



Publishing in Ukraine:
a review of the sector

Final report 2020

February–March 2021

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Foreword

When we commissioned this research into the literary and publishing sector in Ukraine in September 2019 the world looked very different. In 2020, in the wake of the disruption caused by Covid-19, publishers, bookshops and literary organisations have faced difficult challenges with creativity and innovation, and they have rapidly altered the ways in which they work.

It has been a period of enormous change, and it is not yet clear what the long-term impact of it will be on the sector. However, we can be sure that building international connections and skills in the sector continues to be essential in this tumultuous time.

Ukraine's publishing sector has much to interest UK and international publishers, including festivals and book fairs that have begun to gain global attention; exceptional illustration and design, and examples of ground-breaking technical innovation. Over the past few years, the British Council has run several successful publishing-focused programmes, including Booking the Future – comprising lectures and presentations from European publishing experts at Book Arsenal Festival and a 5 day seminar for 27 Ukrainian professionals – and the 3x3 Mentoring Programme for Ukrainian publishing specialists. These programmes gave us an idea of the need and interest in publishing skills in the region. We wanted to look more deeply into the Ukrainian sector, to build an evidence base for future programmes and to understand the challenges faced by the different parts of the sector, whether it be bookshops, small or conglomerate publishers, or libraries. We appointed Emma Shercliff, whose other work – for a small independent publisher and her academic research – has complemented and informed her approach to this report.

In a whirlwind year, Emma's work has continued, talking to a huge range of people and making connections, identifying commonalities and possibilities for development and growth. We hope this rich and thoroughly researched report will be an exciting starting point for many more years of engagement between the UK and Ukrainian literature sectors, whether virtually or face to face. We believe there will be multiple opportunities for UK-Ukraine collaboration over the next few years and we want to support the publishing sector to be ready for further internationalisation. We at the British Council look forward to the conversation, collaboration and exchange we hope this report will inspire.

Sinead Russell
Co-Director Literature
British Council



Thorough research of the Ukrainian book market is an essential activity for a number of reasons: to assist in the formulation of effective state policy; to develop a profitable business enterprise, in particular, the publishing sector; to promote reading.

We submit that this effort marks the first independent study of this scale of the field, bringing external expertise to bear and drawing extensively on the experience of Ukrainian market players.

The results of this study should prove useful to both foreign partners as well as Ukrainian institutions, publishers, booksellers, authors, and other actors in this segment. This independent, external view of the field provides a much-needed challenge to entrenched perspectives, with solutions proffered arising from a welcome reconsideration of the challenges facing the sector to the benefit of both stand-alone projects and the broader publishing industry. Of particular note is the attention given in the study to the undergraduate community and instructors at industry-related university programmes—the wellspring of emerging publishers, managers, agents, mediators, authors, and literary critics soon poised to join the market.

The Ukrainian Book Institute would like to express our gratitude to the British Council in Ukraine for their cooperation and experience, essential to this effort. We also extend our thanks to Emma Shercliff, whose immense research has contributed to the development of the Ukrainian book market, bringing it to the attention of the international professional community.

Oleksandra Koval

Head of the Ukrainian Book Institute

Iryna Baturevych

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Executive summary

This report provides a detailed summary of research into the Ukrainian publishing sector undertaken between February and October 2020. The study was funded by the British Council Ukraine, in conjunction with the Ukrainian Book Institute, and comprised over 100 hours of face-to-face and remote interviews with publishers, retailers, librarians, festival staff, representatives of cultural and industry bodies and other stakeholders.

The aim of the project was to conduct research into Ukraine's trade publishing sector, undertaking a detailed needs-analysis of publishers, and scoping opportunities for internationalisation.

The project was impacted by the outbreak of Covid-19 in Ukraine in March 2020, and the subsequent lockdown, which resulted in a three-month hiatus to data collection, and a change to the planned research design. A second phase of data collection was undertaken remotely in July and August 2020 to assess the impact of the pandemic on the Ukrainian publishing sector, and focus group discussions were held in September 2020 (via video conference) to review and validate findings.

Key findings

1

The review found that the publishing sector in Ukraine faces **significant challenges**, compounded by a lack of reliable statistics and an absence of trust across the sector. Under-developed retail and library infrastructures make the distribution of, and access to, books difficult for many people located outside major urban centres. The government legislation introduced in 2017 which led to restrictions on the import of books from Russia had a significant impact on the publishing sector in Ukraine, creating space for a renaissance of Ukrainian language publishing across genres, and creating renewed interest in Ukrainian authors, stories and content. Copyright infringement remains a significant problem in Ukraine, and the lack of enforcement of existing legislation by the authorities means publishers are often left to tackle the problem themselves, with very limited success.

2	<p>Industry <u>skills gaps</u> identified included the absence of editorial expertise, weaknesses in the understanding of editorial and publishing processes, a lack of knowledge about how to sell and market foreign rights, or forge international connections. A scarcity of leaders able to demonstrate high-level strategic thinking and planning was highlighted as a failing which could hinder the development of the sector. Whilst there is currently little knowledge-sharing between Ukrainian publishers, all respondents, including those from well-established and market-leading publishing houses, were very open about their desire to learn from international experience and expertise.</p>
3	<p>The data highlighted many <u>possibilities for optimism</u>, however. The high quality of design, illustration, production skills and cutting-edge printing facilities in Ukraine offer possibilities for international cooperation. Significant work is already taking place to promote translated fiction, although there is scope for more activity here, and programmes need to be designed around the needs of the participating publishers and not the bureaucratic processes of the Ministry of Culture and Information Policy. Ukrainian publishers have considerable expertise in buying rights; more needs to be done to encourage publishers to see the economic potential in rights sales. Work needs to be undertaken to encourage the development of a larger cadre of high-quality translators; the capacity of the sector to publish more translated fiction and non-fiction will remain limited without additional support.</p>
4	<p>Whilst there has been a widespread decrease in reading and demand for books, mirroring global trends, the significant work done by literary bodies and festivals in Ukraine has helped <u>raise the profile of Ukrainian literature</u> at home and abroad. Book Fairs, literary festivals and author events are generally well-attended by the public and form an important platform for publishers to present and sell their works.</p>

5	<u>Workshops, fellowship and training programmes</u> for publishing professionals designed and organised by the British Council and the Ukrainian Book Institute, some in partnership with major book fairs and literary festivals, were generally very well received and provide sound models for future initiatives and interventions.
6	The level of pessimism seen in some of the post-lockdown media reports, warning of ‘an almost total collapse’ of Ukrainian publishing, was not reflected in the second round of interviews conducted in July–August 2020. Whilst <u>the long-term impact of the pandemic</u> has yet to be seen, most publishers reported that they had cut print runs but not the number of titles published, and that they hoped that by the end of 2020 their publishing programmes would be broadly on track (albeit with smaller numbers of units). There was however universal disquiet that the relief grants promised by the Ministry had not yet been disbursed at the time of writing, several months after they had been announced.

The full Executive Summary of the Report is published separately, and can be found at <https://www.britishcouncil.org.ua/en>

Project recommendations

The four areas of proposed programmatic activity that emerged as priorities from the research conducted between February and July 2020 are:

- promoting Ukrainian writing internationally
- training and skills
- leadership development
- readership development.

Detailed recommendations from this report will be published in a separate document, outlining a three-year strategy for engagement with the sector.

Aims & objectives

Background to research project

In September 2019, the British Council in Ukraine commissioned a research consultant to undertake a review of the Ukrainian publishing sector, to identify what is required to develop and 'internationalise' the sector, and develop a three-year strategy on how to use UK-sector expertise to do this.

The research was to focus on the 'trade' sector, defined here as general consumer books, including adult fiction and non-fiction of all genres, children's books and Young Adult titles. The research did not include educational titles, textbooks, academic books or technical books.

Research aims

1	<u>Conduct research into Ukraine's trade publishing sector</u> , scoping opportunities for internationalisation, including a detailed needs-analysis of publishers.
2	<u>Devise a 3-year strategy</u> in the form of a written report recommending ways that UK-sector expertise can be used to enable Ukrainian publishers to build international trade links and thrive in a global environment.

Research methods

Research design

Given the aims of the research, which included a detailed needs-analysis of publishers, the research design aimed to engage with a wide range of views from participants, allowing for in-depth reflection. A review of the literature was undertaken, and data collection planned via semi-structured, in-depth interviews with the aim of collecting rich data to fulfil the following aims:

- identify skills gaps related to international publishing (e.g. in rights buying or selling, preparing rights materials, networking and forging international contacts, agenting, editorial, digital publishing, subsidiary rights exploitation)
- identify needs and demand for various interventions – including but not limited to professional training, brokering international networks, translation subvention, support for international trade delegations and attendance at book fairs
- provide a baseline assessment of the relevant skills, resources and international reach of Ukrainian publishers which can be used in future evaluations
- interview past participants in British Council Ukraine publishing interventions to evaluate their impact, and how these activities contribute to the agenda of growing and internationalising the Ukrainian publishing sector.

Data was collected from a stratified sample of small, medium and large publishers, supplemented with additional data about the sector from expert interviews (these expert respondents were recommended by the Ukrainian Book Institute and the British Council). Following background briefing from staff at the British Council and the Ukrainian Book Institute (UBI), a list of 80 publishers and stakeholders was compiled, including the top five market leaders, as identified by the Report on the State of Publishing in Ukraine (UBI, 2019a). Interviews were sought with these respondents, who were drawn from a variety of small, medium and large publishing houses across Ukraine. The sample included senior and junior staff, company owners, early career publishers, freelancers and permanent staff, across different functions (sales, marketing, rights, editorial, design). Book Festival staff, librarians, retailers, printers and expert consultants were interviewed, as were representatives from governmental, cultural and industry bodies.

60 respondents in Ukraine were interviewed in February–March 2020 and July–August 2020, ensuring a large enough sample size to be able to generalise and make recommendations based upon the findings.

There were two phases to the data collection:

- in-person in-depth qualitative interviews conducted in Kyiv, Kharkiv and Lviv
- in-depth qualitative interviews conducted remotely via Zoom.

After the data collection phase, focus group discussions with Ukrainian publishers and stakeholders was scheduled to be held at Book Arsenal in May 2020, in which the preliminary research findings would be presented, and draft recommendations discussed and agreed. This was in part to review and validate the findings, but also to secure engagement from publishers and stakeholders, which would be vital for the success of the second phase of the project, in which recommendations would be implemented.

However, due to the lockdown imposed as a result of the Covid-19 pandemic, there was a change to the original project design. The project was put on hold for three months from April–July 2020. A second phase of remote data collection was then undertaken in July–August (via Zoom) to interview publishers about the impact of the pandemic on their business, and on the publishing sector in general. The planned focus group discussions took place in September 2020 via Zoom.

Instruments

A semi-structured interview schedule was developed, focusing on four main areas:

- brief overview of company/organisation
- what are the three main challenges facing the sector?
- where are the needs gaps specifically relating to skills?
- what could the British Council do to support development in the publishing sector?

For the second phase of data collection (July–August 2020), two additional questions were added:

- what are the greatest challenges facing the sector in light of the Covid-19 pandemic?
- what has been the impact of the lockdown on your own company/organisation?

The instruments were piloted on two visiting Ukrainian publishers in London in February 2020, and subsequently refined. Interviews were planned to take 1 hour 15 minutes.

Ethics

The research was conducted according to BSA and BERA guidelines, ensuring that informed consent was obtained from all interviewees and assuring them that all answers would be treated confidentially. All respondents were asked to sign a consent form at the beginning of the interview, which confirmed that they had been informed about the purpose of the research and that all information would be treated as confidential and reported anonymously. No representative from the British Council or UBI was in the room when the interviews were taking place. Interpreters were appraised of confidentiality

requirements. Notes were taken by hand during the interviews. The interviews were not recorded. This was a deliberate decision on the part of the researcher, in order to reinforce the confidentiality of the interviews and create an open environment in which respondents would feel comfortable sharing as much information as possible. The researcher offered to send copies of the report to interview respondents and sought permission to list respondents in the appendix. Interview notes were securely stored on a password-protected computer and will be disposed of after the submission of the report.

Data collection

Semi-structured interviews were conducted with 60 stakeholders in Ukraine over a ten-day period in February–March 2020:

- 42% of the respondents worked in the publishing sector
- 20% in associated professions (cultural advisors, festival staff, academia)
- 17% in related governmental organisations.

Of the publishing companies in which data were collected:

- 32% were small companies (up to 10 employees)
- 32% were medium-sized (11–50 members of staff)
- 37% employed over 50 staff
- several with over 100 employees.

56% of the publishers interviewed were male and 44% were female.

Other respondents included librarians, printers, authors, agents and retailers (and publishers who also owned or ran bookstores).

38% of the total respondents were male and 62% female.

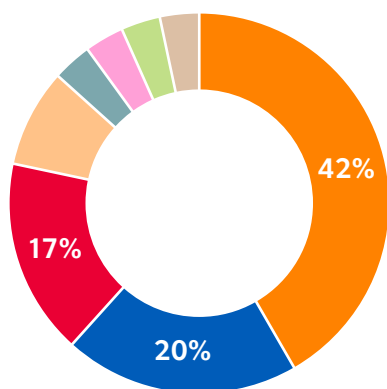
The interviews were a mixture of individual interviews and group interviews. 20% of respondents spoke in Ukrainian, and an interpreter was provided for those interviews. Two respondents from Phase 1 were re-interviewed in Phase 2 (but were only counted once). The interviews took approximately one hour;¹ those by video call in Phase 2 took an average of 1 hour 15 minutes.

Over a dozen bookshop visits were conducted across the country; these included informal conversations with staff. Open air markets selling second-hand books were also visited.

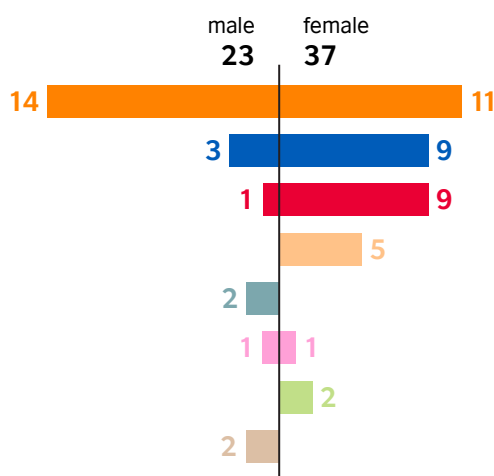
In addition to the 60 interview respondents in Ukraine, UK participants in past and current British Council publishing ventures were interviewed, and briefing calls were held about the research project with industry experts in the UK and Europe.

1 A logistical delay to the start of the research trip meant that the schedule had to be rearranged at short notice, so some interviews were rather tight, needing to be conducted within an hour, rather than the projected 1 hour 15 minutes. All respondents were still interviewed.

