

Essential Support for Literary Publishing in Canada

**A Review of the Canada Council for the Arts'
Programs in Support of Book Publishing**

Final Report

Written by:

DeGros Marsh Consulting

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Executive Summary

The mandate of the Canada Council for the Arts is “to foster and promote the study and enjoyment of, and the production of, works in the arts.” In this context, “the Canada Council provides financial assistance to Canadian publishers to offset the costs of publishing Canadian trade books that make a significant contribution to the development of Canadian literature.”¹

The Canada Council created its first program in support of literary publishing in Canada in 1972. Over the years since the introduction of the Block Grant program, the Canada Council has developed other targeted programs in support of book publishing: Author Promotion Tours, Translation Grants, Grants for Art Books, and the Emerging Publishers program. Taken together, these programs have provided effective and essential support for literary publishing in Canada, helping to ensure that a vibrant, diverse Canadian literature is available to readers across Canada and in many other countries. As the Canada Council observed, “Thirty-three years and many thousands of terrific books later, Canadian literature – and the industry behind it – is arguably one of the most successful cultural industries Canada has developed – both at home and abroad.”²

The Canada Council has turned its attention to how to effectively provide greater stability and sustainability to the more mature but still struggling indigenous book publishing industry. This review of its programs is a valuable step, examining the impacts and effects of its programs in support of book publishing. This programs review will focus on the two main purposes of program evaluation:

- To help improve the design of the Canada Council’s programs; and
- To provide an assessment of program effectiveness, of impacts both intended and unintended, and of alternative ways of achieving expected results.

In particular, this review has proposed alternative ways to improve the design of the Canada Council’s programs and to better achieve expected results in order to maximize publishers’ success and sustainability in their publishing of culturally significant books and in their publishing of Canadian writers. The findings and conclusions of this program review clearly prove the fundamental value of the Canada Council’s support of book publishing, while identifying numerous mechanisms to improve the delivery and administration of these important programs.

Financial Impacts of the Canada Council Programs in Support of Book Publishing

As part of this programs review, the financial impacts of the Block Grant, Emerging Publishers, Author Promotion Tours, Translation Grants and Art Books programs from 1998 to 2005 were examined. Key findings from this longitudinal data review of the Canada Council’s support for book publishing are:

Overview of the Canada Council’s Programs in Support of Book Publishing

The budgets of each of the Canada Council’s programs in support of book publishing remained relatively stable from 1998 to 2001. All program budgets received an increase through the Tomorrow Starts Today funding late in the 2001-2002 fiscal year. In addition, a federal government-wide priority re-allocation came into effect for the Canada Council in 2004-2005, affecting the Canada Council’s overall budget. The impact of budget reductions from 2002-2003 to 2005-2006, adjusted for inflation, were severe: a decrease in Canada Council support for book publishing of over 20% in just three years (for details, see the table on the following page).

¹ Writing and Publishing Section (2006), *From Seed to Sustainability: A Strategic Review of Book Publishing Support at the Canada Council for the Arts* (Ottawa: Canada Council for the Arts); will be referred to as “the 2006 Canada Council programs review discussion paper”.

² The 2006 Canada Council programs review discussion paper.



Program Budgets				
	2002-2003		2005-2006	Change (adjusted for inflation)
	Actual	Adjusted for Inflation ¹	Actual	
Block Grants	8,644,100	10,132,541	7,885,000	- 22.18 %
Emerging Publishers Program	420,800	450,150	350,000	- 22.25 %
Author Promotion Tours	395,200	422,764	316,900	- 25.04 %
Translation Grants	533,290	570,486	666,400	+ 16.81 %
Art Books	178,000	190,415	109,800	- 42.34 %
Total	\$ 10,171,390	\$ 11,766,356	\$ 9,328,100	- 20.72 %

Overview of the Block Grant Program

By Language (2005-2006)			
	French-language	English-language	Total
Budget (\$)	3,154,000	4,731,000	7,885,000
Recipients (#)	64	92	156
By Eligible Titles (2005-2006)			
	French-language	English-language	Total
Eligible Titles (#)	1,003	1,075	2,077

- A total of 203 publishers received support from the Block Grant program at some time during the period from 1998 to 2005.
- The overall number of titles supported by the program increased by 26.0% from 1998 to 2005.

Block Grant Program Eligible Titles

- Francophone publishers received a considerably lower base grant per title than anglophone publishers in almost all genres.
- It was generally somewhat more expensive for anglophone publishers to produce their books than francophone publishers, but anglophone publishers generally sell more copies of a specific title.

Block Grant Program Bonus Points

- Publishers in the Atlantic region generally received the fewest bonus points for their literary publishing program; from 1998 to 2003, publishers in British Columbia and Ontario received the most bonus points; since 2004, publishers in Quebec and Ontario have received the most bonus points.
- The larger the publisher, the more bonus points received in both 2002 and 2005; however, the larger publishers received fewer bonus points per eligible title.

BPIDP

- As expected, in both 2002 and 2005, as publisher size increased, publishers went from receiving only Block Grant support to obtaining support from both the Block Grant and BPIDP programs.

¹ Amounts adjusted for inflation used Statistics Canada's average annual Consumer Price Index (CPI), with its base of CPI = 100 for June 1992, thus 2002-2003 CPI = 119.0 and 2005-2006 CPI = 127.3; available at: www40.statcan.ca/l01/cst01/econ46a.htm.



Total Government Support for Publishers

- Of the \$38.8 million in grants and contributions reported to the Canada Council as received by book publishers from federal and provincial sources in 2005, nearly one-quarter (24.1%) was provided by the Canada Council's programs in support of book publishing.¹
- Minority-language publishers received less government support than majority-language publishers.

Profitability

- Over one-third of the publishers (35.4%) supported by the Block Grant program ended 2005 at a loss, and close to one-half (44.7%) showed a profit of \$50,000 or less for that year.
- In 2002, over one-third of these publishers (36.6%) experienced a loss; for smaller publishers, this deficit was under \$100,000; two larger publishers' deficits were in excess of \$500,000.
- By 2005, the situation had worsened: although a relatively similar portion of these publishers (35.2%) had experienced a loss, five publishers experienced deficits in excess of \$500,000 and numbers of smaller and larger publishers had experienced somewhat greater deficits.
- This decline in profitability is corroborated by Statistics Canada's latest data on profit margins: in 2004, the average profit margin for Canadian- and foreign-controlled book publishers combined was 10.9%, a decline from 11.1% in 2001 and 1998; in addition, in 2004, 80% of foreign-controlled publishers earned a profit compared to only 60% of Canadian publishers, and the median profit attained by Canadian-owned publishers was only \$9,197 compared to \$3.6 million for foreign-controlled firms.²

Other Canada Council Programs in Support of Book Publishing

2005-2006	French-language	English-language	Total
Emerging Publishers Program			
Budget (\$)	175,000	175,000	350,000
Recipients (#)	12	11	23
Author Promotion Tours			
Budget (\$)	108,900	208,000	316,900
Recipients (#)	41	70	111
Translation Grants			
Budget (\$)	468,100	198,300	666,400
Recipients (#)	26	20	46
Art Books			
Budget (\$)	30,000	79,800	109,800
Recipients (#)	3	3	6

¹ Note that this information is based on amounts reported by publishers, and would not include any federal, provincial/territorial or other grants and contributions to other publishers or received by these publishers after their Canada Council applications were submitted.

² Statistics Canada (2006), *The Daily, Friday, June 30, 2006*; available at: www.statcan.ca/Daily/English/060630/d060630a.htm.



Recommendations

Publishers and publishing industry associations resoundingly acknowledged the key role that the Canada Council's programs in support of book publishing play in developing, supporting and sustaining an indigenous publishing industry in Canada. Nonetheless, the climate for indigenous book publishing has changed considerably from the days when these programs were first introduced, and it has been many years since these programs were evaluated in their entirety. The following 30 recommendations for changes and improvements to the Canada Council's programs in support of book publishing integrate the perspectives and experiences of Canadian-owned book publishers, their associations and the Canada Council itself, analysis of the financial impacts of the program over the last eight years, and other data and information gathered throughout the review.

Mandate

1. Given the essential contributions of the Canada Council for the Arts in fostering the development of a world-class Canadian indigenous literature and given the significant decrease in program dollars (adjusted for inflation) in the last three years, maintain the Canada Council's programs in support of book publishing and increase program budgets in order to ensure the stability and diversity of Canadian literary publishing.

Publisher Eligibility

2. Continue to apply the policy for assessing Canadian ownership and control, including publicly traded companies, and the treatment of affiliated companies, monitoring and revising on a regular basis.
3. Eliminate the requirement that publishers use "normal bookselling channels."
4. Maintain the requirement that book publishing be a primary activity for entrance into the book publishing support programs of the Canada Council.

The Transition from the Emerging Publishers Program to the Block Grant Program

5. Support the transition of professional publishers from the Emerging Publishers to the Block Grant program.
6. Develop a mechanism to enable publishers to access continued funding if they have difficulty making the transition from the Emerging Publishers program into the Block Grant program. Apply a mechanism similar to the Fair Notice Policy in situations where publishers have continual difficulty making the transition from the Emerging Publishers program into the Block Grant program.
7. In order to foster diversity in book publishing, allow Aboriginal, minority-language, ethnic-minority and arts-discipline publishers to remain in the Emerging Publisher program, if such publishers can demonstrate why they cannot publish more than 3 eligible titles per year.

Title Eligibility

8. Continue to apply a broad interpretation of title eligibility to the category of creative or literary non-fiction, and introduce refinements to the title eligibility guidelines.
9. Improve the title eligibility review and appeals process for Block Grant and Emerging Publishers recipients so that appeals of contested titles can be heard before peer assessment committees meet.
10. Maintain Canadian-authorship as a title eligibility requirement, unless the program budgets are substantially increased. Should eligibility of foreign-authored books be re-considered, develop assessment and financial models that illustrate the impact of such a change on these programs and ensure that broad consultation with publishers and the publishing industry associations is undertaken.
11. Modify the minimum and maximum print runs.



The Risk in Publishing Literary Works

12. Recalculate risk by genre to accurately reflect all costs involved in publishing each genre.

Financial & Funding Issues

13. As a first priority, increase the budget of the Block Grant program. As a second priority, increase the budgets of the Author Promotion Tours, Emerging Publishers and Translation Grants programs.
14. If the budget of the Block Grant program increases significantly, include 2 straight reprints of eligible titles per year per publisher as eligible for support at 50% of risk reduction per title.
15. Introduce 2-year multi-year funding to the Block Grant program.
16. Establish a minimum grant of \$10,000 in both the Emerging Publishers and Block Grant programs to provide stability to eligible publishers in both programs, and during the transition from one program to the other.
17. In exceptional circumstances, allow grants of up to \$30,000 to be awarded to a publisher in the Emerging Publishers program.
18. In consultation with industry associations, eliminate the BPIDP clawback, and replace it with a mechanism that has a similar effect on publishers' Block Grants.
19. After the BPIDP clawback replacement mechanism has been in place for 3-5 years and new title analysis data is available, explore scenarios to determine whether the 42%-58% base-bonus split should be revised.
20. Maintain the current allowable variance at a maximum of a 25% increase in Block Grant program funding awarded to a publisher from one cycle to the next but change the maximum decrease to 15%.
21. Examine the established French-English budget split in the Block Grant program, in consultation with industry associations, and build consensus on the appropriate split.

The Role of the Peer Assessment Committee

22. Strengthen publisher representation on peer assessment committees, and provide overlap from one committee to the next.
23. Refine and improve the assessment criteria and process.

Organizational Health

24. Given the Canada Council's decision to introduce organizational health across its disciplines and the need to provide more information to the book publishing industry, introduce the organizational health initiative into the book publishing sector gradually.

Author Promotion Tours

25. Make publisher support for promoting authors more effective in today's environment.

Translation Grants

26. Make the Translation Grants program operate more effectively.

Support for Industry Associations

27. Increase the level of core operational support to publishing industry associations so that they can properly fulfill their responsibilities to their members and provide expert stakeholder advice to the Canada Council and other funders and policy-makers.



Administration

28. Allocate some of the new money at the Canada Council to hire much needed capacity within the Writing & Publishing Section so that essential activities can be undertaken.
29. Simplify the funding formulas within the Canada Council's programs in support for book publishing, and publicize the simplified formulas in program guidelines, so that all publishers have more knowledge of how grants are administered.
30. Simplify and refine some of the Canada Council's administrative processes and tools used to provide support for book publishing.

Conclusions

Publishers and publishing industry associations resoundingly acknowledged the key role that the Canada Council's programs in support of book publishing play in developing, supporting and sustaining an indigenous publishing industry in Canada. Nonetheless, the climate for Canadian-owned book publishing has changed considerably from the days when the Canada Council's programs were first introduced, and it has been many years since these programs were evaluated in their entirety. The recommendations included in this report aim to increase sustainability of Canadian-owned publishing houses through improvements and adjustments to existing programs which have served publishers and literary production in Canada very well.

The 30 recommendations in this report address both substantive and detailed administrative issues that were uncovered during the programs review. The substantive recommendations are:

- Reinforcing the essential role that the Canada Council's book publishing programs play in fostering, developing and sustaining an indigenous book publishing industry and the continued development of a national literature.
- Confirming that the Canada Council's programs in support of book publishing can remain distinctly different from the BPIDP of Canadian Heritage by virtue of targeting support to the less commercial, more risky literary genres of book publishing, and should be continued. Maintaining the per literary title approach to its support is the sole method to enable the Canada Council to distinguish its mandate from other more industrial support for book publishing, and must be preserved.
- Confirming that Canada Council programs in support of book publishing are significantly underfunded. It is hoped that decision-makers will hear this "clarion call" and appropriately fund writing and publishing in Canada. The budgets of all of the Canada Council's programs in support of book publishing must be enhanced in order to adequately invest in and support publishers' risk in producing literary titles.
- Changing the paradigm that underpins the Canada Council's support for book publishing from a deficit funding model to a deliberate effort to calculate and support risk reduction.
- Introducing a multi-year funding model into the core program of the Canada Council's support for book publishing, providing stable funding to Canadian-owned book publishers.
- Replacing the redistribution mechanism that clawed back a portion of publishers' BPIDP contributions with a comparable mechanism that enables the Canada Council to make similar policy-based adjustments to the base grants that publishers receive, and set any policy priorities that might impact on and fine-tune the redistribution mechanism.
- Rationalizing the entry into and transitions between the Emerging Publishers and Block Grant programs to ensure that professional publishers who contribute to the development of Canadian literature are supported and rewarded, and that publishers who do not make such professional contributions are no longer supported.
- Clarifying and simplifying processes and procedures to provide publishers with more certainty and understanding of administration of these essential programs.



- Adequately funding industry associations and the administration budget of the Canada Council's Writing and Publishing Section itself to enhance necessary policy development and ensure that the programs are administered as effectively and efficiently as possible.

Action on the recommendations arising from this programs review would ensure a stronger Canadian-owned book publishing sector and the continued opportunity for Canadians to read about and be engaged by a diverse Canadian literature.



Purpose of the Review

The mandate of the Canada Council for the Arts is “to foster and promote the study and enjoyment of, and the production of, works in the arts.” In this context, “the Canada Council provides financial assistance to Canadian publishers to offset the costs of publishing Canadian trade books that make a significant contribution to the development of Canadian literature.”¹

By policy, the Treasury Board of Canada Secretariat is mandated to ensure that the government has timely, strategically focussed, objective and evidence-based information on the performance of its policies, programs and initiatives to produce better results for Canadians. According to the federal government evaluation policy, evaluation has two main purposes:

- To help managers design or improve the design of policies, programs and initiatives; and
- To provide, where appropriate, periodic assessments of policy or program effectiveness, of impacts both intended and unintended, and of alternative ways of achieving expected results.²

Prior to this programs review, the Canada Council had undertaken an evaluation of the Block Grant program’s impact on English-language publishers in 1999.³ In the report on that evaluation, Frith and Lorimer stated that the fundamental tenets of the Canada Council flow from the arms-length principle that mandates all Canadian Crown corporations and agencies; for the Canada Council, these tenets are “commitments to long-term stability, to excellence for its own sake and to responsiveness to each arts community that the Council serves.” Frith and Lorimer also observed that English-language publishers were very satisfied with the design and administration of the Block Grant program, despite “myriad quibbles.” They concluded at the time that “the program is functioning well in responding to the general mandate of the Canada Council for the Arts and the specific responsibilities of the Writing and Publishing section of the Council and in providing an appropriate amount of support in a constructive and responsive manner.”

In 2005, the Canada Council decided to undertake a review of its programs in support of book publishing for a number of reasons:

- The book publishing sector had changed significantly since it first began providing support directly to book publishers.
- The most recent Block Grant evaluation, in 1999, had focused on overarching policy issues and had not made recommendations regarding program design or administration.⁴
- The Canada Council had never conducted a program review that took into account both language groups.

The objectives of this review of the Canada Council’s programs in support of literary publishing are in line with the main purposes of program evaluation noted above:

- To help improve the design of the Canada Council’s programs; and
- To provide an assessment of the current programs effectiveness, of impacts both intended and unintended, and of alternative ways of achieving expected results.

In particular, this review will propose alternative ways to improve the design of the Canada Council’s programs and to better achieve expected results in order to support publishers’ success and sustainability in their publishing of culturally significant books and in their publishing of Canadian writers.

¹ Writing and Publishing Section (2006), *From Seed to Sustainability: A Strategic Review of Book Publishing Support at the Canada Council for the Arts* (Ottawa: Canada Council for the Arts); will be referred to as “the 2006 Canada Council programs review discussion paper”.

² Treasury Board of Canada Secretariat (2001), *Evaluation Policy* (Ottawa, Government of Canada); available at: www.tbs-sct.gc.ca/pubs_pol/dcgpubs/tbm_161/ep-pe_e.asp.

³ Valerie Frith & Rowland Lorimer (n.d.), *To Foster and Promote Writing and Publishing in Canada: An Evaluation of the Block Grant Program of the Canada Council for the Arts* (Ottawa: The Canada Council for the Arts).

⁴ Ibid.



By evaluating the design and impact of its programs, and making both substantive and subtle changes as appropriate to ensure that the programs are operating in an effective and efficient manner, the Canada Council is fulfilling a core management responsibility: accountability to the federal government, Canadian taxpayers and the publishers themselves. In addition, the Canada Council viewed the review process as an opportunity to examine how its support for book publishing might move from that of a seed program to one that would contribute to the stability and sustainability of the indigenous book publishing sector after over 30 years of partnership.



Context

The Canada Council created its first program in support of literary publishing in Canada in 1972. Over the years since the introduction of the Block Grant program, the Canada Council has developed other targeted programs in support of book publishing: Author Promotion Tours, Translation Grants, Grants for Art Books, and the Emerging Publishers program. Taken together, these programs have provided effective and essential support for literary publishing in Canada, helping to ensure that a vibrant, diverse Canadian literature is available to readers across Canada and in many other countries. As the Canada Council observed, “Thirty-three years and many thousands of terrific books later, Canadian literature – and the industry behind it – is arguably one of the most successful cultural industries Canada has developed – both at home and abroad.”¹

The Canada Council’s programs in support of literary publishing do not operate in a vacuum. The Canada Council Block Grant program is twinned with another federal program that supports Canadian publishers, the Book Publishing Industry Development Program (BPIDP). Created in 1979, BPIDP targets its support to meet industrial development and cultural objectives. In contrast, the Canada Council’s support of book publishing aims to foster the development of Canadian literature, with an emphasis on literary publishing and professional excellence. The Canada Council’s programs target support for publishing of Canadian-authored literary works; the BPIDP provides contributions based on sales of Canadian-authored commercial, educational and literary titles. These differences are far from subtle: many literary titles, while important to the cultural life of Canada and our understanding of ourselves, are harder to market and may sell far fewer copies than commercial and educational books. (Note that the most commercially-successful literary titles are excluded from the Canada Council’s programs through a limit on number of copies printed.) In addition to these federal programs that provide support to book publishers regardless of where in Canada they operate, there are provincial, territorial and municipal governments and agencies that support book publishing, with widely differing levels of support available from one region of Canada to another.² All of these programs, in particular BPIDP, must be taken into consideration during any review of the Canada Council’s support of literary publishing, given that Canada Council support is essential for publishers regardless of where they are located.

So, too, must the environment for book publishing be considered as context for this programs review. Reading printed books continues to be important to Canadians, despite the extensive presence of computers in Canadian homes and businesses, and the development of other technological options for reading that are only beginning to make their presence felt in the marketplace, such as various forms of e-books devices. A recent study of Canadian’s book reading habits stated that “the rapid growth of the Internet has not been at the expense of reading books for pleasure.”³ Of the \$22.8 billion Canadians spent on cultural goods and services in 2003, \$1.2 billion was spent on books (not including school books), and a further \$1.1 billion was spent on post-secondary textbooks, the latter market segment being dominated by foreign-owned publishing houses.⁴ Almost one-half of Canadians (44%) mainly read literary materials, including novels, essays, anthologies of poetry, drama, for pleasure, and over three-quarters (79%) have read at least one book of this genre over the past 12 months.⁵ However, the Canadian-owned book publishing sector, unlike many of the arts disciplines supported by the Canada Council, is comprised primarily of for-profit companies that seek to fulfill their individual publishing mandates while operating in a very competitive environment.

¹ The 2006 Canada Council programs review discussion paper.

² For more information on provincial programs administered by government departments and arms-length agencies that directly fund the cultural industries, including book publishing, see: Andrew David Terris (2004), *Provincial Support for the Cultural Industries: A Systematic Presentation of Programs and Policies* (Ottawa: Canadian Heritage).

³ Créatec (2005), *Reading and Buying Books for Pleasure: 2005 National Survey* (Ottawa: Canadian Heritage).

⁴ Hill Strategies Research (2005), *Consumer Spending on Culture in Canada, the Provinces and 15 Metropolitan Areas in 2003*; available at: www.hillstrategies.com/docs/Consumer_spending2003.pdf.

⁵ Créatec (2005).



Canadian-owned book publishers operate in an environment of considerable challenge and change. Numerous factors contribute to this very unstable environment. Canada's close proximity to a much larger English-language market in the United States is an ever-present factor that disadvantages Canadian-owned book publishers. Just as Canadian book publishers can readily sell into the U.S. market, U.S.-based multinational publishers can reach the Canadian marketplace without difficulty. As well, the tenfold larger English-speaking population in the U.S. has meant that U.S.-based English-language publishers can afford larger print runs, resulting in a considerably lower cost per unit than a comparable title in Canada. With higher profit margins and commensurate larger budgets, the U.S.-based English-language publishers can also more easily afford to acquire new manuscripts written by the cream of Canadian authors.

A closer examination of sales illustrates the far-from-level market pressures facing Canadian-owned book publishers in Canada. Eighty-three percent of Canadian-authored books were published by Canadian-owned firms in 2000-01, yet sales by Canadian-owned book publishers accounted for only 62% of total sales of Canadian-authored books.¹ The latest research from Statistics Canada shows that foreign-controlled publishers accounted for 59% of Canadian book sales in 2004 (\$808 million out of a total of almost \$1.4 billion).² In addition, the significant presence that publishers from France have been able to establish in the Canadian market – Quebec publishers only control 35% of their domestic market – seriously disadvantages Canadian-owned French-language publishers.³ At the same time, expenses for the book publishing industry totalled \$1.9 billion, an increase of 24% from 1998 to 2004.⁴

The Canadian retail sector has undergone considerable change over the last decade. Trade bookselling has concentrated in the hands of one or a few chain stores in the French- and English-language Canadian markets. Many independent and specialty bookstores have closed, decreasing the diversity of titles available to Canadian readers. The remaining chain bookstores have been able to exert substantial influence on terms of trade with the Canadian publishing industry. To make matters worse, high return rates continue to plague the retail sector, resulting in increased risk for publishers for any book that they do place in the large chain stores.

So, too, has the structure of the book publishing industry itself undergone considerable change. Consolidation, vertical integration and mergers between publishing houses in different countries have decreased the number of book publishing companies in Canada, especially in Quebec. Long-established publishing houses have been sold to other Canadian-owned publishing houses or media corporations. Internationally, the situation is the same. In the United States, the entertainment industry is showing exponential growth, and has absorbed the book publishing industry, with 80% of the market now being controlled by five conglomerates, and similar shifts have been observed in Europe.⁵

The demise of General Distribution Services (GDS) in 2002 had a profoundly negative impact on the book publishing companies that it distributed. Many book publishers, in particular smaller literary presses, are still recovering from the financial impact of that bankruptcy, are still paying off the debts incurred when they did not receive payment for books sold through GDS or did not get all of their unsold books back from the distributor. In addition, the supply chain has generally become much more complex, requiring considerably more effort to ensure that books reach readers. One of the significant hurdles in the supply chain has been guaranteeing that book distributors in Canada, the U.S. and elsewhere incorporate accurate bibliographic data on each of a Canadian publisher's books into their databases. Recently, this particular issue has been substantially improved, thanks to appreciable effort on the part of Canadian-owned book publishers and financial support from Canadian Heritage. Other issues in the supply chain,

¹ Prairie Research Associates (2004), *Summative Evaluation of the Book Publishing Industry Development Program (BPIDP): Final Report* (Ottawa: Canadian Heritage).

² Statistics Canada (2006), *The Daily, Friday, June 30, 2006*; available at: www.statcan.ca/Daily/English/060630/d060630a.htm.

³ Gouvernement du Québec (1998), *Le temps de lire, un art de vivre. Politique de la lecture et du livre*.

⁴ Statistics Canada (2006).

⁵ L'Association nationale des éditeurs de livres (2005), *Pour un renouveau du soutien aux éditeurs et à la diffusion de la création littéraire* (Montreal: L'Association nationale des éditeurs de livres).



such as electronic data interchange (EDI) standards, digitization, and the availability of point-of-sale information, continue to challenge the industry.

