intermediaries – agents, rights specialists, dedicated translators – limits the sector’s ability to convert creative excellence into repeatable international outcomes. Publisher sustainability is further constrained by rights structures: when authors retain world rights

through agents, as with *Llyfr Glas Nebo*, publishers gain no financial return from international success. Securing world rights, as Firefly Press achieved with *The Clockwork Crow*, enables publishers to build sustainable revenue streams.

### **Limited international engagement**

The research reveals critically limited international activity in both import and export. The case studies examined (2018-2023) represent one of the sector's most active periods yet constitute the only identifiable examples of sustained international engagement during this timeframe. While *Llyfr Glas Nebo*'s exceptional achievement demonstrates export potential, it remains an outlier rather than indicating systematic capability. Export activity shows similar constraints, with most publishers lacking capacity for sustained international market development. Import activity is limited to individual publisher initiatives, with systematic sourcing from languages beyond English remaining underdeveloped. Wales Literature Exchange and Literature Across Frontiers have proven instrumental in facilitating specific discoveries (*Dog Town*, *Y Parsel Coch*, *Wombat* series), yet coordination between these literature promotion agencies and publishers' actual commercial needs requires strengthening. Notably, survey data revealed that many publishers remain unaware of existing WLE resources that could support their international activities — a knowledge gap that improved communication could address without significant new investment.

### **Domestic market economics**

The challenging economics of UK book retail – detailed in Section 5.3.2 – create an 'internationalisation imperative' where publishers need international rights income for viability, not merely growth. Standard bookshop discounts of 40-50% and universal sale-or-return arrangements create substantial cash flow pressures. These structural realities mean domestic sales alone struggle to sustain publishing operations, making international rights increasingly useful for financial sustainability. This tension between producing culturally authentic Welsh content and developing commercially viable international products shapes publisher strategic decisions.

### 10.3 Strategic recommendations

Five interconnected priorities emerge for developing Welsh children's publishing's international presence. Since this research concluded, several developments have begun addressing these priorities, demonstrating sector momentum while highlighting remaining areas for development.

#### **Priority 1: Institutional coordination and strategic alignment**

Coordinated strategic approach to sector development is essential. The Books Council, Wales Literature Exchange, Literature Across Frontiers, British Council Wales, Arts Council Wales and Literature Wales each bring valuable expertise requiring better integration through structured collaboration.

Drawing on Québec's industry-led governance model (Section 7.1.3), coordination should ensure publishers participate actively in funding decision-making processes rather than being positioned merely as recipients of predetermined support. This shift from consultation to collaboration would ensure support mechanisms respond effectively to publishers' commercial realities while serving cultural objectives. Enhanced alignment between literature promotion agencies (Wales Literature Exchange, Literature Across Frontiers) and publishers' actual market development needs is essential for maximising limited resources.

The establishment of Cyhoeddi Cymru Publishing Wales has created new opportunities for sector coordination, as well as a dedicated children's publishing network for Wales and SW England that facilitates coordination between publishers, authors, illustrators, and supporting institutions. Building on this foundation, creation of a dedicated children's literature strategy remains essential for articulating clear development pathways and aligning funding mechanisms with international development objectives.

Multi-year funding commitments for international market presence would enable strategic approaches rather than project-based engagement. Implementation of three-year grant cycles for international book fair attendance would facilitate effective planning and

relationship building, allowing Welsh publishers to establish consistent presence at key events like Bologna Children's Book Fair. This longer-term funding security would particularly benefit smaller publishers while supporting comprehensive market engagement strategies.

### **Priority 2: Professional development and international networks**

Systematic professional development programming must address critical gaps in rights management, translation expertise, and international market engagement skills.

Significant progress has occurred in international network development. Wales now has a new IBBY branch based at the Books Council, strengthening its presence in international children's literature discourse. The researcher's active participation in International Research Society of Children's Literature (IRSL) conferences has enhanced Wales's visibility internationally. Additionally, collaborative research partnerships have emerged, including Wales-New Zealand cooperation examining how both countries use picture books for language acquisition in bilingual educational settings (Daly, S.M. Rosser and Haf, 2025).

However, sector-wide professional capability building remains essential. Strategic support for international festival participation and book fair presence is important for enabling Welsh creative professionals to engage effectively with international audiences while building professional networks.