Repondent profiles



- Publishers
- Cultural advisors/
Festival staff/
Sector consultants/
Academic
- Governmental



- Librarians
- Printers
- Authors
- Agents
- Retailers

Data analysis

The interviews were coded and examined using a system of thematic analysis. Recurring themes were extracted and tabulated, and the data then re-examined. A summary of draft findings by theme was produced and circulated to participants in advance of the focus group discussions.

The focus group discussions originally scheduled as an in-person event in May 2020 were re-designed and held via Zoom. 12 publishers/stakeholders (a sub-set of the initial 60 respondents) attended the remote event, which was designed to triangulate the draft findings and discuss suggestions for the project recommendations which could be incorporated into the three-year sector strategy.

Literature review

General background

Ukraine has experienced a tumultuous past decade, with huge political and economic upheaval and acute security challenges.

In late 2013, President Yanukovich's refusal to sign an Association Agreement with the EU led to huge protests across the country. The Euromaidan uprising continued throughout the winter, with protestors camped out in sub-zero temperatures, and culminated with riot police firing upon protestors in central Kyiv in February 2014. Over 100 people were killed and approximately 15,000 injured. Yanukovich was deposed and Poroshenko elected as Ukraine's new president. Ensuing Russian aggression led to the annexation of Crimea in March 2014 and the outbreak of conflict in the eastern region of Donbas. The regions of Donetsk and Luhansk remain at war today.

Government measures in support of book publishing and the promotion of reading were enshrined in law in 2013. An array of fiscal and social reforms have been implemented since 2014, including reducing tariffs, introducing measures aimed at stabilising the business and banking sectors, implementing health and pension reforms, and establishing anti-corruption agencies.

President Volodymyr Zelenskyy was elected in April 2019, winning 73% of the vote. Zelenskyy's Servant of the People Party won the parliamentary elections in July 2019, taking 60 per cent of the seats in the Rada. The government assumed office in August 2019, pledging an ambitious and wide-ranging reform agenda, although a reshuffle on 4 March raised concerns among investors about the commitment of the president to reform.¹ Ukraine's economy had been growing since 2016 and the World Bank reported that the economic growth was solid at 3.2% in 2019. GDP was calculated at \$139.1 billion in 2019 and GDP per capita at \$3,140.8.² However, Ukraine's economy has been severely impacted by the Covid-19 outbreak, with GDP declining by 11.4% in the second quarter of 2020. Growth is expected to remain modest at 1.5% in 2021, rising to about 3.7% by 2023. The European Commission cites Ukraine's population as approximately 44.2 million,³ although recent Ukrainian government estimates place the figure around 37 million (there has been no official census since 2001).⁴

1 <https://country.eiu.com/ukraine> Economist Intelligence Unit. Retrieved 23 August 2020.

2 <https://www.worldbank.org/en/country/ukraine/overview> World Bank. Retrieved 23 August 2020.

3 <https://ec.europa.eu/eurostat/documents/4031688/9684146/KS-01%E2%80%9119%E2%80%911056-EN-N.pdf> European Commission. Retrieved 6 November 2020.

4 <https://www.rferl.org/a/30393838.html> Radio Free Europe. Published 23 January 2020. Retrieved 6 November 2020.

Publishing in Ukraine

There are several studies of the book market in Ukraine, mostly notably a Report on the State of Publishing published by the Ukrainian Book Institute (2019a), partly based on the results of The Ukrainian Reading and Publishing Data 2018 survey conducted by NGO Chytomo (Chytomo, 2018). An earlier survey carried out by the Ukrainian Publishers and Booksellers Association was published in report form as part of the Book Platform project (Afonin, 2012).

According to the Ukrainian Book Institute, **1,280 publishers (i.e. companies with books publishing as their main activity) are registered in Ukraine**. Of these, an estimated 300 are active publishers. Market volume is estimated at between €80–100 million per annum (including academic publishing). In 2019, 24,416 titles were published, of which 18,142 were in Ukrainian, and 7,895 were educational books. The number of titles has been increasing year-on-year since 2014. In 2019, a total of 61.3 million books (units) were printed, 52.5 million of those in Ukrainian. Almost all publishers (80%) have translated titles in their catalogues; 67% of titles are translated from English. The market is heavily reliant on translated titles: for 48% of the respondents surveyed, translated titles account for more than 50% of titles, and for almost 25% of respondents, the share was more than 75%. The languages most often translated are English (67%), French (38%), German (34%), Polish (27%). 68% of Ukrainians consider Ukrainian to be their mother tongue (Chytomo, 2018).

Major publishers include Ranok, KSD (Family Leisure Club), Vivat and Folio (all based in Kharkiv), Old Lion (Lviv), KM Books (Kyiv) and Bohdan (Ternopil). Several of these well-established publishing houses own book stores and Ranok owns two schools. A number of new publishers have entered the market in recent years; these include The Foundation of Fairy Tales (2014), BookChef (2015), IST (2017) and Art Nation (2017). Children's publisher A-BA-BA-HA-LA-MA-HA is amongst the most

recognised of all publishers; the first privately owned children's publishing house to be established in an independent Ukraine, it has been publishing children's titles in Ukrainian since 1992.

In 2012, a survey carried out by the Ukrainian Publishers and Booksellers Association and a report commissioned by the Publishers Forum (Lviv) was published as part of the Book Platform project (Afonin, 2012). Reporting on data from 2002–2012, the report estimated that the domestic Ukrainian book market accounted for between approximately 20–23% of the total book consumption in Ukraine, whilst the 'combined legal, individual and illegal important from Russia plus pirated editions' accounted for 73–74% of the market (Afonin, 2012:7). It estimated the domestic book market to have a total value of 1.6 billion UAH (€154 million) in 2011, with net sales from publishers worth about 1 billion UAH (€95 million). The report gives a history of publishing in Ukraine, detailing the transition after the collapse of the Soviet Union in 1991 from a state-controlled sector, 'with 26 specialized publishing houses subordinated to a State Committee for Publishing, and 3,600 book retail outlets subject to similar central control, towards today's highly diversified industry' (Afonin, 2012:7).

The cultural sector in Ukraine has grown significantly since 2014, with the creative industries comprising 4.4% of GDP (UBI, 2019). Creative industries were listed amongst the priority area for the Ukraine's Export Strategy in 2017. In 2016–2017, the Ministry of Culture and Information Policy created three cultural bodies: the Ukrainian Book Institute¹ (annual budget €4.7 million in 2018; €3.6 million in 2019); the Ukrainian Institute,² aimed at promoting Ukrainian culture worldwide; and the Ukraine Cultural Foundation,³ established to facilitate development of national culture and art in Ukraine (UBI, 2019a). The UCF oversees a large budget of grant programmes (almost €23 million in 2019) and has given grants to publishers including Ranok, Osnovy and IST.

1 <https://book-institute.org.ua/>

2 <https://ui.org.ua/en>

3 <https://ucf.in.ua/en>

UCF is modelled to some degree on similar foundations abroad such as Arts Council England. The Ukrainian Book Institute was founded in 2016 with the purpose of providing recommendations on government policy in the book industry, encouraging publishing, promoting reading in Ukraine, and promoting Ukrainian literature abroad (UBI, 2019a). As well as domestic initiatives focusing on promoting reading and replenishing library collections, UBI has worked to promote Ukrainian writing internationally, notably by support for translators and a presence at international book fairs. This included offering subsidised places for Ukrainian publishers at the London, Frankfurt and Bologna Book Fairs, and assistance preparing material and catalogues for the fairs. Since 2019, the Ukrainian Book Institute has conducted significant research into the publishing market, although their data on new titles and print runs are based on statistics from the government Book Chamber, are widely acknowledged to be unreliable (see section on market data below).

Research into reading habits by the Kyiv Institute of Sociology¹ in 2018 found almost a quarter (23%) of Ukraine's adult population had visited a library or bookstore at least once in the preceding year, but 60% said that they had not read any books (electronic or printed) or visited a library or bookstore during the same period. These findings were echoed in a study undertaken by the Razumkov Centre for Economic and Political Research in 2018 and published in the Ukrainian Reading and Publishing Data 2018 report² (Chytomo, 2018), which found that 14% of Ukrainians surveyed could not name a single Ukrainian writer and 60% of respondents had not purchased a single printed book in the previous year (UBI, 2019:14).

The same report found that geography plays a part in the choice of language in which respondents preferred to read. The majority of readers in the western region prefer books in Ukrainian (61%), whereas books in Russian were preferred by readers in the South (8% Ukrainian, 51% Russian) and East (5% Ukrainian, 50% Russian). Readers from the central region reported that it was equally convenient for them to read books in both languages. However, recent research on regionalism in Ukraine warns against 'simplistic conceptualization and generalizations'³ and the choice of language is often a pragmatic or stylistic (rather than a political) choice. Many readers exhibit the 'casual bilingualism' noted by Pomerantsev (in his introduction to Yermolenko, 2019), with 33% preferring to read in the language in which the book was originally written. Those in large cities were more likely to read in Russian (37%, versus 15% in Ukrainian), whereas in villages books in Ukrainian are more popular (38%, versus 17% in Russian). Younger respondents prefer books written in Ukrainian. Politics, publishing policies and availability of works do however have an impact on reading patterns: whilst 28% of the respondents said that it is more convenient for them to read in Russian (versus 24% Ukrainian), the number of readers who read in Ukrainian has doubled since 2015 (Chytomo, 2018).

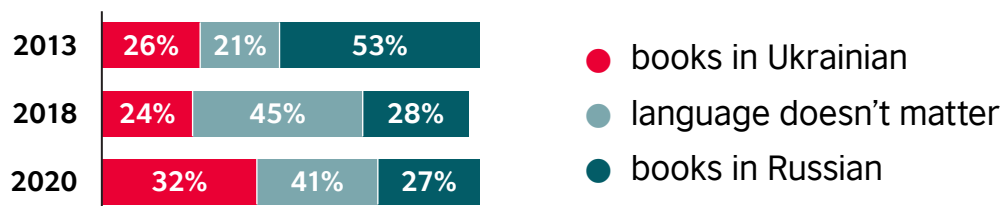
New data published in November 2020 found, for the first time, that **Ukrainian readers stated a preference for books published in Ukrainian (32%)** over Russian (27%) (UBI, 2020).

1 <https://www.kiis.com.ua/?lang=ukr&cat=reports&id=834>

2 <http://data.chytomo.com/en>

3 <https://www.uaregio.org/> Research project on Ukrainian Regionalism, University of San Gallen.

Language of preference for readers in Ukraine.¹ Source: UBI, 2020.



The publishing sector was profoundly impacted by a law signed in December 2016 restricting imports of ‘foreign products with anti-Ukrainian content’, leading to a dramatic drop in the number of books from Russia. The value of books imported from Russia reduced from a value of €3.2 million in 2016 to €1.2 million in 2017 (from a high of almost €18 million in 2013).² At the time the restrictions were introduced, it was estimated that Russian books accounted for 55–60% of sales in the Ukrainian market, with imported sales units in the region of some 100,000 copies per year. Sanctions against nine specific Russian publishers were announced in March 2019, banning imports from those companies completely.³ Bans on Russian online distributors came into force in March 2019, when Ukrainian internet users were blocked from accessing three popular Russian online stores.⁴ Whilst there were protests from some publishers and distributors, and concern from some quarters that local publishers ‘don’t have sufficient resources to replace banned books from Russia’, the move has led to a vast increase in the number of Ukrainian publishers and 2018 saw a record number of titles published in Ukrainian (16,857 copies) and record print runs (38 million copies, including educational

literature financed by the government) (UBI, 2019a). Imports of up to ten books for personal use is still permitted.

Ukraine joined the EU Deep and Comprehensive Free Trade Area (DCFTA) on 1 January 2016, as part of the Association Agreement promoting deeper political ties, stronger economic links and respect for common values. The EU is Ukraine’s largest trading partner, accounting for more than 40% of its trade in 2019. Total trade between EU and Ukraine reached €43.3 billion in 2019.⁵ In May 2017 the EU approved visa-free travel for Ukrainian citizens to the Schengen area.⁶ There is close cooperation with other European countries and institutions, with financial and logistical support provided via publishing initiatives and partnerships (e.g. House of Europe, EUNIC, EU4Business, EBRD).

1 The chart is only showing people who answered this question in a survey.

2 <https://chytomo.com/kryminalne-chtyvo-iak-knyzhkovyj-rynok-vidreahuvav-na-obmezhennia-roslitu> Chytomo. Published 25 June 2019. Retrieved 6 November 2020.

3 <https://www.uawire.org/ukraine-prepares-sanctions-against-russian-publishers> UA Wire. Published 8 May 2018. Retrieved 23 August 2020.

4 <https://www.ewdn.com/2019/03/25/popular-russian-online-stores-and-publishing-houses-banned-from-ukraine> East West Digital News. Published 25 March 2019. Retrieved 23 August 2020.

5 https://ec.europa.eu/trade/policy/countries-and-regions/countries/ukraine/index_en.htm European Commission. Retrieved 23 August 2020.

6 <https://www.schengenvisa.info.com/news/eu-approves-visa-free-travel-ukrainians> Schengen Visa Info. Retrieved 23 August 2020.

Ukraine has two UNESCO Cities of Literature:

Lviv has held the status since 2015; Odesa joined the network in October 2019.¹ Lviv City of Literature² has been active in projects to promote literary translation, such as the Lit Transformer project,³ as well as a programme run in conjunction with Old Lion Publishing House to support the Ukrainian language publishing sector.

The aim of UNESCO's Creative Cities Network is to promote cooperation with other cities in the network and much of Lviv's communication and interaction is with their partners, rather than with other Ukrainian organisations outside the city.

The Trade Market in Ukraine

In 2018, trade publishing amounted to 37% of the market in Ukraine, with the production of approximately 17 million copies (of a total of 47 million copies), and the most popular genres among Ukrainian readers being modern crime fiction, romance, fantasy and classics (UBI, 2019a). Children's publishing remains strong (UBI, 2019b), and there has been an emergence of Ukrainian teen fiction in recent years, with Nash Format, Old Lion Publishing House and Laurus cited as publishers helping to develop the genre (Pavlychko, n.d.). Self-help remains a popular area and there has been an increase in the publication of and interest in domestic Ukrainian non-fiction.⁴ Literary and commercial fiction (classic and contemporary prose) is a focus for many publishers, and widely read (UBI, 2019a). The increasing popularity of authors such as Yuri Andrukhovych, Oksana Zabuzhko, Andrei Kurkov and Serhiy Zhadan has led to declarations of a 'rebirth' of Ukrainian writing (Bohdan, 2020). However, many popular Ukrainian authors with

a significant domestic audience are still untranslated and unavailable internationally.

There is relatively little reliable data available about the trade market and there is more information about readership than retail. The Ukrainian Reading and Publishing Data 2018 report does not give retail figures but reports on buying habits, stating that readers buy their books at local bookstores (25%), markets (20%), large retail networks (17%), supermarkets (12%), bookfairs (12%), and via large online bookstores (10%). Younger respondents are more likely to purchase books in online stores (15% of people aged between 15 and 25), and the least likely to purchase books at markets (13%) (Chytomo, 2018).