A recent study of Canadian book exports by publishers who received support from Association for the Export of Canadian Books programs found that, for those publishers, exports nearly doubled from 1996-97 to 2003-04, with exports totalling \$77.7 million in 2003-04, with 67.8% of those sales by English-language publishers.¹ Finished books were by far the most important portion, representing 93.1% of export sales in 2003-04. Because the export of finished books is such an important market for Canadian publishers, the rise in the value of the Canadian dollar has become a serious issue. Exporting publishers, while significantly increasing their exports, are obtaining smaller net revenues per copy sold as a result of the high exchange rate, reducing the value of these increasingly important export markets to Canadian book publisher's sustainability and growth.

Another very pressing issue is the greying of the Canadian-owned book publishing industry. A 2003 study of for-profit publishing companies that receive support from Canadian Heritage's Book Publishing Industry Development Program² found that 56% of these publishing companies had been in existence between 20 to 40 years, and another 6% had been in existence even longer. Seventy percent of the owners of those firms were 50 years of age and older, with 20% age 60 and over, and 5.5% over age 65. In 2003, almost one-half (49%) of all of those owners planned to retire in the next 10 years, with 18% planning to retire within 5 years. Who will be able to purchase those companies and how we can ensure the next generation of indigenous book publishers are new issues putting considerable stress on the Canadian-owned publishing sector.

It is in this context of considerable flux and challenge that the review of Canada Council programs in support of book publishing was conducted. Desirous of improving the stability and sustainability of a more mature indigenous book publishing industry, the Canada Council determined two over-arching objectives for the review: to measure the success and appropriateness of the Canada Council book publishing support programs; and to examine how the programs could be improved to enable participating publishers to thrive into the 21st century, by:

- Sustaining a high level of literary excellence.
- Increasing publishers' marketing and promotion efforts to reach readers.
- Planning for succession.
- Better enabling the growth and development of emerging publishers.
- Attracting and retaining talented staff.
- Responding to new technologies.³

The Canada Council invited 8 French-language and 8 English-language publishers to form an advisory committee for the programs review. The Canada Council asked those publishers to take on an additional focus: a broad examination of the needs, challenges and opportunities facing Canadian publishers and how those needs might be met. At a strategic visioning session in January 2006 involving the publisher advisory committee members, staff of the Canada Council Writing and Publishing Section, and the programs review consultants, publishers were easily able to articulate new measures and initiatives that would strengthen and support Canadian book publishing. A significant portion of the strategic session focused on six priorities for Canadian-owned book publishers:

- **Awareness and promotion of Canadian books:** Developing a major, ongoing, year round media-based awareness campaign, tied into other writing and publishing events in Canada, and including prizes and involving youth. Some of the English- and French-language publishers on the Canada Council's publisher advisory committee are striving to build support across the publishing community and within

¹ Étude Économique Conseil (2005), *Impact of EMAP and FRMAP Programs Final Report: Participation in Fairs and Salons and Evolution of Export Sales, 1996-2004* (Ottawa: Association for the Export of Canadian Books).

² Étude Économique Conseil (2003), *Survey on Succession Planning of Owners of Publishing Companies* (Ottawa: Canadian Heritage).

³ The 2006 Canada Council programs review discussion paper.



government for such a substantial new initiative to promote and market Canadian-authored, Canadian published books.

- **Independent bookstores:** Providing independent bookstores with tools needed to compete with the larger chains, including marketing and promotion incentives; exploring whether to expand the Quebec model of requiring bookstores to order copies of all new titles across Canada; and rigorously enforcing the terms under which Chapters/Indigo received approval from the federal Competition Bureau.
- **Public libraries:** Substantially increasing the awareness and reading of culturally significant Canadian books by public library users, using the delivery model of the AECB, in close consultation with librarians.
- **School curriculum and school libraries:** Involving many stakeholders – including writing and publishing trade associations, federal funders and parents – in a policy initiative to increase the acquisition of Canadian books in school libraries and the use of Canadian content in school curricula.
- **Industry renewal and succession:** Involving the training, coaching and mentorship of publishing staff to support recruitment, retention and succession within Canadian-owned publishing houses, coupled with succession-related tax incentives.
- **Tax incentives:** Providing tax exemptions for a certain portion of authors' royalty income, and providing tax incentives for private investment in Canadian-owned book publishing companies.

The ready identification of new measures and incentives to support Canadian-owned book publishing illustrates the demanding nature of book publishing today. While much larger and more diverse than 30 years ago, the Canadian-owned book publishing sector is still fragile and reliant on government support for its very survival. Indeed, the sector is more fragile and less diverse than it was five years ago because of consolidation of publishing houses and booksellers, a decrease in the number of mid-sized publishers and an emphasis on commercial success of books published in order to ensure publisher survival. This programs review has demonstrated the fragile condition of the sector (see the section of the report entitled Financial Impacts, 1998-2005, and Appendix C, in particular Tables 22.1 and 22.2). The 2004 BPIDP evaluation concluded that self-sufficiency in the Canadian-owned publishing sector is unlikely, a conclusion echoed in evaluations of BPIDP conducted in 1984, 1986 and 1992, and by key informants in the 2004 BPIDP evaluation.¹ The 1999 Frith and Lorimer evaluation of the Canada Council's Block Grant program stated that, "the stability of the Canadian book publishing industry relies on significant financial incentives from public bodies, incentives that are essential to the indigenous book publishing industry if it is to survive at all, never mind achieve success and stability."²

And the Canada Council clearly has done its part. Its contributions to book publishing went from aiding 38 publishers in 1972,³ to assisting 156 Canadian-owned houses to publish 2,077 literary titles under the Block Grant program in 2005. Canadian-owned book publishers rely on the Canada Council's support to continue publishing Canadian literary works. They know that Canada Council staff are sympathetic allies who understand literary publishing and strive to provide support in good faith and with a spirit of collaboration. They understand that the Canada Council works to ensure the vibrant presence of small and mid-sized Canadian publishing houses. And they articulately and gratefully acknowledge the fundamental importance of the Canada Council's programs in support of book publishing.

Now the Canada Council has turned its attention to how to effectively provide greater stability and sustainability to the more mature but still struggling indigenous book publishing industry. This program review has thoroughly examined the impacts and effects of the Canada Council's programs in support of book publishing, by reviewing the financial impacts of the program over the last eight years, by engaging publishing industry associations and the Canada Council itself in policy and impact deliberations, by considering new avenues and mechanisms, and by speaking extensively with publishers themselves. The

¹ Prairie Research Associates (2004), *Summative Evaluation of the Book Publishing Industry Development Program (BPIDP): Final Report* (Ottawa: Canadian Heritage).

² Valerie Frith & Rowland Lorimer (n.d.), *To Foster and Promote Writing and Publishing in Canada: An Evaluation of the Block Grant Program of the Canada Council for the Arts* (Ottawa: The Canada Council for the Arts).

³ Association of Canadian Publishers (January 2006), *Canada Council Publishing Grants Policy Paper* (Toronto: ACP).



findings and conclusions of this program review clearly demonstrate the fundamental value of the Canada Council's support of book publishing, while determining numerous mechanisms to fine-tune the delivery and administration of these important programs.



Approach & Methodology

The Canada Council for the Arts engaged consultants Sibyl Frei and Louise Fleming of DeGros Marsh Consulting and Marcel Ouellette of Édinova Inc. to conduct an independent review of its programs in support of book publishing. The consultants – who are all former book publishers – undertook an in-depth analysis of the financial support provided to book publishers by the Canada Council, conducted extensive consultations with many francophone and anglophone book publishers and their industry associations, spoke regularly with staff at the Canada Council, and met with officials at Canadian Heritage (the complete list of people consulted can be found in Appendix A).

The consultants and the Canada Council believed that it was fundamentally important to reflect the realities and environments of both French- and English-language publishers as part of the program review and in order to propose changes to program design or implementation. To that end, the program review methodology included broad consultation with both parts of the Canadian book publishing sector.

The multi-pronged review included the following steps:

A) Canada Council

The Writing and Publishing Section at the Canada Council developed a detailed discussion paper on issues and options to strengthen and provide stability to Canadian-owned book publishers. Its discussion paper was carefully examined, and contributed to the planning of key interviews and focus group discussions with publishers and the formulation of recommendations in this report. In-depth interviews were conducted with two long-term Canada Council staff in order to gain insight into the historical and current rationales behind the Canada Council's book publishing support programs and their administration, and the consultants worked closely with staff in the Writing and Publishing Section at the Canada Council during the review.

B) Canada Council Publishers Advisory Committee

The Canada Council invited eight French-language and eight English-language book publishers to form an advisory committee for its programs review. This advisory committee, along with the staff of the Writing and Publishing Section at the Canada Council, provided advice and suggestions to the consultants several times during the planning of the programs review. In addition, the advisory committee and the Writing and Publishing Section at the Canada Council thoroughly discussed the draft report and recommendations with the consultants.

C) Publisher Associations

Policy papers on the Canada Council's support to book publishing developed by the four main professional associations – the Association of Canadian Publishers (ACP), the Association nationale des éditeurs de livres (ANEL), the Literary Press Group (LPG) and the Regroupement des éditeurs canadiens-français (RÉCF) – were carefully examined, and contributed to the planning of the key interviews and focus group discussions with publishers and to the formulation of recommendations found later in this report. Potential recommendations for change were discussed with these four publisher associations at the same time as the publisher focus groups were conducted. In addition, the associations were given the opportunity to comment on the draft final report and recommendations.



D) Longitudinal Data Review

A detailed review of program spending and its impacts for the Block Grant, Emerging Publishers, Author Promotion Tours, Translation Grants and Art Books programs from 1998 to 2005 was conducted.¹ Highlights of the longitudinal data review can be found in Appendix C.

E) Mini-survey of Publishers

A mini-survey, composed of three general questions about publisher eligibility, title eligibility and overall comments about book publishing support were sent electronically to all applicants to the Block Grant and Emerging Publishers programs from 2000 to 2005. Of 271 e-mails sent to publishing houses, 86 responses were received, representing a response rate of 32 percent, including 35 percent of current Block Grant program recipients. Questions covered in the mini-survey of publishers can be found in Appendix F.

F) Key Interviews with Publishers

In-depth interviews were conducted with thirty French- and English-language book publishers to gain a comprehensive understanding of the impacts and administrative challenges of the Canada Council's programs in support of book publishing on publishers. Questions covered in the key interviews can be found in Appendix F.

G) Publisher Focus Groups

Focus groups of three to five publishers were conducted in Vancouver, Toronto, Montreal, Quebec City and Halifax to test potential recommendations for changes to the Canada Council's various programs in support of book publishing. Questions covered in the focus group discussions can also be found in Appendix F.

H) Department of Canadian Heritage

A discussion on publishing programs was conducted with Department of Canadian Heritage staff involved in book policy development, and administration of its complementary Book Publishing Industry Development Program (BPIDP).

I) Examination of Alternate Scenarios to the BPIDP Clawback Formula

Options to the BPIDP clawback² were developed and examined. Those options that ensured a continued emphasis on literary excellence and that did not have a appreciable negative impact on small and mid-sized publishers were examined in further detail and are presented in this report. The detailed scenarios can be found in Appendix D.

Summary

Comprehensive consultations with the Canadian-owned book publishing industry and its funders allowed the consultants to gain a deep understanding of program impacts, results and challenges for publishers and for the Canada Council itself and the potential consequences of program changes being proposed

¹ There were significant challenges in terms of data available for analysis, which are detailed at the beginning of Appendix C.

² The "BPIDP clawback" is a complex formula that reduces the base grant of publishers in the Canada Council Block Grant program who also receive Book Publishing Industry Development program (BPIDP) financial support from Canadian Heritage. The intent of the BPIDP clawback was to redistribute some of the Block Grant program funds that would have gone to larger BPIDP-eligible publishers to smaller non-BPIDP-eligible publishers that received positive assessments from Block Grant juries.



and considered. In making their recommendations, the consultants drew upon the extensive and varied input of this programs review: in-depth consultations with publishers, detailed analysis of program spending, and examination of the policy frameworks in which these programs operate.



Financial Impacts, 1998-2005

As part of this programs review, the financial impacts of the Block Grant, Emerging Publishers, Author Promotion Tours, Translation Grants and Art Books programs from 1998 to 2005 were examined. Key findings from this longitudinal data review of the Canada Council's support for book publishing are outlined below; detailed information can be found in Appendix C.

Overview of the Canada Council's Programs in Support of Book Publishing

The budgets of each of the Canada Council's programs in support of book publishing remained relatively stable from 1998 to 2001 (see Tables 1.1A, 1.1B, and 13.0 to 16.0). All program budgets received an increase through the Tomorrow Starts Today funding late in the 2001-2002 fiscal year. In addition, a federal government-wide priority re-allocation came into effect for the Canada Council in 2004-2005, affecting the Canada Council's overall budget. The impact of budget reductions from 2002-2003 to 2005-2006, adjusted for inflation, were severe: a decrease in Canada Council support for book publishing of over 20% in just three years.

Program Budgets				
	2002-2003		2005-2006	Change (adjusted for inflation)
	Actual	Adjusted for Inflation ¹	Actual	
Block Grants	8,644,100	10,132,541	7,885,000	- 22.18 %
Emerging Publishers Program	420,800	450,150	350,000	- 22.25 %
Author Promotion Tours	395,200	422,764	316,900	- 25.04 %
Translation Grants	533,290	570,486	666,400	+ 16.81 %
Art Books	178,000	190,415	109,800	- 42.34 %
Total	\$ 10,171,390	\$ 11,766,356	\$ 9,328,100	- 20.72 %

Overview of the Block Grant Program

The characteristics of Block Grant program recipients in 2005-2006 are summarized in the following tables.

By Language			
	French-language	English-language	Total
Budget (\$)	3,154,000	4,731,000	7,885,000
Recipients (#)	64	92	156
By Eligible Titles (#)			
	French-language	English-language	Total
Eligible Titles	1,003	1,075	2,077

¹ Amounts adjusted for inflation used Statistics Canada's average annual Consumer Price Index (CPI), with its base of CPI = 100 for June 1992, thus 2002-2003 CPI = 119.0 and 2005-2006 CPI = 127.3; available at: www40.statcan.ca/l01/cst01/econ46a.htm.



Block Grant Recipients by Size (\$)			
	French-language	English-language	Total
< \$100,000	21	24	46
\$100,000 - 249,999	12	25	38
\$250,000 - 499,999	9	9	19
\$500,000 - 999,999	8	8	17
\$1M - 2M	6	10	18
\$2M - 5M	2	8	10
> \$5M	6	8	14
Total	64	92	156
Block Grant Recipients by Region (#)			
Atlantic	2	10	12
Quebec	56	5	61
Ontario	4	41	45
Prairies	2	16	18
British Columbia	0	20	20
Total	64	92	156

- Although francophone publishers comprised just over 40% of Block Grant recipients, they published close to 50% of eligible titles; the overall number of titles supported by the program increased by 26.0% from 1998 to 2005 (see Tables 1.2 & 1.3).
- A total of 203 publishers received support from the Block Grant program at some time during the period from 1998 to 2005 (see Table 2.0).
- While the overall number of Block Grant recipients and smaller publishers¹ remained the same between 2002 and 2005, the number of mid-sized publishers declined in favour of larger publishers (see Table 3.0).
- The overall Block Grant program budget and the grants to small and mid-sized publishers declined from 2002 to 2005, while grants to the group of large publishers increased due to an increase in the number of large publishers (see Table 4.0).

Block Grant Program Eligible Titles

- Just as the total number of eligible titles levelled off since 2002 (see Table 1.3), with the exception of non-print titles, only the genre of drama has shown a significant decline since 2002 (from 94 to 74 titles); before 2002, while fluctuating from year to year, the number of eligible titles published in each genre increased gradually from 1998 to 2002, with the exception of all children's publishing, which increased significantly (from a total of 435 in 1998, to 628 in 2002, and 681 in 2004 (see Table 5.0).
- Of the titles eligible for Block Grant program support, francophone recipients published more fiction, longer works of non-fiction, non-hardcover children's books, and shorter works of poetry; anglophone recipients emphasize all lengths of non-fiction, fiction, illustrated children's books and young adult titles, and shorter works of poetry (see Table 5.0).

¹ Throughout this report, publisher "size" is determined by total operating revenue. For the purposes of this report and its recommendations, "small" publishers were publishers with less than \$250,000 in total operating revenue in 2005, "mid-sized" publishers had revenues of \$250,000 to less than \$1 million, and "large" publishers had revenues of over \$1 million. Also note that, in general, calculations are reported as averages.



- Francophone publishers received a considerably lower base grant per title than anglophone publishers in almost all genres (see Tables 6.1 and 6.2).
- Despite rising costs of production,¹ base grant allocations per title – adjusted for inflation – have decreased steadily since the addition of Tomorrow Starts Today funding in 2001-2002 (see Table 6.2).
- It was generally somewhat more expensive for anglophone publishers to produce their books than francophone publishers (see Tables 7.1 and 7.2).
- Anglophone publishers generally sold more copies of a given title than their francophone counterparts (see Table 8.0).
- Unsurprisingly, of the titles submitted to the Block Grant program and deemed ineligible, between two-thirds and three-quarters were non-fiction (see Table 9.0).

Block Grant Program Bonus Points

- Publishers in the Atlantic region generally received the fewest bonus points for their literary publishing program; from 1998 to 2003, publishers in British Columbia and Ontario received the most bonus points; since 2004, publishers in Quebec and Ontario have received the most bonus points (see Table 10.1).
- The larger the publisher, the more bonus points received in both 2002 and 2005; however, the larger publishers received fewer bonus points per eligible title (see Table 10.2).
- For francophone publishers in Quebec, bonus points per title were low; the same was true for anglophone publishers in Ontario until the last two years of the review period (see Table 11.0).
- Generally, both French and English juries tended to attribute fewer overall points to linguistic minority, Aboriginal or culturally significant publishers. This difference has decreased in recent years; although both juries generally attributed fewer points per title to these publishers, the difference was somewhat less noticeable with anglophone juries (see Table 12.0).

Other Canada Council Programs in Support of Book Publishing

2005-2006	French-language	English-language	Total
Emerging Publishers Program			
Budget (\$)	175,000	175,000	350,000
Recipients (#)	12	11	23
Author Promotion Tours			
Budget (\$)	108,900	208,000	316,900
Recipients (#)	41	70	111
Translation Grants			
Budget (\$)	468,100	198,300	666,400
Recipients (#)	26	20	46
Art Books			
Budget (\$)	30,000	79,800	109,800
Recipients (#)	3	3	6

¹ Statistics Canada (2006), *The Daily*, Friday, June 30, 2006; available at: www.statcan.ca/Daily/English/060630/d060630a.htm.



- A total of 114 publishers received support from the Emerging Publishers program at some time during the period from 1998 to 2005 (see Table 17.0).
- The number of English-language publishers in the Emerging Publishers program decreased from 21 to 11 from 1998 to 2005, and the number of French-language publishers increased from 9 to 12, for an overall decline of almost 25% in the number of beneficiaries during the period. In 2001, when the budget was the highest in the period, a total of 36 publishers received an Emerging Publishers grant, confirming a correlation between the budget of the program and the number of emerging publishers that can be supported by the program.
- The distribution of Author Promotion Tours by region echoed the distribution of publishers within the regions, with the exception of a lower portion of the funding in Quebec.
- The relatively lower proportion of the Author Promotion Tours budget going to French-language publishers and publishers in Quebec reflected the relative ease and lower cost of touring authors at the many salons, book fairs and other literary events in Quebec.
- The Translation Grants program is the only Canada Council program in support of book publishing that had a budget increase during the period from 2002-2003 to 2005-2006, from \$570,500 in 2002-2003 to \$666,400 in 2005-2006, or an increase of 16.8%; however, this is down from a high of \$738,700 in 2001-2002 (all amounts adjusted for inflation¹).
- Although the numbers of English- and French-language publishers receiving funding under the Translation Grants program were fairly evenly split, French-language Quebec-based publishers received at least 70% of the funds most years, while Ontario-based publishers received the lion's share of the remaining translation funding.
- The budget in the Art Books program declined dramatically from 1998 to 2003; unsurprisingly, the number of publishers who received support for art books and the number of art books supported declined appreciably.
- More details for each of these programs can be found in tables 13.0 to 16.0.

BPIDP

- As expected, in both 2002 and 2005, as publisher size increased, publishers went from receiving only Block Grant support to obtaining support from both the Block Grant and BPIDP programs (see Tables 18.1 & 18.2).
- The BPIDP clawback was intended to redistribute Block Grant program funds to smaller publishers who received little or no funding under the BPIDP program. Indeed, the smallest publishers did receive the largest average Block Grant per eligible title. The grant per eligible title generally decreased as publisher size increased, with the exception of a relatively higher grant per title for publishers with sales of \$500,000-\$999,999 and \$2-5 million in 2002, and for publishers with sales of \$2-5 million in 2005 (see 19.1 & 19.2).

Total Government Support for Publishers

- Of the \$38.8 million in grants and contributions reported to the Canada Council as received by book publishers from federal and provincial sources in 2005, nearly one-quarter (24.1%) was provided by the Canada Council's programs in support of book publishing (see Table 20.1).²
- Minority-language publishers received less government support than majority-language publishers (see Table 20.1).

¹ Amounts adjusted for inflation used Statistics Canada's average annual Consumer Price Index (CPI), with its base of CPI = 100 for June 1992; available at: www40.statcan.ca/l01/cst01/econ46a.htm.

² Note that this information is based on amounts reported by publishers, and would not include any federal, provincial/territorial or other grants and contributions to other publishers or received by these publishers after their Canada Council applications were submitted.



- The government of Quebec provided more financial support to publishers regardless of size than other provinces and territories; nonetheless anglophone publishers of all sizes received the same or more support from all government sources than their francophone counterparts (see Table 20.2).

Profitability

- Over one-third of the publishers (35.4%) supported by the Block Grant program ended 2005 at a loss, and close to one-half (44.7%) showed a profit of \$50,000 or less for that year (see Table 21.2).
- In 2002, over one-third of these publishers (36.6%) experienced a loss; for smaller publishers, this deficit was under \$100,000; two larger publishers' deficits were in excess of \$500,000 (see Table 21.1).
- By 2005, the situation had worsened: although a relatively similar portion of these publishers (35.2%) had experienced a loss, five publishers experienced deficits in excess of \$500,000 and numbers of smaller and larger publishers had experienced somewhat greater deficits (see Table 21.2).
- This decline in profitability is corroborated by Statistics Canada's latest data on profit margins: in 2004, the average profit margin for Canadian- and foreign-controlled book publishers combined was 10.9%, a decline from 11.1% in 2001 and 1998; in addition, in 2004, 80% of foreign-controlled publishers earned a profit compared to only 60% of Canadian publishers, and the median profit attained by Canadian-owned publishers was only \$9,197 compared to \$3.6 million for foreign-controlled firms.¹

Summary

Over one-third of publishers supported by the Block Grant program recorded a loss in 2005 (in some cases quite substantial) and only one-fifth of publishers in the program (19.9%) posted a profit of more than \$50,000 for that year. Both French- and English-language publishers rely on the Canada Council for support of their literary publishing programs. Considering the turbulent environment in which Canadian-owned book publishers operate, it is clear that the \$9.3 million in support from the Canada Council – which represents nearly one-quarter of all government contributions to book publishers – is essential for the health and survival of an indigenous book publishing industry in Canada.

¹ Statistics Canada (2006), *The Daily*, Friday June 30, 2006; available at: www.statcan.ca/Daily/English/060630/d060630a.htm.



Findings & Recommendations

This section provides an integrated view of the support for book publishing by the Council. It takes into account in the analysis the financial impact of the Council's programs, the interventions of publishing industry associations, the contributions of a diversity of Canadian-owned French- and English-language publishers and the views of Canada Council staff. The recommendations put forward reflect the consultants' synthesis of the tremendous amount of helpful and carefully considered input from the stakeholders – publishers, publishing industry associations and the Canada Council – and the contextual and quantitative information gathered during the programs review.

Mandate

In the context of its mandate "to foster and promote the study and enjoyment of, and the production of, works in the arts," the Canada Council for the Arts provides financial assistance to Canadian publishers to offset the costs of publishing Canadian trade books that make a significant contribution to the development of Canadian literature. Throughout the process of reviewing the Canada Council for the Arts' support for book publishing, one message was heard consistently: the Canada Council's support for book publishing is essential to the health and success of book publishing in Canada. While acknowledging that details concerning the policies, guidelines and administration of the Canada Council programs in support of book publishing could be improved, many publishers and all of their industry associations stressed that these programs are fundamental to the continued existence of the Canadian-owned publishing sector, in particular literary publishing.

Publishers spoke passionately about the need for a continued emphasis on literary contribution for support under the Canada Council's program. This emphasis will ensure that literary works continue to be published, a priority and focus that strongly distinguishes the Canada Council's programs in support of book publishing from Canadian Heritage's mandate to strengthen the capacity of the Canadian-owned and -controlled sector of the industry to publish and market Canadian books in both domestic and international markets.

Recommendation 1. Given the essential contributions of the Canada Council for the Arts in fostering the development of a world-class Canadian indigenous literature and given the significant decrease in program dollars (adjusted for inflation) in the last three years, maintain the Canada Council's programs in support of book publishing and increase program budgets in order to ensure the stability and diversity of Canadian literary publishing.

Publisher Eligibility

Current publisher eligibility criteria under the Block Grant program require publishers to:

- Have a head office in Canada, maintain editorial control in Canada, and be at least 75 percent Canadian-owned.
- Maintain full control over editorial processes, have editorial autonomy from any other house receiving book publishing support from the Canada Council for the Arts, and produce separate financial statements.
- Have book publishing as their primary, not a peripheral or occasional, activity.

Publishers ... indicated their deep appreciation of the [Canada Council] book publishing support program and recognized the central role this program plays in the development of their businesses.

– ANEL policy brief



- Have at least 16 eligible titles in print and be committed to a sustained trade book publishing program consisting of books by a variety of authors.
- Have published at least 3 eligible titles in the past year and (if the recipient of a Block Grant in the previous year) have published at least 8 eligible titles in the previous 24 months.
- Distribute their books through normal bookselling channels.
- Regularly issue clear royalty statements and have fulfilled all contractual obligations to writers, illustrators, translators, and other copyright licensors.