### **Priority 3: Sustainable funding framework**

Fundamental review of current funding mechanisms is needed to support international development effectively. However, the current economic climate presents significant challenges. Progressive reductions in public funding allocations for arts and publishing in Wales create increased pressure on available resources, affecting both direct publishing support and broader cultural initiatives. These constraints require careful resource allocation while highlighting the need for sustainable funding models supporting long-term sector development.

Addressing domestic market economics represents a key element of sustainable development. While Books Council distribution terms and standard retail discounts serve important functions, strategic review could identify opportunities to improve publisher margins without undermining service quality. Grant funding criteria should explicitly recognise publishers' legitimate need to develop commercially viable international strategies alongside cultural objectives, acknowledging that stronger domestic financial foundations directly enable international capability development.

Drawing on successful international models – particularly Lithuania's commission-based 'Book Smuggler' agent (Section 7.1.6) and Latvian Literature's centralised coordination – Wales should establish professional rights representation specifically for children's publishing. Implementation options include: an independent agent operating on commission (self-sustaining through percentage of sales); Books Council or Wales Literature Exchange employing a dedicated children's rights professional; or publishers collectively funding shared rights service through Cyhoeddi Cymru Publishing Wales. The chosen model should provide professional representation at Bologna and other key fairs, sustained relationship-building with international children's publishers, market intelligence gathering, and collective promotion of Welsh children's literature. This addresses the critical gap identified across Chapters 7-9: professional expertise remains concentrated in a few publishers.

Despite these challenges, strategic investment in international market development offers significant returns. Funding mechanisms should encourage sustainable business growth alongside cultural production through dedicated international market development streams, flexible support for various internationalisation aspects, and approaches encouraging long-term strategic planning rather than immediate production requirements.

#### **Priority 4: Sector data infrastructure**

The Books Council of Wales should establish systematic collection and publication of Welsh publishing data, including output statistics, translation activity, and market performance. Countries such as Latvia, Lithuania, and Scotland publish annual reports that enable evidence-based policy development and help their sectors demonstrate cultural and

economic value to government. Without equivalent data, Welsh publishing lacks the evidence base to advocate effectively for public investment or to benchmark its performance internationally.

#### **Priority 5: Strategic international creative collaboration**

Québec's experience (Section 7.1.3) demonstrates that international creative partnerships – particularly pairing domestic writers with international illustrators – enhance books' international appeal from inception. Wales should encourage publishers to commission international illustrators for selected projects while supporting Welsh illustrators to attract international commissions. Additionally, developing bilingual cross-promotion strategies would maximise Wales's distinctive advantage: ensuring Welsh-language and English-language editions promote each other rather than marketing separately would demonstrate Wales's bilingual cultural identity while creating economies of scale in promotional activities.

Systematic development of both import and export capabilities is key. Following successful examples like *Dog Town* (Latvian, Section 7.1.6) and *Y Parsel Coch* (Section 7.1.5), Wales should build strategic networks with other small nation and minority language publishers for reciprocal exchange. Educational publishing offers particular promise through dual-purpose formats serving both language learners and readers with learning differences, as demonstrated by Irish publishers' success (Section 9.2). Post-Brexit, co-production and co-edition opportunities could use Wales's printing capacity while sharing development costs and expanding market reach. Following Latvia's model, Wales should develop structured programmes bringing international publishers to Wales, creating sustained exposure to Welsh literature and fostering long-term professional relationships.

#### **10.4 Study limitations**

The focus on children's publishing, while enabling detailed sector analysis, limits direct application to adult publishing markets. Commercial sensitivity restricted access to detailed

financial data, requiring reliance on alternative success indicators including awards, translations, and critical recognition.

The comparative analysis examines substantially larger markets than Wales, requiring careful adaptation rather than direct replication of successful strategies. Resource constraints and market scale differences necessitate Wales-specific approaches informed by but not identical to comparative models.

### 10.5 Future research directions

**Comparative market analysis** could extend this framework to other minority language publishing contexts, particularly indigenous publishing models in Canada, Australia, Baltic states and Nordic countries, strengthening understanding of successful strategies while building international research networks.

**Deeper comparative analysis** of the small nations examined in Chapters 7 and 9 represents a further promising research direction. While this thesis provides qualitative comparison of support structures in Catalonia, Ireland, Scotland, New Zealand, Latvia, Lithuania, and Québec, systematic quantitative data – including comparable publishing output statistics, translation volumes, and funding allocations – proved difficult to obtain due to differing national data collection methods and the absence of standardised international metrics. Future research could develop such metrics through direct collaboration with support organisations including the Institut Ramon Llull, Literature Ireland, Publishing Scotland, and PANZ, enabling more robust benchmarking and more precise identification of transferable strategies. This would build naturally on the Wales – New Zealand collaboration already emerging from this research.