There is a market for electronic books, but very few Ukrainians are prepared to pay for content. In the Reading and Publishing Data survey, 21% of respondents said that they download 'free' books.

1 <https://youtu.be/bYU5unvS42c> YouTube. Video presentation Odesa City of Literature UNESCO. Published 5 October 2020. Retrieved 6 November 2020.

2 <https://cityofliterature.lviv.ua/en>

3 <https://en.unesco.org/creative-cities/events/call-applications-international-translation-workshop-littransformer-2020-open>

4 <https://youtu.be/lYvSYRmNDs8> Ukrainian Non-Fiction: Why Is It Interesting? Talk by Volodymyr Yermolenko, Book Arsenal (online festival). YouTube. Published 8 May 2020. Retrieved 16 June 2020.

Publishing initiatives

The Ukrainian publishing sector faces significant challenges. A British Council briefing note (2019), identified lack of centralised sales data, underdeveloped book distribution networks around the country, need of effective copyright regulation, and no tradition of literary agents as key issues.¹

A number of initiatives have taken place in recent years to work on capacity-building in the sector, with a particular focus on skills development. These include:

1. **Booking the Future:**² a series of events aimed at the professional development of publishing industry specialists and at promoting cooperation between the Ukrainian and European publishing sectors, as part of the EU-funded Culture Bridges programme. The BTF initiative was launched at the Book Arsenal festival in May 2018 and was followed by a five-day intensive 'Summer School' workshop³ for 27 Ukrainian publishers.⁴
2. **3x3 Mentoring Programme,**⁵ run by the British Council from July 2017 – March 2018, paired three early-career Ukrainian publishers with mentors at UK publishing houses (PRH, Granta and Profile), as they implemented a specific project. The programme included scoping and networking sessions in Ukraine, shadowing a mentor at their publishing house in the UK, and monthly remote mentoring sessions.
3. **The British Council International Publishing Fellowship programme**⁶ supports early-career publishing professionals in the UK, Georgia, Ukraine and Turkey. Two Ukrainian publishing professionals were paired with counterparts from the UK, and visited their opposite number on a curated study visit, to gain sector insight and forge professional connections. (The UK Fellows were unable to complete their study visits due to Covid-19). At the end of the Fellowship (September 2019 – September 2020), Fellows will be invited to bid for a development fund of up to £1,800 each, to enable them to continue forging international professional links.

1 <https://www.britishcouncil.org.ua/en/programmes/arts/literature/fellowship>
Publishing Sector Brief, British Council Ukraine. Retrieved 16 June 2020.

2 http://culturebridges.eu/booking_the_future_en

3 <http://culturebridges.eu/summer-school/en>

4 <https://artarsenal.in.ua/en/laboratory/proekt/booking-the-future-a-summer-school-for-professionals-in-publishing-sector> Mystetskyi Arsenal. Retrieved 16/06/20.

5 <https://www.britishcouncil.org.ua/en/programmes/arts/literature/3x3publishing>

6 <https://www.britishcouncil.org.ua/en/programmes/arts/literature/fellowship>

Research findings by sector

Publishing

Interviews with publishers covered a wide range of issues, with the political backdrop looming large; respondents talked in terms of publishing being an ideological as well as an economic pursuit, and a vehicle for driving social change. The matter of which language to publish in was recognised as a political decision. For some publishers, language choice drove the publishing agenda:

'We know there is demand for Russian books but because we are at war, we won't publish them. We won't do it on principle.'

'It would be economically viable [to publish in Russian] but I am adherent to very firm principle: only Ukrainian.'

'Thanks to my stance, a lot of children read their first book in Ukrainian.'

Respondents spoke of both a political and commercial imperative to produce work in Ukrainian since the Euromaidan Revolution in 2014, and a renewed interest in and increased demand for books by Ukrainian authors. This resurgence was seen in other fields, such as Ukrainian cinema and music; Ukrainian home-grown cultural products, which had previously been seen as 'folksy' or old-fashioned, were redefined and celebrated.

'The last five years, there is a movement against Russian language. Activists protest against cafés and shops where Russian is spoken by staff. After the Revolution of Dignity (2014), young people turned to the Ukrainian language.'

The more favourable financial and business climate after 2014 encouraged publishing houses to invest in infrastructure and technology to support development.

'After Maidan for two years the mechanism changed, it was really good. Our director bought a new printing machine, we could provide service for some other publishers, and could print our own books.'

'... printing companies are able to buy the best machinery, now we finally have companies that can afford to publish technical books in biology, technology etc... and now finally our editors, translators, can earn money here.'

Issues identified as impediments to growth of the publishing sector included cashflow (with several respondents detailing examples of how retailers were slow to pay) and the high cost of borrowing, which was cited as a major challenge by respondents at small, medium and large businesses.

'It is very hard to borrow, interest rates are very high. It's difficult to get credit, it's difficult for small businesses.'

'In order to produce a book, we need time, perhaps one year or 18 months. We need credit to prepare the book. We can pay for credit but the interest rate is quite high, approximately 16%.'

'Loans are very expensive; publishers cannot afford them. Because sector develops slowly, no investor is willing to invest.'

Whilst there are examples of publishers who have sought investment from business partners to expand (e.g. Old Lion, Vivat), the impression of the sector, particularly at the smaller companies, was that it lacked sufficient resources. Crowd-funding models do exist; Komubook¹ is a Ukrainian platform for crowd-publishing, where backers receive a copy of the book in return for contributing funds for publication.²

The lack of market data was also seen as off-putting for investors more generally:

'The Creative Industries need to be more attractive for investors. Investors want statistics, want to measure the sector.'

There was perceived to be a big demand on junior staff, especially at smaller companies. Three of the respondents interviewed in February had subsequently left the sector, citing burn-out as a major factor in their decision to leave their organisations. Respondents reported that staff were not adequately recompensed for their efforts, whilst issues around low pay echoed those seen in salary surveys in the UK:³

'The editorial work is very demanding and very time-consuming.'

'Low salaries is more the problem. It's a huge problem.'

'Editors are underpaid and overworked. But at least they have relatively safe position. For designers and freelancers it is even worse, they are in precarious positions.'

When asked about gender balance within companies, and the way in which women were viewed within the publishing industry, respondents reported that gender bias was not a problem in Ukraine, although there were certain areas of the business (logistics, distribution) which employed more men than women. Women were perceived to be more dominant in editorial.⁴ Amongst senior staff interviewed, there was a balance of women and men running large companies, and an awareness of the importance of gender parity.

'I'm happy to work in a company where the owner respects all managers regardless of gender.'

'In my company we have parity between women and men.'

'In editorial department it is mostly women, in distribution mostly men, in the warehouse only men.'

1 <https://komubook.com.ua/>

2 <https://voxukraine.org/en/every-little-bit-helps-en> Vox Ukraine. Published 15 May 2017. Retrieved 9 September 2020.

3 <https://www.thebookseller.com/blogs/how-low-pay-and-low-pay-transparency-undermine-publishing-business-1206737> The Bookseller. Published 12 June 2020. Retrieved 23 August 2020.

4 These patterns of gendered employment by type of job are seen throughout publishing industries in different countries (see, for example, Shercliff, 2015:55). Pay disparity between sexes is still a significant problem in the UK and US publishing industries (see <https://www.theguardian.com/books/2018/mar/23/gender-pay-gap-figures-reveal-big-publishings-great-divide>), but this subject was not examined in detail in relation to Ukrainian publishers.

Market data

Many publishers commented that their publishing strategies were not as well-formed as they would like, due to the absence of reliable market data. The lack of statistics was seen as an impediment to developing new publishing programmes, as well as to understanding the true picture of sales and consumer demand. It was also regarded as an obstacle to growing domestic and international sales, making it difficult to state trends in reading habits and patterns of book consumption.

'Most publishers are doing publishing by intuition – no coherent publishing strategy or plan.'

'Our main problem is no statistics. You do everything as you feel, you can't base it on evidence.'

'As a scout I'm trying to find the most relevant books for our readers, but I don't have data. I understand our book industry institutions are quite young, but we don't have a good knowledge base. We don't have good statistics or analysis of what is going on in publishing business in Ukraine. We need to know the state of the market, titles published, information for foreign markets. We need to know of authors who receive awards, who sold rights abroad, how many rights were sold, how many people took part in books fairs, which literature is the most popular.'

Specialist publishers were seen as closer to the market. Interaction with the public at book fairs was seen as particularly important for gathering feedback from readers and consumers.

'Niche publishers have closer connection to readership. Big publishers are not so close, they need data.'

The lack of centralised sales data (and outdated mechanisms for gathering statistics) was seen as a key issue. The Book Chamber was regarded as slow, cumbersome and of little value as statistics did not reflect the reality of the market. Amongst policy-makers, there was a lack of confidence in being able to project Ukraine internationally, or put themselves forward for initiatives such as Guest of Honour status at international book fairs, without a firmer knowledge of the market.

'There is no central data that is reliable. The Bureau of Statistics works in all sectors but these are not good statistics, they also include books for students, catalogues and other things. They are useless, a waste of time, waste of money.'

'Book Chamber data is quite slow information. Publishers give data once a year; the market is much quicker.'

There is no central means of gathering information from retail environments, so the Book Chamber is dependent upon publishers submitting data manually to them. Many sales are still cash sales, for example at markets, and there is no centralised mechanism for reporting data (such as Nielsen Bookscan data). When asked why the data was so unreliable, two reasons were given:

- a reluctance amongst publishers to share sales data, for reasons of commercial sensitivity and/or tax avoidance
- a feeling that even if data were given, the data produced by the Book Chamber would still be inaccurate as their reporting mechanisms were so outdated.

'Publishers don't want to share information about the source of sales. They are not prepared to be open, they need to be convinced, to feel safe. And there are tax implications.'

'If the tax system worked well and efficiently, I would be free to provide them all the statistics they need. But this is a problem for all Ukrainian business, not just publishing.'

'Publishers don't want to share information about source of sales. There is fear from previous generations, they are not prepared to be open. It relates to the economy and politics, it's cultural politics. They need to be convinced and to feel safe. And of course there are tax implications.'

Respondents reported that there had been steps in recent years to counter this, with some preliminary quantitative research on the books market and readership habits taking place, particularly by the statistical department at UBI:

'UBI analytical department produce good statistics. Such data is the very thing we are lacking to navigate the consumer demand to market.'

And whilst the reliability of the UBI reports was recognised, respondents observed that these statistics were better than nothing:

'I am not familiar with methodology, but if you compare this report with an absence of report, I would prefer the report, whether it's faulty or not.'
'Only UBI is trying to fill this gap.'

One of the reasons UK experts were invited to the Booking the Future forum was 'to explain why it is important to share data, how this can help the sector.' But, despite these efforts, the sector appears no further forward in tracking data in a retail environment or sharing existing information.

In Ukraine, access to sales data is seen as a commercial advantage. A growing number of publishers have their own bookshops or retail chains, and this sales data can be used by the publishing divisions to inform commissioning and acquisition decisions.

'We have more than 10,000 titles in Ukrainian and Russian. They [the publishers within the Group] can use this to check sales histories before commissioning or signing new titles.'

This unwillingness to share data was seen as indicative of a wider issue of a lack of trust across the sector. When asked about relations between publishers, respondents were unanimous that this was not a strength of the sector:

'It is a pity to say but we are more competitive. In Ukraine we do not have strong publisher community. They put business interests in the first place.'
'Relations between publishers are closed.'
'Relations between publishers are rather superficial, we say hello at receptions.'
'We need more trust. Ukrainian publishers don't trust each other, or institutions.'

Some publishers within Kharkiv had warmer relations with one another, and one respondent reported that there is 'a big and close community of publishers of fantasy fiction', but overall there was no tradition of sharing best practice or providing informal support.

Editorial

With so much of the Ukrainian trade market comprised of translated or imported (whether legally or otherwise) books, editorial skills in both fiction and non-fiction were deemed to be lacking. The dearth of editorial expertise can result in difficulties developing authors, or ensuring work is of high quality:

'We don't have special editors, who work with plot. A novel or short story collection can be weak, but it will be published anyway.'

The high proportion of translated titles means that non-fiction or self-help books are not always relevant, as they are not written for a Ukrainian audience.

'There are not many examples of Ukrainian non-fiction; I would say 80% of it is imported. We don't have writers of self-help and so on here. It's all imported, and the context is different.'

However, the desire for Ukrainian titles focusing on local success stories or experiences is such that when local examples are produced, they can be very lucrative (e.g. BookChef's 'super-bestseller' *Big Money*, in which famous Ukrainian businesspeople share their experience).

Despite the efforts of Ukrainian-language publishers such as Old Lion and A-BA-BA-HA-LA-MA-HA, the children's sections in bookshops are dominated by translations of international best-sellers such as *Harry Potter*, *Diary of a Wimpy Kid* and titles by David Walliams. This leads to a particular problem with Ukrainian children's literature, the dearth of which was lamented by several respondents, who voiced concern that 'children are not learning about their own history and culture.'

As well as editing skills, several of the more established and larger companies expressed a need for more training in editorial management and publishing processes:

'We would be grateful for advice on how to organise the process of publishing. On how to manage the process from buying rights to hard copy. Time management, process flow, how much time to allow for translation, how much for printing, how much time should be spent on each part of the publishing process.'

Design and production

The quality of design and production of many of the titles on display in bookstores was extremely high.

Ukrainian books are increasingly noted for their design, and an annual Best Book Design Contest¹ held at Book Arsenal has raised the profile of this discipline within the sector. Held in conjunction with the Goethe-Institut and NGO Chytomo, each year the publications included in the shortlist of the contest are presented within the collection 'The Most Beautiful Books of the World' at the Frankfurt and Leipzig Book Fairs. Examples of high-quality innovative design include books published by Osnovy Publishing, Agrafta Art Studio, Old Lion Publishing House and Red Zet. The high quality of Ukrainian illustration is widely recognised, with Agrafta Art Studio a particularly successful story, having won multiple design prizes at the Bologna Children's Book Fair.²

Efforts by UBI to promote the work of Ukrainian illustrators internationally, including at Frankfurt Book Fair via the production of a bespoke illustration catalogue,³ has led to an increasing number of foreign publishers using Ukrainian illustrators.

'Lots of illustrators are working for publishers abroad, it is raising level of pay, working for foreign publishers. It is still cheap for European publishers.'

However, as noted above, some respondents warned of the precarious financial position of freelance designers, a problem which will be amplified by financial difficulties arising from the Covid-19 pandemic.

1 <https://artarsenal.in.ua/en/book-arsenal/>

2 <https://www.kyivpost.com/lifestyle/ukrainian-illustrators-seen-among-worlds-best.html> Kyiv Post. Published 14 February 2018. Retrieved 14 June 2020.