The growth in the Canadian publishing industry is the direct result of the success of the Canada Council's financial support.

– ACP policy brief

Generally, the publishing industry believes that the existing rules regarding publisher eligibility are appropriate. Although some publishers suggested increasing the Canadian ownership requirement to a higher percentage, the vast majority of publishers and their associations supported the existing requirement of 75 percent Canadian ownership.

On the other hand, ensuring effective Canadian editorial and financial control of individual publishing houses and affiliated companies and determining that publicly traded companies meet the Canadian ownership requirement were issues of great concern to some Canadian-owned publishers. A good number of francophone and anglophone publishers expressed strong reservations about whether every Block Grant program recipient operates under Canadian editorial and financial autonomy. It is important to note that, over the last few years, the Canada Council has adopted a policy that has required affiliated companies that cannot demonstrate editorial autonomy and financial independence to apply under one publishing house instead of as individual houses. Suggestions regarding affiliated companies included: a cap on the total amount a group of companies could receive; a three-year transition period for new acquisitions at the end of which affiliated companies would have to apply under one publishing house; and mandatory affiliation in at least one publishing industry association.

Recommendation 2. Continue to apply the policy for assessing Canadian ownership and control, including publicly traded companies, and the treatment of affiliated companies, monitoring and revising on a regular basis, by:

- Including the policy in the program guidelines, and revising the policy as necessary in consultation with the book publishing industry.
- Working with the Department of Canadian Heritage – which is also examining its policy on affiliated companies – and other funding bodies to ensure congruence between the related policies of each organization.

Another issue regarding publisher eligibility was raised: the requirement that publishers distribute their books through normal bookselling channels. Many publishers noted that, given the current fragmented marketplace, there really are no "normal" bookselling channels. Publishers develop bookselling channels appropriate to their own lists and markets, which may or may not include an emphasis on distribution to trade bookstores, in particular the chains.

Recommendation 3. Eliminate the requirement that publishers use "normal bookselling channels."

Finally, publishers overwhelmingly indicated that the requirement for publishing to be a primary activity should be kept.

Recommendation 4. Maintain the requirement that book publishing be a primary activity for entrance into the book publishing support programs of the Canada Council.



The Transition from the Emerging Publishers Program to the Block Grant Program

The only difference in publisher eligibility between the Emerging Publishers program and the Block Grant program is the number of titles published. Emerging Publishers are required to have:

- At least 4 eligible titles in print and be committed to a sustained trade book publishing program consisting of books by a variety of authors, while Block Grant recipients must have at least 16 eligible titles.

Publishers strongly supported a program for emerging publishers and recognized the importance of developing a new cadre of professional publishers and the contribution of the Canada Council – the only federal funder with the mandate and capacity to play this developmental role – in their development. Publishers, publisher associations and the Canada Council identified challenges encountered as publishers attempted to make the transition from the Emerging Publishers program to the Block Grant program. Difficulties experienced included: publishers not necessarily ready to make the transition into the Block Grant program even though they had 16 titles in print; publishers barely meeting the minimum requirements for eligibility into the Block Grant program; experienced publishers who started or purchased new houses being required to wait a number of years before being eligible for the Block Grant program regardless of their years of book publishing experience; publishers who were unable or did not wish to publish more than three titles per year; publishers receiving less money in their first and even their second year in the Block Grant program than they received in the Emerging Publishers program; and the negative impact on established book publishers as more publishers get into the Block Grant program.

A number of modifications, taken together, could help to ensure that the next generation of book publishers establish themselves successfully. The essential support of the Block Grant program for already established literary publishers would be preserved.

Recommendation 5. Support the transition of professional publishers from the Emerging Publishers to the Block Grant program, by:

- **Increasing the minimum number of titles for entrance into the Block Grant program to between 16 and 24 titles.**
- **Reducing the minimum number of eligible titles for the first two years in the Block Grant program to 7 eligible titles published.**
- **Providing Flying Squad and Canada Council officer assistance to emerging publishers as they prepare to meet the requirements for transition into the Block Grant program, and in the first two to three years that they are in the Block Grant program.**
- **Considering a mechanism to fast-track the transition into the Block Grant program for publishers with significant prior experience in book publishing.**

Another transition occurs when publishers who have been in the Emerging Publishers program are unsuccessful in their application to the Block Grant program. The timing is such that publishers are too late to then apply to the Emerging Publishers program. As a result, publishers must meet contractual obligations in the absence of any Canada Council support, and they must continue to develop and finance additional titles if they hope to apply for Canada Council support the following year. Another difficulty occurs when publishers might be accepted into the Block Grant program in the first year, and subsequently fail to meet the minimum eligibility requirements in the second year. While it is important to build a safety net, it is also necessary to recognize that not all aspiring

“We support new blood in our industry. We need to see that the next generation has arrived and will be able to take over.”



publishers are going to be successful. A mechanism similar to the Canada Council's Fair Notice Policy could be applied to program recipients who are not meeting program requirements, allowing the Council to take steps to reduce and, if necessary, withdraw financial support to recipients that receive unsatisfactory assessments over time.

“Canada Council programs are absolutely essential for the health of the industry.”

Recommendation 6. Develop a mechanism to enable publishers to access continued funding if they have difficulty making the transition from the Emerging Publishers program into the Block Grant program. Apply a mechanism similar to the Fair Notice Policy in situations where publishers have continual difficulty making the transition from the Emerging Publishers program into the Block Grant program.

The Writing and Publishing Section desires to support a diversity of publishing in Canada. Yet regional, linguistic minority, Aboriginal and culturally diverse publishers consistently receive lower assessments. In addition, some publishers are unlikely to ever achieve the minimum of 4 eligible titles per year required under the Block Grant program. The development – and possibly even the existence – of Aboriginal publishing in Canada requires considerably more time than was envisioned when the Emerging Publishers program was designed. There may be other cases where ethnic-minority and minority-language publishers, and publishers that focus exclusively on works from a particular arts discipline such as theatre, may never be able to attain the 4-eligible-titles-per-year minimum or may need more time to do so.

Recommendation 7. In order to foster diversity in book publishing, allow Aboriginal,¹ minority-language,² ethnic-minority³ and arts-discipline⁴ publishers to remain in the Emerging Publisher program, if such publishers can demonstrate why they cannot publish more than 3 eligible titles per year, with the following conditions:

- Such exceptions will be determined by a Canada Council peer assessment committee, based on merit.
- Such publishers must re-apply for the exemption every two years.
- The impacts of this new initiative should be examined in 5 years.

Title Eligibility

The Canada Council had hoped that a more proactive and simpler way of defining title eligibility could be found, or that title eligibility could be eliminated as a consideration for Canada Council support. However, a mandate to support literary titles and a peer review process that assesses contributions to Canadian literature and professional excellence are essential features that distinguish the Canada Council's programs in support of book publishing from the Department of Canadian Heritage's BPIDP. Under the BPIDP, formula funding is based on sales of Canadian-authored books in all genres and categories. Conversely, under the Canada Council's programs, only literary books are eligible for support, and those must undergo careful scrutiny for literary merit and

¹ For the purposes of this report and its recommendations, "Aboriginal" publishers are publishers that are majority owned by Aboriginal people, and at least 50% of the Canada Council eligible titles that they publish each year are written by Aboriginal people.

² For the purposes of this report and its recommendations, "minority-language" publishers are French-language publishers based outside Quebec, and English-language publishers based in Quebec.

³ For the purposes of this report and its recommendations, "ethnic-minority" publishers are publishers that are majority owned by members of a particular racial or cultural minority group, and at least 50% of the Canada Council eligible titles that they publish each year are written by members of their particular racial or cultural minority group.

⁴ For the purposes of this report and its recommendations, "arts-discipline" publishers are publishers that focus on books about a particular arts discipline other than writing and publishing, and at least 75% of the Canada Council eligible titles that they publish each year are on subjects related to the particular arts discipline.



professional excellence. In addition, moving toward assessing the risk in publishing literary titles cannot be done without looking at the products: books (see the next section of the report for more on assessing risk). The consultants concluded that an examination of individual title eligibility is a fundamental component of the Canada Council's support for book publishing and should not be changed. As a result, no recommendations will be made to change the direct links that the Canada Council's programs in support of book publishing have to the publication of literary titles.

“Non-fiction works of literary art would not exist without the support of the Canada Council, and specialized publishing houses would not exist either.”

In the last several years, the Canada Council's Writing and Publishing Section has spent considerable effort on clarifying guidelines for title eligibility, in particular creative or literary non-fiction. Publishers acknowledge and appreciate these efforts. However, title eligibility continues to be a thorny issue for both book publishers and the Canada Council, especially the eligibility of some non-fiction titles, how to treat certain sub-genres of fiction, the lack of timeliness for appeals of eligibility decisions, and recent pressure from some quarters to allow a portion of a publisher's eligible titles to be foreign-authored.

Currently, the Canada Council describes a list of eligible and ineligible titles to define title eligibility criteria in the Block Grant and Emerging Publishers program guidelines (for the complete list of title eligibility criteria, see Appendix B). Publishers were asked whether they felt the current definitions of eligible non-fiction should be tightened or loosened. There were impassioned points of view on both sides of the issue. Publishers were also asked what specific non-fiction titles were most likely to fall in the grey area between eligibility and ineligibility: scholarly books, local and regional histories, biographies and self-help books were most frequently identified. The following recommendation on non-fiction eligibility will help the Canada Council to better manage the number and types of books supported by its programs, better target its funding, and administer its programs more effectively.

Recommendation 8. Continue to apply a broad interpretation of title eligibility to the category of creative or literary non-fiction, and introduce refinements to the title eligibility guidelines as follows:

- **Add, to the explanation of eligible creative or literary non-fiction, works that make a significant contribution to Canadian culture.**
- **Clarify the definition of creative or literary non-fiction and the categories of books that constitute works of creative or literary non-fiction.**
- **Add a definition of eligible regional and local histories as only those that include interpretation and analysis by the author.**
- **Refine the qualifier in the definition of eligible biographies to only those that are authored by and about Canadians who have made a significant contribution to the artistic or cultural life of Canada, or to regional or minority communities.**

While acknowledging that publishers should use the eligibility guidelines when submitting books to the Canada Council, publishers and their associations felt that the appeals process for titles deemed ineligible should be improved. Currently, the Canada Council encourages publishers to obtain a preliminary assessment of a title's eligibility by written request at least 6 weeks before the deadline for applications to the Block Grant program. Canada Council staff make all decisions regarding title eligibility, as well as considering publishers' appeals. Should a publisher win an appeal, the title in question is added to the list of their eligible titles in the next year's program application. A faster review process, coupled with clearer title eligibility criteria, should result in fewer appeals and appeals being resolved more quickly.



Recommendation 9. Improve the title eligibility review and appeals process for Block Grant and Emerging Publishers recipients so that appeals of contested titles can be heard before peer assessment committees meet. Include the following steps:

- Require publishers to pre-select titles for submission to the Canada Council, submitting only those that they believe to be eligible.
- Allow publishers to submit, on a quarterly basis, those titles requiring clarification on eligibility.
- Within 60 days of receiving titles of uncertain eligibility, and within 30 days of receiving such titles after September 30th each year, the Canada Council program officer will verify title eligibility. If a title is deemed ineligible, the Canada Council officer will complete a short standard form indicating the reason(s) for rejection and e-mail the form to the publisher.
- The publisher will be given 30 days to appeal.
- Appeals will be considered by an internal Canada Council committee, with the Canada Council program officer sitting as a non-voting member on the committee. If deemed eligible, the particular title will be included in the current year jury assessment.
- The Canada Council will continue to invite book industry associations to comment on title eligibility problems raised by their members and any other issues that have arisen as a result of the most recent round of Block Grant and Emerging Publisher program disbursements, within a reasonable amount of time after the grant notification letters have been sent to publishers, and no later than 90 days after publishers have received their letters from the Canada Council.

"I think the Canada Council's support of all the arts is great. Given the portion of the pie devoted to books, they do a great job."

One of the issues raised during the programs review was whether to open the programs to some percentage of foreign-authored titles. The most often stated rationale for opening the Canada Council's programs to some foreign-authored books was industrial – the need of exporting publishers to be able to buy as well as sell rights in the international marketplace. The publishing community was split, generally along language lines, on whether to include foreign-authored titles, with more francophone publishers favouring expanding eligibility to include a certain percentage of foreign-authored titles, especially if substantial additional funding became available in the Block Grant program; this approach was supported by some anglophone publishers, as well. There was more support for opening the Block Grant program to foreign authors whose works are translated by Canadians. In addition to the division within the industry, the Canada Council must also look at how foreign-authored titles might fit into its mandate to provide financial assistance to Canadian publishers to recognize the risk in publishing Canadian trade books *that make a significant contribution to the development of Canadian literature*. As well, the industrial argument might be more acceptable under BPIDP than the Canada Council's programs.

Recommendation 10. Maintain Canadian-authorship as a title eligibility requirement, unless the program budgets are substantially increased. Should eligibility of foreign-authored books be re-considered, develop assessment and financial models that illustrate the impact of such a change on these programs and ensure that broad consultation with publishers and the publishing industry associations is undertaken.

Overall, publishers were in agreement with the minimum and maximum print runs established in the Canada Council's programs. Two changes were desired: lowering the minimum for poetry to match drama, and recognizing that "livres poche" are not mass market paperbacks and should be considered in the same category as trade paperbacks. However, there was considerable comment about the 50,000-copy maximum. While some publishers were happy with that maximum, many were



concerned that the limit had moved from 25,000 copies to 50,000 copies without consultation with the industry; some felt that maximum print runs should be established at a level where a particular book becomes profitable (at 5,000 or 8,000 copies); and others thought that the maximum should be reduced to somewhere between 15,000 and 30,000 copies, possibly with the exception of children's books. Questions about new technologies and their impact were raised by the Canada Council and considered by some publishers. Publishers did not see the need to lower print runs to accommodate print-on-demand (P.O.D.) because professional publishers would need to print at least the minimum number of copies in a first print run in order to adequately promote and market any new title. Where P.O.D. becomes a useful tool for publishers is for reprints. In terms of e-books and other electronic publishing technologies, the vast majority of publishers didn't feel that these are issues that require changes to the Block Grant program at the present time.

"I'm grateful for the support we receive."

Recommendation 11. Modify the minimum and maximum print runs as follows:

- Lower the minimum print run for poetry from 400 copies to 350 copies.
- Include "livres poche" in the same category as trade paperbacks.
- Lower the maximum print run from 50,000 copies to 25,000 copies, except for children's books (which should remain at 50,000 copies).

The Risk in Publishing Literary Works

The Canada Council Block Grant program was designed to support the publication of literary titles through a delicate balance of supporting average title deficits by genre for literary titles (the "base" portion of the Block Grant), and awarding excellence through assessment by a peer jury (the "bonus" portion of the Block Grant). The use of average title deficits as the mechanism for calculating the base portion of the Block Grant was intended to encourage the publishing of more risky and potentially less profitable literary titles by subsidizing a portion of the average cost of publishing the different literary genres. The calculation of average title deficits was derived from data provided by publishers in "Title Analysis" forms. However, the Canada Council stopped using the data from the title analysis forms to re-calculate average genre deficits a number of years ago, and instead relied on the previous average genre deficit calculations and adjusted them periodically to accommodate changing circumstances and priorities.

The Canada Council and the consultants had hoped to be able to develop a simpler formula for calculating the risk of publishing literary works, ideally without needing to tie grants to specific titles at all or even by eliminating the need to differentiate between different genres. Consultation with the publishers and an examination of the historic financial details of Canada Council support for literary publishing from 1998 to 2005 made it clear that funding under the Canada Council's programs must be tied to the publication of literary titles (for more information, see the first paragraph in the previous section on Title Eligibility). This is a critical component that distinguishes the Canada Council's mandate in support of cultural works from Canadian Heritage's support for book publishers under the BPIDP. In addition, the costs of publishing different genres – in time and outlay of financial resources – are simply not equal.

Many publishers highlighted the lack of relevance of the current "average title deficits," and the need for more of the costs associated with publishing any book to be taken into consideration. Publishers and their associations were strongly in favour of revising the average genre deficit calculations, and adding such costs as post-production marketing expenses, distribution costs, sales commissions and operating costs. In addition, the assumption that a good percentage of a print run would be sold between the



publication date and the date of application to the Block Grant program was of concern. Some publishers suggested that a standard overhead cost be determined, so that all publishers would be calculating overhead costs on the same basis. As well, a number of children's publishers indicated that the current genre sub-categories were not appropriate for their part of the publishing sector.

"If the Canada Council wasn't there, I wouldn't be in business."

In keeping with the Canada Council's desire to move its support for literary publishing from a seeding approach to one that contributes to the stability and sustainability of the indigenous book publishing sector, a different paradigm for supporting the publication of literary titles is appropriate and timely. Rather than funding title deficits, it is time to recognize that the Canada Council's support of literary publishing is one of risk reduction. The re-development of accurate average risk by genre will enable the Canada Council to more finely target its support, and eventually reduce the administrative burden on both individual book publishers and the Canada Council. The revised rates of risk by genre may also help publishers make better publishing decisions because they'll have accurate rates for each genre.

Finally, it will be important to determine whether average genre risks for specific genres are different between French- and English-language publishing; for example, short stories are well established in the English-language market yet they are much more marginal in the French-language market, which should result in a higher risk factor for French-language short story collections; "livres poche" is another exception because it is a format only prevalent in the French-language industry. Other such differences between the languages may become apparent.

Recommendation 12. Recalculate risk by genre to accurately reflect all costs involved in publishing each genre, through the following process:

- **Gather complete and accurate title analysis information for the next 3-5 years, including real costs for post-production marketing expenses, distribution costs, sales commissions and operating expenses. Begin to use this new information to recalculate average risk by genre after one year.**
- **For the first year, use a percentage of other expenses to calculate overhead costs on the title analysis forms; during that year, develop a formula for overhead calculation that is comparable from one publishing house to another, in consultation with publishing industry associations; and apply that formula in subsequent years.**
- **Also for the first year, use the old formula for estimates of print run sold; during that year, consult with the industry associations to determine an appropriate percentage print run sold per genre; and apply those calculations in subsequent years.**
- **After gathering accurate title information for the 3-5 year period, establish a risk factor per genre, including examining differences in risk between French- and English-language publishing, and whether there are different risk factors for Aboriginal, minority-language and other specialized publishing in certain genres; use those risk factors to calculate the base portion of Block Grant in future years.**
- **In consultation with the publishing industry associations, research children's genres to determine appropriate sub-categories, collect accurate title analysis information for those genres, and then set their attendant risk factors as per the other genres.**
- **Audit the costs per genre every 4-5 years, and make corrections to the risk factors per genre as needed.**



Financial & Funding Issues

Despite the growth and diversity of the Canadian-owned book publishing industry in Canada, Canadian-owned book publishers are struggling to survive and thrive. Most publishers and all of the publishing associations spoke of the pressing need for more funding within the Canada Council's envelope of programs in support of literary publishing. The most critical issue is chronic underfunding of the Block Grant program. This is the first priority for any new money available to support literary publishing.

*“Many thanks to
the Canada
Council.”*

Budgets in the other book publishing support programs of the Canada Council are also tight. Publishers indicated that additional funding for all of these programs would be of considerable benefit, although some stressed one over another, depending on their own publishing program and priorities.

Recommendation 13. As a first priority, increase the budget of the Block Grant program. As a second priority, increase the budgets of the Author Promotion Tours, Emerging Publishers and Translation Grants programs.

Many publishers felt that including support for straight reprints of backlist titles would be an effective way to keep important Canadian literary works in print; however, most felt that straight reprints should only be considered eligible for support if there is a larger budget in the Block Grant program. Publishers suggested two options for setting maximum numbers of eligible straight reprints: based on a percentage of eligible new titles; or based on a specific number of titles per year per publisher (the latter option favouring smaller publishers).

Recommendation 14. If the budget of the Block Grant program increases significantly, include up to 2 straight reprints of eligible titles per year per publisher as eligible for support at 50% of risk reduction per title.

In an effort to provide stability and enhance the sustainability of the Canadian-owned book publishing sector, and to administer the program more efficiently and effectively, the Canada Council decided to introduce multi-year funding to the Block Grant program. A number of publishers welcomed this initiative and recognized that it would provide predictability in their funding and reduce the time required to prepare funding applications. At the same time, many publishers expressed reservations about the impact of multi-year funding, including: the length of time that an unfairly negative assessment would be felt by a publisher; the delayed reward for publishing houses in a growth mode; and the potentially longer negative consequences for publishers who get into difficulty. Publishers consulted were made aware of this initiative at the Canada Council, and were asked to consider a two-year multi-year funding program within the Block Grant program. Nonetheless, an annual funding mechanism is still required within the Block Grant program: for Emerging Publishers making the transition into the Block Grant program, for Block Grant recipients in difficulty, and for publishers experiencing unprecedented growth. The Canada Council would also require accountability for the funds on an annual basis, and the ability to address serious variations from an individual publisher's plan.

Recommendation 15. Introduce 2-year multi-year funding to the Block Grant program, based on the following:

- **Require publishers who have been in the Block Grant program for 3 years or more to apply to the multi-year funding component of the program.**



- **Maintain a transitional annual component of the Block Grant program for Emerging Publishers moving into the Block Grant program and for existing Block Grant program recipients who are in difficulty.**
- **Require that new entrants to the Block Grant program spend up to 3 years in the annual component before they must apply to the multi-year funding component of the Block Grant program.**
- **Allow individual publishers to request annual funding under exceptional circumstances, such as unprecedented growth or difficulty.**
- **Consider the previous 3 years of book publishing activity when assessing a publishing house in the multi-year funding component of the Block Grant program.**
- **Require brief annual status reports from publishers in the multi-year program that would be verified by Canada Council staff and, under exceptional circumstances, summarized by Canada Council staff and reviewed by the peer assessment committee.**

“The Canada Council is really important. We know they support us.”

To help stabilize the funding available to Emerging Publishers and Block Grant program recipients, establish minimum funding levels for eligible applicants.

Recommendation 16. Establish a minimum grant of \$10,000 in both the Emerging Publishers and Block Grant programs to provide stability to eligible publishers in both programs, and during the transition from one program to the other.

In recognition of the very high costs of some publishing projects, the maximum funding under the Emerging Publishers program should be raised from \$25,000 to \$30,000. This maximum amount could be applicable under other exceptional circumstances, such as a publisher who applied to the Emerging Publishers program for the first time with a large list of eligible titles.

Recommendation 17. In exceptional circumstances, allow grants of up to \$30,000 to be awarded to a publisher in the Emerging Publishers program.

The Canada Council invited comments and suggestions from the publishing industry and the consultants about replacing the BPIDP clawback with a mechanism internal to the Block Grant program. Many publishers and publisher associations believed that the BPIDP clawback was no longer an effective way to redistribute support and should be eliminated. Most publishers were unaware of the actual mechanism of the BPIDP clawback, or that the mechanisms operated differently for French- and English-language publishers (the BPIDP clawback was calculated based on a portion of eligible title sales for French-language publishers, while a portion of total sales for English-language publishers was used). It is important to note that most publishers were very concerned that any new mechanism not negatively impact smaller publishers, and a good proportion of publishers felt that any new mechanism within the Block Grant program should also protect the shrinking ranks of the mid-sized publishers. The Canada Council shares this opinion.

A number of scenarios for replacing the BPIDP clawback were developed by the Canada Council, using the current, complex formula for determining individual publishers' base grants. The guiding principles employed when choosing between scenario outcomes were to ensure: a continued emphasis on literary excellence; and that any change did not have a negative impact on small or mid-sized publishers. The scenario that most closely replicated the effect of the BPIDP clawback (i.e. that



publishers would receive similar Block Grants under the new scenarios as they received with the BPIDP clawback in place) was to eliminate the BPIDP clawback, set a cap on the base portion of grants at \$30,000, and maintain the current split of 42% base and 58% bonus (see this and other possible scenarios outlined in Appendix D). However, a number of publishers and several industry associations expressed strong reservations about setting a cap on the base portion of the grant since it would become a disincentive to publishing literary titles.

“The Canada Council has done a heck of a good job with the kind of money they have had.”

Recommendation 18. In consultation with industry associations, eliminate the BPIDP clawback, and replace it with a mechanism that has a similar effect on publishers’ Block Grants, with the following conditions:

- **Ensure a continued emphasis on literary excellence, and ensure that small and mid-sized publishers are generally not negatively impacted by any change in the redistribution mechanism.**
- **Adjust the new mechanism as required to reflect financial program changes, such as if new funds become available or the establishment of a minimum grant of \$10,000.**
- **Keep the new mechanism as simple as possible, to ensure that the formula is understood by publishers, and to reduce the amount of work that must be undertaken by Canada Council staff in calculating publishers’ grant amounts.**
- **Include the new funding formula in the program guidelines.**
- **After two years, evaluate the impact of the new mechanism, and make adjustments as necessary.**

One area of inquiry in this programs review requires considerably more information before an informed decision can be made: the base-bonus split in the Block Grant program. In 2005, 42% of the Block Grant program budget was allocated to average title deficits by genre for literary titles (the “base” portion of the Block Grant), and 58% was allocated to awarding excellence through assessment by a peer jury (the “bonus” portion of the Block Grant); a similar split has been in place for some time. Publishers were fairly evenly divided in their opinions about whether the base-bonus split should remain at roughly 40-60 or change to 50-50; however, many publishers acknowledged that they did not have enough information to know which scenario would be preferable for their publishing house or for the publishing industry as a whole.

Recommendation 19. After the BPIDP clawback replacement mechanism has been in place for 3-5 years and new title analysis data is available, explore scenarios to determine whether the 42%-58% base-bonus split should be revised.

Publishers were asked whether the maximum variance in Block Grants awarded from year to year should change from the current 25%. Some publishers felt that the variance should be restricted to increases or decreases of no more than 10%. Other publishers suggested that the maximum increase should stay at 25%, while the maximum decrease should be reduced to 10%. Some industry associations suggested that decreases should be limited to between 10-25%, but that there should be no limit to increases.

Recommendation 20. Maintain the current allowable variance at a maximum of a 25% increase in Block Grant program funding awarded to a publisher from one cycle to the next but change the maximum decrease to 15%.