**Historical investigation** of Welsh children’s publishing would provide valuable context for contemporary development. Systematic examination of archives from publishers like Gomer Press and Dref Wen could enhance understanding of importing and adaptation strategies while documenting sector evolution.

**Market impact measurement** represents a key research need, requiring development of comprehensive frameworks for assessing return on investment in international market development. Investigation of translation impact and analysis of digital market opportunities would inform more effective support mechanism development.

**Academic-industry collaboration** could be strengthened through regular conferences and research partnerships with other small nation institutions. The emerging Wales-New Zealand research collaboration examining bilingual publishing practices in educational contexts highlights potential for comparative analysis and shared learning that could be expanded to other international partnerships.

## 10.6 Conclusion

This research demonstrates that Welsh children's publishing can achieve significant international presence while maintaining its distinctive cultural voice. The path forward requires coordinated action across institutional support, professional development, and sustainable funding mechanisms. The potential returns in both cultural and economic terms justify the investment required.

Comparative analysis reveals that success stems not from resource abundance but from strategic alignment across macro-level institutional coordination, meso-level logic navigation, and micro-level cultural practices. Wales possesses the creative talent and cultural distinctiveness necessary for international success; continued development of the structural support framework will enable this talent to reach global audiences.

The developments since this research concluded, including the establishment of IBBY Wales, a Wales stand at Bologna Book Fair, and a research partnership with another small nation, demonstrate sector momentum and commitment to international engagement. These early steps provide a foundation for continued strategic progress while highlighting the importance of sustained institutional support in enabling publisher success.

Through coordinated institutional action, enhanced professional capabilities, and sustained commitment to strategic development, Welsh children's literature can reach new audiences

while continuing to serve its vital domestic cultural role. This represents both an opportunity and a responsibility: ensuring that Wales's distinctive voice in children's literature finds its place in global cultural conversations.

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<sup>12</sup> Interviews were conducted via email, video conference (Zoom/MS Teams), telephone, and in person at international book fairs and other locations between 2021–2025. Interviews were conducted in English. Interview transcripts and recordings, where these exist and subject to participant consent and data protection requirements, are available for academic verification purposes upon reasonable request through the University of Wales Trinity Saint David research repository. All interviews were conducted with full ethical approval from the University of Wales Trinity Saint David and in compliance with GDPR requirements. For access requests, please contact [pgresearch@uwtsd.ac.uk](mailto:pgresearch@uwtsd.ac.uk).

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## Appendices

### Appendix A: Welsh publisher interview letter and survey questionnaire

Sent via email to 10 publishers on 29 March 2021.

Subject: Interview request for PhD research

Annwyl / Dear Publisher,

I am writing to ask if you might be willing to be interviewed as part of my PhD research into 'Strategic Action for Internationalisation of the Children's Publishing Sector in Wales' which I am currently conducting with the University of Wales Trinity Saint David. It is funded by the KESS2 European Social Fund and sponsored by the Books Council of Wales. My supervisors are Professor Elin Haf Gruffydd Jones and Alexandra Büchler.

Please could you let me know a convenient date and time after 12 April and how you might like best to conduct the interview, for example on the phone or over video conferencing. The interview will take around 45 minutes.

I have attached a questionnaire for you to complete in advance of the interview and I would be grateful if you could send me your latest catalogue, either digitally or print.

I look forward to hearing from you.

Cofion / Regards

Megan Farr

Ymchwilydd PhD / KESS2 PhD researcher

Mercator

Canolfan Uwchefrydiau Cymreig a Cheltaidd Prifysgol Cymru /

University of Wales Centre for Advanced Welsh and Celtic Studies

<https://www.uwtsd.ac.uk/mercator/>

### Questions

I would be very grateful if you were able to help me with my research by answering the following questions relating to your children's publishing business. This data and information will be used anonymously unless you wish to be named.

- 1) Please can you give me a short overview of the history of your company. When it was set up, who by, what was your mission?
- 2) How is your business funded?