3 https://issuu.com/bookinstitute.ua/docs/catalog_eng_small_ok

Digital technology is being embraced by children's publishers to develop new audiences. A-BA-BA-HA-LA-MA-HA has earned a reputation for beautiful illustration and high-quality design and production at home and abroad, and is one of the few Ukrainian publishing companies to successfully sell foreign rights. A new animated version of Vladyslav Yerko's award-winning illustrated version¹ of Hans Christian Andersen's *The Snow Queen* has been developed for i-Pad.

Art Nation's digitally enhanced version of *Alice's Adventures in Wonderland* is an excellent example of how Ukrainian publishers are using augmented reality technology to breathe new life into classic works, and appeal to a new generation of readers. Creative marketing and partnerships with established publisher Ranok and supermarket chain Auchan resulted in sales of over 300,000 units as a first print run.

Printing

There are several high-quality printers based in Ukraine, primarily in Kyiv and Kharkiv. One of the largest facilities, Unisoft, offers cutting-edge technology, with new printers and binders being purchased in recent months and the capacity to produce up to 1 million books in hardcover and 1.5 million books in softcover per month. This investment in new technology by Ukrainian printing companies has had a positive, knock-on effect on the industry. The domestic market has grown rapidly over the past decade, and all the publishers interviewed now printed their books in Ukraine.

'It was 10–15 years ago, printing started in Ukraine. For past couple of years we have now printed in Ukraine.'

Printing patterns are changing, however. Unisoft² estimated that publishers' average print run five years ago was 5,000–6,000 units. By 2019 it had decreased to around 3,500. And by February 2020, it was around 700–800 units. Publishers are moving to shorter selling cycles, saving on warehousing costs (some bypass warehouse facilities altogether and printers deliver books directly to retail outlets or offices). Previously, the time for selling a book was around one year, now it is three to six months. However, the number of titles printed at Unisoft's facility has increased from approximately 300 titles per month five years ago to around 600–700 titles per month in early 2020. This finding may be partly as a response to the cashflow difficulties cited by many publishers; shorter print runs mean the publisher has more money for new titles.

There is awareness of environmental concerns amongst Ukrainian publishers, particularly within production and printing departments. Ranok, for example, has made great strides to become an environmentally-friendly company, introducing digital workflows, creating electronic products and using recycled paper for printing.

E-books and audio books

Interview respondents echoed the findings of the Ukrainian Reading and Publishing survey (Chytomo, 2018) which reported that the vast majority of respondents who read electronic books (92%) download those for free. Only 8% make one-time purchases on specialised websites and 3% use an online subscription. Electronic piracy was viewed by respondents as a major obstacle to development of this sector, and it was not deemed a priority. Most publishers estimated their e-book revenue to be between 1–3% of turnover.

'There is no market for legal e-books.'

'We are just starting to work with e-books, but there are no safe spaces to sell them. There's a huge level of piracy.'

1 http://ababahalamaha.com.ua/en/The_Snow_Queen

2 Cited by name with permission.

'People are not ready to pay for electronic titles.'

'Audio books, there is a lack of places to sell them.'

'We publish and sell e-books and people do buy a little, but we don't make much money.'

'Music, books, film – they are free to use, Ukrainians have bad habit to find and download it for free, no matter which format.'

'Counterfeit pirated books are biggest problem, a significantly bigger problem than e-book piracy. E-books are very small share, less than 1% of a publisher's revenue.'

This last comment encapsulates the cyclical nature of the problem. The e-book sector is not being developed because of the fear of piracy; e-book piracy is therefore not seen by publishers as a major problem because the percentage of e-book sales lost to piracy is small as a percentage of total revenue. However, in other major world markets, e-books and audio are now the fastest growing sectors of the market. Ukraine is missing out on potential new revenue streams by suppressing the development of the sector, particularly as the ease of e-book and audio book delivery makes these formats an attractive proposition for a market which has significant difficulties in distributing physical book products to non-metropolitan areas.

There is a very slow take-up of e-reading devices, with only 7% of respondents to the Chytomo 2018 survey having access to an e-reader (70% had a smartphone). Electronic publishing is an area where the lack of statistics makes analysing the market very difficult. When asked why more people don't buy e-books, one respondent answered:

'We don't know. Maybe people don't buy e-readers. They are in stores but people prefer to read on cell phones perhaps.'

Other reasons cited why Ukrainians might be reluctant to embrace e-books included a high regard for design of printed copies, and a sentimental attachment to the hard-copy book:

'The book is something to love, care about, it is representative of culture. It is important as something physical.'

'Our people love hardbacks. It's a Soviet mentality; it's like a status item.'

Sales and marketing

There are no official statistics on retail book sales in Ukraine (Afonin, 2012), which makes analysing sales and trends extremely difficult. The publicly available sales statistics are highly unreliable, and there is an over-dependence on print runs rather than sales figures in official metrics, which may mean stated figures for certain titles are over-inflated. Just as 'buying a book does not mean reading it' (Pavlychko, n.d.), so printing a book does not mean selling it. However, it is also widely assumed that many publishers under-report their sales figures for reasons of tax avoidance, so the true picture of the market is extremely difficult to gauge.

Amongst respondents interviewed in February–March 2020, first print runs were estimated to be between 1,000–3,000 units, with 2,500 deemed by several respondents to be their break-even point. Several publishers reported selling initial print runs of 1,000–2,000 books, with small reprints 200–300 thereafter. Print on demand has become an important factor in the retail sector. Unisoft reported that average print runs stood at between 800–900 units in February 2020; publishers interviewed in July–August 2020 reported a significant reduction in print runs, with some respondents reporting the need to reduce some first print runs to as low as 500 copies.

Many publishers produce attractive and informative catalogues, listing details of forthcoming publications and books in stock. Several publishers have a good presence on Instagram; some newer publishers are very active. Osnovy have 17,000 followers on Instagram, ArtBooks have 28,500, A-BA-BA-HA-LA-MA-HA 40,000, Old Lion 60,000, and Ranok over 74,000. Bookstore chains and online retailers also have a strong social media presence, with Yakaboo having over 120,000 followers, and Knyharnia Ye (Kyiv) amassing 70,500.

'Public awareness is increasing. Younger publishers grew up in digital era, they are also very participative. They do publishing-on-demand. Crowd-funded publishers do exist, this generates loyalty and readership.'

There was some concern amongst respondents that authors were not as engaged in book promotion as they could or should be (*'Authors think "I made my book, now I sit back and wait for money"'*), but interviewees also gave counter-examples of authors who embrace this aspect of the process and engage enthusiastically with promotional activities. Max Kidruk was cited as an author who is an effective self-publicist, setting aside time to tour his books within Ukraine, selling 20,000 copies or so of each title.

No publisher cited sales as an area where training was needed, but 16% of publishers interviewed said they lacked expertise in marketing. Several publishers asked for help with book promotion.

'[Publishers] know how to create book, edit book, but not how to market it properly.'

Training

When asked what training staff were already given, many gave examples of in-house (on the job) training and external courses that employees had attended.

'We attend different fairs and seminars. We use coaches – in financial, sales and editorial departments.'

Professional development was seen by all respondents as a priority, both for 'up-skilling' staff, making businesses more efficient, and for staff morale.

'We want to improve, make staff more qualified and more happy. We would like each member of staff to be proud of their job.'

Training was an area in which the British Council was regarded as having done important work, and could help in the future. For the market leaders, the reported need for professional development was just as strong as at smaller companies, albeit with different needs being named as priorities. Skills gaps for smaller publishers were identified as marketing, editorial and rights, whereas for larger houses editorial management and strategy planning were seen as greater priorities. When the larger companies that seemed to be doing well were pushed on why they needed this support, responses included that, as market leaders, they needed to look overseas to learn new techniques and processes.

'The sales/financial sector is easier for us – a lot of people can train. We are faced with the problem of editorial because we are one of the biggest publishers in Ukraine so that's why it would be useful for us to learn from international experience.'

'We are highly interested in your experience and that of other houses in UK.'

'We are advanced compared to others but we need information about grants, for example. I never heard about translation grants. We need to know about such projects. And we need to know more about organisation of publishing process, on this we need training.'

'We have our own methods, but we know that here are different types that are more effective. We know your country is more developed than ours. We would like to understand each stage of the process.'

The biggest skills gap identified by respondents was in the area of rights, discussed in further detail below. See page 51 for the full list of identified skill gaps.

Most respondents knew of British Council professional development initiatives such as Booking the Future, but the programme wasn't seen as right for all publishers:

'We know [of] it. But our problems are bigger, a different range of problems.'

There are academic paths to becoming a publisher. The Academy of Printing in Lviv and Kyiv Polytechnic both have departments to train book editors. But in 2017 the Ministry reformed the university syllabus so that publishing (now excluded from the list of 'official occupations') is no longer a standalone subject,

but has to be studied under the umbrella of journalism or polygraphics. Taras Shevchenko University has a Department of Publishing and Editing¹ within its Institute of Journalism.

However, there is no central training body, nor any strong tradition of engaging industry professionals to offer peer support or mentoring with other professionals across the industry. Some companies do take on interns however; in Lviv, several publishing houses mentioned that they offered internships to students from the Academy of Printing. This was seen by academics as very important, with the best publishers identified as those with whom 'we are having constant dialogue, they are in connection, it's not some sort of secret.' This idea of professional development linking with academic study was identified as crucial by several respondents, for both academics and practising publishers:

'Every time I do work as a publishing freelancer, I feel the pulse of the industry. It's impossible to be a tutor when you have only theoretical knowledge; you need practice and experience.'

'A few years ago, one literary school had lectures for Ukrainian publishers. The lectures were successful, for new publishers. We shared our experiences, our thoughts about the market, how to do the first steps, it was useful for them – we need more of this.'

1 <http://labs.journ.univ.kiev.ua/vsr/>

Bookselling and distribution

Since 1991, when there were 3,600 book retail outlets across Ukraine, there has been an almost total collapse of the old retail structures. One consequence of this rapid change in infrastructure is that small towns and cities are not well served by the current book distribution model. Several respondents estimated that there are now only approximately 300 bookshops for the whole country.

'After USSR, bookstores went down, warehouses also closed. As far as Ukraine is a very big country . . . in big cities we have bookstores, we are working quite closely. But small cities of 30,000 inhabitants, they have no bookstores. In these cities, people tend not to read online either, they want real books in their hands.'

Books in Ukraine are sold via open air book markets, chain bookstores, independent bookshops and supermarkets. In addition, books are sold directly to the public by publishing houses in the form of book club sales via catalogues (e.g. KSD), at book fairs and through publishers' websites. The main chain selling books in Ukrainian are KSD (50 stores) and Knyharnia Ye (30 stores); KM Books (30 stores) sell books in Ukrainian, Russian and English. Many publishers reported serious issues with extracting payments from book chains as books are sold on a consignment basis and outlets can take many months to pay. ('They don't give money when books are delivered'). Similar problems arose at supermarkets ('We have big problem, cashflow issue. We can't predict when money will come').

Faced with this lack of reach outside the main population centres and significant obstacles dealing with the main bookshop chains, many publishers have opened their own stores. Folio, Vivat, KSD, Old Lion and Bohdan have their own bookshops. Some stores (Vivat, Bohdan, KSD) stock books from other publishing houses as well as their own titles. For example, KSD stock approximately 80% of their own titles,

and 20% of titles from other publishers. Folio has two branches, in Kharkiv and Lviv, alongside 600 partners who distribute their books (retailers and wholesalers). They plan to open five more stores, including in Kyiv and Odesa. KSD had 63 bookstores across the country, in many towns, but closed some bookshops in 2019 as readership declined. Several other factors have led to a significant deterioration in the retail environment. The conflict in Donbas has had a serious effect on some publishers. KSD had almost 35 bookshops and a large number of book club members in Donetsk and Lugansk, business which disappeared almost overnight in 2014, compounding financial losses already suffered in Crimea.

As mentioned above, publishers with a retail arm consider the sales data gathered from the bookshops as a competitive advantage.

'We must do it ourselves in small towns, small villages, to sell books. We sell other publishers' books as well. We see the sales numbers from stores. But we have not information or statistics across the whole of Ukraine. It's not like Nielsen, we have no national data. We need this. The government statistics are not representative.'

However, this direct selling model does not aid the development of the independent bookselling sector.

'Publishing houses sell their books directly. They are opening their own bookshops and making direct sales. So it's difficult for an independent bookshop to be commercially successful.'

Ukraine's largest online retailer, Yakaboo, began selling books in 2009 and now has a range of more than 300,000 titles in 71 languages in print, e-book and audio formats. It has a strong reputation for customer service and offers same-day delivery in Kyiv. It has a customer base of 2.5 million customers and employs over 200 people.¹ Other online retailers include www.bukva.ua and www.book24.ua (founded 2015). Following in the footsteps of online retailers such as Amazon, Yakaboo launched a publishing arm in 2016, specialising in translated non-fiction literature. The KM retail chain also has a publishing office.

Consumer buying patterns are changing, with many customers now preferring to buy online. This has a detrimental effect on sales in retail stores and at book fairs:

'Publishers need to understand the behaviour of the public is changing. We are now in a situation where people are buying via the internet. They come [to Book Fairs], speak to publishers but don't want to carry things, that's not their reason for being here. Eight to ten years ago, there were no shops, no internet, people came with trolleys. Now publishers need to think of the fairs as a form of promotion, like Facebook.'

'In the past two years Yakaboo appeared so people sit in their houses, get books delivered to doors, [they] don't want to buy in bookshops or at Forums or Fairs.'

There is no system of unified price in Ukraine. Respondents estimated that the average book retails for approximately 200–300 UAH (€6–9), but there can be a large discrepancy between retailers, with some respondents referring to 'discount wars' as a significant problem for the industry.

'It is unfair competition. Knyharnia Ye and Yakaboo have a pricing war between them. We have no net book agreement, it's a real problem.'

However, other respondents complained that books were too expensive and that book prices in shops are inflated:

'In Ukraine, if a book is published, it costs \$4, but is sold at \$10 at a shop, or even higher.'

'The problem here is that the price is inflated so it is very expensive for consumer.'

When challenged on this apparent contradiction, one respondent observed that *'the consequences are the same; the publisher cannot get their money back.'*

The poor retail and distribution infrastructure was named as the single biggest challenge facing publishers (14% of respondents). There were calls for government intervention to prop up the physical bookselling sector, particularly in the light of the coronavirus pandemic. Suggestions included the government establishing a chain of bookshops, providing help with rental of retail premises (citing France as an example) and implementing a net book agreement. Whilst others considered these suggestions to be outside the government's domain, the scale of the problem, and threat to the publishing sector, was clear:

'We have a situation, the market is not organised at all. There are problems of rent, some bookshops close. There is no VAT on books, that's the only one advantage.'

'Our government has to think about our economy, take care of bookshops. Bookshops won't survive otherwise.'

