

Agenda – Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu

Lleoliad: I gael rhagor o wybodaeth cysylltwch a:
Ystafell Bwyllgora 2 – y Senedd **Steve George**
Dyddiad: Dydd Mercher, 20 Medi 2017 Clerc y Pwyllgor
Amser: 09.30 0300 200 6565
SeneddDGCh@cynulliad.cymru

- 1 Cyflwyniad, ymddiheuriadau, dirprwyon a datgan buddiannau**
- 2 Newyddiaduraeth Newyddion yng Nghymru: Sesiwn Dytsiolaeth 12**
(09:30 – 10:15) (Tudalennau 1 – 77)
Douglas McCabe, Prif Swyddog Gweithredol a Chyfarwyddwr Cyhoeddi a Thechnoleg ar gyfer Enders Analysis – trwy gyswllt fideo
Egwyl (10:15 – 10:30)
- 3 Adolygiad Annibynnol o Gymorth ar gyfer Cyhoeddi a Llenyddiaeth: Sesiwn Dystiolaeth 1**
(10:30 – 11:15) (Tudalennau 78 – 320)
Lleucu Siencyn, Prif Weithredwr, Llenyddiaeth Cymru
Damian Walford Davies, Cadeirydd, Llenyddiaeth Cymru
- 4 Adolygiad Annibynnol o Gymorth ar gyfer Cyhoeddi a Llenyddiaeth: Sesiwn tystiolaeth 2**
(11:15 – 12:00) (Tudalennau 321 – 335)
Helgard Krause, Prif Weithredwr, Cyngor Llyfrau Cymru
Yr Athro M Wynn Thomas, Cadeirydd, Cyngor Llyfrau Cymru
- 5 Papurau i'w nodi**



- 5.1 Adolygiad Annibynnol o Gymorth ar gyfer Cyhoeddi a Llenyddiaeth:
Tystiolaeth Ychwanegol**
(Tudalennau 336 – 356)
- 5.2 Gohebiaeth gan yr Adran Materion Digidol, Diwylliant, y Cyfryngau a
Chwaraeon: Dyfodol S4C**
(Tudalennau 357 – 361)
- 5.3 Llythyr gan Ysgrifennydd y Cabinet dros yr Economi a'r Seilwaith ynghylch
Adolygiad Thurley**
(Tudalennau 362 – 368)
- 5.4 Newyddiaduraeth newyddion yng Nghymru: Tystiolaeth Ychwanegol**
(Tudalennau 369 – 373)
- 6 Cynnig o dan Reol Sefydlog 17.42 i benderfynu gwahardd y
cyhoedd o'r cyfarfod ar gyfer y busnes a ganlyn:**
- 7 Ariannu addysg gerddoriaeth a gwella mynediad ati: Ystyried yr
adroddiad drafft**
(12:00 – 12:30) (Tudalennau 374 – 415)