- 3) How many staff do you currently employ? Freelance, part-time, full-time. How many staff are there in each department? Editorial, production, sales and marketing.
- 4) How many books do you publish on average per year?
- 5) What percentage of your publishing is in consumer trade/leisure books vs educational books?
- 6) What percentage of your publishing is in Welsh/English/Bilingual/other languages?
- 7) What percentage of your publishing is in original books vs adaptations/translations?
- 8) What percentage of your publishing is from Wales-based authors and illustrators?
- 9) Where do your core sales come from? E.g., within Wales, within the rest of the UK, outside the UK?
- 10) On average how many books do you publish in each of the following categories in English/Welsh/Bilingually?
  - age (0-3, 3-6, 7-9, 9-12, 12+, 14+)
  - format (BB, HB, PB, e-book, audio, app)
  - genre (baby book, picture book, chapter book, middle grade, teen, YA, anthology, fiction, non-fiction)
- 11) How many of your titles have been translated into languages other than English and Welsh? Please list the titles and the languages/publishers.
- 12) Do you export your books/sell your books to other publishers around the world? If so, how do you do this?
- 13) How many books have you bought from other languages/publishers? Please list the titles and the languages/publishers.
- 14) Do you publish co-editions? If so, how do you find out about the books?
- 15) Do you see it as important to your business to sell your books outside of Wales?
- 16) Would you be interested in buying language rights or co-edition rights from other publishers if there was a grant available to assist with the translation, printing and marketing?
- 17) Would you be interested in selling rights to your books to other publishers if you had the resources to do so?
- 18) Has Brexit affected your business to date? Do you anticipate any long-term impact?

- 19) Has Covid impacted your business? If so can you describe the challenges and how you have overcome them.
- 20) In addition to the new 'Translation Connect: Internationalising reading experiences of children and young people in Welsh' resource from Wales Literature Exchange, Literature Across Frontiers and Books Council of Wales, what other information/resource would be useful to support your business in terms of internationalisation?
- 21) Are you aware of the grants available from literature promotion agencies around the world to help you buy translation rights in other languages and also help you sell your translation rights to other publishers?
- 22) Would you be willing for me to use your books as potential case studies in my research, either books you have published in the past, present or future?

## Appendix B: Author interview questions

### Interview with Megan Angharad Hunter

Questions sent via email on 3 September 2024.

- What motivated you to write the book? How long did it take to write and did you have an editor? How did the book get published? What has that experience been like?
- Would you describe the book as YA or for adults? I noticed it won the fiction category at the Wales book of the Year awards rather than the children's and YA category. Was the book submitted for the Tir na n'Og award do you know?
- What motivated you to translate the book into English? How would you describe this process? Have you made any changes to the text? You mention that you have a new ending?

## Appendix C: Import case studies interview questions

### Import case studies interview questions

Interview questions sent to the publishers and translators of the five import case studies, January - May 2023. Sample questions:

1. Tell me about how you discovered and published/translated X.
2. Did you have any funding support?
3. Were there any challenges?
4. Did you make any changes from the original text? If so please can you give me some examples and your decisions for doing so.
5. How have you marketed the book?
6. What has the reader reception been like? Sales?

#### Appendix D: Export case studies interview letter and questions

##### **Export case study 1: Llyfr Glas Nebo interview questions**

Questions sent to the international publishers and translators of *Llyfr Glas Nebo* via email in January 2023.

- 1) How did you discover Llyfr Glas Nebo?
- 2) Why did you want to translate/publish Llyfr Glas Nebo?
- 3) How did you translate/publish Llyfr Glas Nebo?
- 4) Were there any challenges?
- 5) Were there any changes from the original text?
- 6) How was the novel positioned in the market?
- 7) What has the reception been like? Copies sold?

##### **Interview with Manon Stefan Ros**

Questions sent via email on 15 June 2021.

1. Can you tell us a bit about where the original idea for Llyfr Glas Nebo came from. Did you write it for the Eisteddfod Prose Medal competition? Can you tell us about the challenges of writing for competition and how the book was published.
2. You made some changes to the book when you adapted it into English including changing most of the characters names and changing the language the diary is written in along with the back story of the mother's relationship with the Welsh language and her language ability. Can you explain why you decided to make these changes and what you hope readers will take from both versions.
3. The book has been translated into five languages so far. I understand that the Polish edition was translated from the Welsh. Were the other translations from the Welsh

or English? Does this mean that people are reading different versions of the book in different languages depending on which version it has been translated from? What are your thoughts about that?