1 <https://www.yakaboo.ua/> Retrieved 4 February 2020.

Rights

Ukrainian publishers are familiar with the process of buying translation rights, with up to 80% of the market comprised of translated fiction and non-fiction bought from foreign publishers, particularly from the UK, USA, France and Germany. However, it is only since 2014 that there has been an interest in selling rights, not least because the resurgence of Ukrainian-authored titles gives publishers product to offer.

However, the research found that there is still a lack of expertise in how publishers should present themselves and their products internationally, and a lack of awareness among many Ukrainian publishers of the potential of rights sales.

Buying rights

'Before the Revolution of Dignity and Russian aggression, the market was full of Russian books, perhaps 80–90% of books were from Russian Federation. Many publishers didn't believe in Ukrainian language. So the Ukrainian market was empty. We could acquire. 85% of the books I wanted, I bought.'

All the publishers interviewed had acquired foreign rights from US or European publishing companies. Popular authors include Steven King, Roald Dahl, J.K. Rowling and Jeff Kinney. Many publishers use awards (e.g. Booker, Pulitzer, Goncourt Prizes) as a guide when choosing what to acquire.¹

Several respondents voiced concern that UK or US publishers sometimes sold Ukrainian rights to Russian publishers, which were then left unexploited by those Russian publishers, forcing Ukrainian readers to buy the Russian translation of the book, if available in Ukraine, or to not have access to it at all. It was suggested that there was not enough awareness amongst UK/European publishers that Russian and Ukrainian rights are not the same thing.

'They [Russian publishing houses] are buying Ukrainian rights, but they won't exploit it. They are killing the development for the sphere of Ukrainian development of culture.'

Selling rights

Several of the publishers interviewed had attended Frankfurt, London or Bologna Book Fairs, either individually or as part of the collective Ukraine stand. Countries to which rights have been sold included the UK, US, France, Germany, Italy, Spain, Poland, Bulgaria, Croatia, Czech Republic, Moldova, Lithuania, Romania, China, Korea and Japan. Children's publishers were the most experienced and had had the biggest degree of success in selling translation rights.

'We sell rights but for now only children. Because there are a lot of illustrations it is easy to understand concept of book. It is difficult to sell YA or non-fiction; Ukraine is not popular as a setting.'

¹ https://texty.org.ua/articles/88096/Bum_perekladiv_Z_2015_roku_kilkist_vydanyh-88096/

'The Translation Boom: Since 2015, the number of world bestsellers published in Ukrainian has dramatically increased'. Article on Texty.org.ua. Published 20 September 2018. Retrieved 30 June 2020.

Old Lion were consistently cited by others as a publisher who had expertise in this area and ‘has good results selling.’ However, many publishers interviewed said that they lacked experience and knowledge about how to sell rights and 25% said that this was the biggest skills gap in their companies.

*‘Almost no one knows how to sell rights.’
‘Publishers don’t have enough knowledge of international markets, what overseas publishers are interested in.’*

Skills gaps included ‘quite obvious things’, including ‘standards of communication, how to negotiate, how to behave at meetings, self-presentation, expectations of the market.’ Given how common it is for Ukrainian publishers to acquire rights, it is perhaps surprising that there has not hitherto been more appetite for selling rights.

‘Publishers are not often seeing selling rights as a profitable project. They don’t acquire rights when they acquire manuscripts.’

Several respondents identified lack of awareness of Ukraine and Ukrainian writers as an obstacle to selling rights abroad, particularly for adult fiction and non-fiction. This tallied with data gathered when interviewing UK publishers. Very few UK respondents could name any Ukrainian authors. Those who were named (and only by publishers who had been to Ukraine) included Andrei Kurkov, Serhiy Zhadan and Yuri Andrukhovych. Serhii Ploky has a degree of name recognition since winning the Baillie Gifford Prize for Non-Fiction in 2018 for *Chernobyl: History of a Tragedy*, but he writes in English and is based at Harvard. No one

interviewed could name a female Ukrainian writer. Oksana Zabuzhko is not at all known, despite her status as a leading public intellectual in Ukraine. (She is perhaps better known in the US). One publisher at a major UK house said of the titles they acquired in translation:

‘Very few from Russian, none from Ukraine. It comes down to editors’ particular experiences – or how many languages editors speak. It’s more difficult to take a chance on something if you’re reliant on reader’s reports.’

Translation

Since 2016, there has been an increasing amount of government support for translation, largely implemented through the UBI, but also via projects at the Ukrainian Cultural Foundation.¹ Translation initiatives have been funded in association with European organisations such as Creative Europe (grants of up to €100,000)² and House of Europe (grants of up to €25,000).³ In April 2020, UBI announced a Translate Ukraine programme,⁴ offering grants of up to €4000 to publishers and translators. This was welcomed by respondents as a long overdue move:

‘It has taken more than 20 years to give grants to people who want to translate into their language. It is only now that things are moving in that direction, with UBI.’

- ¹ <https://export.chytomo.com/en/state-grant-programs-to-support-literature-publishing-from-ukrainian-cultural-foundation> Chytomo. Published 4 June 2020. Retrieved 30 June 2020.
- ² https://eacea.ec.europa.eu/creative-europe/actions/culture/creative-europe-culture-literary-translation_en European Commission. Retrieved 30 June 2020.
- ³ <https://houseofeurope.org.ua/en> House of Europe. Retrieved 30 June 2020.
- ⁴ <https://youtu.be/9D1vL2niwDc> YouTube. Translate Ukraine: New Grant Program of the Ukrainian Book Institute. Published 30 May 2020. Retrieved 30 June 2020.

The UBI catalogue was considered to be very helpful for showcasing work, as was their support for publishers to attend international book fairs and make presentations and contacts.

However, the lack of skilled translators into and from Ukrainian remains a big problem for Ukrainian publishers.

'There are next to zero translators from Ukrainian into other languages, even in the Diaspora.'

'It is easier to translate children's books – it's so difficult to find people who can translate.'

'We do not have translators, for example, from Ukrainian into Hungarian.'

'There are not enough specialists for translation or editing. There are trained people for translation but at some stage of development we lost the craft of translation. There are not specialist translators for military or philosophy works. Some terms are not well established, not common term for specific words, the language is not developed enough. Some famous books – Jung, Nietzsche – are still not translated.'

Many respondents said that the quality of translations was not always good, which in turn led to readers being reluctant to read in Ukrainian. Several specific recent high-profile titles were cited as being badly translated, with consumers preferring to buy the Russian version.

Agents

The concept of literary agents is still nascent in Ukraine (*'Mostly publishers here deal directly with authors'*), although some individual authors are represented by publishing companies based outside Ukraine (e.g. Suhrkamp, a German publisher, sells foreign rights for Yuri Andrukhovych and Serhiy Zhadan). A new literary agency actively recruiting authors (Ovo Agency), was established in 2019 *'to promote modern Ukrainian literature in Ukraine and the world.'*¹

A British Council briefing note (2019), outlined significant challenges facing the Ukrainian publishing sector, including *'no tradition of literary agents (whose functions are usually taken over by publishers).'*² However, the absence of literary agents is not necessarily a problem in a market where Ukrainian trade publishers are *'typically independent, medium-sized (15–50 employees) or small (5–10)'*, and there may not be enough revenue in the market to support an extra cog in the wheel. There is a danger in assuming that Ukraine should aspire to the agency model in the UK and US; strong in-house rights departments can provide an important stream of revenue for independent publishers, even keeping publishing houses afloat in difficult years (Charkin, 2020).

Respondents were asked whether the Ukrainian market needed agents:

'Yes, to find new writers for publishers, there are lots of young people trying to write. And also to promote Ukrainian writers around the world. Really famous Ukrainian authors are not known.'

'Agencies are really helpful, trying to present Ukrainian writers around the world, telling publishers this is suitable for your house.'

1 <https://litagencyovo.com/>. OVO Literary Agency. Retrieved 15 July 2020.

2 <https://www.britishcouncil.org.ua/en/programmes/arts/literature/fellowship> Publishing Sector Brief, British Council Ukraine. Retrieved 2 February 2020.

'Sometimes we have big problems. The authors are signing agreements, they are not looking properly, they give foreign rights to publishers.'

Some writers retain their own rights and try to sell. But, as one respondent stated: *'For a writer, it is hard to present your own rights. They are asked, "Who are you, why don't you have an agent?"'*

Several respondents remain sceptical of the role of agents.

'Some publishers are not ready to work with agents.'
'There is one agency, they are trying to do something but do not have good expertise.'

A US-based Ukrainian literary translation agency, TAULT (The Tompkins Agency for Ukrainian Literature in Translation), operates as an intermediary between Ukrainian publishers/agents and publishers, also acting as a literary agent, although this is not their main focus of activity. There may be opportunities for publishers and agents to form relationships with sub-agents in individual territories (UK, France, Germany) to promote the best of Ukrainian writing to those markets.

One way an agent can be of value is in ensuring that author-publisher contracts are robust. There is no existing template in Ukrainian law for a publishing contract, and multiple respondents reported that author-publisher contracts are incomprehensive or incomplete. It is important that Ukrainian publishers are aware of the possibilities of income via rights sales, and that they ask to acquire rights when negotiating the initial author contract. Equally, authors need to be aware of the rights that they are signing over to publishing companies; several respondents noted that it is unfair to authors to include translation or screen rights in a book contract if publishers are not exploiting the rights that they've acquired.¹

1 An area not explored in any depth in this report, and a potentially interesting future research project, is authors' experience of the publishing process (as well as their view of agents). Anecdotally, several authors reported in conversation that they were concerned about a lack of contracts, poor editorial work and an absence of regular sales/royalty reporting.

Restrictions on Russian imports

The prohibition of ‘anti-Ukrainian’ content and the embargo on importing books from specific Russian publishers has had a profound effect on the Ukrainian market since 2017. When the legislation was first announced, opposition from publishers and booksellers was widely reported,¹ with fears of piracy being amongst the greatest concerns.² However, others noted the chances for the flourishing of domestic book publishing.³ Respondents were asked about the changes they had seen since the restrictions were imposed in 2017.

Since the ban, do you see change?

‘Yes, of course. It was well enforced. Before the ban, about 20% of books were Ukrainian, after the ban there was more space for Ukrainian books so we produced them. We bought foreign rights from abroad and started to publish books in different topics.’

‘The reader might not yet feel the influence of this law but the sector definitely did.’

‘Until 2014, the immense presence of Russian books was killing our own market. After the war, the former leadership banned import of Russian books, then there was a renaissance of Ukrainian books.’

This increased ‘space’ for Ukrainian content helped to stimulate new sectors of the market. Graphic novels were cited by several respondents as a sphere that had particularly benefitted:

‘Pre 2017 there were no graphic novels. From 2014–2015 we had Maus, Watchman, Persepolis but all in Russian. Then there was the ban and so no Russian comics. Suddenly Ukrainian comic shops start coming up, all of a sudden. They have a mission. Culturally, this is very important.’

Respondents were generally of the opinion that the ban had been well enforced for the first 12–18 months, but was now regarded as less effective:

‘But it’s not an actual ban, it’s a procedure of giving a special licence and approval. It worked from 2017 to the end of 2019. From this year [2020], the procedure transferred from one state body to another, and that Minister didn’t start the process. Russian distributors can import books with licences from previous years. Something happened, the Ministry of Culture and Information Policy doesn’t have the resources to give those licences. And we can see original new books from Russia, using black schemes – they’re contraband. But it’s not such a big problem as those books are very expensive. The main problem is counterfeit books produced in Ukraine.’

‘Yes, for one year, Russian publishers don’t see how to access Ukrainian market. There were possibilities for Ukrainian publishers to grow. But now, there are no borders on the internet, so I have no answers.’

‘The ban is slipping a bit but it is still really important.’

‘Step by step, the market begins to be Russian again. A lot of books from Russia came here again. Yakaboo and bookstores do licence and buy Russian books.’

The restrictions have also led to an increase in piracy, as discussed below.

- 1 <https://www.theguardian.com/books/2017/feb/14/ukraine-publishers-speak-out-against-ban-on-russian-books>
The Guardian. Published 14 February 2017. Retrieved 2 February 2020.
- 2 <https://publishingperspectives.com/2017/02/ukraine-ban-book-imports-from-russia>
Publishing Perspectives. Published 10 February 2017. Retrieved 2 February 2020.
- 3 <https://chytomo.com/kryminalne-chtyvo-iak-knyzhkovyj-rynok-vidreahuvav-na-obmezhennia-roslitu/>
Chytomo. Published 25 June 2019. Retrieved 6 November 2020.

Copyright infringement

Piracy and copyright infringement was named as the most serious factor facing the industry by 8% of respondents, alongside 9% who stated 'threat from Russian publishers' as their biggest challenge, and the two issues are closely aligned.

There are two types of copyright infringement in Ukraine:

- pirated books, printed inside or outside Ukraine
- contraband titles, i.e. books which are illegally imported into Ukraine and sold covertly.

There was a clear acknowledgement amongst all respondents that the problem of piracy had increased significantly since 2017.

'Since 2017 there has been a growing problem of piracy. The black market is growing; books are printed here without paying royalties.'

'We publish big names in Ukrainian. Then we see the black market print runs in Russian of same authors. We would like to buy Russian language rights for Ukrainian territory.'

'A printing house printed our books and then printed more without our permission.'

The scale of the problem is enormous, although estimates as to the market value lost to piracy varied wildly (another problem of the lack of statistics):

'Biggest problem in market is piracy. Up to half the market is black; certainly not less than 30%.'

'The black market is approximately the same value as the normal market.'

'I would say 30% of sales are lost to piracy.'

When asked what could be done to halt the piracy, respondents made clear that the problem is not regulation, but lack of enforcement. There is no fear of reprisals or penalties for those that break the law. The government was criticised by many respondents for the lack of efforts made to enforce anti-piracy legislation.

'The government should enforce our state institutions to fight book distributors of counterfeit books.'

'This is not a problem that just one publisher can solve. . . . The government doesn't help solve this problem. The black market is worth a lot of money, it's a big corruption problem.'

'We have no clear copyright law that can protect publishers. It exists but the implementation of the law is awful.'

One respondent suggested that individual publishers should do more:

'Publishing houses will protect markets from piracy themselves. They seek out pirate copies themselves. This will help the fight much better.'

However, piracy was seen as a particularly difficult problem for small publishers to tackle without support ('We are very small to have a lawyer'), and respondents were agreed that industry collaboration was the best way forward:

'For piracy we have to have agreement inside company to have collaboration between publishers and work together.'

The consequences of this widespread copyright infringement on the Ukrainian publishing sector as a whole is clear:

'We Ukrainian publishers do not have enough reasons to develop Ukrainian translators or editorial teams. We can buy Russian titles for less.'

'Some Ukrainian books are twice the price of the Russian imported book. Ukrainian books are losing out to Russian reprinted or pirate books.'