In examining the financial impacts of the Block Grant program, it became apparent that there was a significant disparity between the average genre deficits funded for French- and English-language book publishers, with French-language publishers receiving considerably less per genre than English-language publishers (see Tables 1.1, 1.3 and 6.0 in Appendix C for details). The main reason for this disparity is the split in the Block Grant program: 60% of the total budget is allocated to English-language publishers and 40% is allocated to French-language publishers. Given that French-language publishers are now publishing roughly the same number of titles per year as English-language publishers with only 40% of the budget, the amounts that particular genres can be supported are necessarily lower to compensate.

On the face of it, this difference appears unfair. However, the assignment of a budget split between official language groups is a reality in the Canadian landscape and has been a practice of the Canada Council in all its disciplines. Should factors such as population or number of publishing houses – and how to count the number of publishing houses – be considered, or should the budget be allocated based on title output alone? This is an issue that cannot be resolved in the context of this review. Publishers' associations must be given time to consider the matter. Differences across the language divide must be reconciled. The Canada Council may also consider reviewing its policy and practice on this matter in other disciplines.

Recommendation 21. Examine the established French-English budget split in the Block Grant program, in consultation with industry associations, and build consensus on the appropriate split.

The Role of the Peer Assessment Committee

Peer assessment is a fundamental principle of Canada Council programs in all disciplines. Publishers were overwhelmingly in support of the principle of peer assessment, and recognized the importance of being judged by their peers. Many publishers and some publishers' associations commented on jury composition: some appreciated the diversity of the current juries; others believed that only a jury of publishers would truly be a jury of their peers; and others thought that the jury should be made up of a majority of publishers. Concerns were expressed about the small size of the Emerging Publishers jury. And many publishers indicated that overlap of members from one year to the next would strengthen the peer assessment process.

Recommendation 22. Strengthen publisher representation on peer assessment committees, and provide overlap from one committee to the next, by:

- **Continuing to invite publishers' industry associations to suggest peer assessment committee members.**
- **Including at least 50% current or former book publishers on each committee, such publishers to come from a diversity of publishing houses with respect to size, type of publishing, region, etc.**
- **Continuing to include at least 1 minority-language publisher on the French-language jury.**
- **Arranging for 1 or 2 committee members to overlap from one cycle to the next.**
- **Increasing the size of the Emerging Publishers peer assessment committee from 3 members to 4, including at least 2 experienced book publishers.**



While supporting the principle of peer assessment for the awarding of bonus points, many publishers suggested improvements to the jury process. Juries were not always adequately prepared, and rushed in their deliberations. Juries did not necessarily know how to support excellence in a diverse publishing industry nor did they understand regional realities, and they lacked expertise in specific areas. A number of publishers suggested that the jury assessment process could be much more clear and objective if the assessment criteria were more specific and included assigning relative weights to each criterion. In addition, assessment criteria should recognize the contributions to Canadian literature that regional, linguistic minority, Aboriginal and culturally diverse publishers make. Some publishers also felt that contributions to feminist publishing warranted bonus points. A new approach to a Bonus Point Assessment Grid can be found in Appendix E. Publishers also recommended that the Canada Council provide more information and guidance to jury members; however, it is important that any mechanism to provide more information does not add too much extra work to the jury or to Canada Council staff.

“The Canada Council is a touchstone for ourselves and for many others. It is important to have acknowledgement of our cultural contribution, and the Canada Council does that well.”

Recommendation 23. Refine and improve the assessment criteria and process, by:

- **Extending the time that peer assessment committees meet by one day.**
- **In consultation with industry associations, refining the bonus point assessment grid proposed in Appendix E, so that specific value is placed on areas of professional excellence and contributions to Canadian literature, including regional, minority-language, Aboriginal and other contributions.**
- **Having committee members use the revised bonus point assessment grid for evaluating individual publishers, first by themselves, and then when discussing the ranking with other committee members (recognizing that publishers’ rankings will be revised as a result of group discussion and deliberation).**
- **Ensuring that a Canada Council officer provides context and industry knowledge to the committee deliberations.**
- **Varying the order in which publishers are considered by the committee.**
- **Including the bonus point assessment grid in the program guidelines, and providing publishers with more feedback regarding their bonus point assessments.**
- **After the first year, evaluating the impact of the new bonus point assessment grid, and making adjustments as necessary.**

Organizational Health

In 2005, the Canada Council established a Council-wide initiative to promote organizational health. From the Canada Council’s perspective, its organizational health initiative will help build capacity in organizations from all disciplines, including the for-profit book publishing industry. The organizational health initiative, with its own budget, could be of use to very successful publishers who may want to work on a particular aspect of their organizational capacity through the Flying Squad program, as well as to emerging publishers or ones in difficulty.

Many of the publishers consulted and all of the publisher associations raised concerns about the Canada Council’s organizational health initiative, and the appropriateness of this initiative with respect to the largely for-profit book publishing industry. Some major concerns were expressed. One concern raised was that an examination of organizational health, and some of the proposed criteria, fell outside the mandate of the Canada Council to support the publication of literary works, and that it more appropriately fell within the purview of BPIDP, an industry development program, which



already undertakes a rigorous assessment of publishers' financial health. Another concern was the poor fit of the Canada Council-wide organizational health initiative with the for-profit book publishing sector, an initiative better suited to the not-for-profit environment of most organizations that the Canada Council supports. Publishers were unhappy with some of the suggested indicators, particularly given the amount of time required to prepare those documents. As well, many Block Grant publishers found it hard to imagine how the Flying Squad would help them, given that they are experienced book publishers; however, many publishers did see the benefit of the Flying Squad to emerging publishers. Some practical issues were also raised, including how the indicators could be made as quantitative and objective as possible, and how to address publishers for whom certain criteria do not apply, such as succession plans in university presses or for younger publishers. Publishers wanted to ensure that jury members did not see detailed financial information of Block Grant applicants. Publishers also wondered how organizational health would actually be assessed: who had the requisite skills; how external assessment of organizational health would fit into the peer review process; and what value would be placed on the organizational health assessment in terms of overall grants. In addition, publishers and their associations strongly opposed organizational health being assessed by juries themselves since they have neither the time nor the expertise to undertake such assessments. Finally, publishers were concerned that the cost to implement organizational health initiatives would come out of the Block Grant program and other underfunded Canada Council programs in support of book publishing.

“The Canada Council is a great supporter of publishers.”

Recommendation 24. Given the Canada Council's decision to introduce organizational health across its disciplines and the need to provide more information to the book publishing industry, introduce the organizational health initiative into the book publishing sector gradually, by:

- Undertaking a one-year pilot, and ask general organizational health questions that will not have an impact on assessment.
- Ensuring that the Canada Council has the necessary expertise to assess publishers' organizational health
- Ensuring that any organizational assessment not be part of the peer assessment committee's mandate.
- Continue to communicate and consult with the publishing industry on organizational health, including workshops and information sessions on the assessment of organizational health.
- Facilitating the sharing of pertinent information with Canadian Heritage and other funding bodies to reduce duplication in information requests to publishers.
- Making Flying Squad assistance available to all publishers by request.
- Harmonizing the Canada Council's Flying Squad initiative in book publishing with similar programs of the Association of Canadian Publishers and at Canadian Heritage.

Author Promotion Tours

Publishers were pleased to receive support for author tours; however, many expressed the view that the traditional author tour was no longer necessarily the best vehicle for promoting the work of a particular author. Some practical issues were raised: most publishers felt that eligible activities were too restrictive and that the requirement to apply the support to only one aspect of touring expenses was far from ideal; the 12-month time limit on expenditures was restrictive, given that promotional activities for a particular title often extended beyond 12 months. In addition, roughly one-half of



publishers who made specific comments on whether the Author Promotion Tours program should be a stand-alone program indicated that it should be rolled into the Block Grant program. Given the support for this program by Canadian authors, and the Canada Council's desire to encourage author promotion, the consultants are recommending that the Author Promotion Tour program be retained as a separate program, and strengthened. However, the funding formula itself is very complicated and poorly understood within the publishing sector, and would benefit from being greatly simplified.

“Without Canada Council support, we would not be here.”

Recommendation 25. Make publisher support for promoting authors more effective in today's environment, by:

- **Renaming the program Author Promotion, and increasing its budget if new funds become available.**
- **Revising the Author Promotion program to allow more flexible promotion choices and eligible expenses, as long as such activities and costs are related to the promotion of a particular author.**
- **Allowing funds for the promotion of a particular author and title to be spent over a 24-month period rather than the current 12 months.**
- **Developing a simple and transparent funding formula, such as dividing the number of eligible titles included in applications for author promotion support into the available budget, and awarding that amount per title to each publisher (or less, if they applied for less).**

Translation Grants

Generally, publishers were satisfied with the Translation Grant program and recognized its importance in encouraging translation of Canadian authors. The most frequently suggested change was a return to continuous intake in the program in order to avoid delays in translating new projects. Removal of deadlines favours publishers that have a strong translation program whereas maintenance of the twice-annual deadlines allows greater access to publishers with less experience in publishing translations. Mindful of this trade-off and the other program limits (a maximum of \$20,000 per book and a maximum of 6 translations underway at any time), the consultants recommend increasing the deadline frequency but imposing a cap on the grant per intake.

Concerns were also expressed about: low rates for translators, the need for support to translate excerpts, and the delay in receiving the marketing support component of the program. In addition, some publishers expressed concern about the 5,000 copy limit, especially since the application for translation support is made far in advance of publication and publishers are unlikely to have a firm estimate of the print run and thus may claim an under-5,000-copy print run in order to ensure eligibility for program support.

Recommendation 26. Make the Translation Grants program operate more effectively, by:

- **Raising translation rates to \$0.19 per word for fiction and non-fiction, and \$0.25 per word for poetry, drama and illustrated children's books and adapting the maximum contribution per book accordingly, if new funds become available.**
- **Open the program to continuous intake, but set a maximum of \$60,000 per publisher per year until the final quarter of each fiscal year, at which time exceptions to the maximum could be made; however, if new funds become available, adapt the maximum contribution per publisher per year accordingly.**



- **If new funds become available, allowing a small portion of the budget to be allocated for excerpt translation.**
- **Simplifying the application process to include an application for marketing funding at the same time as the application for translation support, and providing the approved marketing funding at the time of final payment for the translation.**

“Canada Council’s programs are well conceived, competently managed, and fairly delivered.”

Support for Industry Associations

A study on the state of national arts service organizations (NASOs) was conducted for the Canada Council in 2004 to determine NASO’s ability to deliver professional development to their members, to conduct advocacy activities, and to provide policy advice to the Canada Council.¹ The report found that NASOs were very good at offering a range of professional development opportunities to their members; however, they were prevented from being even more effective by a lack of human and financial resources. The report acknowledged the vital role that NASOs play in policy development and advocacy. It also pointed out that some NASOs have been very effective in providing policy advice to governments and arms-length agencies such as the Canada Council while others have lacked the financial resources to develop policies and then make their arguments convincingly to governments and agencies. The report went on to recommend that the Canada Council establish a dedicated program for NASO operating grants.

In our consultations regarding the Canada Council’s support for book publishing, each and every publishing association, and many of their members, articulated the need for increased operating funding to improve capacity to properly fulfill their mandates of member services as well as policy advocacy. Regardless of the mechanism that the Canada Council chooses to support NASOs, it is clear that publishing industry associations provide a vital link between individual book publishers and policy-makers and with other parts of the national and international writing and publishing sector, and that a lack of funds is a serious impediment.

The Canada Council will need to undertake additional consultation with publishing industry associations in the coming years as the recommendations of this report are carried out. With the high demands already placed on publishing industry associations, additional support for these associations is crucial.

Recommendation 27. Increase the level of core operational support to publishing industry associations so that they can properly fulfill their responsibilities to their members and provide expert stakeholder advice to the Canada Council and other funders and policy-makers.

Administration

Just as capacity and organizational health are issues for Canadian-owned book publishers, so too is capacity an issue at the Canada Council itself. Most publishers knew that the administration budget of the Writing and Publishing Section had been significantly decreased in the mid-1990s and that this redistribution limited the Canada Council’s ability to respond to its program requests. Publishers commented on their desire to have the Canada Council keep more in touch with book publishers, and help

¹ Roy MacSkimming (2004), *Policy in Action: A Report on National Arts Service Organizations* (Ottawa: The Canada Council for the Arts).



publishers make the transition to the Block Grant program. Other issues that the Writing and Publishing Section will need more time to devote to include: keeping on top of external events that will affect Canadian-owned book publishers, analysing information about book publishers and the environment affecting book publishers, assessing organizational health, assessing title eligibility, and maintaining ongoing consultations with book publishers and their industry associations.

“The Canada Council folks are very good people and work well with publishers.”

Recommendation 28. Allocate some of the new money at the Canada Council to hire much needed capacity within the Writing & Publishing Section so that essential activities can be undertaken, such as:

- **More ongoing contact with book publishers.**
- **More consulting with publishers and their industry associations.**
- **Providing extra support to publishers moving from the Emerging Publishers to the Block Grant program and other publishers in difficulty, addressing organizational health issues, and demonstrating their own organizational health.**

The budgets of the Canada Council's programs in support of book publishing changed somewhat from year to year. In addition, the formulas for determining the amount of the grant that an individual publisher receives are extremely complex and require considerable Canada Council staff time each year. Over time, these two factors have led to programs that are neither simple to administer nor transparent in their administration.

Recommendation 29. Simplify the funding formulas within the Canada Council's programs in support for book publishing, and publicize the simplified formulas in program guidelines, so that all publishers have more knowledge of how grants are administered.

A number of other suggestions for improvements to the Canada Council's administrative processes are being brought forward.

Recommendation 30. Simplify and refine some of the Canada Council's administrative processes and tools used to provide support for book publishing, by:

- **Reconciling the two data management systems used by the Writing and Publishing Section at the Canada Council into one Section-wide system that is compatible with the data maintained in the Canada Council's main information system.**
- **Gathering and analysing key financial data for the Canada Council programs in support of book publishing on an annual basis, and sharing material conclusions with the publishing industry associations.**
- **Only asking publishers for information that will be used by the Canada Council in the management and administration of its programs in support of book publishing.**
- **As much as possible, streamlining the application processes with other funders of book publishing in Canada (such initiatives must take into account that some publishers only have dial-up internet access, so another option must be provided for any online applications).**
- **Continue to inform other book publishing industry funders of changes to the Block Grant application forms as soon as possible, so that such agencies that use the Canada Council forms for their applications can make adjustments as necessary.**



Conclusions

The support that the Canada Council has provided to Canadian-owned publishing houses has fostered a vibrant, diverse and professional industry. The very existence of literary publishing in Canada would not have been possible had the Canada Council for the Arts not begun its book publishing programs over 30 years ago. From programs that provided seed money to literary publishers in 1972 to an array of essential programs that supported the literary excellence of 179 publishers in 2005, the Canada Council has ensured that Canadian literature will continue to reach Canadians and readers from around the world.

Publishers and publishing industry associations resoundingly acknowledged the key role that the Canada Council's programs in support of book publishing play in developing, supporting and sustaining an indigenous publishing industry in Canada. Nonetheless, the climate for Canadian-owned book publishing has changed considerably from the days when the Canada Council's programs were first introduced, and it has been many years since these programs were evaluated in their entirety. The 30 recommendations for improvements to the Canada Council's programs in support of book publishing integrate the perspectives and experiences of Canadian-owned book publishers, their associations and the Canada Council itself, analysis of the financial impacts of the program over the last eight years, and other data and information gathered throughout the review. These recommendations aim to increase sustainability of Canadian-owned publishing houses through improvements and adjustments to existing programs which have served publishers and literary production in Canada very well.

Key findings that underpinned this programs review included:

- The indigenous book publishing industry has grown substantially since the Canada Council first began to support book publishers in 1972.
- The environment in which book publishers operate at present is very challenging and changeable.
- A substantial portion of current heads of firms in the Canadian-owned book publishing industry (49%) plan to retire in the next 7 years, and 18% plan to retire in the next 2 years.
- Only 20% of Block Grant program recipients posted a profit of more than \$50,000 in 2005, and fully 35% reported a loss.

The 30 recommendations in this report address both substantive and detailed administrative issues that were uncovered during the programs review. The substantive recommendations are:

- Reinforcing the essential role that the Canada Council's book publishing programs play in fostering, developing and sustaining an indigenous book publishing industry and the continued development of a national literature.
- Confirming that the Canada Council's programs in support of book publishing can remain distinctly different from the BPIDP of Canadian Heritage by virtue of targeting support to the less commercial, more risky literary genres of book publishing, and should be continued. Maintaining the per literary title approach to its support is the sole method to enable the Canada Council to distinguish its mandate from other more industrial support for book publishing, and must be preserved.
- Confirming that Canada Council programs in support of book publishing are significantly underfunded. It is hoped that decision-makers will hear this "clarion call" and appropriately fund writing and publishing in Canada. The budgets of all of the Canada Council's programs in support of book publishing must be enhanced in order to adequately invest in and support publishers' risk in producing literary titles.
- Changing the paradigm that underpins the Canada Council's support for book publishing from a deficit funding model to a deliberate effort to calculate and support risk reduction.
- Introducing a multi-year funding model into the core program of the Canada Council's support for book publishing, providing stable funding to Canadian-owned book publishers.
- Replacing the redistribution mechanism that clawed back a portion of publishers' BPIDP contributions with comparable mechanism that enables the Canada Council to make similar policy-based



adjustments to the base grants that publishers receive, and set any policy priorities that might impact on and fine-tune the redistribution mechanism.

- Rationalizing the entry into and transitions between the Emerging Publishers and Block Grant programs to ensure that professional publishers who contribute to the development of Canadian literature are supported and rewarded, and that publishers who do not make such professional contributions are no longer supported.
- Clarifying and simplifying processes and procedures to provide publishers with more certainty and understanding of the administration of these essential programs.
- Adequately funding industry associations and the administration budget of the Canada Council's Writing and Publishing Section itself to enhance necessary policy development and ensure that the programs are administered as effectively and efficiently as possible.

Action on the recommendations arising from this programs review would ensure a stronger Canadian-owned book publishing sector and the continued opportunity for Canadians to read and be engaged by a diverse Canadian literature.



Appendices

Appendix A: Individuals & Groups Consulted

Canada Council for the Arts' Publishers Advisory Committee

Susanne Alexander, Goose Lane Editions
Todd Besant, Turnstone Press
René Bonenfant, Presses de l'Université de Montréal and Les Heures bleues
Brigitte Bouchard, Les Allusifs
Jack David, ECW Press
Normand de Bellefeuille, Québec Amérique
Hélène Derome, Éditions de la courte échelle
Bill Harnum, University of Toronto Press
Valerie Hussey, Kids Can Press
James Lorimer, Formac Publishing Company
Ginette Péloquin, Éditions du remue-ménage
Denise Truax, Prise de Parole
Bob Tyrrell, Orca Books
André Vanasse, XYZ Éditeur
Denis Vaugeois, Éditions du Septentrion
Alana Wilcox, Coach House Books

Publishers Who Participated in Key Interviews and Focus Groups

Kateri Akiwenzie-Damm, Kagedonce Press
Pascal Assathiany, Éditions du Boréal
Nurjehan Aziz, TSAR Publications
Paul Bélanger, Éditions du Noroît
Michelle Benjamin, Raincoast Book Distribution
Yvon Bienvenue, Dramaturges Éditeur
Nik Burton, Coteau Books
Giovanni Calabrese, Éditions Liber
Linda Cameron, University of Alberta Press
Ron Caplan, Breton Books
Philip Cercone & Arden Ford, McGill-Queens University Press
Guy Champagne, Éditions Nota bene
Benoit Chaput, L'Oie de Cravan
Lesley Choyce, Pottersfield Press
Gary Cranford, Flanker Press
Simon Dardick, Véhicule Press
Bev Daurio, Mercury Press
Antoine del Busso, Éditions Fides / Bibliothèque québécoise / Presses de l'Université de Montréal
Hervé Foulon, Éditions Hurtubise HMH
Jean-Marc Gagnon, Éditions Multimondes
Robert Giroux, Éditions Tryptique
Johanne Guay, Québecor Média (Libre Expression, Stanké, Trécarré)
Ron Hatch, Ronsdale Press
Kirk Howard, Dundurn Press
Maria Jacobs, Wolsak & Wynn Publishers
Danielle Lalande, Boomerang Éditeur Jeunesse
Brian Lamm, Arsenal Pulp Press
Jean-Claude Larouche, Éditions JCL
Edith Madore, La Veuve noire
Marguerite Maillet, Bouton d'or Acadie



Rolf Maurer, New Star Books
Kim McArthur, McArthur & Company
Sandra McIntyre, Nimbus Publishing
Colette Michaud, Editions Vents d'ouest
Mike O'Connor, Insomniac Press
Jacques Payette & Janine Bonneau, Éditions Héritage & Dominique et compagnie
Jean Pettigrew, Éditions Alire
Lois Pike, Sumach Press
Marie-Madeleine Raoult, Éditions de la Pleine lune
Rebecca Rose, Breakwater Books
Sylvie Ross, Éditions des Plaines
Karl Seigler, Talon Books
Errol Sharpe, Fernwood Books
Gordon Shillingford, J. Gordon Shillingford
Andrew Steeves, Gaspereau Press
Marie Taillon, Éditions de L'instant même
Rodger Touchie, Heritage House Publishing
Francine Vernac, Éditions du Loup de gouttière
Mélanie Vincelette, Editions Marchand de feuilles
Howard White, Harbour Publishing
Rick Wilks, Annick Press
Paul Wilson, Hagios Press

In addition, 86 publishers responded to the mini-survey, including 63 publishers who are not in the above-mentioned lists, and several individual publishers commented on the draft report.

Publishing Industry Associations

Association of Canadian Publishers
L'Association nationale des éditeurs de livres
Literary Press Group
Regroupement des éditeurs canadiens-français

Canada Council for the Arts Writing & Publishing Section Staff

Nicole Beauchamp
Carole Boucher
Elizabeth Eve
Marcel Hull
Christian Mondor
Catherine Montgomery
Melanie Rutledge

Canadian Heritage Aid to Publishers Staff

Gordon Platt
Dennis Price
Scott White



Appendix B: Canada Council Title Eligibility Criteria

The Canada Council considers the following titles eligible under the Block Grant and Emerging Publishers programs:

- Poetry.
- Fiction.
- Drama.
- Titles for children and young adults, except those in the ineligible categories (see below).
- Literary criticism and literary biography.
- Creative or literary non-fiction (including works of history and biography; essays on ideas, society, politics, culture and the arts; and travel writing) that is accessible to the general public and makes a significant contribution to the development of Canadian literature, to the arts or to the enjoyment of writing by Canadians.
- Materials that would be eligible for support as books and that are professionally produced on CD-ROMs, CDs or cassettes in runs of at least 300 copies (publishing programs that include such materials must be primarily composed of books).
- Books on the arts or architecture.

The Canada Council considers the following titles ineligible under the Block Grant and Emerging Publishers programs:

- Mass-market paperbacks distributed through mass-market channels, with print runs of 8,000 copies or more or trade books with print runs of more than 50,000 copies.
- Straight reprints, i.e. reprints produced without any significant changes.
- Books not printed in Canada, **except** international co-editions or full-colour, highly illustrated books from an eligible genre (the publisher must be able to demonstrate that printing at a competitive price was not available in Canada).
- Academic, scholarly or educational books destined primarily for an educational or scholarly market.
- Books with text that is primarily short captions, quotations, jokes or sayings.
- Calendars, agendas and almanacs.
- Cookbooks.
- Guidebooks, including travel, nature and gastronomy guides.
- Books that describe how-to techniques, skills or games.
- Colouring and activity books.
- Trivia and quiz books.
- Instructional, personal growth or self-help books and manuals, including those of a devotional or spiritual nature.
- Testimonials, including those of a devotional nature, **unless** they make a significant artistic contribution.
- Illustrated nature and non-fiction books containing fewer than 10,000 words, **unless** they make a significant artistic or literary contribution.
- Books commissioned or paid for by an individual, group, political party or company where the publisher does not have complete and independent editorial control (if the copyright for an eligible title is held by an organization, a government department or the Crown, the publisher must include contract details with the Title Analysis Report form).
- Co-publications with governments or government departments or agencies, **except** titles that are co-published with museums or art galleries.
- Books for which 50 percent or more of the print run is pre-sold outside normal trade bookselling channels and book clubs.



- Verbatim interviews or previously published journalistic articles, **unless** directly on the arts or literature in Canada.
- Books for which the author receives no royalties or the author has contributed financially towards the publication costs. For further clarity, an author's obligation to purchase a given number of copies of his book as a condition of publication represents a financial contribution on his part. Royalties must be paid on each copy of a book sold, through normal trade bookselling channels.
- Saddle-stitched books, **except** illustrated books for children or books of poetry, where no more than 50 percent of the poetry titles from the house per year are saddle-stitched.
- Books written by owners or employees of the publishing house, **unless** these titles represent less than 25 percent of the house's program each year (peer assessment committees can make an exception for publishing collectives, on special request).
- Reference books, **unless** they are about the arts.
- Sports books, **except** serious works of creative non-fiction or works written for children.
- Collections of specialized scholarly or conference papers, **unless** they make a significant contribution to the arts.
- Catalogues of visual art exhibitions (i.e. a book of a visual artist's work related to a specific exhibition, which includes one or more of the following elements: detailed information regarding the exhibition, a list of works exhibited, an artist's statement, and/or provenance of the works).
- Books containing prominently displayed advertising, promotional material and/or corporate logos.
- Professional manuals and reference books intended for a specialized audience.

In addition to the list of eligible and ineligible titles, the Canada Council requires that each eligible title under the Block Grant and Emerging Publishers programs:

- Contain at least 50 percent Canadian-authored creative content (literary or graphic).
- Have at least 48 printed pages (with the exception of children's books, which must contain at least 24 printed pages).
- Have a print run of at least 500 copies (exceptions are poetry collections, with a required minimum of 400 copies, and stage plays, with a required minimum of 350).
- Be published principally in English, French or one of Canada's Aboriginal languages.
- Acknowledge the support of the Canada Council, if produced by a publisher receiving book publishing support.