4. Can you tell me a bit about your thoughts on the theories of foreignization and domestication in literary translation. For example conversations with the Thorpes are written in English in the Welsh edition but everyone communicates in the same language in the English adaptation. Is this because in the adaptation everyone is speaking English all the time? Do you know if there were any changes made in the translations to foreignize or domesticise?
5. The original book has been adapted as a stage play. Do you know if there are plans for the book to be adapted for the screen too? Are there any other translations of the book planned that you can tell us about?

### **Export case study 2: The Clockwork Crow interview questions**

Questions sent to the international publishers and translators of *The Clockwork Crow* via email in January 2023.

1. How did you discover The Clockwork Crow?
2. Why did you want to publish The Clockwork Crow?
3. How did you translate and publish The Clockwork Crow?
4. Were there any challenges?
5. Were there any changes made to the original text?
6. How was the novel positioned in your market?
7. What has the reception been like? Copies sold?
8. Please can you send me the link to the book on your website or catalogue so I can see all bibliographic data and the cover image for all three editions.

### [Appendix E: Co-production case studies interview letter and questions](#)

#### **Co-production case study 2: Molly series interview questions**

Questions sent to Matthew Howard, Graffeg Publishing, publisher of the Molly series via email on 12 April 2023.

1. How did you discover Molly and the Stormy Sea? Did Malachy send the ms to you directly? And did he always have Andrew Whitson in mind as the illustrator?

2. Why did you decide to publish Molly and the Stormy Sea into Welsh, Irish and English?
3. Can you tell me how the books have been translated and published into each language, have you had any grants to help with this?
4. Which language market is selling the best, Welsh, Irish or English?
5. Have any subsidiary rights been sold to date for the series? Are there plans to print co-editions in other languages in the future?

Questions sent to Malchy Doyle, author of the *Molly* series via email on 12 April 2023.

1. How did the first Molly book come about – why did you decide to write it?
2. How did you go about publishing the first Molly book, did you approach Graffeg directly or through your agent? Was Graffeg your first choice of publisher? Did you always envisage the book being published into English, Welsh and Irish? Who did the translation into Irish? And into Welsh?
3. Tell me about your working relationship with Andrew Whitson, have you worked with him before?
4. Where have the ideas for each of the Molly books come from?

#### Appendix F: Tir na n-Og Children's Book Awards - Welsh-language category award winners (1976-2024)

Award Year	Title	Author	Publisher	Age category
2024	Astronot yn yr Atig	Megan Angharad Hunter	Y Lolfa	Primary
2024	Jac a'r Angel	Daf James, illustrated by Bethan Mai	Y Lolfa	Secondary
2023	Dwi Eisiau bod yn Ddeinosor	Luned Aaron and Huw Aaron	Atebol	Primary
2023	Manawydan Jones: Y Pair Dadeni	Alun Davies	Y Lolfa	Secondary
2022	Gwag y Nos	Sioned Wyn Roberts	Atebol	Primary
2022	Y Pump	Elgan Rhys (ed.)	Y Lolfa	Secondary
2021	Sw Sara Mai	Casia Wiliam	Y Lolfa	Primary
2021	#helynt	Rebecca Roberts	Gwasg Carreg Gwalch	Secondary
2020	Pobol Drws Nesaf	Manon Steffan Ros	Y Lolfa	Primary
2020	Byw yn fy Nghroen	Sioned Erin Hughes	Y Lolfa	Secondary
2019	Cymru ar y Map	Elin Meek	Rily	Primary
2018	Dosbarth Miss Prydderch	Mererid Hopwood	Gomer	Primary
2018	Mae'r Lleud yn Goch	Myrddin ap Dafydd	Gwasg Carreg Gwalch	Secondary
2017	ABC Byd Natur	Luned Aaron	Gwasg Carreg Gwalch	Primary
2017	Pluen	Manon Steffan Ros	Y Lolfa	Secondary