Some respondents suggested that lowering the prices of books could lead to a decrease in piracy (see also the Focus Group Discussion).

'At Book Fairs, especially in the regions, we can see people with our counterfeit titles, the prices is 2–3 times less than original. But they are very low quality. And the translator, author, publisher gets no royalty.'

Several respondents stated that more needed to be done to make the public aware of the consequences of buying pirated books.

'People have to understand what they do – they are stealing money from publisher and authors.'

'People don't understand they buy pirated books.'

There are some companies legally importing Russian books (there is no restriction on importing up to ten copies of a title). In cities such as Kharkiv the majority of inhabitants speak and read Russian as a first language. Some respondents regarded it as a 'human right' that citizens had a choice in which language to read, and felt Ukrainian publishers were trying to suppress 'commercial competition'.

'So people who don't read Ukrainian will try to get Russian books. If you are not giving them books in Russian they won't buy, they won't read.'

'It should be my choice what language I read it; it's a human right.'

'Ukrainian publishers don't want the books imported from Russia because they publish it in Ukrainian.'

Allied to the problem of copyright infringement is the perceived 'threat from Russian publishers'. Respondents identified two different challenges which suppressed Ukrainian language titles and made it difficult for Ukrainian publishers to thrive:

- Literature in Russia published in Russian and illegally imported into Ukraine
- Literature in Russian published in Ukraine.

Respondents acknowledged that Ukrainian publishers generally found it difficult to compete with the might of well-financed Russian companies. Since 2019, some Russian publishing houses (such as Alpina) have set up 'daughter' companies within Ukraine, to sell Russian and Ukrainian titles.

'Our biggest challenge is that Russian printing houses are entering the market. Since 2016 they had to have certificates for Russian books to come to market. But there is a change in cultural strategy and now Russian publishers entered by creating local companies and are publishing books in both languages. After Presidential elections, this was when it became more lenient.'

'Russian publishers can pay more money, they can employ powerful marketing people.'

One publisher cited a specific case of a non-fiction book they wished to acquire:

'We spent 3–4 months in auction for buying rights. Previously it was \$1,000, now it has gone up to \$4,500 because we are in auction with Russian publisher. It makes it very difficult.'

One of the main criticisms of this development was that Russian-backed companies were not contributing to the growth and development of the Ukrainian publishing sector. Not only were Russian language versions of titles supressing the Ukrainian language editions, but the editorial, translation, design and production work on those titles is all done in Russia.

'It's not about the language. It's about Russian books, translated, edited, designed there, not supporting Ukrainian publishing. They are not investing in Ukraine. Vivat, KSD, they also have books in Russian, it's not a problem, they are providing work for Ukrainian employees. And the cash can go to support Ukrainian books too, for translating and editing.'

'Russian company has an LLC in Ukraine; that's why Ukrainian publishers couldn't compete. Their income is reported in Russia.'

'They spend no money for translation, design, nice production, they are not investing in Ukraine. Bookshops, supermarkets work with them immediately, no problem.'

Respondents stated that these 'daughter companies' tend to prioritise the Russian translation, releasing it months or even years ahead of a Ukrainian translation.

'If the Ukrainian version comes after Russian version then the Ukrainian version has no hope.'

'All the best non-fiction books are in Russian.'

Several other respondents suggested that acquiring rights to print books in Russian for the territory of Ukraine was one way around the problem, although all acknowledged that it would be difficult to convince a foreign publishing company to divide Russian rights in this way.

Readership and audience development

The fall in demand for reading was cited by respondents as the second most important challenge facing the sector (10% of all respondents), with Ukrainians said to be increasingly uninterested in books, too busy to read, or preferring to spend leisure time watching TV or gaming.

'Books were cheaper 10–15 years ago, it's connected to the prices publishing houses pay for paper. Salaries and incomes stayed the same. So books appear more expensive.'

'Ukrainians don't read a lot, this is the main problem. About 60% are not buying books in any language.'

'We try to popularise reading through government, try to have support from government through promotions, librarians, we ask government for support for our publishing house.'

'People have no time for reading. But this is a problem not only for Ukraine. The book is competing with the internet for entertainment.'

'We need a scheme to popularise reading. For the past 28 years there has been no scheme to promote reading.'

The fall in demand for books was seen as an economic as well as social issue; a lack of consumer purchasing power was cited by 9% of respondents as one of the major challenges for the sector.

'We are a poor country, people look but don't buy.'

'In Ukraine, people like beautiful books, but they don't have money to buy.'

There is some work already taking place to tackle this problem, and one of UBI's stated missions is to develop readership. Festivals and book fairs have good outreach programmes to develop reading.

Festivals and book fairs

Ukraine hosts two large annual books fairs, Book Arsenal in Kyiv in May and Book Forum in Lviv in September, as well as dozens of smaller regional book festivals including an international literature festival in Odesa,¹ established in 2017. In 2019, Book Arsenal was recognized as the best literary festival of the year² at the London Book Fair International Publishing Industry Excellence Awards. These festivals attract dozens of Ukrainian and international authors and are generally very well-attended by the public (Book Arsenal hosts more than 100 foreign guests, more than 200 publishers and cultural institutions, and more than 55,000 visitors each year).³

The popularity of book fairs has been increasing steadily in recent years, with the public paying to attend readings, and buying books directly from publishers' stands at the fairs.

'From 2014, there has been a blossoming of Ukrainian literature, and a strong trend with local festivals. Even five years ago, it was unusual to buy a ticket for a poetry reading.'

However, as stated above, there has been a decline in sales over recent years, as customers turn to online ordering.

'People buy less at book fairs. They note the books to possibly buy them in the future. So now fairs are more for promotion, to make books visible. Publishers are disappointed.'

1 <http://litfestodessa.com/en/>

2 <https://hub.londonbookfair.co.uk/the-london-book-fair-international-excellence-awards-2019-winners-announced/>

3 <https://artarsenal.in.ua/en/povidomlennya/the-10th-international-book-arsenal-festival-is-postponed-till-2021/> Mystetskyi Arsenal. Retrieved 6 June 2020.

Book Arsenal and Book Forum have a number of initiatives to support the development of the publishing industry, from hosting workshops and seminars for publishers, such as the Rights Now! programme hosted online in May 2020 which featured experts from Poland, Turkey, France, Slovenia and the UK,¹ to hosting prizes and competitions. For example, the annual prize awarded at Book Arsenal for Best Book Design previously mentioned encourages excellence and raises interest in the highlighted books both domestically and internationally, as shortlisted titles are showcased at the Frankfurt Book Fair.

'Book Arsenal did a lot to make publishers understand about quality of books, and technology.'

There is a high degree of international collaboration with the UK and other countries in Europe. Guests at the International Literature Festival in Lviv have included Paulo Coelho, Olga Tokarczuk, Philippe Sands and Sofi Oksanen. Despite this, representatives from book festivals said it is still difficult to invite authors as Ukraine 'is not on the hotlist,' and there is more that could be done to raise the profile of Ukrainian festivals internationally. Respondents named festival development as an area where the British Council could be helpful in offering support and expertise, from assistance suggesting authors and securing visas, to funding for bringing UK authors to Ukraine.

Libraries

There are over 15,000 libraries in Ukraine today – compared to an estimated 50,000 libraries in 1991 (Afonin, 2012). There is no guaranteed state budget, so libraries often do not know how much funding they will receive each year, if any. Acquisitions libraries are often reliant on donations from authors or organisations to build their collections. Despite government initiatives to support the library sector, publishers were unanimous in their view that the lack of government

funding and support for libraries poses a major challenge for the publishing sector.

'Libraries are not able to buy; they don't have money.'

'There has been no funding for ten years since 1991. That's ten years out of the past 28.'

Despite (or indeed because of) this lack of funding, libraries are evolving into community hubs and being used as spaces for meetings (evening events, talks, discussions), education events (including volunteer English lessons for IDPs) and social gatherings. On visits to two libraries in Lviv on a Saturday, one space was being used by a Brownie pack and the other for a very lively 'read with a dog' programme, to engage children from a local orphanage. Both libraries had a programme of hosting school visits during the week.

Between 2008 and 2015, the Gates Foundation provided significant funding to modernise libraries and, in conjunction with the Ukraine Librarians Association and the US Embassy in Ukraine, created internet centres in nearly 2,000 public libraries. The 'Bibliomist' programme, described by respondents as 'a huge contribution' and 'transformative', provided training to library professionals to improve their media literacy and IT skills through 25 regional centres. As a result, many libraries now offer a more general form of support to the public, transforming many libraries into 'community hubs' (in much the same way as can be seen in libraries in the UK, where many libraries have become 'community knowledge hubs').²

'A public library is now practically the only place where someone with no money can go to get free services, especially in small villages.'

'Libraries shouldn't be closed down; they should be reformed.'

1 <https://artarsenal.in.ua/en/povidomiennya/the-book-arsenal-festival-will-arrange-more-than-a-hundred-b2b-meetings-between-ukrainian-and-foreign-publishers/> Mystetskyi Arsenal. Retrieved 6 June 2020.

2 <https://libraries.communityknowledgehub.org.uk/> Retrieved 26 June 2020.

Several respondents referenced the work being done around capacity building within the library sector in cooperation with Book Forum, Book Arsenal and EU cultural organisations such as House of Europe.¹ The UBI reported that 60% of its budget in 2020 will be spent on the purchase of books for public libraries.² However, publishers reported frustration with the system, saying that funding was incredibly slow to arrive, and citing specific examples of problems with tender procurement.

One respondent said that many libraries were ‘boring, dark Soviet spaces’ in urgent need of reform; another librarian said that she was greatly concerned by issues of accessibility in her old-fashioned building (there being stairs but no lift to access the library in which she worked). Whilst work has been done in this area (the Gates Foundation funded the creation of internet centres for blind people within libraries, and Book Arsenal works closely with Ostrovskiy Central Specialized Library for the Blind), accessibility was mentioned as a concern by several respondents. Children’s libraries in Lviv all have books in braille, and there is a braille printer at the Lviv Institute of Printing,³ but across the country there is a lack of books for blind people.⁴

Several librarians interviewed said they found it difficult to have comprehensive information on new titles.

‘Neither libraries nor ordinary citizens know what sort of books have been published by the companies. As a librarian, I would say this is the biggest problem, as well as low funding for purchasing new books.’

All librarians receive sporadic information and press releases from the publishers, and collect catalogues from publishers during book forums, which one librarian said was ‘the most important source of information for them.’ However, there is no form of ‘Books in Print’ and an almost complete lack of critical coverage – very few book reviews are published, and Ukraine lacks the literary coverage in newspapers and magazines that one sees in the UK and US.

Criticism

The lack of literary critics was cited by several respondents as an obstacle to readership development.

‘There is a lack of high-quality book journalists and critics.’

‘The “critics”, instead of giving you analysis they are trying to sell you the book.’

‘There were some initiatives supported by British Council or EU that included this type of course – a school for book critic. The problem is that it happened from time to time. We need it to be sustainable. To keep it as a process.’

Respondents reported that there was some coverage of books and authors on radio and TV shows, but no tradition of blogs or podcasts critically reviewing new title releases.

- 1 Some professional development training is being undertaken in 2020 by the Ukrainian Library Association under a House of Europe programme to train librarians on ‘innovative services’, but this is only open to a small number of librarians.
- 2 <https://publishingperspectives.com/2020/04/ukraine-book-institute-translation-grant-program-rights-covid19/> Publishing Perspectives. Published 24 April 2020. Retrieved 6 June 2020.
- 3 <https://youtu.be/A6gEV6bA2QM> YouTube. Book Braille Printer in Lviv. Published 8 May 2019. Retrieved 26 June 2020.
- 4 <https://www.kyivpost.com/lifestyle/ukrainians-with-vision-impairment-facing-shortage-of-books-in-braille.html> According to government figures, only 1,258 books in Braille were printed in 2017 for the estimated 80,000 Ukrainians who are either blind, or have visual impairments. Some 500 more were produced by NGOs. Published 17 August 2018. Retrieved 26 June 2020.

Institutions and associations

Ukrainian Book Institute

The Ukrainian Book Institute (UBI) was founded in 2016 with three main aims:

- popularise reading
- promote the book industry in Ukraine
- promote Ukrainian literature abroad.

It has conducted research and provided support to the sector through a series of programme initiatives. Current projects include the Translate Ukraine grant programme¹ (for foreign publishers), grant projects for authors (2022), publishers, libraries and translators, and three research projects on reading and publishing in Ukraine.

There was widespread acknowledgement amongst respondents that UBI had some excellent initiatives, particularly in the work it has been doing to gather and disseminate information, and to promote Ukrainian literature abroad:

'It's very good we could participate at book fairs as part of Ukrainian stand.'

'Thanks to UBI, we participated in the international stand at Frankfurt and Bologna.'

'Good initiatives for publishers.'

'UBI does really good job, they get lots of attention, how to advance the market, but they are still bureaucratic – they cannot do a lot without changing the legislation through the government and parliament. This is the problem with the grant money, how to do it legally, and disperse the grants. They are trying to push for change so they can operate more easily, more smoothly.'

However, there was considerable criticism from respondents about the bureaucratic nature of the Institute, which comes under the auspices of the Ministry of Culture and Information Policy.

'We have good relationship with them but no time to fill in a lot of forms.'

'UBI? It's good idea it exists. But we want it less bureaucratic, it is also a government organisation, representing the Ministry of Culture and Information Policy. When they want to do something they must give this paper to Minister, then another, it takes too long.'

'The programme of library support for buying books, we have been waiting from the beginning of the year until now – half of the year is gone already, they keep saying it's coming.'

Respondents saw UBI as useful because it has funds to disburse. However, the management of the Institute was seen to be in a difficult position with UBI seemingly unable to lobby government (because they are paid by government and report to the Ministry). Concern was also voiced that the Institute has 'not enough capabilities' and that staff were so stretched on a day-to-day basis that they had no time to think about strategy, or provide leadership to the sector. There was perceived to be a lack of creative and critical thinking at the institution:

'We work with UBI, we are trying to be involved, support each other, provide experts in different programmes. The main interest for publishers is money.'

'The Book Institute needs to not play their [i.e. Ministry's] game, they should cut bureaucracy, it needs to lobby Ministry more.'

'If I were Director, I will work more strictly with Ukrainian publishers. They think of UBI as a service. The role of the UBI should be as mediator, facilitator. Communication with publishers should be improved.'

1 <https://www.facebook.com/translateukraine>

'The strategy is lacking. If we don't have a big strategy, we can't prepare international strategy. Just trying to save budgets, it is not enough. The issue of cultural management in Ukraine is a problem. There is no multi-year analysis. There is no space for new ideas or information.'

'They don't have the vision. Thought leadership is still lacking. Where is Point B?'