Appendix C: Longitudinal Data Review Highlights

PREAMBLE

Data presented in this appendix and in the main body of the report cover Canada Council program activities and results from 1998 to 2005, including publishers' activities and results reported to the Canada Council during the same period. Due to a data information systems change at the Canada Council in 1997, it was not possible to compare data prior to that period with subsequent data, limiting the review to an eight-year period. For questions requiring more detailed analysis, data from 2002 and 2005 were compared.

All data used to prepare these tables come from the Canada Council's reporting systems. The Canada Council has three different data systems that capture data related to the Writing and Publishing Section and, unfortunately, the data in each of these systems does not necessarily match. As a result, in analyzing tables, readers must take into account the following:

- One data system uses annual amounts allocated to publishers (but doesn't include new formats, and could include amounts that were not distributed).
- A second data system uses annual amounts distributed (paid) to publishers during the year (some of these amounts could have been allocated in the previous year).
- Annual reports for the Block Grant program also present some data that often doesn't correspond to the first two data sources.
- The third data system presents data on titles, but is based on titles submitted rather than on titles deemed eligible. Therefore, totals coming from this source never correspond to other sources or BGP annual reports.
- There is some confusion from one source to the other regarding distinction between the year the title was produced or submitted, and the year of the program.

Considerable data that could improve the analysis of program activities and impact on publishers are not collected by the Canada Council or are only collected in aggregate form, and some data are not reported by all publishers. For example:

- Information on total activities of a publisher (total sales, total number of titles published, number of non-eligible titles published, etc.) are not collected by the Canada Council, and therefore were not available for this analysis.
- Data on CDs, CD-ROMs and audio books are not integrated in some of the Canada Council's reporting tables, and therefore were not available for parts of this report.
- Data on the number of titles covered by Author Tours program were not available for this report.
- Data on Translation program were presented by title by year, integrating amounts attributed for the translation and the promotion of titles. Therefore, specific data for each aspect of the program's allocation were not available for this report. In addition, data for 1998 were not available.
- Data on production costs integrated the costs for soft and hard cover editions, and presented different prices for each edition. Therefore, data on retail price could not be compared with production costs.
- Data collected about English-language titles produced by French-language publishers are counted among French-language titles, and vice versa.
- Data on number of copies sold for 2004 and 2005 were not available due to a two-year reporting period.
- Information on publishers' activities is not collected electronically. In order to access that information, publishers' files had to be retrieved from the archives, and examined individually. It was decided therefore to collect discrete data on publishers' activities for 2002 and 2005 only. For 2002, five files were missing; consequently, totals don't always correspond to data from other sources. The data on publishers' activities are not verified by the Canada Council, and some are provided by publishers only as approximations. In addition, some required data are not reported by the majority of publishers (accumulated surplus, for example). Therefore, such data were not available for use in this report.



1.0 Block Grant Program Overview

1.1 Block Grant Contributions by Language

1.1A: Amounts per Year (in Actual Dollars)

Language	1998		1999		2000		2001		2002		2003		2004		2005	
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
Anglophone Publishers	3,990,900	60.0	3,922,800	59.8	3,914,700	59.7	5,168,000	59.9	5,186,400	60.0	4,724,400	60.0	4,724,400	60.3	4,731,000	60.0
Francophone Publishers	2,666,000	40.0	2,640,300	40.2	2,638,100	40.3	3,453,700	40.1	3,457,700	40.0	3,149,600	40.0	3,106,400	39.7	3,154,000	40.0
Total	6,656,900	100.0	6,563,100	100.0	6,552,800	100.0	8,621,700	100.0	8,644,100	100.0	7,874,000	100.0	7,830,800	100.0	7,885,000	100.0

1.1B: Amounts Adjusted for Inflation (in 2005 Dollars)¹

Language	1998		1999		2000		2001		2002		2003		2004		2005	
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
CPI	108.6		110.5		113.5		116.4		119.0		122.3		124.6		127.3	
Anglophone Publishers	4,678,099	60.0	4,598,273	59.8	4,588,778	59.7	6,057,886	59.9	6,079,454	60.0	5,537,902	60.0	5,537,902	60.3	4,731,000	60.0
Francophone Publishers	3,125,063	40.0	3,094,937	40.2	3,092,358	40.3	4,048,398	40.1	4,053,087	40.0	3,691,934	40.0	3,641,296	39.7	3,154,000	40.0
Total	7,803,162	100.0	7,693,210	100.0	7,681,137	100.0	10,106,284	100.0	10,132,541	100.0	9,229,836	100.0	9,179,197	100.0	7,885,000	100.0

¹ Amounts adjusted for inflation used Statistics Canada's average annual Consumer Price Index (CPI), with its base of CPI = 100 for June 1992; available at: www40.statcan.ca/l01/cst01/econ46a.htm.

1.0 Block Grant Program Overview (continued)

1.2 Block Grant Program Recipients¹ by Language

Language	1998		1999		2000		2001		2002		2003		2004		2005	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Anglophone Publishers	83	59.3	86	59.7	89	58.9	88	57.9	91	58.7	91	56.9	95	59.7	92	59.0
Francophone Publishers	57	40.7	58	40.3	62	41.1	64	42.1	64	41.3	69	43.1	64	40.3	64	41.0
Total	140	100.0	144	100.0	151	100.0	152	100.0	155	100.0	160	100.0	159	100.0	156	100.0

1.3 Eligible Titles² in the Block Grant Program by Language

Language	1998		1999		2000		2001		2002		2003		2004		2005	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
English	766	49.2	842	51.5	984	52.6	944	49.6	1,006	50.0	1,015	47.2	1,033	51.2	1,075	51.7
French	790	50.8	794	48.5	887	47.4	959	50.4	1,006	50.0	1,137	52.8	986	48.8	1,003	48.3
Total	1,556	100.0	1,635	100.0	1,871	100.0	1,903	100.0	2,012	100.0	2,151	100.0	2,019	100.0	2,077	100.0

¹ The number of recipients is not as significant as the number of titles because the data hides the consolidation within the Canadian publishing industry over the past 8 years. The CC has made efforts to group affiliated companies and consider them as one applicant when editorial control is centralized.

² When reporting global numbers of admissible titles, the CC reports do not include CDs, CD-ROMs or audio books.

2.0 Block Grant per Publisher¹ (\$)

Publisher	L	R	1998	1999	2000	2001	2002	2003	2004	2005
Annick Press	E	ON	43,500	46,200	48,100	63,100	70,700	60,200	70,600	73,800
Anvil Press	E	BC		36,200	33,700	46,300	64,300	52,000	43,200	47,800
Arsenal Pulp Press Book Publishers *	E	BC	64,100	65,500	55,400	66,300	78,900	72,700	68,600	69,000
Art Global	F	QC	19,500							
Balzac - Le Griot	F	QC	31,100	38,500	28,900	24,800	24,600			
Banff Centre Press	E	AB			27,600	40,600	30,500	23,700	29,600	25,800
Bayard Canada Livres	F	QC	22,700	17,000	17,700	36,000	29,000	31,300	37,600	39,800
Bayeux Arts	E	AB		30,600	38,400	34,700	28,400	21,300	24,000	18,000
Beach Holme Publishers	E	BC	48,900	50,300	62,900	85,500	78,000	58,500	43,900	35,500
Between the Lines	E	ON	27,500	26,900	33,600	43,700	45,100	41,000	39,400	39,000
Bibliothèque Québécoise	F	QC	38,200	31,800	36,800	60,900	45,700	40,700	45,000	44,800
Black Moss Press	E	ON	63,500	63,700	61,700	77,700	58,300	46,100	56,600	47,600
Black Rose Books *	E	QC	24,000	30,000	27,500	29,100	36,400	35,200	26,400	
Blizzard Publishing	E	MB	32,300	27,700	34,600	43,300				
Books Collective	E	AB	37,500	50,800	38,100	37,300	28,000	21,000	18,000	13,500
Borealis Press	E	ON		21,600						
Boston Mills Press	E	ON	26,500		18,300	20,200			25,300	
Bouton d'or Acadie *	F	NB			30,900	49,000	40,600	34,600	36,900	40,100
Breakwater Books	E	NL		15,500	16,800	29,600	22,200	19,000	21,600	17,400
Breton Books	E	NS	21,000	31,500	32,900	34,800	26,100	19,600	20,700	15,500
Brick Books	E	ON	56,500	52,100	52,800	78,000	72,700	64,400	69,000	72,500
Broken Jaw Press	E	NB		47,000	58,800	65,900	57,400	43,800	35,700	24,700
BuschekBooks	E	ON					17,300	26,000	36,500	31,400
Caitlin Press	E	BC	37,800	43,400	32,600	51,200	38,400	28,800		
Canadian Scholars' Press	E	ON							32,400	22,200
Carleton University Press	E	ON	32,700	32,600						
Coach House Books	E	ON			34,500	66,500	80,800	85,500	91,100	94,000
Conundrum Press *	E	QC								37,500
Cormorant Books	E	ON	70,700	57,500	62,400	87,400	80,800	70,000	67,600	66,800
Coteau Books	E	SK	73,400	80,800	83,500	86,600	83,300	75,900	72,200	67,800
Creative Book Publishing	E	NL	65,400	55,300	59,100	66,100	65,200	49,600	55,700	53,800
Douglas and McIntyre Publishing Group	E	BC	92,100	54,100	55,900	72,500	90,600	84,200	90,100	92,200
Dramaturges Éditeurs	F	QC		30,700	25,000	38,300	43,300	42,300	33,300	36,400

¹ Amounts reported are actuals, not adjusted for inflation. Light grey shading means the year that the publisher entered the BG program; dark grey shading means the year that the publisher exited the BG program.

* Minority publishers (includes linguistic minority, aboriginal and culturally diverse publishers).



Publisher	L	R	1998	1999	2000	2001	2002	2003	2004	2005
Drawn & Quarterly Publications *	E	QC						30,000	45,000	60,700
Dundurn Press	E	ON	68,300	51,200	51,300	81,800	97,600	97,600	103,800	88,400
Écrits des Forges	F	QC	73,100	77,300	72,000	89,000	95,400	79,300	80,600	87,300
Écrits des Hautes-Terres	F	QC			35,700	29,900	28,000	25,100	19,300	
ECW Press	E	ON	71,900	55,900	47,500	66,700	65,100	73,700	75,000	71,300
Éditions Alire	F	QC		35,000	37,500	43,600	54,800	47,000	51,300	43,900
Éditions Anne Sigier	F	QC	15,400							
Éditions Chouette	F	QC		8,800	11,000	11,400				
Éditions coopératives Albert Saint-Martin	F	QC	4,400							
Éditions d'Acadie *	F	NB	58,000	49,900	47,000					
Éditions d'art Le Sabord	F	QC				14,400	21,600	27,000	27,100	27,500
Éditions David *	F	ON			25,900	59,000	72,600	59,500	48,500	54,800
Éditions de la courte échelle	F	QC	61,500	48,500	47,200	61,900	77,400	75,000	65,300	72,200
Éditions de la Huit	F	QC								7,500
Éditions de la nouvelle plume *	F	SK	13,400	10,400	15,600	15,000	12,200	9,200		
Éditions de la Paix Enr.	F	QC		15,000	17,000	21,900	29,500	22,100	16,600	17,100
Éditions de la Pleine Lune	F	QC	44,600	49,300	43,000	46,200	49,200	41,000	49,900	45,600
Éditions de l'Effet pourpre	F	QC						20,000	19,300	
Éditions de l'Hexagone	F	QC	93,200	71,500	58,600	80,400	73,600	67,800	64,300	
Éditions de L'instant même	F	QC	76,000	69,600	64,000	95,300	84,800	66,200	62,800	71,500
Éditions des Glanures	F	QC	11,700	17,600	16,100					
Éditions des Intouchables	F	QC	26,800	40,200	41,500	42,000	52,500	44,900	50,200	37,700
Éditions des Plaines	F	MB	18,200	22,600	28,100	32,100	29,800	26,300	32,000	26,000
Éditions du Blé *	F	MB	17,200	21,500	19,600	35,300	41,300	31,000	35,800	39,200
Éditions du Boréal	F	QC	129,300	121,600	120,000	150,900	129,600	98,300	100,000	113,500
Éditions du CIDIHCA*	F	QC		28,100	25,100	21,900	27,400	20,600	25,800	19,400
Éditions du CRAM	F	QC						9,800	9,000	8,700
Éditions du Loup de Gouttière	F	QC	31,000	31,700	29,800	30,700	38,400	38,000	40,600	36,400
Éditions du Méridien	F	QC	23,800	17,900	17,200	12,900				
Éditions du Nordir *	F	ON	56,300	53,900		66,600	54,500	56,300		
Éditions du Noroît	F	QC	92,300	89,400	89,400	104,700	89,000	73,600	72,600	68,200
Éditions du remue-ménage	F	QC	28,100	33,400	40,000	55,000	56,800	46,100	44,100	39,000
Éditions du Septentrion	F	QC	66,300	64,800	59,100	90,100	78,700	69,100	63,100	66,600
Éditions du soleil de minuit	F	QC					18,200	16,600	24,900	22,700
Éditions du Trécaré	F	QC			14,800	14,200				



Publisher	L	R	1998	1999	2000	2001	2002	2003	2004	2005
Éditions du Vermillon *	F	ON	38,800	43,200	39,800	46,400	41,400	31,100	38,900	47,300
Éditions Fides	F	QC	105,500	96,500	95,100	123,400	104,600	88,700	79,200	77,800
Éditions GID Inc.	F	QC								18,900
Éditions Héritage Inc.	F	QC	100,100	75,100	83,300	114,000	102,300	82,500	78,800	76,500
Éditions Hurtubise HMH Limitée	F	QC	49,200	44,100	49,500	43,700	53,400	59,500	64,000	80,000
Éditions internationales Alain Stanké	F	QC	40,700	33,600	25,400	27,800	32,900			
Éditions JCL	F	QC	31,800	39,800	30,100	46,900	51,200	38,400	41,500	39,200
Éditions Les Herbes Rouges	F	QC	73,700	62,200	60,200	55,700	69,600	57,200	58,600	65,600
Éditions Liber	F	QC	40,700	44,100	49,500	71,600	69,500	54,700	59,500	56,500
Éditions Libre Expression Ltée	F	QC	45,200	33,900	37,300	42,000	36,000	31,800	39,100	
Éditions L'Interligne*	F	ON	26,600	32,300	31,000	53,200	43,300	43,900	45,200	50,700
Éditions Logiques	F	QC	15,500	11,600						
Éditions Marchand de feuilles	F	QC								20,500
Éditions Médiaspaul	F	QC	42,100	31,600	23,700	29,300	29,600	29,600	30,600	29,500
Éditions Michel Quintin	F	QC	38,500	28,900	36,100	56,500	55,300	41,500	51,900	45,100
Éditions Mille-Îles et les 400 Coups	F	QC	56,000	51,700	54,900	79,700	79,800	82,400	90,100	100,200
Éditions Multimondes	F	QC								7,500
Éditions Nota bene (Nuit blanche)	F	QC	58,300	47,100	41,300	64,500	77,000	63,800	62,600	51,100
Éditions Perce-Neige*	F	NB	25,400	26,100	31,000	49,500	50,200	47,000	49,500	44,100
Éditions Pierre Tisseyre	F	QC	70,500	55,700	41,800	49,100	54,100	40,600	48,100	55,600
Éditions Point de fuite	F	QC					19,200	14,400	14,800	16,000
Éditions Prise de Parole *	F	ON	44,900	59,300	55,200	65,000	61,400	51,100	55,400	51,300
Éditions Québec Amérique	F	QC	84,000	63,000	47,300	54,200	67,800	79,900	74,600	89,000
Éditions Quebecor Média	F	QC						41,100	50,400	63,000
Éditions Trait d'Union	F	QC				43,700	40,300	30,800		
Éditions Triptyque	F	QC	76,200	79,900	66,600	84,300	77,000	63,400	58,500	67,600
Éditions Trois Enr.	F	QC	39,800	41,800	46,700	38,100	44,200	45,400	34,100	41,100
Éditions Trois-Pistoles	F	QC	31,300	32,500	26,900	30,100	37,600	47,000	58,800	71,000
Éditions Varia	F	QC			37,800	31,500	33,800	32,700	40,900	41,400
Éditions Vents d'Ouest (1993)	F	QC	53,300	69,300	64,600	69,000	70,700	55,100	55,500	49,600
Ekstasis Editions Canada	E	BC	39,100	58,700	64,900	78,100	59,400	56,000	58,100	50,600
Empyrean Press *	E	QC		12,000						
Exile Editions	E	ON	76,000	76,600	67,700	102,500	76,900	57,700	46,600	49,000



Publisher	L	R	1998	1999	2000	2001	2002	2003	2004	2005
Fernwood Publishing	E	NS			20,700		18,000	20,700	24,000	24,400
Fifth House	E	AB	31,100	23,300	25,700	42,400	42,500	32,900	33,700	33,900
Firefly Books	E	ON						22,400	16,800	
Fitzhenry and Whiteside Limited	E	ON			31,600	52,800	66,000	61,300	64,300	72,600
Formac Publishing Company	E	NS	16,200	20,300	20,800	21,500	26,900	33,600	28,700	25,100
Gaspereau Press	E	NS					32,300	48,500	72,800	81,000
Goose Lane Editions	E	NB	71,500	58,100	52,200	81,800	93,000	75,900	71,600	99,900
Great Plains Publications	E	MB			25,100	50,200	46,300	36,700	45,900	42,000
Groundwood Books	E	ON	69,000	61,700	68,800	84,600	78,200	70,700	78,000	81,500
Groupe Ville-Marie Littérature	F	QC								107,500
Guernica Editions	E	ON	63,800	60,700	55,100	77,300	83,500	76,000	57,000	51,100
Gutter Press	E	ON		42,400	35,200	30,800	35,100	30,000	24,000	
Guy Saint-Jean Éditeur	F	QC						11,100	13,600	13,300
Harbour Publishing	E	BC	44,400	55,500	56,200	64,000	69,400	66,100	57,400	57,500
Heritage House Publishing	E	BC	6,300			18,000	22,500	23,000	17,300	21,600
House of Anansi Press	E	ON	71,600	68,600	65,700	84,100	94,200	78,000	70,300	71,200
Humanitas	F	QC	35,300	44,100	34,200	28,800	24,900	26,500	32,200	24,200
Insomniac Press	E	ON	37,700	56,600	68,200	92,500	87,100	65,300	58,400	68,400
J. Gordon Shillingford Publishing	E	MB	56,400	68,400	74,100	80,300	68,500	58,800	50,500	51,100
James Lorimer and Company	E	ON	49,000	45,000	38,100	45,600	57,000	49,400	37,100	39,800
Key Porter Books	E	ON	56,700	37,400	43,300	64,200	48,200	53,900	40,400	43,500
Kids Can Press	E	ON	46,100	34,600	36,500	55,100	60,800	48,500	51,400	64,300
Lanctôt Éditeur	F	QC	64,300	75,300	74,600	94,900	97,300	79,900	84,400	73,900
Leméac Éditeur	F	QC	66,600	66,200	67,800	99,900	83,600	75,200	83,400	83,900
Les Heures bleues	F	QC						31,900	28,000	37,300
Livres DC Books *	E	QC		12,000	12,000	22,400	23,500	22,200	23,700	21,600
Lobster Press *	E	QC					19,900	27,800	22,000	
Lux Éditeur	F	QC						33,800	31,500	36,700
Macfarlane Walter and Ross	E	ON	41,800	31,400	23,600	53,100	66,400	64,600		
Mansfield Press	E	ON							30,000	44,400
Maple Tree Press	E	ON	17,900	20,500	18,900	17,100	21,400	26,800	20,100	16,900
McArthur & Company Publishing	E	ON					37,500	53,700	52,400	59,000
McClelland and Stewart	E	ON	108,500	89,100	115,300	96,500	110,600	138,300	163,700	161,800
McGilligan Books	E	ON								30,000
McGill-Queen's University Press *	E	QC	70,600	69,400	76,300	107,500	130,200	126,600	134,500	124,600
Mercury Press	E	ON	84,400	76,800	67,100	88,300	69,700	60,000		58,500



Publisher	L	R	1998	1999	2000	2001	2002	2003	2004	2005
Mosaic Press	E	ON	49,800	58,300	45,900	49,500	37,100	33,800	37,300	
Napoleon Publishing / Rendez Vous Press	E	ON	16,200	20,300	17,800	32,600	29,100	23,800	29,800	32,800
Natural Heritage / Natural History	E	ON	31,000	38,800	29,100	24,700	24,500	30,600	26,300	28,300
New Star Books	E	BC	51,100	47,800	35,900	45,500	55,700	49,300	39,600	36,100
NeWest Publishers	E	AB	49,600	52,600	55,800	86,900	75,300	67,500	66,100	62,900
Nightwood Editions	E	BC			20,400	31,900	45,100	47,800	58,700	54,900
Nimbus Publishing	E	NS	33,800	25,400	31,800	53,100	58,800	50,300	37,700	37,100
Oberon Press	E	ON	52,700	61,700	57,100	75,500	63,000	48,100	59,200	54,300
Oolichan Books	E	BC	49,200	41,800	35,600	62,200	59,000	47,800	39,000	35,400
Orca Book Publishers	E	BC	47,800	38,700	44,900	70,600	81,300	75,200	71,100	88,900
Pedlar Press	E	ON						37,500	46,800	41,800
Pemmican Publications *	E	MB	32,700	27,200	23,000	24,700	30,900	25,500	31,900	25,600
Penumbra Press	E	ON			31,400	43,700	45,000	33,800	25,400	
Planète rebelle	F	QC				33,900	42,000	42,400	52,200	42,500
Playwrights Canada Press	E	ON	63,600	66,800	74,200	102,600	91,000	86,500	83,800	82,600
Polestar Press	E	BC	46,800	45,300						
Porcupine's Quill	E	ON	77,500	70,500	62,100	88,800	86,200	82,700	82,500	82,200
Pottersfield Press	E	NS	36,000	32,100	33,300	32,600	25,100	23,300	23,300	22,500
Press Gang Publishers	E	BC	49,900	45,200						
Presses de l'Université d'Ottawa	F	ON						14,000		
Presses de l'Université de Montréal	F	QC	10,300		12,900	31,600	39,500	49,400	42,900	50,300
Presses de l'Université du Québec	F	QC	22,900	17,200						
Presses de l'Université Laval (IQRC)	F	QC	24,700	29,100	34,700	60,400	53,000	39,800	49,800	56,100
Publications MNH	F	QC			13,800		14,200	10,700		
Quarry Press	E	ON	46,600	37,600						
Ragweed Press	E	PE	42,000	33,500	30,500					
Raincoast Book Distribution	E	BC	35,900		53,900	80,700	100,400	108,300	99,200	95,700
Red Deer Press	E	AB	39,300	39,600	50,600	67,300	78,100	65,000	48,800	45,200
Ronsdale Press	E	BC	34,300	30,400	36,500	53,900	40,400	34,100	28,900	29,100
Roussan Éditeur *	E	QC	16,100	20,100	15,100	21,800	25,100			
Second Story Feminist Press	E	ON	55,600	39,400	42,500	51,600	44,600	47,000	47,100	44,200
Seraphim Editions	E	ON							16,500	18,500
Signature Editions	E	MB	50,300	49,100	43,500	66,000	58,100	47,900	35,900	42,500
Sister Vision: Black Women and Women of Colour Press *	E	ON	45,000		15,000					



Publisher	L	R	1998	1999	2000	2001	2002	2003	2004	2005
Sogides	F	QC	18,000			9,100	11,400	14,300	17,600	22,000
Sono Nis Press	E	BC	54,600	40,300	30,200	49,600	49,600	37,200	27,900	26,200
Soulières Éditeur	F	QC		35,500	49,900	58,500	64,300	50,800	52,200	57,700
Stoddart Publishing	E	ON	72,300	55,200	65,400	95,000	108,800			
Sumach Press	E	ON							30,000	35,900
Talon Books	E	BC	75,100	82,500	88,800	107,000	93,700	86,600	82,700	91,400
Theytus Books *	E	BC	40,400	30,300	33,400	58,000	44,000	38,600	32,800	28,300
ThistleDown Press	E	SK	67,200	61,600	70,500	94,800	76,700	65,300	70,900	68,000
Thomas Allen & Son	E	ON							33,800	50,700
TouchWood Editions	E	BC	38,000	41,500		42,900	50,200	37,700	28,300	26,000
Tradewind Books	E	BC							30,000	45,000
TSAR Publications *	E	ON	56,000	52,900	39,700	50,600	42,600	40,000	46,900	45,800
Tundra Books	E	ON	60,200	56,700	53,700	85,400	98,800	93,600	91,100	100,500
Turnstone Press	E	MB	66,000	67,900	74,400	95,800	85,200	74,000	74,300	74,000
University College of Cape Breton Press	E	NS	20,900	26,100	27,000					
University of Alberta Press	E	AB	15,500	23,400	29,300	45,900	39,700	45,400	41,500	33,000
University of British Columbia Press	E	BC	27,700	31,200	23,700	40,500	38,600	35,200	44,000	55,000
University of Calgary Press	E	AB			4,500	12,700	19,100	28,700	35,900	44,900
University of Manitoba Press	E	MN	13,100			28,500	34,600	29,600	35,800	29,900
University of Ottawa Press/Presses de l'Université d'Ottawa	E	ON	20,600	25,800	21,300	18,900	18,700			
University of Toronto Press	E	ON	96,200	93,600	84,200	107,300	97,500	106,900	121,500	105,500
Véhicule Press *	E	QC	82,300	84,800	78,500	84,100	76,700	69,000	68,000	65,200
VLB Éditeur	F	QC	58,400	60,200	56,500	72,900	74,400	62,600	63,000	
Whitecap Books Limited	E	BC	19,900	14,900	17,100	22,900	28,400	21,300	19,500	15,500
Wilfrid Laurier University Press	E	ON	12,700	18,800	14,500	16,500	20,600	25,800	27,400	34,300
Wolsak and Wynn Publishers	E	ON	46,600	43,500	41,500	59,800	48,000	38,500	34,500	41,300
Women's Educational Press	E	ON	37,100	44,100						
XYZ Éditeur	F	QC	95,200	90,800	83,800	121,800	103,300	84,800	81,500	90,100
YYZ Artists' Outlet	E	ON								22,500



3.0 Distribution of Block Grant Program Recipients

Region / Size	Year	< \$100,000	\$100,000 – 250,000	\$250,000 – 500,000	\$500,000 – 1 M	\$1 M - 2 M	\$2 M - 5 M	> \$5 M	Total
NF, NB, NS & PE	2002	4	2	2	3	1			12
	2005	4	3	1	1	3			12
QC	2002	16	14	9	8	2	7	3	59
	2005	17	12	8	8	7	3	6	61
ON	2002	14	8	8	1	4	2	7	44
	2005	16	9	3	3	4	4	6	45
MB, SK & AB	2002	7	7	2	3	0			19
	2005	4	8	3	2	1			18
BC	2002	5	5	2	1	3	0	4	20
	2005	4	5	3	1	3	2	2	20
Total	2002	46	36	23	16	33			154
	2005	45	37	18	15	41			156

4.0 Average Block Grant by Size of Publisher¹

Size	2002					2005				
	F	E	All		Grants per Group	F	E	All		Grants per Group
	\$	\$	\$	#	\$	\$	\$	\$	#	\$
< \$100,000	41,350	46,877	43,993	46	2,023,700	38,319	42,200	40,389	45	1,817,500
\$100,000 – 249,999	52,231	56,604	55,025	36	1,980,900	50,108	44,473	46,351	39	1,807,700
< \$250,000					4,004,600					3,625,200
\$250,000 – 499,999	70,613	53,850	59,945	22	1,318,800	48,900	43,067	45,983	18	827,700
\$500,000 – 999,999	58,675	55,963	57,319	16	917,100	42,350	52,875	47,613	16	761,800
\$250,000 – 999,999					2,235,900					1,589,500
\$1M – 2M	68,300	62,629	71,478	9	643,300	59,917	58,060	58,756	16	940,100
\$2M – 5M\$	72,317	81,200	75,870	10	758,700	75,600	76,388	76,230	10	762,300
> \$5M	60,500	78,070	74,015	13	962,200	68,050	69,950	69,136	14	967,900
> \$1M					2,364,200					2,670,300
Total				152	8,604,700				158	7,885,000

¹ Averages are based on actuals, not adjusted for inflation. It is important to note that there are large variations within many of the size categories each year.