2016	Pedair Cainc y Mabinogi	Siân Lewis	Rily	Primary
2016	Gwalia	Llŷr Titus	Gomer	Secondary
2015	Straeon Gorau'r Byd	Caryl Lewis	Gwasg Carreg Gwalch	Primary
2015	Y Gêm	Gareth F Williams	Gwasg Carreg Gwalch	Secondary
2014	Cwmwl Dros y Cwm	Gareth F Williams	Gwasg Carreg Gwalch	Primary
2014	Diffodd y Sêr	Haf Llewelyn	Y Lolfa	Secondary
2013	Cynefin yr Ardd	Bethan Wyn Jones & Iolo Williams	Gwasg Carreg Gwalch	Primary
2013	Y Gemau Olympaidd	Alun Wyn Bevan	Gomer	Secondary
2012	Prism	Manon Steffan Ros	Y Lolfa	Primary
2012	Yr Alarch Du	Rhiannon Wyn	Y Lolfa	Secondary
2011	Dirgelwch y Bont	Hywel Griffiths	Gwasg Gomer	Primary
2011	Stwff Guto S. Tomos	Lleucu Roberts	Y Lolfa	Secondary
2010	Trwy'r Tonnau	Manon Steffan Ros	Y Lolfa	Primary
2010	Codi Bwganod	Rhiannon Wyn	Y Lolfa	Secondary
2009	Bownsio	Emily Huws	Cymdeithas Lyfrau Ceredigion	Primary
2009	Annwyl Smotyn Bach	Lleucu Roberts	Y Lolfa	Secondary
2008	Y Llyfr Ryseitiau: Gwaed y Tylwyth	Nicholas Daniels	Dref Wen	Primary
2008	Eira Môn, Eira Mawr	Gareth F Williams	Gwasg Gomer	Secondary
2007	Ein Rhyfel Ni	Mair Wynn Hughes	Gwasg y Bwthyn	Primary
2007	Adref Heb Elin	Gareth F Williams	Gwasg Gomer	Secondary
2006	Carreg Ateb	Emily Huws	Cymdeithas Lyfrau Ceredigion	Primary
2006	Creadyn	Gwion Hallam	Gwasg Gomer	Secondary
2005	Byd Llawn Hud	Multiple Authors	Gwasg Gomer	Primary
2005	Eco	Emily Huws	Cymdeithas Lyfrau Ceredigion	Secondary
2004	Stori Dafydd ap Gwilym	Gwyn Thomas	Y Lolfa	Primary
2004	Iawn Boi?	Caryl Lewis	Y Lolfa	Secondary
2003	Dewi Sant	Rhiannon Ifans & Margaret Jones	Y Lolfa	Primary
2003	Sgôr	Bethan Gwanas	Y Lolfa	Secondary
2002	Poeth! Cerddi Poeth ac Oer	Non ap Emlyn & Marian Delyth	Y Lolfa	Primary
2002	Gwirioni	Shoned Wyn Jones	Y Lolfa	Secondary
2001	Jam Coch Mewn Pwdin Reis	Myrddin ap Dafydd	Hughes	Primary
2001	Llinyn Trôns	Bethan Gwanas	Y Lolfa	Secondary
2000	Ta-Ta Tryweryn	Gwenno Hughes	Gwasg Gomer	Primary
2000	Chwedlau o'r Gwledydd Celtaidd	Rhiannon Ifans	Y Lolfa	Secondary
1999	Pam Fi Eto, Duw?	John Owen	Y Lolfa	Primary