In particular, criticism was made that UBI was so in thrall to the government that excellent initiatives were less effective that they could have been because of the need to adhere to unhelpful bureaucratic guidelines or legislation. Examples included the disbursement of library funding, cultural institutes being unable to pay individual recipients (for rights or translation work) and delays in distributing emergency Covid-19 funding.

The bureaucratic restrictions around the Translate Now programme proved a particular obstacle for UK publishers. Not only was there a very short amount of time between the announcement of the programme (24 April 2020) and the deadline (15 May 2020), the proposed timescale was impossibly short for UK publishers. A stipulation was made that the funded title needed to be *translated and published* by the end of the calendar year. Given that most UK publishers need to present new titles to their sales teams 6–9 months ahead of publication (9–12 months in the US), this timetable showed a lack of understanding for the editorial processes and timetables with which international publishers work.

'We heard of it in April, with a deadline in May, with only two weeks to say to our partners about this programme.'

'The partners do not have time to print.'

Whilst 53 submissions were approved and grants awarded, many of these were for projects which were already in train. The scheme therefore favoured publishers such as Old Lion who were already in the process of selling rights

to established contacts, rather than opening up new publishing partnerships in more mature markets such as the UK or USA, for example. Despite good publicity in industry publications such as Publishing Perspectives and via the London Book Fair, only one UK publisher (a small independent publisher of European Literary Fiction who had a translation 'ready to go') took part in the scheme.

Ukrainian Publishers & Booksellers Association

The Ukrainian Publishers & Booksellers Association (UPBA) was established in 1994 and has more than 125 members. The UPBA is a member of the International Publishers Association (IPA) and has been active in lobbying on legislation (for example, ensuring that books are VAT exempt) and piracy. In 2013, at the invitation of the UPBA, the then-head of the IPA, Jens Bammel, visited Kyiv for a parliamentary hearing on I.P. and copyright, and underlined the importance of a successful national book policy. Shortly thereafter, the government announced the approval of a new \$61 million book programme for 2014–2018, aimed at strengthening interest in reading by the promotion of the local publishing sector.¹

However, the UBPA was seen by respondents as a rather out-dated institution which has not adapted to the needs of new publishers. New publishers did not view it as a body that they could approach for guidance or advice when setting up their businesses:

'We couldn't ask them, they are very closed.'

'They are representatives of the old school, their vision is outdated.'

'We are a member but . . . it's not really reflecting its members. Young publishing houses are really sceptical about it and don't want to be involved.'

'They are quite active to find ways to influence Ministers or the government but they get no answer or reaction.'

¹ <https://www.internationalpublishers.org/images/aa-content/ipa-reports/ipa-annual-report-2012-2013.pdf>
IPA. Retrieved 17 August 2020.

It is nevertheless seen as important for publishing houses to belong to the UBPA. Several respondents stated that they joined the association because they felt it offered a 'stamp of approval' for presenting themselves internationally.

'As a new company... in principle, it's part of our image to raise our profile. We have the opportunity to participate in their sector, but I can't say we benefitted very much from their association. Based on my own experience, UBI is much more active, more visible.'

A generational divide emerged amongst respondents when talking about UBI and the UPBA, as well as some of the longer-established publishing houses, which were felt to be 'backward-looking'.

'The age of publishers in the industry is another problem. It is difficult to explain the need of modernisation, many worked in the industry in Soviet times. They are mainly not effective; they are remembering the "good old times".'

'I was born in the independent Ukraine. I believe in the strength of my country. I don't want to work just for money. We need to make people grow in the institutions.'

'We don't have intellectual discourse and many of the old guard are backward-looking. We are frustrated with bureaucracy.'

British Council

The British Council has run several initiatives that harness UK expertise to support the growth and internationalisation of the Ukrainian publishing sector. These include the Creative Enterprise Ukraine¹ training workshops for entrepreneurs, the 3x3 Mentoring programme and the Booking the Future initiatives for publishers, and the British Council International Publishing Fellowship Programme, as described above. These programmes were seen as particularly valuable for early career publishers, or those setting up new businesses. One respondent found the Creative Industries course transformational for her business:

'After mentoring, I realised what we had to do. Every month we have meetings, talk about plans and responsibilities. We have to plan cashflow. It helps us to survive.'

Feedback from respondents who had participated in the bespoke publishing initiatives were very positive:

'After this I changed my practice, my thinking, it gave me a kick.'

'Extremely helpful in terms of networking.'

'It was a good programme, the process was nice, the people chosen from the UK were good.'

'It was a chance to see how publishing companies in the UK could be structured, and useful from that perspective, so we could see how to formally organise and structure our company.'

Success stories included one Ukrainian publisher who was publishing Joseph Conrad's works in Ukraine being put in touch with a world-renowned UK academic expert, who has subsequently written an introduction to the Ukrainian translations of two of Conrad's works, and came to Kyiv to give a lecture to mark the launch of the series.

1 <https://www.britishcouncil.org.ua/en/creativeenterprise>

Participants in the British Council's most recent publishing initiative, the International Publishing Fellowship Programme, in Ukraine and in the UK, found the scheme very useful, despite its interruption due to the Covid-19 pandemic:

'I learnt so much interesting and useful new information, it has opened up avenues. It's a great way of reaching authors and publishers, I would trust something if they recommended authors, in languages we don't speak.'

'I feel like I've benefitted so much from the fellowship and the networks.'

'The networking and mutual support were really useful; I've made real friends and have a safe space for work and personal discussions.'

When respondents were asked what the British Council could do to strengthen links with international publishers and expand the market for Ukrainian writers, many asked for help with rights sales, including pinpointing the right publishers to approach, and how to formulate an appropriate pitch.

'Our key aim is to make sure British readership are aware of our authors. We can prepare digests, bulletins, but we wouldn't know how to expand this knowledge to the UK. We need help to get this knowledge into the right hands.'

'We know ways in which our literature is strong, but need tips on how to get into other markets, and the trends of markets.'

Study visits for foreign publishers and/or agents were seen as useful as 'publishers get to meet the country too' and could enthuse to colleagues about Ukraine and its writers when they returned home.

Despite it being identified as a major challenge for the sector, piracy was not seen as an area in which the British Council could offer much support (with the possible exception of asking the British Embassy trade department to lobby the Ministry). Respondents generally felt that

the role of the British Council should be to support the work that festivals and publishers were already doing, offer training and make introductions to UK institutions, companies and individuals. Professional development seminars, mentoring, training on strategic thinking/thought leadership and help to support translation and translators were amongst the priorities named.¹

Other suggestions and requests included the following:

'Can British Council support training of translators?'

'Within the last 15 years there is a new generation of translators. Lots of these people would like to translate but not all publishing houses would like to take a risk on them. We could have summer or winter schools, or residencies, or translators could go to residencies in the UK. We can identify people but they need training.'

'If we are publishing UK authors, can the British Council support these authors coming to Ukraine?'

'Maybe some lectures? I'd like to know more about world market, newest ways of developing, in the future.'

'We could know more about the personal experience of good book publishers in Britain – editors, managers, getting case studies and experience from UK people.'

'We plan to publish lots of titles of classic English literature and we would be grateful for additional information about authors we are going to publish.'

'Could the British Council tell us of reputed academics and critics who can write prefaces?'

'Introductions to people that can write introductions for us, or support cost of translation of British work.'

'Mustn't forget librarians. Training for librarians.'

1 See page 52 for the full list of suggestions.

Impact of Covid-19

Ukraine's economy was hit hard by the Covid-19 outbreak, with the country going into a full-scale lockdown from mid-March to early May 2020. Retail outlets, publishing companies and printing facilities closed, and the Book Arsenal festival was postponed. A gradual lifting of restrictions enabled many services to return to some form of normality over ensuing months,¹ with many services moving online and events and meetings taking place on digital platforms. An article in Publishing Perspectives in August 2020 proclaimed an 'almost complete collapse' of the book industry in Ukraine after lockdown, with the President of the Ukrainian Publishers and Booksellers Association stating that the number of published book titles had fallen by 55% compared to the same period in 2019.² The Director of UBI estimated 70% of titles going to print in March/April didn't print because of the pandemic (UBI):

*'A survey made by the Ukrainian Publishers and Booksellers Association a few days ago showed that our 50 biggest publishing companies haven't published 70 per cent of planned titles for this month, April, and have lost 70 percent of their revenues.'*³

Having initially cancelled all funding to the publishing sector, a government rescue package for Creative Industries of UAH 150 million (approximately £4 million) was announced on 9 July 2020.

Data from a second round of data collection, in July and August 2020, confirmed these findings, although publishers generally saw the impact of the pandemic as 'very serious but not catastrophic', and the level of pessimism indicated in the media reports cited above was not reflected in the extended interviews. Estimates of the impact of lockdown on businesses varied, from one very large publisher who estimated that the market would be down by 40% overall in 2020, and that 'half of retailers would close', to several other smaller publishers who said that total turnover would not be hugely adversely impacted, although the number of titles printed would be reduced. Other publishers planned the same number of titles, but with reduced print runs. Publishers were frustrated at the lack of information from the government, and the length of time being taken to disburse grants. Uncertainty about 'what was happening at the Ministry' was compounded by a reshuffle in March 2020 resulting in a change of Minister of Culture.

'Print runs have to decrease. From March to June we have to decrease number of printed titles. We continue to prepare titles, and have started to print all those titles, so we should start to see our sales rise again now.' [July 2020]

'For us, quarantine was a very hard time. We had to work from home, sometimes it was difficult, especially the first month was difficult in sales – all stores were closed, there was a panic in society. The second month was much better, and in the third month sales are slowing rising. We only printed titles which had good pre-orders. We postponed new books.'

1 <https://www.worldbank.org/en/country/ukraine/overview#3>. World Bank. Retrieved 5 September 2020.

2 <https://publishingperspectives.com/2020/08/ukraine-industry-following-lockdown-an-almost-complete-collapse-covid19/> Publishing Perspectives. Published 18 August 2020. Retrieved 5 September 2020.

3 <https://publishingperspectives.com/2020/04/ukraine-book-institute-translation-grant-program-rights-covid19/> Publishing Perspectives. Published 24 April 2020. Retrieved 5 September 2020.

'By the end of 2020, we may catch up with forecast. We will print fewer titles, but more of each title.'

'We saw a reduction of print runs, we will publish some books later. We are printing 200–300 books, not our usual 2,000 copy print run.'

'As a result of Covid-19, we will see a 50% drop in total volume. Printing (in titles) has decreased by 47% from the first quarter of 2019 to Q1 in 2020.'

Many publishers were undertaking new initiatives to promote books online, or introducing crowd-funding measures. Like many UK publishers, respondents reported that sales from websites increased in April and then gradually decreased as restrictions on movement were lifted.

'We are doing promotions, via internet, social media, Facebook, YouTube, Google search. We are sharing and creating additional content for our online stores.'

As respondents were quick to emphasise, the challenges facing the sector identified in the first phase of data collection in February–March 2020 have not gone away, but have been compounded by the pandemic. The problems of cashflow and difficulties accessing credit or bank loans identified in the first phase of the research have only been exacerbated. As stated by Mr. Afonin of the UPBA, the 'promised government funding of 45 million UAH (\$1.6 million), intended to fund book purchases for libraries' and outstanding for many months had still not arrived, and in August 2020, publishing companies were still awaiting grants from the 150 million UAH (\$5.4 million) rescue package designed to provide 'direct support to the industry and major companies'.¹

New challenges identified included how to get customers back into bookstores and how to find new ways of selling online. Respondents identified the cancellation of the physical book fairs at Book Arsenal in May and Book Forum in September as particular problems; one publisher estimated that the sales for her company at these events equated to approximately three months' worth of bookshop sales.

'Some publishers are waiting for grant support, they do very little by themselves, they don't use own opportunities to exit the situation. Others understand that they need to do something without government support, they are cutting costs and changing focus, like moving to online distribution model.'

'Today, the biggest concern, the Russian books are still there, not gone away. But now we also have to target people to get them back to bookstores. Books come second to food. And we also didn't have Book Arsenal or Book Forum. This is a problem for publishers. No cashflow, no income, it's a big issue.' [July 2020]

'Without the Fair it's difficult to make new contacts, or assess new titles. You need the physical feel of the books, especially for kids' books.'

'Some houses will die; they can't continue their businesses without resources or money. The format of distributing books will have to change.'

The fragmented nature of the publishing community was highlighted by the response to Covid-19, which saw individual rather than collective responses. For example, one respondent said that the 'discount wars' identified in the first phase of the research were intensifying.

¹ <https://publishingperspectives.com/2020/08/ukraine-industry-following-lockdown-an-almost-complete-collapse-covid19/>. Publishing Perspectives. Published 18 August 2020. Retrieved 5 September 2020.

'One bookshop gives crazy discount and pushes away another one. We see huge discounts at bookstore websites.'

'Each player did something with his own audience. For books, the challenge is that the market isn't that big, we are all playing in the same field. We need government money.'

'We need to work together more as a team, as a sector.'

However, there was some room for optimism amongst smaller publishers. One respondent who had participated in a crowd-funding initiative for the first time reported feeling closer to their audience now. The new challenges facing the sector may offer particular opportunities for niche publishers, who tend to be nimbler and less risk-averse than larger companies.

'Our plans were reduced more than 75% down, but e-books, internet sales are growing exponentially; there are opportunities for growing business.'

'Previously, [publisher X] was pessimistic and really aware of the difficulties, in distribution, and promotion. It feels like COVID seems to have brought her together with other small publishers – really great things are happening and galvanising small publishers.'

Summary of findings

Strengths of publishing sector

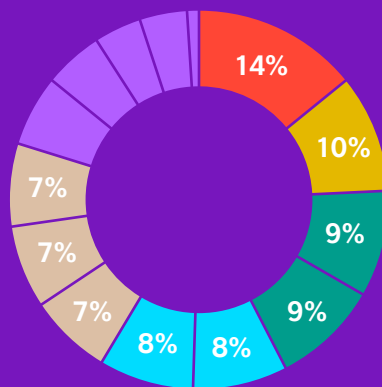
1	Excellent printing capabilities, high quality production.
2	Strong design capabilities (notably in contemporary graphic design).
3	High quality of illustrators/illustrations and children's books.
4	A large percentage of companies acquire rights.
5	Some expertise in selling rights – helpful examples of best practice.
6	Examples of ground-breaking innovation in sector (e.g augmented reality technology).
7	Excellent book fairs & public facing events, now gaining international profile.
8	Government institutions exist (e.g. UBI, UCF, UI) to facilitate development.
9	Very favourable feedback from participants on previous publishing development initiatives.

Challenges

1	Lack of bookstores/ distribution networks.	2	Piracy and copyright infringement.
3	Lack of readership/ book-buying public.	4	Lack of support/funding for libraries.
5	Lack of information about what is being published/ poor review coverage.	6	Lack of awareness amongst publishers of potential of international rights sales.
7	Difficulties raising visibility of Ukrainian writers in overseas markets.	8	Lack of good translators.
9	Lack of statistics/reliable market data.	10	Unwillingness of publishers to share data.
11	Bureaucratic government structures.	12	Lack of investment in publishing sector.
13	Lack of training/professional development for publishers.	14	Need for increased thought leadership amongst policy- makers.
15	Difficult working conditions, particularly for junior staff.	16	Lack of mentoring programmes/knowledge- sharing amongst publishers.