5.0 Eligible Titles under the Block Grant Program

Genre	Code	1998			1999			2000			2001			2002			2003			2004		
		F	E	All	F	E	All	F	E	All	F	E	All	F	E	All	F	E	All	F	E	All
art books	AB	4	7	11	0	1	1	1	10	11	5	9	14	5	13	18	2	7	9	5	6	11
audio book	AD	1	11	12	0	9	9	1	7	8	0	6	6	0	4	4	0	1	1	0	0	0
CD audio	CD	2	3	5	0	1	1	3	0	3	1	2	3	10	0	10	2	5	7	0	11	11
CD-ROM	CR	0	2	2	0	6	6	1	0	1	0	0	0	0	0	0	0	1	1	0	0	0
non-fiction, more than 160 p.	N1	221	347	568	220	398	618	264	388	652	244	404	648	267	410	677	263	382	645	250	391	641
non-fiction, 160 p. or less	N2	64	73	137	56	68	124	72	56	128	89	64	153	93	72	165	69	91	160	69	113	182
non-fiction (all)		285	420	705	276	466	742	336	444	780	333	468	801	360	482	842	332	473	805	319	504	823
children's illust. HC	C1	9	79	88	11	105	116	33	100	133	21	120	141	25	145	170	26	147	173	26	141	167
children's illust. SC & YA, more than 100 p.	C2	208	124	332	185	134	319	171	131	302	220	155	375	208	111	319	183	139	322	185	182	367
children's other	C3	4	11	15	78	28	106	94	28	122	129	22	151	115	24	139	107	36	143	121	26	147
children's (all)		221	214	435	274	267	541	298	259	557	370	297	667	348	280	628	316	322	638	332	349	681
short stories	S	52	82	134	61	64	125	51	86	137	33	77	110	59	64	123	55	74	129	49	72	121
poetry, more than 112 p.	P1	34	35	69	49	53	102	63	57	120	47	40	87	58	49	107	48	54	102	41	52	93
poetry, 112 p. or less	P2	94	108	202	78	117	195	87	117	204	106	120	226	121	115	236	99	120	219	110	121	231
poetry (all)		128	143	271	127	170	297	150	174	324	153	160	313	179	164	343	147	174	321	151	173	324
fiction	F	212	101	313	230	128	358	228	146	374	259	165	424	282	186	468	237	179	416	255	155	410
drama, more than 112 p.	D1	16	22	38	15	26	41	17	26	43	27	16	43	18	19	37	15	19	34	13	24	37
drama, 112 p. or less	D2	14	28	42	17	27	44	17	30	47	13	28	41	23	34	57	17	18	35	13	24	37
drama (all)		30	50	80	32	53	85	34	56	90	40	44	84	41	53	94	32	37	69	26	48	74
Total		935	1,033	1,968	1,000	1,165	2,165	1,103	1,182	2,285	1,194	1,228	2,422	1,284	1,246	2,530	1,123	1,273	2,396	1,137	1,318	2,455

6.0 Base Grant Allocation per Eligible Title

6.1: Amounts per Year (in Actual Dollars)

Genre	Code	1998		1999		2000		2001		2002		2003		2004		2005	
		F	E	F	E	F	E	F	E	F	E	F	E	F	E	F	E
audio book	AD	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
CD audio	CD	1,000	1,000	2,800	2,800	2,800	2,800	2,800	2,800	2,800	2,800	2,800	2,800	2,800	2,800	2,800	2,800
CD-ROM	CR	1,000	1,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	1,000	1,000
non-fiction, more than 160 p.	N1	2,243	4,800	2,243	4,723	2,061	3,992	1,856	3,853	1,541	2,841	1,398	2,786	1,438	2,738	1,549	2,684
non-fiction, 160 p. or less	N2	1,380	2,560	1,380	2,588	1,268	2,281	1,198	2,201	994	1,623	902	1,592	928	1,565	999	1,534
children's illust. HC	C1	2,070	3,840	1,898	3,559	1,744	3,137	1,677	3,192	1,392	2,354	1,262	2,308	1,299	2,269	1,399	2,224
children's illust. SC & YA, more than 100 p.	C2	1,898	2,880	1,725	2,588	1,585	2,281	1,527	2,422	1,267	1,786	1,150	1,751	1,183	1,721	1,274	1,687
children's other	C3	1,208	1,920	1,139	1,812	1,046	1,597	988	1,816	820	1,339	744	1,313	765	1,291	824	1,265
short stories	S	2,415	5,120	2,415	5,176	2,219	4,562	2,096	4,403	1,740	3,246	1,578	3,184	1,623	3,129	1,749	3,067
poetry, more than 112 p.	P1	2,070	3,840	2,243	4,206	2,061	3,707	1,946	3,578	1,615	2,638	1,465	2,587	1,507	2,542	1,624	2,492
poetry, 112 p. or less	P2	1,967	3,648	2,070	3,882	1,902	3,422	1,796	3,302	1,491	2,435	1,353	2,388	1,391	2,347	1,499	2,300
fiction	F	2,415	5,120	2,415	5,176	2,219	4,562	2,096	4,128	1,740	3,044	1,578	2,985	1,623	2,934	1,749	2,876
drama, greater than 112 p.	D1	2,070	4,480	2,070	4,529	1,902	3,992	1,796	3,853	1,491	2,841	1,353	2,786	1,391	2,738	1,499	2,684
drama, 112 p. or less	D2	1,725	3,840	1,725	3,882	1,585	3,422	1,497	3,302	1,243	2,435	1,127	2,388	1,159	2,347	1,249	2,300

6.0 Base Grant Allocation per Eligible Title (continued)

6.2: Amounts per Year, Adjusted for Inflation (in 2005 Dollars)¹

Genre	Code	1998		1999		2000		2001		2002		2003		2004		2005	
		F	E	F	E	F	E	F	E	F	E	F	E	F	E	F	E
		CPI = 108.6		CPI = 110.5		CPI = 113.5		CPI = 116.4		CPI = 119.0		CPI = 122.3		CPI = 124.6		CPI = 127.3	
audio book	AD	1,172	1,172	1,152	1,152	1,122	1,122	1,094	1,094	1,070	1,070	1,041	1,041	1,022	1,022	1,000	1,000
CD audio	CD	1,172	1,172	1,152	3,226	1,122	3,140	1,094	3,062	1,070	2,995	1,041	2,914	1,022	2,861	2,800	2,800
CD-ROM	CR	1,172	1,172	11,520	11,520	11,216	11,216	10,936	10,936	10,697	10,697	10,409	10,409	10,217	10,217	1,000	1,000
non-fiction, more than 160 p.	N1	2,629	5,627	2,584	5,441	2,312	4,477	2,030	4,214	1,648	3,039	1,455	2,900	1,469	2,797	1,549	2,684
non-fiction, 160 p. or less	N2	1,618	3,001	1,590	2,981	1,422	2,558	1,310	2,407	1,063	1,736	939	1,657	948	1,599	999	1,534
children's illust. HC	C1	2,426	4,501	2,187	4,100	1,956	3,518	1,834	3,491	1,489	2,518	1,314	2,402	1,327	2,318	1,399	2,224
children's illust. SC & YA, more than 100 p.	C2	2,225	3,376	1,987	2,981	1,778	2,558	1,670	2,649	1,355	1,911	1,197	1,823	1,209	1,758	1,274	1,687
children's other	C3	1,416	2,251	1,312	2,087	1,173	1,791	1,081	1,986	877	1,432	774	1,367	782	1,319	824	1,265
short stories	S	2,831	6,002	2,782	5,963	2,489	5,117	2,292	4,815	1,861	3,472	1,643	3,314	1,658	3,197	1,749	3,067
poetry, more than 112 p.	P1	2,426	4,501	2,584	4,845	2,312	4,158	2,128	3,913	1,728	2,822	1,525	2,693	1,540	2,597	1,624	2,492
poetry, 112 p. or less	P2	2,306	4,276	2,385	4,472	2,133	3,838	1,964	3,611	1,595	2,605	1,408	2,486	1,421	2,398	1,499	2,300
fiction	F	2,831	6,002	2,782	5,963	2,489	5,117	2,292	4,515	1,861	3,256	1,643	3,107	1,658	2,998	1,749	2,876
drama, greater than 112 p.	D1	2,426	5,251	2,385	5,218	2,133	4,477	1,964	4,214	1,595	3,039	1,408	2,900	1,421	2,797	1,499	2,684
drama, 112 p. or less	D2	2,022	4,501	1,987	4,472	1,778	3,838	1,637	3,611	1,330	2,605	1,173	2,486	1,184	2,398	1,249	2,300

¹ Amounts adjusted for inflation used Statistics Canada's average annual Consumer Price Index (CPI), with its base of CPI = 100 for June 1992; available at: www40.statcan.ca/l01/cst01/econ46a.htm.

7.0 Production Cost per Copy for Eligible Titles under the Block Grant Program¹

7.1: Amounts per Year (in Actual Dollars)

Genre ²	Code	1998		1999		2000		2001		2002		2003		2004	
		F	E	F	E	F	E	F	E	F	E	F	E	F	E
non-fiction, more than 160 p.	N1	8.86	8.58	7.86	9.28	8.99	10.24	8.73	9.74	8.73	9.10	8.41	9.79	9.52	9.19
non-fiction, 160 p. or less	N2	5.63	5.95	5.43	5.11	5.36	6.68	5.33	6.54	5.78	5.81	5.15	5.40	5.61	6.17
children's illust. HC	C1	5.92	3.62	3.25	3.04	4.50	3.78	4.30	3.67	4.76	3.20	4.46	2.57	4.31	2.58
children's illust. SC & YA, more than 100 p.	C2	2.65	3.01	3.13	3.14	3.03	3.71	3.49	3.21	3.13	3.29	3.20	3.00	3.23	3.31
children's other	C3	4.35	2.16	2.38	2.59	2.56	1.95	2.35	2.71	2.51	1.91	2.68	1.98	2.75	2.07
short stories	S	5.98	6.45	6.04	6.26	6.93	7.29	6.32	6.96	6.47	6.54	5.66	7.38	7.01	7.19
poetry, more than 112 p.	P1	8.04	7.54	6.45	7.42	7.48	9.55	6.75	8.73	7.09	8.30	6.94	8.45	7.83	8.60
poetry, 112 p. or less	P2	6.11	6.63	5.92	6.45	5.66	6.67	5.67	7.85	5.87	7.36	6.25	7.81	7.09	7.17
fiction	F	5.64	5.72	5.37	5.52	5.68	6.61	6.68	6.53	5.65	5.94	5.77	6.31	6.38	6.63
drama, greater than 112 p.	D1	5.44	8.60	5.93	7.28	6.15	7.44	6.08	10.38	7.78	9.14	6.29	9.59	7.67	10.49
drama, 112 p. or less	D2	4.69	6.52	5.33	5.35	4.55	5.08	5.96	5.65	4.78	6.43	5.03	6.64	5.07	6.79

¹ Based on Title Analysis forms, so only as accurate as publishers' reporting.

² Table does not include AB, AD, CD & CR titles because numbers are too small, publishers could be identified and there is a great variation in the data.

7.0 Production Cost per Copy for Eligible Titles under the Block Grant Program¹ (continued)

7.2: Amounts per Year, Adjusted for Inflation (in 2005 Dollars)²

Genre ³	Code	1998		1999		2000		2001		2002		2003		2004	
		F	E	F	E	F	E	F	E	F	E	F	E	F	E
		CPI = 108.6		CPI = 110.5		CPI = 113.5		CPI = 116.4		CPI = 119.0		CPI = 122.3		CPI = 124.6	
non-fiction, more than 160 p.	N1	10.39	10.06	9.06	10.69	10.08	11.49	9.55	10.65	9.34	9.73	8.75	10.19	9.32	9.00
non-fiction, 160 p. or less	N2	6.60	6.97	6.26	5.89	6.01	7.49	5.83	7.15	6.18	6.22	5.36	5.62	5.49	6.04
children's illust. HC	C1	6.94	4.24	3.74	3.50	5.05	4.24	4.70	4.01	5.09	3.42	4.64	2.68	4.22	2.53
children's illust. SC & YA, more than 100 p.	C2	3.11	3.53	3.61	3.62	3.40	4.16	3.82	3.51	3.35	3.52	3.33	3.12	3.16	3.24
children's other	C3	5.10	2.53	2.74	2.98	2.87	2.19	2.57	2.96	2.69	2.04	2.79	2.06	2.69	2.03
short stories	S	7.01	7.56	6.96	7.21	7.77	8.18	6.91	7.61	6.92	7.00	5.89	7.68	6.86	7.04
poetry, more than 112 p.	P1	9.42	8.84	7.43	8.55	8.39	10.71	7.38	9.55	7.58	8.88	7.22	8.80	7.66	8.42
poetry, 112 p. or less	P2	7.16	7.77	6.82	7.43	6.35	7.48	6.20	8.59	6.28	7.87	6.51	8.13	6.94	7.02
fiction	F	6.61	6.70	6.19	6.36	6.37	7.41	7.31	7.14	6.04	6.35	6.01	6.57	6.24	6.49
drama, greater than 112 p.	D1	6.38	10.08	6.83	8.39	6.90	8.34	6.65	11.35	8.32	9.78	6.55	9.98	7.51	10.27
drama, 112 p. or less	D2	5.50	7.64	6.14	6.16	5.10	5.70	6.52	6.18	5.11	6.88	5.24	6.91	4.96	6.65

¹ Based on Title Analysis forms, so only as accurate as publishers' reporting.

² Amounts adjusted for inflation used Statistics Canada's average annual Consumer Price Index (CPI), with its base of CPI = 100 for June 1992; available at: www40.statcan.ca/l01/cst01/econ46a.htm.

³ Table does not include AB, AD, CD & CR titles because numbers are too small, publishers could be identified and there is a great variation in the data.

8.0 Average Copies Sold per Eligible Title under the Block Grant Program, 1998-2003¹

Genre	Code	FR	ENG	TOTAL
children's illust. HC	C1	5,075	8,519	8,042
children's illust. SC & YA, more than 100 p.	C2	2,614	4,346	3,429
children's other	C3	2,415	2,300	2,388
drama, greater than 112 p.	D1	503	480	488
drama, 112 p. or less	D2	401	440	429
fiction	F	2,312	2,484	2,376
non-fiction, more than 160 p.	N1	1,279	2,340	1,911
non-fiction, 160 p. or less	N2	872	2,028	1,378
poetry, more than 112 p.	P1	383	527	448
poetry, 112 p. or less	P2	190	535	364
short stories	S	556	1,858	1,289

¹ Only a percentage of publishers provide data on number of copies sold after two years. Therefore, tables on copies sold represent only about 60% of eligible titles.



9.0 Non-eligible Titles under the Block Grant Program¹

Genre	Code	1999	2000	2001	2002	2003	2004
audio book	AD	3	0	1	0	0	0
CD audio	CD	0	6	13	7	2	1
CD-ROM	CR	5	1	0	3	1	0
non-fiction, more than 160 p.	N1	211	146	154	162	193	178
non-fiction, 160 p. or less	N2	71	48	72	54	62	49
children's illust. HC	C1	4	21	37	18	26	18
children's illust. SC & YA, more than 100 p.	C2	22	27	11	10	28	27
children's other	C3	2	7	3	3	3	6
art books	AB	1	0	0	2	1	0
short stories	S	6	6	6	4	1	7
poetry, more than 112 p.	P1	17	8	21	13	5	3
poetry, 112 p. or less	P2	11	8	15	16	7	5
fiction	F	11	7	20	23	5	15
drama, greater than 112 p.	D1	1	5	4	1	1	3
drama, 112 p. or less	D2	1	1	0	1	2	1
Total		366	291	357	317	337	313

¹ The number of non-eligible titles is based on titles submitted to the CC only; 1998 data not included as incomplete; 2005 data not yet collected.



10.0 Average Number of Bonus Points Awarded per Publisher

10.1 By Region

Region	1998	1999	2000	2001	2002	2003	2004	2005	Average		
									Points per Year	Titles per Year	Points per Title
NF, NB, NS & PE	4.4	4.1	4.2	4	4.1	4.4	3.7	3.8	4.1	8.3	0.5
QC	4.6	4.4	4.5	4	4.6	4.6	4.9	5.1	4.6	15.5	0.3
ON	5.6	5	4.5	5	5.2	5.4	4.7	5.2	5.1	12.6	0.4
MB, SK & AB	4.6	4.6	4.5	4.4	4.4	4.3	4.1	3.9	4.3	7.5	0.6
BC	5.2	5.2	4.7	5.1	5.5	5.2	4.5	4.8	5.0	10.0	0.5

10.2 By Size

Size	Points		Titles / Titles		Points per Title	
	2002	2005	2002	2005	2002	2005
< \$100,000	3.96	4.29	7.67	7.19	0.52	0.60
\$100,000 – 249,999	4.67	4.35	9.96	9.74	0.47	0.45
\$250,000 – 499,999	5.10	4.85	12.76	11.83	0.40	0.41
\$500,000 – 999,999	5.13	4.95	14.72	15.90	0.35	0.31
\$1M - 2M	6.02	5.26	16.33	19.56	0.37	0.27
\$2M - 5M	5.57	6.08	26.10	22.60	0.21	0.27
> \$5M	6.08	6.25	25.00	26.83	0.24	0.23
Overall Average	4.84	4.84	12.98	13.31	0.37	0.36

11.0 Average Number of Bonus Points Awarded per Region per Eligible Title¹

Region	1998		1999		2000		2001		2002		2003		2004		2005	
	F	E	F	E	F	E	F	E	F	E	F	E	F	E	F	E
NF, NB, NS & PE	0.54	0.66	0.61	0.54	0.53	0.49	0.68	0.43	0.68	0.49	0.72	0.50	0.63	0.34	0.69	0.36
QC	0.31	0.53	0.30	0.41	0.30	0.22	0.25	0.32	0.27	0.40	0.26	0.48	0.31	0.44	0.30	0.51
ON	0.55	0.49	0.45	0.43	0.53	0.34	0.35	0.40	0.33	0.39	0.32	0.42	0.32	0.37	0.43	0.39
MB, SK & AB	0.49	0.82	0.54	0.60	0.86	0.58	0.56	0.57	0.81	0.61	0.62	0.59	0.67	0.49	1.70	0.42
BC	none	0.64	none	0.62	none	0.46	none	0.51	none	0.53	none	0.45	none	0.45	none	0.41
Overall Average	0.47	0.63	0.48	0.52	0.56	0.42	0.46	0.45	0.52	0.48	0.48	0.49	0.48	0.42	0.78	0.42

12.0 Average Number of Bonus Points Awarded to Linguistic Minority, Aboriginal and Culturally Diverse Publishers

Points & Titles	Language	1998		1999		2000		2001		2002		2003		2004		2005	
		F	E	F	E	F	E	F	E	F	E	F	E	F	E	F	E
Points	Minority Publishers ²	3.81	5.34	4.06	4.08	4.18	2.99	3.59	4.12	3.91	4.43	4.05	4.85	4.74	4.44	4.69	5.2
	All	4.51	5.22	4.41	4.88	4.58	4.44	4	4.78	4.52	5.02	4.51	5.13	4.95	4.39	5.01	4.72
Titles	Minority Publishers	7.1	7.10	7.6	7.30	7.3	8.60	9.1	9.80	9	8.50	10	9.30	11	8.70	8.3	9.00
	All	13.7	9.10	13.7	9.78	14.3	11.10	15	10.70	15.7	11.00	16.5	11.10	15.4	10.90	15.7	11.70
Points per Title	Minority Publishers	0.54	0.75	0.53	0.56	0.57	0.35	0.39	0.42	0.43	0.52	0.41	0.52	0.43	0.51	0.57	0.58
	All	0.33	0.57	0.32	0.50	0.32	0.40	0.27	0.45	0.29	0.46	0.27	0.46	0.32	0.40	0.32	0.40

¹ Note that there are fewer publishers in the larger size categories, so reported numbers are less accurate.

² "Minority publishers" includes linguistic minority, aboriginal and culturally diverse publishers.

13.0 Emerging Publishers Program Summary

	1998		1999		2000		2001		2002		2003		2004		2005	
	CPI = 108.6		CPI = 110.5		CPI = 113.5		CPI = 116.4		CPI = 119.0		CPI = 122.3		CPI = 124.6		CPI = 127.3	
Contributions by Language (in 2005 Dollars)¹																
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
Anglophone Publishers	305,962	64.4%	224,647	58.2%	128,982	37.7%	294,190	62.4%	312,152	69.3%	252,414	63.4%	194,117	56.7%	175,000	50.0%
Francophone Publishers	169,427	35.6%	161,285	41.8%	213,101	62.3%	177,061	37.6%	137,997	30.7%	145,724	36.6%	148,142	43.3%	175,000	50.0%
Total	475,389	100.0%	385,932	100.0%	342,084	100.0%	471,251	100.0%	450,150	100.0%	398,138	100.0%	342,259	100.0%	350,000	100.0%
Contributions by Region (in 2005 Dollars)¹																
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
NF, NB, NS & PE	74,630	15.7%	48,962	12.7%	11,216	3.3%	42,652	9.0%	29,418	6.5%	23,420	5.9%	17,879	5.2%	10,000	2.9%
QC	187,010	39.3%	132,484	34.3%	196,278	57.4%	225,400	47.8%	164,741	36.6%	174,348	43.8%	186,455	54.5%	190,000	54.3%
ON	112,404	23.6%	145,387	37.7%	112,159	32.8%	138,018	29.3%	140,886	31.3%	135,835	34.1%	33,204	9.7%	25,000	7.1%
MB, SK & AB	52,615	11.1%	36,059	9.3%	22,432	6.6%	30,622	6.5%	45,464	10.1%	24,461	6.1%	86,842	25.4%	100,000	28.6%
BC & YT	48,730	10.3%	23,041	6.0%	0	0.0%	34,668	7.4%	69,641	15.5%	40,074	10.1%	17,879	5.2%	25,000	7.1%
Total	475,389	100.0%	385,932	100.0%	342,084	100.0%	471,360	100.0%	450,150	100.0%	398,138	100.0%	342,259	100.0%	350,000	100.0%
Recipients by Language																
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Anglophone Publishers	21	70.0%	21	70.0%	10	43.5%	22	61.1%	20	64.5%	19	63.7%	15	60.0%	11	47.8%
Francophone Publishers	9	30.0%	9	30.0%	13	56.5%	14	38.9%	11	35.5%	11	36.7%	10	40.0%	12	52.2%
Total	30	100.0%	30	100.0%	23	100.0%	36	100.0%	31	100.0%	30	100.0%	25	100.0%	23	100.0%
Recipients by Region																
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
NF, NB, NS & PE	5	16.7%	5	16.7%	1	4.3%	3	8.3%	2	6.5%	3	10.0%	2	8.3%	1	4.5%
QC	10	33.3%	8	26.7%	12	52.2%	16	44.4%	13	41.9%	13	43.3%	12	50.0%	13	59.1%
ON	9	30.0%	12	40.0%	8	34.8%	11	30.6%	9	29.0%	8	26.7%	2	8.3%	2	9.1%
MB, SK & AB	3	10.0%	3	10.0%	2	8.7%	4	11.1%	4	12.9%	3	10.0%	6	25.0%	5	22.7%
BC & YT	3	10.0%	2	6.7%	0	0.0%	2	5.6%	3	9.7%	3	10.0%	2	8.3%	1	4.5%
Total	5	16.7%	5	16.7%	1	4.3%	3	8.3%	2	6.5%	3	10.0%	2	8.3%	1	4.5%

¹ Amounts adjusted for inflation used Statistics Canada's average annual Consumer Price Index (CPI), with its base of CPI = 100 for June 1992; available at: www40.statcan.ca/01/cst01/econ46a.htm.