1999	Byw a Bod yn y Bâth	Lis Jones	Gwasg Carreg Gwalch	Secondary
1998	Dyddiau Cŵn	Gwen Redvers Jones	Gwasg Gomer	Primary
1998	Stori Branwen	Tegwyn Jones & Jac Jones	Gwasg Gomer	Secondary
1997	Ydy Fe!	John Owen	Iaith Cyf	Primary
1997	Dirgelwch Loch Ness	Gareth F Williams	Y Lolfa	Secondary
1996	Coch yw Lliw Hunllef	Mair Wynn Hughes	Gwasg Gomer	Primary
1996	Sbectol Inc	Eleri Ellis Jones	Y Lolfa	Secondary
1995	Pam Fi, Duw, Pam Fi?	John Owen	Y Lolfa	Primary
1995	Geiriadur Gomer i'r Ifanc	D Geraint Lewis	Gwasg Gomer	Secondary
1994	Sothach a Sglyfath	Angharad Tomos	Y Lolfa	Primary
1994	Cristion Ydw I	Huw John Hughes & Rheinallt Thomas	Canolfan Genedlaethol Addysg Grefyddol	Secondary
1993	'Tisio Tshipsan?	Emily Huws	Gwasg Gomer	Primary
1993	Chwedl Taliesin	Gwyn Thomas & Margaret Jones	Gwasg Prifysgol Cymru	Secondary
1992	Wmffra	Emily Huws	Gwasg Gomer	Primary
1992	Broc Môr	Gwen Redvers Jones	Gwasg Gomer	Primary
1992	Yn y Dechreuad	Robert M. Morris & Catrin Stephens	Gwasg Prifysgol Rhydychen/CBAC	Secondary
1991	O Ddawns i Ddawns	Gareth F Williams	Y Lolfa	Primary
1991	Cymru Ddoe a Heddiw	Geraint H Jenkins	Gwasg Prifysgol Rhydychen/CBAC	Secondary
1990	Llygedyn o Heulwen	Mair Wynn Hughes	Gwasg Gomer/CBAC	Primary
1990	Lleud yn Olau	T Llew Jones & Jac Jones	Gwasg Gomer	Secondary
1989	Liw	Irma Chilton	Gwasg Gomer	Primary
1989	Ben y Garddwr a Storiâu Eraill	Jac Jones	Cymdeithas Lyfrau Ceredigion	Primary
1989	Culhwch ac Olwen	Gwyn Thomas & Margaret Jones	Gwasg Prifysgol Cymru	Secondary
1988	'Tydi Bywyd yn Boen!	Gwenno Hywyn	Gwasg Gwynedd	Primary
1988	Yr Atlas Cymraeg	Dafydd Orwig (ed.)	George Philip/CBAC	Secondary
1987	Jabas	Penri Jones	Uned Iaith, CBAC/Gwasg Dwyfor	Primary
1987	Gardd o Gerddi	Alun Jones & John Pinion Jones	Gwasg Gomer	Secondary
1986	Y Llipryn Llwyd	Angharad Tomos	Y Lolfa	Primary
1984	Y Llinyn Arian	Mair Wynn Hughes	Gwasg Gomer/CBAC	Primary
1984	Herio'r Cestyll	Malcolm M Jones, Cyril Jones & Gwen Redvers Jones	Gwasg Prifysgol Cymru	Secondary
1983	Croes Bren yn Norwy	J Selwyn Lloyd	Gwasg Gomer/CBAC	Primary
1982	Gaeaf y Cerrig	Gweneth Lilly	Gwasg Gomer/CBAC	Primary

1981	Y Drudwy Dewr	Gweneth Lilly	Gwasg Gomer	Primary
1980	Y Llong	Irma Chilton	Gwasg Gomer/CBAC	Primary
1979	Y Flwyddyn Honno	Dyddgu Owen	Christopher Davies	Primary
1978	Miriam	Jane Edwards	Gwasg Gomer	Primary
1977	Trysor Bryniau Caspar	J. Selwyn Lloyd	Gwasg Gomer/CBAC	Primary
1976	Tân ar y Comin	T. Llew Jones	Gwasg Gomer/CBAC	Primary

Source: Books Council of Wales, 2024.

### Appendix G: Interview data summary table

Name	Role/Organisation	Location/Organisation type	Key work/Connection	Interview date	Method
Aaron, Huw	Author/Illustrator/Publisher	Wales - Broga	Children's Books	May 7, 2021	Zoom
ap Dafydd, Myrddin	Founder/Publisher	Wales - Carreg Gwalch	Welsh-language Publishing	Apr 29, 2021; Apr 19, 2023	Zoom; In-person (LBF)
Borda Green, Sara	Translator	Spain	Spanish translation of Llyfr Glas Nebo	Jan 24, 2023	Email
Boore, Roger	Publisher (1970-1999)	Wales - Dref Wen	Historical Welsh Publishing	Jan 26, 2021	Zoom
Boswell, Mererid	Head of Business/Finance (2018-2024)	Wales - Books Council of Wales	Industry Body	Jul 7, 2021	Zoom
Büchler, Alexandra	Director/Translator	Literature Across Frontiers/Wales Literature Exchange	George the Wombat/George the Brave translations	Oct 20, 2024	Email
Combemale, Christopher	Associate Agent	Sterling Lord Literistic, Inc.	Rights/Literary Agency	Jan 25, 2023	Email
de Jocas, Simon	Owner/President	Canada - Éditions Les 400 Coups	International Publishing	Mar 22, 2022	In-person (BBF)
Doyle, Malachy	Author	Ireland	Children's Literature	Apr 12, 2023	Email