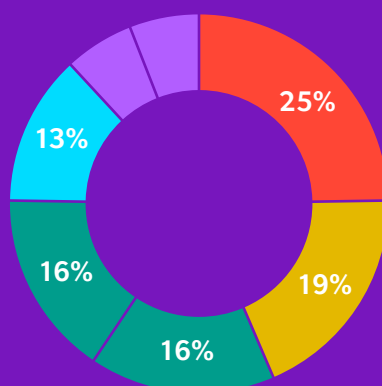
Summary of challenges and skills gaps

Most serious challenges facing sector, as identified by interview respondents



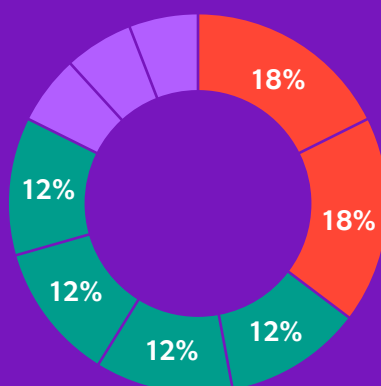
- Bad retail infrastructure, problematic distribution, problems getting paid on time
- Demand for reading decreasing
- Lack of consumer purchasing power
- Lack of statistics
- Lack of training, skills gaps
- Threat from Russian publishers
- Difficulty of borrowing, not enough investment, cashflow issues
- Piracy, copyright enforcement
- Lack of translators
- Quality of libraries very poor, lack of government support & funding for libraries
- Brain drain, lack of good people, staff underpaid, working conditions too tough, poor staff retention
- Lack of critics, lack of information about what is being published
- Government bureaucracy
- Threat of war

Biggest skills gaps for publishers, as identified by interview respondents



- Understanding of foreign rights, documentation, catalogues, how to present oneself, lack of international connections
- Publishing processes, management, strategy
- Marketing expertise
- Editorial
- Contracts, documentation
- Sales
- E-publishing

Ways in which British Council could support sector, as identified by interview respondents



- Professional development seminars
- Help with information about UK publishing, UK connections
- Mentoring programmes
- Thought leadership
- Bringing authors/academics to Ukraine
- Supporting translators
- Support to attend international book fairs
- Help with visas
- Reading, libraries

Validation and review

Booking the Future feedback

Many of the research findings echoed feedback from the Booking The Future Summer School (July 2018).

A summary of anonymised feedback from two questions in the Booking The Future end-of-project participant questionnaire is provided below, for reference.

What challenges can stop you from reforming your business?

- Badly planned/lack of budget
- Investment problems
- Hard to forecast
- No state support for publishers
- Legislation peculiarities
- Lack of transparent statistics, and therefore, inability to make forecasts
- Unwillingness of colleagues to work together
- Insufficient financing
- Ukrainian realm
- Probable decline of the book market
- Lack of specialists
- Corruption
- High taxes
- Lack of effect from changes implemented
- Waiting for more favourable market conditions.

If you had the chance to visit a similar [training] event in 2019, what subjects would you recommend to concentrate on?

- Book copyright sale negotiations
- Working with publishing houses abroad and literary agencies
- Author promotion abroad
- Innovative approaches to book business
- Market research, publisher-distributor relations
- Joint projects between publishing houses and representatives of other (non-book) markets
- Experiences of big players of the Ukrainian publishing market
- Tips on how to choose books for print (how do you choose a bestseller)
- Book design trends
- Unsuccessful cases and publishers' mistakes
- How do our colleagues from abroad maintain interest for reading?
- Opportunities to create a market for bestsellers in Ukraine
- Specialized and genre literature, non-mass market books
- Successful cases of book promotion in other countries
- World book trade policy and discounts (and invite someone from the government)
- Small publishers vs. large ones: the peculiarities.

Focus Group Discussions

Focus group discussions were held in September 2020 (via video conference) to review and validate draft findings, and to discuss suggestions for the project recommendations which could be incorporated into a three-year sector strategy.

Aims

1. To validate research findings / triangulate interview data.
2. To help develop recommendations for a three-year strategy plan.

Organisation

The findings from data collected from interview respondents were grouped into themes, and a series of detailed questions developed for discussion in focus groups.

Respondents were asked to choose the theme which they would like to discuss. A Zoom workshop was held, during which the issues were discussed in a whole group and in break-out groups. Participants were asked to highlight any issues in the draft findings that they felt were not of importance, and to suggest recommendations for the three-year strategy plan.

The broad themes discussed were:

- distribution and piracy
- audience development
- international rights sales
- bureaucracy, statistics and investment
- training and development.

Agreed assumptions

- Lack of statistics (lack of information on book marketing, lack of statistics making it difficult for researchers to undertake analysis, problem with publishers not wishing to share confidential statistics) are a major problem, but without government reform this can't change.
- Piracy can't be prevented; discussions must be focused on how to tackle it.

Suggestions for recommendations

Distribution and piracy

- The government could offer rent holidays to bookshop retailers struggling as a result of the pandemic.
- Prices should be put on all books.
- Prices should be reduced to prevent piracy (there was much discussion/disagreement on this point).

International rights sales

- To further cooperation between Ukrainian publishers, they should recommend books from other publishers if they don't have relevant ones themselves.
- Need more scouts and agents to develop and present our 'stars' (growing 'new stars' is difficult).
- It's very nice for fellows who take part in international fellowships but they could share their learnings more with other publishers.
- Not enough managers or literary agents took part in these fellowships – they should be publicised more.
- Work closer with Embassies abroad to promote Ukrainian literature (e.g. the Ukrainian Embassy in Mexico is very actively supporting the publication of the first titles from Mexico in Ukraine).
- Produce one big catalogue of all Ukrainian titles every year so foreign publishers know what is being published (some discussion/disagreement on this point).

Training

- There is a lack of training to cater for professional needs of publishers – we need a centre for postgraduate studies, where people can get more practical skills or a 'professional upgrade'.
- Offer short term professional programmes/diplomas.
- International professional and mentoring programmes are useful but advice needs to be more specific, more adapted to Ukrainian situation (i.e. foreign experts need to understand more about Ukrainian needs).
- Send sector leaders on programmes to develop creative thinking, understand more about strategic planning.

Summary of recommendations

When developing recommendations, I have focused on:

- the way in which UK sector expertise can be used
- how to foster international trade links.

There are other areas which merit much attention, notably the chronic under-funding of the library sector, the lack of reliable statistics, difficulties with the distribution and retail networks, and endemic problems of piracy. However, after discussion with colleagues at the British Council, UBI and interview respondents, these are all issues that have been deemed out of scope as a priority for British Council intervention,

largely because it was agreed that these are challenges that need to be addressed primarily by the Ukrainian government.

However, work in readership development, whilst also an issue which needs to be addressed by the Ukrainian government, is an area in which the UK has considerable expertise and could form part of the three-year strategic plan for the publishing sector, in conjunction with the work UBI is already doing in this field. The other three thematic areas also build on programmatic work already identified as priorities by UBI and other institutions in Ukraine.

My recommendations will therefore **focus in the following areas:**

- promoting Ukrainian writing overseas
- training and skills
- leadership development
- readership development.

Detailed recommendations from this report will be published in a separate document, outlining a three-year strategy for engagement with the sector.

Concluding remarks

Whilst there are some significant challenges facing the publishing sector in Ukraine, there is undoubtedly an appetite for change.

There is a clear desire across the sector for more interaction with international partners, and interest in learning from international expertise. However, there are also some excellent examples of best practice taking place in Ukraine – in terms of innovative publishing, environmental initiatives, and inclusive practices embedded at libraries and within publishing houses. The challenge will be to encourage sharing of expertise and knowledge amongst Ukrainian publishers. Coupled with a stated desire for more Ukrainian-specific examples and context, the obvious starting point for training and professional development is to encourage publishers to talk to each other, share ideas (and data) and learn from one another. Despite an increasing number of opportunities for industry collaboration, and acknowledgement amongst publishers that the sector will be strengthened by increased cooperation, publishers remain siloed. This is also the case for some cultural organisations: for example, staff at UBI and within the British Council were unaware that Odesa had been made a UNESCO City of Literature until we were told of the new status by staff at Lviv City of Literature when visiting their office.

Ukraine has a great deal to offer international publishing partners.

I was impressed by the extremely high quality of much of the publishing I saw on sale in retail stores, and in production, across the country. The accomplished and distinct voices of the most celebrated contemporary Ukrainian authors, very few of whom are translated into English, offer an exciting prospect for foreign publishers looking for translated literary fiction, a genre in which there is a growing interest

internationally. Children's books and graphic novels with high-quality illustration and design also present an attractive product for export. The challenge is to raise the profile of these works abroad.

The work already being done to promote Ukrainian literature abroad, primarily by UBI, is excellent. The brochures compiled by UBI (and translated by TAULT) for the international book fairs are extremely impressive, containing publisher profiles, presenting key titles and highlighting new books which may be of interest to foreign publishers. However, I felt that the underlying lack of statistics meant that publishers and UBI staff suffered from a lack of confidence about presenting themselves internationally. There is no reason why Ukraine should not consider applying for Country of Honour status at the Frankfurt or London Book Fairs, for example. The statistical reports and research UBI is already doing provide a sound basis on which to begin, particularly given the challenges facing Ukraine as an emerging economy.

The generation conflict between the 'old guard', many of whom don't speak English, are more conservative and operate within bureaucratic structures, and the younger generation who are more entrepreneurial, media savvy and outward-facing, echoes the findings of the Next Generation report (Dowle, Vasylyuk & Lotten, 2015), which found young Ukrainians (under 35) optimistic about the future of their country and about their right to express their own opinions and engage in social activism, but are not yet convinced that traditional forms and institutions of democracy will provide the answer. Younger publishers have, perhaps, to acknowledge

the expertise and experience of this older generation; the 'old guard' need to be more open to change. Such is the case the world over. However, there is a very real possibility that the government institutions and publishing houses risk losing their strongest resource – the young people who offer energy and creativity, but feel they are over-worked, under-paid and ignored.

As Ukraine looks increasingly towards Europe, it is able to access **financial and logistical support** via European publishing initiatives and partnerships (House of Europe, Culture Bridges, EU4Business, EBRD), with good links and sharing of information between organisations in France, Germany, Poland, Lithuania, Georgia and Slovenia, amongst others. The Goethe Institut was consistently cited as providing very strong support, bringing publishers from Germany to share experiences and helping tour authors, and via links at the Frankfurt Book Fair. Poland, Georgia and Slovenia were all looked to as examples of how the publishing sector can develop in other markets and there are already excellent knowledge-sharing links between these countries and UBI. For example, in an online session on the Rights Now programme at the Book Arsenal in May, the head of the Slovenia delegation to the Frankfurt Book Fair gave practical advice and suggestions on how to prepare for being Country of Focus at an international book fair. For a post-Brexit UK, closer engagement with Ukraine via networks such as UNESCO's Creative Cities (of which there are five: Edinburgh, Exeter, Manchester, Norwich, Nottingham) and the British Centre for Literary Translation in Norwich may be fruitful avenues for international collaboration.

Lastly, I was struck by the very warm welcome I received from all those I interviewed, and the willingness of respondents to talk candidly, and to share insights and suggestions. I was extremely pleased with **the quality of the data** gathered and felt publishers and stakeholders were very open, particularly in their criticism of the government, its bureaucratic processes and inability to enforce copyright law. I was careful to stress confidentiality and anonymity at all stages throughout the research process (particularly when asking about commercially or politically sensitive areas such as sales figures, piracy or corruption), which I believe added to better outcomes. The semi-structured interview schedule worked well; by the end of the research trip I was using the interviews to triangulate information gathered from earlier respondents.

The outbreak of **Covid-19** and subsequent travel restrictions had an impact on the research project itself; whilst I was very fortunate to have completed my research trip just ahead of lockdown, follow-up meetings and introductions scheduled for the London Book Fair had to be shelved when the Fair was cancelled, and the strong sense of momentum I felt at the end of my trip, with a return visit to Kyiv planned for May, was lost. However, the follow-up interviews, second phase of data collection and focus group discussions, all held by Zoom, enabled me to interview some respondents I had not been able to meet on my trip, and to assemble participants from all over the country on the Focus Group Zoom call. The entrepreneurial spirit exhibited in many of the independent presses bodes well for the future as the industry enters uncertain times in the light of the Covid-19 pandemic.

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Interview respondents

In addition to a number of freelance consultants, advisors and authors, representatives from the following Ukrainian companies and organisations were interviewed:

- A-BA-BA-HA-LA-MA-HA Publishers
- Art Nation Publishing
- Artbooks Publishing
- ArtHuss
- Association of Publishers and Book Distributors of Ukraine
- Astrolabe Publishing
- Bohdan Publishing House
- Book Chef Publishing House
- Chas Maystriv
- Discursus
- Folio Publishing House
- International Book Arsenal Festival
- IST Publishing
- KSD (Family Leisure Club)
- Litopys
- Lviv Children's Regional Library
- Lviv International BookForum
- Lviv Mediateka, based in Lesia Ukrainka's Library
- Nash Format Publishers
- Old Lion Publishing House
- Osnovy Publishing
- OVO Literary Agency
- Parliamentary Library (National Library)
- Ranok
- Ripol Ukraine
- TAULT Translation Agency
- Ukrainian Academy of Printing
- Ukrainian Book Institute
- Ukrainian Cultural Foundation
- Ukrainian Institute
- Lviv – UNESCO City of Literature
- Unisoft Printing House
- Vivat Publishing Ltd.
- Yakaboo.

Author

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Acknowledgements

Many thanks to **Dasha Stokoz**, **Harriet Williams** and **Iryna Baturevych** for all their support, good humour and resilience throughout the research project.

I am deeply grateful to Dasha, Ira, **Kyrylo Krasnokutsky** and all the staff at British Council Ukraine and at UBI who went out of their way to make my trip to Ukraine so stimulating, productive and enjoyable.

I am indebted to all the interview respondents in Ukraine and the UK who gave so generously of their time, and to the following people for their helpful advice and insights:

- **Christoph Hassenzahl**, Suhrkamp Verlag
- **Hazel Kenyon**, Nielsen Book International
- **Maeve Dunne and Claire Anker**, UK Publishers Association
- **Melinda Simmons**, British Ambassador to Ukraine
- **Jane Southern**, Literary Scout
- **José Borghino**, Secretary General, IPA
- **Thomas Minkus**, Frankfurt Book Fair
- **Joanna Everard**, Group Rights Director, Bloomsbury
- **Iryna Bielkina**, Ukrainian Book Institute.

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