14.0 Author Promotion Tours Summary

	1998		1999		2000		2001		2002		2003		2004		2005	
	CPI = 108.6		CPI = 110.5		CPI = 113.5		CPI = 116.4		CPI = 119.0		CPI = 122.3		CPI = 124.6		CPI = 127.3	
Contributions by Language (in 2005 Dollars)¹																
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
Anglophone Publishers	n/a	n/a	265,890	66.8%	268,164	64.1%	274,176	68.5%	281,023	66.5%	257,827	65.9%	216,083	65.5%	208,000	65.6%
Francophone Publishers	n/a	n/a	132,382	33.2%	150,068	35.9%	125,988	31.5%	141,742	33.5%	133,545	34.1%	113,916	34.5%	108,900	34.4%
Total	n/a	n/a	398,272	100.0%	418,233	100.0%	400,164	100.0%	422,764	100.0%	391,372	100.0%	329,999	100.0%	316,900	100.0%
Contributions by Region (in 2005 Dollars)¹																
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
NF, NB, NS & PE	n/a	n/a	24,308	6.1%	23,441	5.6%	18,811	4.7%	20,218	4.8%	22,067	5.6%	19,105	5.8%	21,600	6.8%
QC	n/a	n/a	135,607	34.0%	132,908	31.8%	124,347	31.1%	132,863	31.4%	119,597	30.6%	104,312	31.6%	103,900	32.8%
ON	n/a	n/a	125,687	31.6%	148,386	35.5%	147,423	36.8%	154,686	36.6%	143,850	36.8%	113,303	34.3%	106,900	33.7%
MB, SK & AB	n/a	n/a	30,068	7.5%	32,744	7.8%	27,013	6.8%	38,404	9.1%	41,948	10.7%	39,232	11.9%	33,700	10.6%
BC & YT	n/a	n/a	82,601	20.7%	80,754	19.3%	82,570	20.6%	76,594	18.1%	63,910	16.3%	54,046	16.4%	50,800	16.0%
Total	n/a	n/a	398,272	100%	418,233	100%	400,164	100%	422,764	100%	391,372	100%	329,999	100%	316,900	100%
Recipients by Language																
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Anglophone Publishers	n/a	n/a	64	64.0%	70	64.2%	64	62.1%	71	65.1%	71	62.3%	75	62.5%	70	63.1%
Francophone Publishers	n/a	n/a	36	36.0%	39	35.8%	39	37.9%	38	34.9%	43	37.7%	45	37.5%	41	36.9%
Total	n/a	n/a	100	100.0%	109	100.0%	103	100.0%	109	100.0%	114	100.0%	120	100.0%	111	100.0%
Recipients by Region																
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
NF, NB, NS & PE	n/a	n/a	10	10.0%	8	7.3%	5	4.9%	7	6.4%	8	7.0%	7	5.8%	8	7.2%
QC	n/a	n/a	36	36.0%	37	33.9%	40	38.8%	37	33.9%	41	36.0%	45	37.5%	40	36.0%
ON	n/a	n/a	29	29.0%	34	31.2%	30	29.1%	35	32.1%	35	30.7%	34	28.3%	33	29.7%
MB, SK & AB	n/a	n/a	9	9.0%	14	12.8%	12	11.7%	14	12.8%	15	13.2%	16	13.3%	13	11.7%
BC & YT	n/a	n/a	16	16.0%	16	14.7%	16	15.5%	16	14.7%	15	13.2%	17	14.2%	17	15.3%
Total	n/a	n/a	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	0.8%	0	0.0%

¹ Amounts adjusted for inflation used Statistics Canada's average annual Consumer Price Index (CPI), with its base of CPI = 100 for June 1992; available at: www40.statcan.ca/01/cst01/econ46a.htm.

15.0 Translation Grants Summary

	1998		1999		2000		2001		2002		2003		2004		2005	
	CPI = 108.6		CPI = 110.5		CPI = 113.5		CPI = 116.4		CPI = 119.0		CPI = 122.3		CPI = 124.6		CPI = 127.3	
Contributions by Language (in 2005 Dollars)¹																
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
Anglophone Publishers	173,098	33.1%	236,513	39.5%	141,544	25.4%	220,697	29.9%	237,045	41.6%	108,772	21.2%	142,012	26.7%	198,300	29.8%
Francophone Publishers	349,635	66.9%	362,315	60.5%	415,940	74.6%	518,004	70.1%	333,440	58.4%	403,498	78.8%	388,950	73.3%	468,100	70.2%
Total	522,733	100.0%	598,828	100.0%	557,484	100.0%	738,701	100.0%	570,486	100.0%	512,271	100.0%	530,962	100.0%	666,400	100.0%
Contributions by Region (in 2005 Dollars)¹																
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
NF, NB, NS & PE	9,389	1.8%	17,165	2.9%	2,019	0.4%	29,528	4.0%	16,217	2.8%	4,268	0.8%	3,065	0.6%	23,700	3.6%
QC	373,724	71.5%	430,516	71.9%	438,708	78.7%	544,689	73.7%	315,041	55.2%	413,990	80.8%	413,367	77.9%	469,300	70.4%
ON	61,424	11.8%	96,886	16.2%	49,798	8.9%	152,563	20.7%	97,914	17.2%	67,782	13.2%	66,919	12.6%	119,100	17.9%
MB, SK & AB	42,327	8.1%	23,041	3.8%	4,711	0.8%	2,734	0.4%	41,506	7.3%	0	0.0%	12,464	2.3%	16,200	2.4%
BC & YT	35,869	6.9%	31,220	5.2%	62,248	11.2%	9,187	1.2%	99,807	17.5%	26,230	5.1%	35,145	6.6%	38,100	5.7%
Total	522,733	100.0%	598,828	100.0%	557,484	100.0%	738,701	100.0%	570,486	100.0%	512,271	100.0%	530,962	100.0%	666,400	100.0%
Recipients by Language																
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Anglophone Publishers	22	43.1%	20	50.0%	17	45.9%	21	42.0%	19	43.2%	14	32.6%	17	44.7%	20	43.5%
Francophone Publishers	29	56.9%	20	50.0%	20	54.1%	29	58.0%	25	56.8%	29	67.4%	21	55.3%	26	56.5%
Total	51	100.0%	40	100.0%	37	100.0%	50	100.0%	44	100.0%	43	100.0%	38	100.0%	46	100.0%
Recipients by Region																
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
NF, NB, NS & PE	3	5.9%	2	5.0%	1	2.7%	5	10.0%	4	9.1%	2	4.7%	2	5.3%	3	6.5%
QC	30	58.8%	22	55.0%	22	59.5%	30	60.0%	24	54.5%	30	69.8%	24	63.2%	26	56.5%
ON	8	15.7%	9	22.5%	8	21.6%	13	26.0%	10	22.7%	9	20.9%	6	15.8%	11	23.9%
MB, SK & AB	5	9.8%	4	10.0%	2	5.4%	1	2.0%	3	6.8%	0	0.0%	3	7.9%	1	2.2%
BC & YT	5	9.8%	3	7.5%	4	10.8%	1	2.0%	3	6.8%	2	4.7%	3	7.9%	5	10.9%
Total	51	100.0%	40	100.0%	37	100.0%	50	100.0%	44	100.0%	43	100.0%	38	100.0%	46	100.0%

¹ Amounts adjusted for inflation used Statistics Canada's average annual Consumer Price Index (CPI), with its base of CPI = 100 for June 1992; available at: www40.statcan.ca/0101/cst01/econ46a.htm.

16.0 Art Books Summary

	1998		1999		2000		2001		2002		2003		2004		2005	
	CPI = 108.6		CPI = 110.5		CPI = 113.5		CPI = 116.4		CPI = 119.0		CPI = 122.3		CPI = 124.6		CPI = 127.3	
Contributions by Language (in 2005 Dollars)¹																
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
Anglophone Publishers	149,103	67.9%	167,045	82.9%	171,042	67.1%	169,515	70.5%	110,719	58.1%	98,884	70.4%	79,179	49.4%	79,800	72.7%
Francophone Publishers	70,331	32.1%	34,561	17.1%	84,007	32.9%	71,087	29.5%	79,696	41.9%	41,635	29.6%	81,223	50.6%	30,000	27.3%
Total	219,434	100.0%	201,606	100.0%	255,049	100.0%	240,601	100.0%	190,415	100.0%	140,519	100.0%	160,402	100.0%	109,800	100.0%
Contributions by Region (in 2005 Dollars)¹																
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
NF, NB, NS & PE	11,722	5.3%	11,520	5.7%	33,648	13.2%	0	0.0%	0	0.0%	0	0.0%	10,217	6.4%	0	0.0%
QC	82,053	37.4%	23,041	11.4%	67,183	26.3%	87,491	36.4%	79,696	41.9%	52,044	37.0%	67,430	42.0%	30,000	27.3%
ON	46,888	21.4%	74,882	37.1%	53,275	20.9%	46,480	19.3%	43,860	23.0%	52,044	37.0%	24,009	15.0%	24,800	22.6%
MB, SK & AB	8,440	3.8%	34,561	17.1%	39,256	15.4%	19,139	8.0%	21,395	11.2%	26,022	18.5%	10,217	6.4%	0	0.0%
BC & YT	70,331	32.1%	57,602	28.6%	61,687	24.2%	87,491	36.4%	45,464	23.9%	10,409	7.4%	48,529	30.3%	55,000	50.1%
Total	219,434	100.0%	201,606	100.0%	255,049	100.0%	240,601	100.0%	190,415	100.0%	140,519	100.0%	160,402	100.0%	109,800	100.0%
Recipients by Language																
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Anglophone Publishers	9	69.2%	11	78.6%	11	68.8%	9	75.0%	7	70.0%	5	62.5%	7	63.6%	3	50.0%
Francophone Publishers	4	30.8%	3	21.4%	5	31.3%	3	25.0%	3	30.0%	3	37.5%	4	36.4%	3	50.0%
Total	13	100.0%	14	100.0%	16	100.0%	12	100.0%	10	100.0%	8	100.0%	11	100.0%	6	100.0%
Recipients by Region																
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
NF, NB, NS & PE	1	7.7%	1	7.1%	2	12.5%	0	0.0%	0	0.0%	0	0.0%	1	9.1%	0	0.0%
QC	5	38.5%	2	14.3%	4	25.0%	4	33.3%	3	30.0%	4	50.0%	3	27.3%	3	50.0%
ON	3	23.1%	5	35.7%	5	31.3%	4	33.3%	2	20.0%	1	12.5%	2	18.2%	1	16.7%
MB, SK & AB	1	7.7%	3	21.4%	3	18.8%	1	8.3%	2	20.0%	2	25.0%	1	9.1%	0	0.0%
BC & YT	3	23.1%	3	21.4%	2	12.5%	3	25.0%	3	30.0%	1	12.5%	4	36.4%	2	33.3%
Total	13	100.0%	14	100.0%	16	100.0%	12	100.0%	10	100.0%	8	100.0%	11	100.0%	6	100.0%

¹ Amounts adjusted for inflation used Statistics Canada's average annual Consumer Price Index (CPI), with its base of CPI = 100 for June 1992; available at: www40.statcan.ca/0101/cst01/econ46a.htm.

17.0 Contributions per Publisher, Emerging Publishers Program¹ (\$)

Publisher	L	R	1998	1999	2000	2001	2002	2003	2004	2005
7th Generation Books	ON	E	10,300							
Acorn Press	PE	E				11,000	15,000	10,000	15,000	
Altitude Publishing	AB	E							10,000	
Anvil Press	BC	E	23,286							
Arbeiter Ring Publishing	MB	E				11,000	10,000	7,500	12,500	15,000
Artexes Editions - Artex Information Centre	QC	F	13,286		5,000			5,000		
Arts Inter-Media	ON	E		10,000						
Athéna éditions	QC	F						10,000	25,000	10,000
Banff Centre Press	AB	E	5,000	10,000						
Bayeux Arts Inc.	AB	E	24,886							
Blue Lake Books	BC	E				11,500	20,000	11,000		
Boheme Press	ON	E				11,500	5,000	11,000		
Bouton d'or Acadie	NB	E	15,000	20,000						
Brindle and Glass Publishing Ltd.	AB	E							17,500	15,000
Broken Jaw Press	NB	E	10,000							
BuschekBooks	ON	E	10,000	10,000	15,000	11,500				
Canadian Committee on Labour History	ON	E	5,000	5,000						
Canadian Scholars' Press	ON	E				6,500	15,000	15,000		
Catchfire Press Inc.	ON	E		10,000						
Coach House Books	ON	E		15,000						
Comeau et Nadeau, éditeurs	QC	F		15,000	20,000	20,000	10,000			
Conundrum Press	QC	E					15,000	20,000	25,000	
Creekstone Press Ltd.	BC	E							7,500	
Cumulus Press	QC	E						7,500	12,500	15,000
Cyclops Press	MB	E		5,000	5,000		10,000			
Dazibao, centre d'animation et d'exposition photo	QC	F				5,000		15,000		
De Beaumont, éditeur	QC	F			10,000					
Dramaturges Éditeurs	QC	F	25,000							
Drawn & Quarterly Publications	QC	E				19,700	10,000			
DreamCatcher Publishing Inc.	NB	E				6,500				

¹ Amounts reported are actuals, not adjusted for inflation. Light grey shading means the year that the publisher entered the BG program; dark grey shading means the year that the publisher exited the BG program.

* Minority publishers (includes linguistic minority, aboriginal and culturally diverse publishers).



Publisher	L	R	1998	1999	2000	2001	2002	2003	2004	2005
Écrits des Hautes-Terres	QC	F		20,000						
Éditions Adage Inc.	QC	F				9,000	7,500	5,000	5,000	
Éditions Alexandre Stanké	QC	F				6,500				
Éditions Alire	QC	F	29,900							
Éditions d'art Le Sabord	QC	F		10,000	15,000					
Éditions David Inc.	ON	F	5,000	20,000						
Éditions de la Huit	QC	F	14,353	5,000	7,500	11,000	12,000	5,000		
Éditions de la Pastèque	QC	F					12,000	15,000	15,000	25,000
Éditions de l'Effet pourpre	QC	F			12,500	15,000	10,000			
Éditions de l'Isatis Inc.	QC	F								10,000
Éditions du 42e Parallèle inc.	QC	F								10,000
Éditions du CRAM Inc.	QC	F				6,500				
Éditions du Gref	ON	F			15,000					
Éditions du passage inc.	QC	F								10,000
Éditions du soleil de minuit	QC	F			5,000	16,500				
Éditions Élaeis	QC	F			15,000					
Éditions GID Inc.	QC	F						20,000		
Éditions J'ai VU	QC	F				6,000	7,500	15,000	5,000	10,000
Éditions Lauzier, Inc.	QC	F								10,000
Éditions Les Allusifs	QC	F					20,000	20,000	20,000	20,000
Éditions Lescop	QC	F			20,000	11,500	5,000			
Éditions Marchand de feuilles	QC	F						15,000	20,000	
Éditions Multimondes	QC	F							5,000	
Éditions Point de fuite	QC	F				16,500				
Éditions Trait d'Union	QC	F			25,000					
Éditions Varia	QC	F	5,000	10,000						
Empyreal Press	QC	E	10,000							
Fernwood Publishing Co. Ltd.	NS	E	25,381	10,000						
Firefly Books Ltd.	ON	E			5,000	5,000				
Flanker Press Ltd.	NL	E								10,000
Folklore Publishing	AB	E								20,000
Frontenac House Ltd.	AB	E					15,000	11,000	5,000	
Gabriel Dumont Institute of Native Studies and Applied Research	SK	E				5,000		5,000		



Publisher	L	R	1998	1999	2000	2001	2002	2003	2004	2005
Gaspereau Press	NS	E			10,000	21,500				
Golden Dog Press	ON	E	14,500	5,000						
Great Plains Publications	MB	E	15,000	16,300						
Gutter Press Inc.	ON	E	23,286							
Hades Publications Inc.	AB	E								15,000
Hagios Press	SK	E							25,000	20,000
Harry Cuff Publications Limited	NL	E					5,000			
Heartland Associates Inc.	MB	E							10,000	15,000
Imago Press	ON	E	9,520							
Institut culturel et éducatif montagnais (ICEM)	QC	F						15,000		
ISER Books Institute of Social and Economic Research	NL	E		5,000						
Island Studies Press	PE	E						2,500	2,500	
Kegedonce Press	ON	E			5,000	6,500	10,000		12,500	10,000
La Veuve Noire	QC	F							20,000	25,000
Le Quartanier	QC	F								10,000
Les Heures bleues	QC	F			15,000	21,700	25,000			
L'île de la Tortue, éditeur	QC	F				7,500	5,000			
Lions Gate Publishing / Ripple Effect Press	BC	E						7,500		
Livres DC Books	QC	E	10,000							
Lobster Press	QC	E				24,500				
L'Oie de Cravan	QC	F				9,200	15,000		10,000	20,000
Lost Moose Publishing	YT	E		5,000			5,000		10,000	
Malcolm Lester Books	ON	E		20,000						
Mansfield Press	ON	E				21,700	15,000	20,000		
McArthur & Company Publishing Ltd.	ON	E				25,000				
McGilligan Books	ON	E			10,000	6,500	15,000	11,000	20,000	
Mémoire d'encrier	QC	F							20,000	10,000
New Society Publishers	BC	E	5,000							
Nightwood Editions	BC	E	13,286	15,000						
Owl's Head Press	NB	E	5,000							
Pedlar Press	ON	E		10,000	25,000	20,000	25,000			
Planète rebelle	QC	F		25,000	25,000					
Publications MNH	QC	F	10,000	15,000						



Publisher	L	R	1998	1999	2000	2001	2002	2003	2004	2005
Queer Press Non-Profit Community Publishing of Toronto	ON	E		5,000						
Riverbank Press	ON	E		11,200	15,000					
Robert Davies Multimedia Publishing	QC	E	15,000	15,000						
Robin Brass Studio	ON	E								15,000
Roseway Publishing	NS	E	8,286	5,000						
Rowan Books Inc.	AB	E			15,000	6,500	7,500			
Seraphim Editions	ON	E			10,000	6,500	15,000	16,000		
Simply Read Books	BC	E								25,000
Solus Publishing	NS	E		2,500						
Soulières Éditeur	QC	F	27,000							
St. Norbert Arts Centre	MB	E				5,500				
Sumach Press	ON	E					20,000	20,000		
Thomas Allen & Son Ltd.	ON	E						22,500		
Touchwood Press	AB	E							5,000	
Tradewind Books Ltd.	BC	E				20,200	20,000	20,000		
Tuns Press	NS	E						10,000		
Voyageur Publishing	ON	E	5,000							
YYZ Artists' Outlet	ON	E	13,286	5,000		5,500	5,000	15,000		



18.0 BPIDP recipients

18.1 2002

Size	Francophone					Anglophone					Total				
	BG only		BPIDP + BG		Total	BG only		BPIDP + BG		Total	BG only		BPIDP + BG		Total
	#	%	#	%	#	#	%	#	%	#	#	%	#	%	#
< 100 000 \$	15	62.5	9	37.5	24	17	73.9	6	26.1	23	32	68.1	15	31.9	47
100 000 - 249 999 \$	3	23.1	10	76.9	13	6	26.1	17	73.9	23	9	25.0	27	75.0	36
250 000 - 499 999 \$		0.0	9	100.0	9	2	13.3	13	86.7	15	2	8.3	22	91.7	24
500 000 - 999 999 \$		0.0	8	100.0	8	1	12.5	7	87.5	8	1	6.3	15	93.8	16
1M - 2M \$		0.0	2	100.0	2		0.0	8	100.0	8		0.0	10	100.0	10
2M - 5M \$		0.0	8	100.0	8		0.0	4	100.0	4		0.0	12	100.0	12
> 5M \$		0.0	5	100.0	5		0.0	11	100.0	11		0.0	16	100.0	16
Total	18	26.1	51	73.9	69	26	28.3	66	71.7	92	44	27.3	117	72.7	161

18.2 2005

Size	Francophone					Anglophone					Total				
	BG only		BPIDP + BG		Total	BG only		BPIDP + BG		Total	BG only		BPIDP + BG		Total
	#	%	#	%	#	#	%	#	%	#	#	%	#	%	#
< 100 000 \$	14	66.7	7	33.3	21	16	64.0	9	36.0	25	28	60.9	18	39.1	46
100 000 - 249 999 \$	3	25.0	9	75.0	12	5	19.2	21	80.8	26	8	21.1	30	78.9	38
250 000 - 499 999 \$	1	11.1	8	88.9	9		0.0	10	100.0	10	1	5.3	18	94.7	19
500 000 - 999 999 \$	1	11.1	8	88.9	9	1	12.5	7	87.5	8	2	11.8	15	88.2	17
1M - 2M \$		0.0	7	100.0	7		0.0	11	100.0	11		0.0	18	100.0	18
2M - 5M \$		0.0	2	100.0	2		0.0	8	100.0	8		0.0	10	100.0	10
> 5M \$		0.0	6	100.0	6	1	12.5	7	87.5	8	1	7.1	13	92.9	14
Total	19	28.8	47	71.2	66	23	24.0	73	76.0	96	40	24.7	122	75.3	162

19.0 Block Grant per Eligible Title and per Firm, by Publisher Size¹

19.1 2002

Size	Publishing Houses	Eligible Titles	Block Grants	Eligible Titles per Firm	Block Grant per Eligible Title	Block Grant per Firm
	#	#	\$	#	\$	\$
< 100,000	46	198	2,023,700	4	10,221	43,993
100,000-249,999	36	194	1,980,900	5	10,211	55,025
250,000-499,999	22	272	1,318,800	12	4,849	59,945
500,000-999,999	16	122	917,100	8	7,517	57,319
1M-2M	9	147	643,300	16	4,376	71,478
2M-5M	10	144	758,700	14	5,269	75,870
> 5M	13	278	962,200	21	3,461	74,015
Total	152	1355	8,604,700			8,604,700

19.2 2005

Size	Publishing Houses	Eligible Titles	Block Grants	Eligible Titles per Firm	Block Grant per Eligible Title	Block Grant per Firm
	#	#	\$	#	\$	\$
< 100,000	45	196	1,817,500	4	9,273	40,389
100,000-249,999	39	240	1,807,700	6	7,532	46,351
250,000-499,999	18	191	827,700	11	4,334	45,983
500,000-999,999	16	171	761,800	11	4,455	47,613
1M-2M	16	261	940,100	16	3,602	58,756
2M-5M	10	131	762,300	13	5,819	76,230
> 5M	14	307	967,900	22	3,153	69,136
Total	158	1497	7,885,000			7,885,000

¹ Amounts reported are actuals, not adjusted for inflation.



20.0 Provincial and Total Government Funding per Publisher¹ (\$)

20.1 By Region

Region	2002				2005			
	Provincial Grants per Publisher		Total Grants per Publisher		Provincial Grants per Publisher		Total Grants per Publisher	
	F	E	F	E	F	E	F	E
NF, NB, NS & PE	6,636	17,268	26,277	98,071		33,410	42,754	194,785
QC	38,253	6,586	155,648	88,704	76,636	11,529	197,275	167,699
ON	22,907	15,527	86,996	194,550	1,327	35,968	89,290	208,668
MB, SK & AB	46,668	33,388	59,870	138,993	15,576	36,758	63,522	210,411
BC		19,307		127,515		44,008		181,249
Average	36,373	18,351	143,005	209,908	66,578	271,985	179,685	271,985
Total	3,128,076	2,147,071	12,298,402	18,052,116	5,725,746	4,140,491	15,452,927	23,305,092

20.2 By Size

Size	2002				2005			
	Provincial Grants per Publisher		Total Grants per Publisher		Provincial Grants per Publisher		Total Grants per Publisher	
	F	E	F	E	F	E	F	E
< 100 000 \$	30,440	13,313	64,470	66,725	50,938	19,319	69,936	70,176
100 000 - 249 999 \$	29,859	23,845	104,359	109,612	38,697	28,779	94,968	119,028
250 000 - 499 999 \$	49,401	25,343	194,019	167,250	70,494	48,501	164,976	286,736
500 000 - 999 999 \$	34,736	23,353	180,191	172,941	70,841	45,079	237,588	220,844
1M - 2M \$	58,119	21,728	445,151	222,056	93,300	44,668	357,823	310,811
2M - 5M \$	49,403	2,305	421,233	414,563	18,671	39,980	655,172	654,796
> 5M \$	35,076	45,903	535,970	690,337	278,795	153,109	893,725	674,444
Average	36,471	22,753	180,216	202,833	77,731	43,015	231,400	245,896
Total	2,443,574	2,025,033	12,074,461	18,052,116	5,207,988	4,000,440	15,503,784	22,868,363

¹ Government funding amounts are as reported to the Canada Council in annual application forms, not adjusted for inflation..



21.0 Profit – Loss, 2002 and 2005¹

21.1 2002

Size	LOSS			BALANCE													PROFIT			
	> 1M \$	1M - 500k \$	500k - 100k \$	100k - 50k \$	50k - 40k \$	40k - 30k \$	30k - 20k \$	20k - 10k \$	10k \$ - 0	0	0 - 10k \$	10k - 20k \$	20k - 30k \$	30k - 40k \$	40k - 50k \$	50k - 100k \$	100k - 500k \$	500k - 1M \$	> 1M \$	
< 100 000 \$				1		2	2	5	10		16	6	3	1		1				
100 000 - 249 999 \$			1	3	1	2	2		5		10	4	2	2	2	1	1			
250 000 - 499 999 \$			1		2			2	2	2	7		1	1	1	4	1			
500 000 - 999 999 \$			3	1					2				2		3	3	2			
1M - 2M \$			2	1							1	1	2		1		2			
2M - 5M \$				1	1		1				1	1	1			2	3	1		
> 5M \$		2	3	1							1	1				2	3		3	
Total	0	2	10	8	4	4	5	7	19	2	36	13	11	4	7	13	12	1	3	

21.2 2005

Size	LOSS			BALANCE													PROFIT			
	> 1M \$	1M - 500k \$	500k - 100k \$	100k - 50k \$	50k - 40k \$	40k - 30k \$	30k - 20k \$	20k - 10k \$	10k \$ - 0	0	0 - 10k \$	10k - 20k \$	20k - 30k \$	30k - 40k \$	40k - 50k \$	50k - 100k \$	100k - 500k \$	500k - 1M \$	> 1M \$	
< 100 000 \$				1		4	1	7	6		13	5	6	1	2					
100 000 - 249 999 \$			1	2	2	2	1	5	2		7	3	7	1		3	2			
250 000 - 499 999 \$			2		1		1			1	5	5	1		1	2				
500 000 - 999 999 \$			1	1	2	1		2				2		1	2	3	2			
1M - 2M \$			1		1						2	1	3			4	6			
2M - 5M \$	1		3								1						5			
> 5M \$	2	2	1						1				1		2		3	1	1	
Total	3	2	9	4	6	7	3	14	9	1	28	16	18	3	7	12	18	1	1	

¹ Publisher size is based on total revenues and that profit or loss is in relation to overall operations. This information is provided by publishers, from their own financial statements and is not adjusted for inflation.