Drake, Ashley	Director	UK - Ashley Drake Publishing	Publishing	Apr 19, 2023	In-person (LBF)
Edwards, Margot	Rights Manager	Wales - Firefly Press	Rights Management	Apr 14, 2023	Email
Escuin, Maria	Editor	Spain - Grupo Planeta	Foreign Fiction	Jan 25, 2023	Email
Evans, Ann	Head of Welsh Resources	Welsh Government	Education Resources	Feb 21, 2022	Zoom
Evans, Will	Publisher	USA - Deep Vellum	Translation Publishing	Feb 7, 2023	Email
Fadl, Hoda	Editor	Egypt - Al Arabi	Arabic Publishing	Feb 6, 2023	Email
Fisher, Simon	Teacher/Blogger	Family Bookworms	Education/Reviews	Sep 10, 2021	Email
Garond, Lise	Translator	France	French translation of Llyfr Glas Nebo	Feb 2, 2023	Email
Gruffudd, Lefi	Editor	Wales - Y Lolfa	Welsh Publishing	Apr 23, 2021; Jan 20, 2023	Phone; Email
Gruffydd, Emyr	Translator	Catalonia	Catalan translation of Llyfr Glas Nebo	Feb 6, 2023	Email
Hallström, Kajsa	Publisher/Illustrator	Sweden - Stabenfeldt	Nordic Publishing	May 2, 2023	Email
Howard, Matthew	Publishing Director	Wales - Graffeg	Publishing	Apr 22, 2021; Apr 19, 2023	Zoom; In-person (LBF)
Hunter, Megan Angharad	Author	Wales	Welsh Literature	Oct 3, 2024	MS Teams
Jacobsen, Else K.	Translator	Norway	Norwegian translation of The Clockwork Crow	03-May-23	Email
Jones, Arwel	Head of Publishing Development	Wales - Books Council of Wales	Industry Development	Dec 3, 2024	MS Teams
Jones, Alun Ceri	Publisher	Wales - Dalen	Publishing	Apr 13, 2021	Email
Jones, Elwyn	Director (2009-2017)	Wales - Books Council of Wales	Industry Leadership	Nov 29, 2021	Phone
Jones, Elin Haf Gruffydd	Strategic Director/Translator	Wales Literature Exchange	Translation/Exchange	Jan 20, 2025	Email

Jones, Gwerfyl Pierce	Director (1987-2009)	Wales - Books Council of Wales	Industry Leadership	Jan 28, 2022	Zoom
Jones, Helen	Head of Children's Books (2016–2022)	Wales - Books Council of Wales	Children's Publishing	Jan 13, 2022	MS Teams
Karadog, Aneirin	Author/Translator	Wales	Translation of L'Abri	May 18, 2023	Zoom
Listewnik, Maria	Translator	Poland	Polish translation of Llyfr Glas Nebo	Jan 20, 2023	Email
Musioł, Anita	Editor	Poland - Wydawnictwo Pauza	Polish Publishing	Feb 2, 2023	Email
Pasqualini, Žanete Vēvere	Translator and literary agent	Latvia - Latvian Literature	Latvian translation of Dog Town	May 17, 2023	WhatsApp
Rafel, Aniol	Editor/Publisher	Catalonia - Periscopi	Catalan Publishing	Jan 18, 2023	Email
Roberts, Sophie	Sector Researcher	Wales - Creative Wales	Industry Research	Jul 7, 2021	Zoom
Ros, Manon Steffan	Author	Wales	Llyfr Glas Nebo/The Blue Book of Nebo	Jul 14, 2021	Email
Salonen, Elina	Translator	Finland	Finnish translation of The Clockwork Crow	May 3, 2023	Email
Saunders-Jones, Owain	Managing Director	Wales - Atebol	Publishing	Apr 30, 2021	Zoom
Saumell Santaeugè n, M.	Translator/Editor	Catalonia - Periscopi	Catalan translation/editing of Llyfr Glas Nebo	Feb 1, 2023	Email
Sinclair, Angharad	Project Development Manager	Wales - Books Council of Wales	Project Development	Jan 11, 2022	In-person
Smith, Gareth	Projects Manager	Wales - Peniarth	Publishing	April, 28 2023	Email
Spiegel, Tina	Editor	Germany - Fischer Sauerländer	The Clockwork Crow German edition	Apr 24, 2023	Email
Srdić, Nataša	Director/Translator	Serbia - Partizanska knjiga	Serbian translation of Llyfr Glas Nebo	Jul 26, 2023	Email
Thomas, Janet	Co-founder and board member	Wales - Firefly Press	Publishing	Sep 12, 2024	MS Teams
Thomas, Penny	Co-founder/Publisher	Wales - Firefly Press	Publishing	Apr 20, 2021;	Zoom; MS Teams

				Oct 10, 2024	
Tunncliffe, Lynda	Owner/Publisher	Wales - Rily Publications	Publishing	Apr 27, 2021; Apr 19, 2023	Zoom; In- person (LBF)