Appendix D: Possible Scenarios to the BPIDP Clawback

The guiding principles employed to develop these charts were: to ensure a continued emphasis on literary excellence; and to ensure that any change did not have a negative impact on small or mid-sized publishers. The following options reflect these guiding principles, and are based on the current practices of providing 60% of the program budget to English-language publishers and 40% to French-language publishers, and a base-bonus split of 42% - 58%.

Publisher	Language	Size	2005 Block Grant	POSSIBLE SCENARIOS					
				\$30,000 Cap on Base Grant	Difference	\$40,000 Cap on Base Grant	Difference	\$50,000 Cap on Base Grant	Difference
	E	1	18,500	18,400	(0.5%)	17,300	(6.5%)	16,900	(8.6%)
	E	1	21,600	21,800	0.9%	20,200	(6.5%)	19,600	(9.3%)
	E	1	22,500	24,800	10.2%	24,800	10.2%	24,800	10.2%
	E	1	24,700	23,600	(4.5%)	22,200	(10.1%)	22,200	(10.1%)
	E	1	25,800	25,400	(1.6%)	24,500	(5.0%)	24,100	(6.6%)
	E	1	30,000	32,000	6.7%	31,800	6.0%	31,700	5.7%
	E	1	31,400	31,000	(1.3%)	29,800	(5.1%)	29,300	(6.7%)
	E	1	35,400	36,200	2.3%	34,700	(2.0%)	34,100	(3.7%)
	E	1	36,100	36,700	1.7%	35,600	(1.4%)	35,200	(2.5%)
	E	1	37,500	38,700	3.2%	37,500	0.0%	37,000	(1.3%)
	E	1	41,300	41,100	(0.5%)	39,700	(3.9%)	39,200	(5.1%)
	E	1	41,800	41,000	(1.9%)	40,200	(3.8%)	39,900	(4.5%)
	E	1	42,500	42,000	(1.2%)	40,200	(5.4%)	39,500	(7.1%)
	E	1	44,400	43,400	(2.3%)	42,700	(3.8%)	42,400	(4.5%)
	E	1	45,800	45,100	(1.5%)	43,600	(4.8%)	43,000	(6.1%)
	E	1	47,600	47,300	(0.6%)	44,200	(7.1%)	42,900	(9.9%)
	E	1	47,800	47,800	0.0%	45,800	(4.2%)	45,000	(5.9%)
	E	1	49,000	48,500	(1.0%)	46,100	(5.9%)	45,100	(8.0%)
	E	1	51,100	50,900	(0.4%)	47,200	(7.6%)	46,000	(10.0%)
	E	1	51,100	51,200	0.2%	48,600	(4.9%)	47,100	(7.8%)
	E	1	54,900	53,900	(1.8%)	52,400	(4.6%)	51,900	(5.5%)
	E	1	58,500	58,700	0.3%	56,800	(2.9%)	56,100	(4.1%)



Publisher	Language	Size	2005 Block Grant	POSSIBLE SCENARIOS					
				\$30,000 Cap on Base Grant	Difference	\$40,000 Cap on Base Grant	Difference	\$50,000 Cap on Base Grant	Difference
	E	1	72,500	72,000	(0.7%)	71,200	(1.8%)	71,000	(2.1%)
	E	1	81,000	80,700	(0.4%)	78,900	(2.6%)	78,300	(3.3%)
	F	1	7,500	8,300	10.7%	8,300	10.7%	8,300	10.7%
	F	1	16,000	17,200	7.5%	15,700	(1.9%)	15,400	(3.8%)
	F	1	19,400	18,500	(4.6%)	17,500	(9.8%)	17,500	(9.8%)
	F	1	20,500	19,200	(6.3%)	18,500	(9.8%)	18,500	(9.8%)
	F	1	22,700	24,000	5.7%	22,400	(1.3%)	22,000	(3.1%)
	F	1	24,200	25,400	5.0%	22,400	(7.4%)	21,800	(9.9%)
	F	1	27,500	27,800	1.1%	27,300	(0.7%)	27,300	(0.7%)
	F	1	36,400	37,000	1.6%	36,200	(0.5%)	36,000	(1.1%)
	F	1	37,300	37,300	0.0%	37,000	(0.8%)	37,100	(0.5%)
	F	1	39,200	39,000	(0.5%)	38,900	(0.8%)	38,700	(1.3%)
	F	1	40,100	42,300	5.5%	40,300	0.5%	39,800	(0.7%)
	F	1	41,100	43,100	4.9%	40,700	(1.0%)	40,100	(2.4%)
	F	1	41,400	45,500	9.9%	40,700	(1.7%)	39,300	(5.1%)
	F	1	44,100	45,100	2.3%	43,800	(0.7%)	43,500	(1.4%)
	F	1	45,600	46,000	0.9%	45,300	(0.7%)	45,200	(0.9%)
	F	1	49,500	52,100	5.3%	50,100	1.2%	49,700	0.4%
	F	1	50,700	54,300	7.1%	50,800	0.2%	49,900	(1.6%)
	F	1	51,100	53,400	4.5%	48,800	(4.5%)	47,600	(6.8%)
	F	1	54,800	57,800	5.5%	54,500	(0.5%)	53,100	(3.1%)
	F	1	65,600	68,200	4.0%	64,900	(1.1%)	64,100	(2.3%)
	F	1	68,200	71,400	4.7%	67,500	(1.0%)	66,500	(2.5%)
Anglophone Publishers' Group Average			42,200	42,175	0.2%	40,667	(3.5%)	40,096	(4.9%)
Francophone Publishers' Group Average			38,233	39,662	3.5%	37,695	(1.5%)	37,210	(2.7%)
Average for All Publishers with Sales Under \$100,000			40,349	41,002	1.8%	39,280	(2.6%)	38,749	(3.8%)



Publisher	Language	Size	2005 Block Grant	POSSIBLE SCENARIOS					
				\$30,000 Cap on Base Grant	Difference	\$40,000 Cap on Base Grant	Difference	\$50,000 Cap on Base Grant	Difference
	E	2	13,500	12,200	(9.6%)	12,200	(9.6%)	12,200	(9.6%)
	E	2	15,500	17,100	10.3%	16,500	6.5%	16,000	3.2%
	E	2	18,000	16,200	(10.0%)	16,200	(10.0%)	16,200	(10.0%)
	E	2	22,500	24,800	10.2%	24,300	8.0%	23,600	4.9%
	E	2	25,600	28,200	10.2%	27,800	8.6%	27,300	6.6%
	E	2	28,300	31,100	9.9%	31,100	9.9%	30,100	6.4%
	E	2	28,300	28,900	2.1%	28,600	1.1%	28,500	0.7%
	E	2	29,100	30,500	4.8%	28,300	(2.7%)	27,400	(5.8%)
	E	2	29,900	31,000	3.7%	30,100	0.7%	29,800	(0.3%)
	E	2	32,800	33,000	0.6%	29,700	(9.5%)	29,500	(10.1%)
	E	2	35,500	34,900	(1.7%)	33,900	(4.5%)	33,500	(5.6%)
	E	2	35,900	38,600	7.5%	37,000	3.1%	36,300	1.1%
	E	2	42,000	44,400	5.7%	42,200	0.5%	41,400	(1.4%)
	E	2	45,000	46,400	3.1%	46,300	2.9%	46,300	2.9%
	E	2	50,600	45,500	(10.1%)	45,900	(9.3%)	45,500	(10.1%)
	E	2	53,800	51,200	(4.8%)	49,600	(7.8%)	48,400	(10.0%)
	E	2	54,300	55,600	2.4%	52,200	(3.9%)	50,800	(6.4%)
	E	2	62,900	65,300	3.8%	62,400	(0.8%)	61,300	(2.5%)
	E	2	65,200	66,700	2.3%	65,000	(0.3%)	64,300	(1.4%)
	E	2	66,800	68,700	2.8%	65,700	(1.6%)	64,600	(3.3%)
	E	2	68,000	63,700	(6.3%)	66,100	(2.8%)	64,400	(5.3%)
	E	2	74,000	73,100	(1.2%)	71,500	(3.4%)	70,300	(5.0%)
	E	2	82,200	83,100	1.1%	80,900	(1.6%)	79,800	(2.9%)
	E	2	82,600	74,300	(10.0%)	79,600	(3.6%)	77,600	(6.1%)
	E	2	91,200	88,000	(3.5%)	89,200	(2.2%)	88,000	(3.5%)
	F	2	8,700	9,600	10.3%	8,500	(2.3%)	8,200	(5.7%)



Publisher	Language	Size	2005 Block Grant	POSSIBLE SCENARIOS					
				\$30,000 Cap on Base Grant	Difference	\$40,000 Cap on Base Grant	Difference	\$50,000 Cap on Base Grant	Difference
	F	2	17,100	18,800	9.9%	18,400	7.6%	17,400	1.8%
	F	2	36,400	39,800	9.3%	37,100	1.9%	36,400	0.0%
	F	2	36,700	37,200	1.4%	36,400	(0.8%)	36,300	(1.1%)
	F	2	39,000	40,900	4.9%	39,700	1.8%	39,500	1.3%
	F	2	42,500	43,900	3.3%	42,200	(0.7%)	41,800	(1.6%)
	F	2	47,300	52,000	9.9%	47,200	(0.2%)	45,800	(3.2%)
	F	2	49,600	54,600	10.1%	50,600	2.0%	49,300	(0.6%)
	F	2	56,500	60,600	7.3%	57,200	1.2%	56,300	(0.4%)
	F	2	67,600	60,800	(10.1%)	68,300	1.0%	66,200	(2.1%)
	F	2	71,000	69,000	(2.8%)	71,700	1.0%	70,000	(1.4%)
	F	2	71,500	76,300	6.7%	72,200	1.0%	71,200	(0.4%)
Anglophone Publishers' Group Average			46,140	46,100	0.9%	45,292	(1.3%)	44,524	(2.9%)
Francophone Publishers' Group Average			45,325	46,958	5.0%	45,792	1.1%	44,867	(1.1%)
Average for All Publishers with Sales between \$100,000 - 249,999			45,876	46,378	2.3%	45,454	(0.5%)	44,635	(2.4%)
	E	3	24,400	26,800	9.8%	26,800	9.8%	26,800	9.8%
	E	3	26,000	28,600	10.0%	28,600	10.0%	28,600	10.0%
	E	3	26,200	28,800	9.9%	28,400	8.4%	28,000	6.9%
	E	3	33,000	36,300	10.0%	36,300	10.0%	36,300	10.0%
	E	3	34,300	37,700	9.9%	37,700	9.9%	37,500	9.3%
	E	3	39,000	42,400	8.7%	41,900	7.4%	41,700	6.9%
	E	3	44,900	49,400	10.0%	49,400	10.0%	49,400	10.0%
	E	3	68,400	65,600	(4.1%)	69,700	1.9%	68,000	(0.6%)
	E	3	91,400	82,300	(10.0%)	90,300	(1.2%)	90,300	(1.2%)
	F	3	7,500	8,300	10.7%	8,300	10.7%	8,300	10.7%
	F	3	26,000	27,900	7.3%	26,200	0.8%	25,800	(0.8%)
	F	3	36,500	40,200	10.1%	38,900	6.6%	38,600	5.8%
	F	3	39,800	43,800	10.1%	43,300	8.8%	42,500	6.8%



Publisher	Language	Size	2005 Block Grant	POSSIBLE SCENARIOS					
				\$30,000 Cap on Base Grant	Difference	\$40,000 Cap on Base Grant	Difference	\$50,000 Cap on Base Grant	Difference
	F	3	44,800	49,100	9.6%	48,200	7.6%	48,000	7.1%
	F	3	57,700	63,500	10.1%	61,800	7.1%	61,100	5.9%
	F	3	66,600	66,200	(0.6%)	70,100	5.3%	68,300	2.6%
	F	3	73,900	66,500	(10.0%)	68,500	(7.3%)	73,600	(0.4%)
	F	3	85,500	77,000	(9.9%)	85,500	0.0%	84,400	(1.3%)
Anglophone Publishers' Group Average			43,067	44,211	6.0%	45,456	7.4%	45,178	6.8%
Francophone Publishers' Group Average			48,700	49,167	4.1%	50,089	4.4%	50,067	4.0%
Average for All Publishers with Sales between \$250,000 - 499,999			45,883	46,689	5.1%	47,772	5.9%	47,622	5.4%
	E	4	25,100	27,600	10.0%	27,600	10.0%	27,600	10.0%
	E	4	39,800	43,800	10.1%	43,800	10.1%	43,100	8.3%
	E	4	44,200	48,600	10.0%	48,600	10.0%	48,600	10.0%
	E	4	45,200	49,700	10.0%	49,400	9.3%	47,800	5.8%
	E	4	60,700	59,200	(2.5%)	58,800	(3.1%)	58,700	(3.3%)
	E	4	67,800	65,600	(3.2%)	70,300	3.7%	68,500	1.0%
	E	4	69,000	75,900	10.0%	74,900	8.6%	73,700	6.8%
	E	4	71,200	78,300	10.0%	78,000	9.6%	77,400	8.7%
	F	4	18,900	20,800	10.1%	18,900	0.0%	18,300	(3.2%)
	F	4	29,500	32,500	10.2%	30,900	4.7%	30,000	1.7%
	F	4	39,200	43,100	9.9%	41,800	6.6%	40,300	2.8%
	F	4	45,100	49,600	10.0%	48,100	6.7%	46,900	4.0%
	F	4	50,300	53,000	5.4%	50,800	1.0%	50,300	0.0%
	F	4	55,600	55,000	(1.1%)	60,300	8.5%	58,300	4.9%
	F	4	100,200	90,200	(10.0%)	90,200	(10.0%)	97,100	(3.1%)
Anglophone Publishers' Group Average			52,875	56,088	6.8%	56,425	7.2%	55,675	5.9%
Francophone Publishers' Group Average			48,400	49,171	4.9%	48,714	2.5%	48,743	1.0%
Average for All Publishers with Sales between \$500,000 - 999,999			50,787	52,860	5.9%	52,827	5.0%	52,440	3.6%



Publisher	Language	Size	2005 Block Grant	POSSIBLE SCENARIOS					
				\$30,000 Cap on Base Grant	Difference	\$40,000 Cap on Base Grant	Difference	\$50,000 Cap on Base Grant	Difference
	E	5	16,900	18,600	10.1%	18,600	10.1%	18,600	10.1%
	E	5	17,400	19,100	9.8%	19,100	9.8%	19,100	9.8%
	E	5	22,200	24,400	9.9%	24,400	9.9%	24,400	9.9%
	E	5	33,900	37,300	10.0%	37,300	10.0%	37,300	10.0%
	E	5	55,000	60,500	10.0%	60,500	10.0%	60,500	10.0%
	E	5	57,500	63,300	10.1%	63,300	10.1%	63,300	10.1%
	E	5	74,700	78,700	5.4%	78,000	4.4%	76,800	2.8%
	E	5	88,400	79,600	(10.0%)	79,600	(10.0%)	79,600	(10.0%)
	E	5	88,900	80,000	(10.0%)	83,200	(6.4%)	93,800	5.5%
	E	5	100,500	90,500	(10.0%)	93,500	(7.0%)	104,200	3.7%
	F	5	13,300	14,600	9.8%	14,600	9.8%	14,600	9.8%
	F	5	43,900	48,300	10.0%	48,200	9.8%	47,400	8.0%
	F	5	56,100	52,300	(6.8%)	56,200	0.2%	54,200	(3.4%)
	F	5	72,200	71,700	(0.7%)	79,400	10.0%	79,400	10.0%
	F	5	83,900	79,000	(5.8%)	90,100	7.4%	89,900	7.2%
	F	5	90,100	81,100	(10.0%)	87,300	(3.1%)	94,200	4.6%
Anglophone Publishers' Group Average			55,540	55,200	3.5%	55,750	4.1%	57,760	6.2%
Francophone Publishers' Group Average			76,667	72,917	(2.2%)	78,217	4.5%	80,650	6.6%
Average for All Publishers with Sales between \$1 - 2 million			57,181	56,188	2.0%	58,331	4.7%	59,831	6.1%
	E	6	21,600	23,800	10.2%	23,800	10.2%	23,800	10.2%
	E	6	37,100	40,800	10.0%	40,800	10.0%	40,800	10.0%
	E	6	71,300	64,200	(10.0%)	65,800	(7.7%)	74,700	4.8%
	E	6	73,800	80,600	9.2%	81,200	10.0%	81,200	10.0%
	E	6	81,500	88,000	8.0%	89,700	10.1%	89,700	10.1%
	E	6	95,700	86,100	(10.0%)	94,800	(0.9%)	98,600	3.0%
	E	6	105,500	95,000	(10.0%)	95,000	(10.0%)	95,000	(10.0%)
	E	6	124,600	112,100	(10.0%)	112,100	(10.0%)	112,100	(10.0%)



Publisher	Language	Size	2005 Block Grant	POSSIBLE SCENARIOS					
				\$30,000 Cap on Base Grant	Difference	\$40,000 Cap on Base Grant	Difference	\$50,000 Cap on Base Grant	Difference
	F	6	37,700	41,100	9.0%	37,600	(0.3%)	36,000	(4.5%)
	F	6	113,500	102,200	(10.0%)	102,200	(10.0%)	102,900	(9.3%)
Anglophone Publishers' Group Average			76,388	73,825	(0.3%)	75,400	1.5%	76,988	3.5%
Francophone Publishers' Group Average			75,600	71,650	(0.5%)	69,900	(5.1%)	69,450	(6.9%)
Average for All Publishers with Sales between \$2 - 5 million			76,230	73,390	(0.4%)	74,300	0.1%	75,480	1.4%
	E	7	15,500	17,100	10.3%	17,100	10.3%	17,100	10.3%
	E	7	43,500	47,900	10.1%	47,900	10.1%	47,900	10.1%
	E	7	50,700	55,800	10.1%	55,800	10.1%	55,800	10.1%
	E	7	59,000	58,700	(0.5%)	64,900	10.0%	63,700	8.0%
	E	7	64,300	70,700	10.0%	70,700	10.0%	70,700	10.0%
	E	7	72,600	65,300	(10.1%)	71,600	(1.4%)	79,900	10.1%
	E	7	92,200	88,000	(4.6%)	99,900	8.4%	101,400	10.0%
	E	7	161,800	145,600	(10.0%)	145,600	(10.0%)	145,600	(10.0%)
	F	7	22,000	24,200	10.0%	24,200	10.0%	24,200	10.0%
	F	7	63,000	56,700	(10.0%)	57,100	(9.4%)	67,300	6.8%
	F	7	76,500	74,500	(2.6%)	77,400	1.2%	75,800	(0.9%)
	F	7	77,800	71,700	(7.8%)	79,800	2.6%	77,900	0.1%
	F	7	80,000	72,000	(10.0%)	79,900	(0.1%)	81,000	1.3%
	F	7	89,000	80,100	(10.0%)	86,700	(2.6%)	97,100	9.1%
	F	7	107,500	96,800	(10.0%)	96,800	(10.0%)	96,800	(10.0%)
Anglophone Publishers' Group Average			69,950	68,638	1.9%	71,688	5.9%	72,763	7.3%
Francophone Publishers' Group Average			73,686	68,000	(5.8%)	71,700	(1.2%)	74,300	2.3%
Average for All Publishers with Sales more than \$5 million			71,693	68,340	(1.7%)	71,693	2.6%	73,480	5.0%



Appendix E: Proposed Bonus Point Assessment Criteria

Bonus Points (%)	Maximum per Criterion	Assessment Criteria
Publisher's Contribution to Canadian Literature		
	15%	Author development (investing in new authors, long-term commitment to authors, etc.)
	15%	Excellence and innovation in writing
	10%	Reprint program (commitment to keeping culturally significant books in print)
Specialized Contributions to Canadian Literature¹		
	10% for each criterion, to a maximum of 20% for all specialized contributions	Minority-language publishing ²
		Regional publishing ³
		Aboriginal publishing ⁴
		Ethnic-minority publishing ⁵
		Primarily publishes poetry or drama (at least 50% of eligible titles in the year are poetry and/or drama)
Professional Excellence of the Publisher		
	10%	Editorial vision and choices
	10%	Quality of the editing
	10%	Quality of the design, production and printing of the work
	10%	Clearly defined and effective sales and marketing infrastructure (suitable to publishers type of publishing, location and list, including consideration of non-traditional or innovative methods of promotion or distribution, and of the website of the publishing house)
Total (out of 100%)		

¹ For specialized contributions to Canadian literature, a publisher who fits any category would automatically receive the full 10% bonus points for that category unless the quality for that criterion is particularly poor, in which case the percentage could be lower; no publisher could receive more than 20% for all of its specialized contributions to Canadian literature.

² "Minority-language" publishers are French-language publishers based outside Quebec, and English-language publishers based in Quebec.

³ "Regional" publishers are those publishers based more than 50km outside of Montreal, Toronto and Vancouver.

⁴ "Aboriginal" publishers are publishers that are majority owned by Aboriginal people, and at least 50% of the Canada Council eligible titles that they publish each year are written by Aboriginal people.

⁵ "Ethnic-minority" publishers are publishers that are majority owned by members of a particular racial or cultural minority group, and at least 50% of the Canada Council eligible titles that they publish each year are written by members of their particular racial or cultural minority group.



Appendix F: Mini-survey of Publishers, Key Interview & Focus Group Questions

Mini-survey of Publishers Protocol

1. Do you think that publisher eligibility for the Block Grant or Emerging Publishers programs should change? If so, how?
2. Do you think that title eligibility under the Block Grant or Emerging Publishers programs should change? If so, how?
3. Do you have any other comments about the Canada Council's Block Grant or Emerging Publishers programs?



Key Interviews Protocol

PUBLISHER ELIGIBILITY

- Should the Canadian ownership requirements change and, if so, how?

TITLE ELIGIBILITY

- What non-fiction titles should be eligible for Canada Council support?
- Should the Canadian authorship requirements change?
- Should minimum or maximum print runs change?
- Do you have other comments about title eligibility?

JURY COMPOSITION, PROCESS & DUTIES

- How should the jury be formed?
- What kind of jury feedback on your publishing program would be useful for you to have?

ASSESSMENT

- Should there be changes to the assessment criteria?
- What role, if any, should the jury have in determining title eligibility?
- Do you have any comments about how bonus points are awarded or calculated?

INDUSTRY SUSTAINABILITY AND RENEWAL (ORGANIZATIONAL HEALTH)

- Do you have any suggestions for structural changes to the Block Grant or Emerging Publishers programs, now that the publishing industry has matured (for example, entry requirements, transition from Emerging to Block Grant, backlist reprint eligibility, or multi-year funding)?
- What type of planning (organizational, financial, succession etc.) and other strategic thinking do you do now?
- How should publisher's organizational health be reviewed?

FINANCIAL AND FUNDING CHANGES

- Should the overall budget of the Block Grant program change and, if so, how?
- Do you have any comments about how well the title deficit formula for calculating base grants works?
- Should the base/bonus split change?
- Should grants to individual publishers be stabilized?
- Should the BPIDP clawback change?

EMERGING PUBLISHERS PROGRAM

Have you ever applied to this program?

- Should entrance or exit requirements change?
- Should minimum or maximum grant amounts change?
- Should any of the organizational health initiatives apply to the Emerging Publishers program?
- Should the overall budget of the Emerging Publishers program change and, if so, how?
- Are there other issues that should be addressed?

AUTHOR PROMOTION TOURS PROGRAM

Have you ever applied to this program?

- Should the program scope – what is funded and how – be changed?
- Should the program budget change?



- Are there other issues that should be addressed?

TRANSLATION GRANTS PROGRAM

Have you ever applied to this program?

- Should the program scope – what is funded and how – be changed?
- Should the program budget change?
- Are there other issues that should be addressed?

Do you have any other comments about the Canada Council's support for book publishing?



Associations Protocol

TITLE ELIGIBILITY

- Should the Canadian authorship requirements change?

FINANCIAL AND FUNDING CHANGES

- Do you have any suggestions for structural changes to the Block Grant or Emerging Publishers programs, now that the publishing industry has matured (for example, entry requirements, transition from Emerging to Block Grant, backlist reprint eligibility, or multi-year funding)?
- Do you have any comments about the program budget split between French- and English-language publishing?
- Do you have any comments about the title analysis forms, the title deficit calculations, or Block Grant program administration generally?

INDUSTRY SUSTAINABILITY AND RENEWAL (ORGANIZATIONAL HEALTH)

- Do you have any comments about the Canada Council's Organizational Health criteria?
- The Canada Council plans to introduce its Flying Squad program to book publishing. Who should deliver the program?

EMERGING PUBLISHERS PROGRAM

- Should entrance or exit requirements change?
- Should the program scope – what is funded and how – be changed?

AUTHOR PROMOTION TOURS PROGRAM

- Should the program scope – what is funded and how – be changed?

TRANSLATION GRANTS PROGRAM

- Should the program scope – what is funded and how – be changed?

Do you have any other comments about the Canada Council's support for book publishing, including to your association, or the program review itself?