Eitem 2

Mae cyfyngiadau ar y ddogfen hon

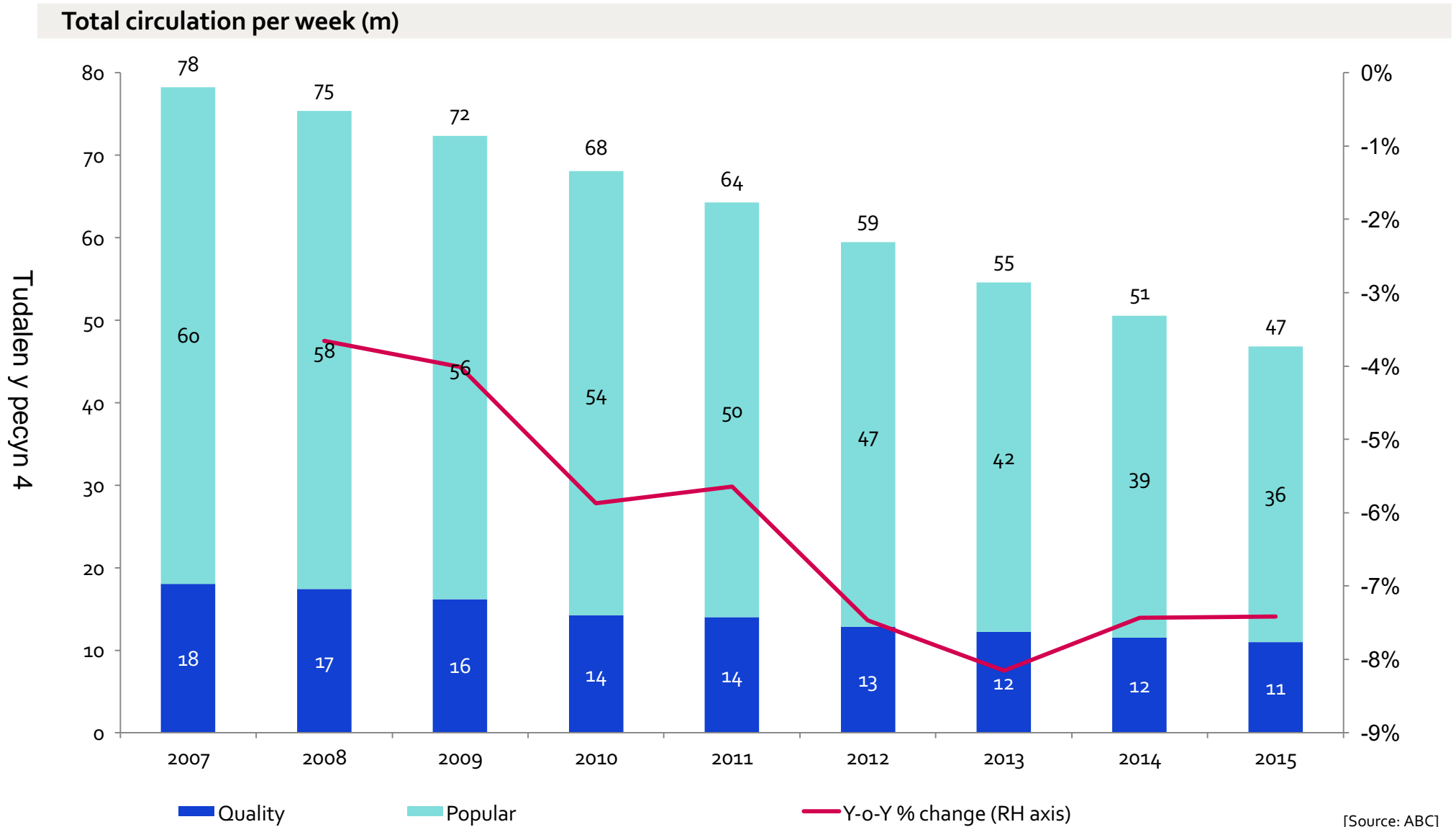
News media outlook

Culture Welsh Language & Communications Committee

Douglas McCabe | douglas.mccabe@endersanalysis.com | +44 20 7851 0910

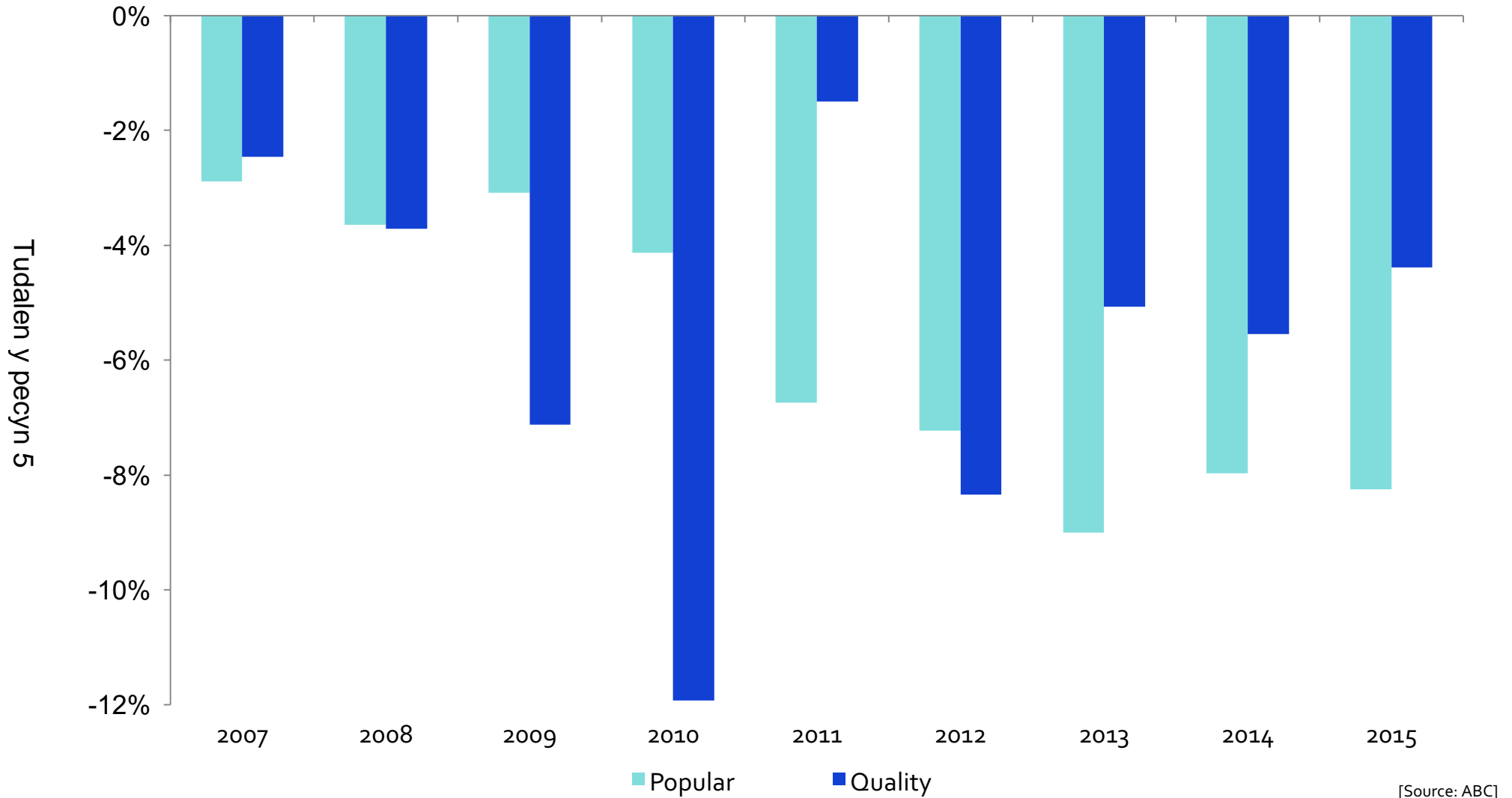
Alice Pickthall | alice.pickthall@endersanalysis.com | +44 20 7851 0900

Daily print news: relentless 8% decline



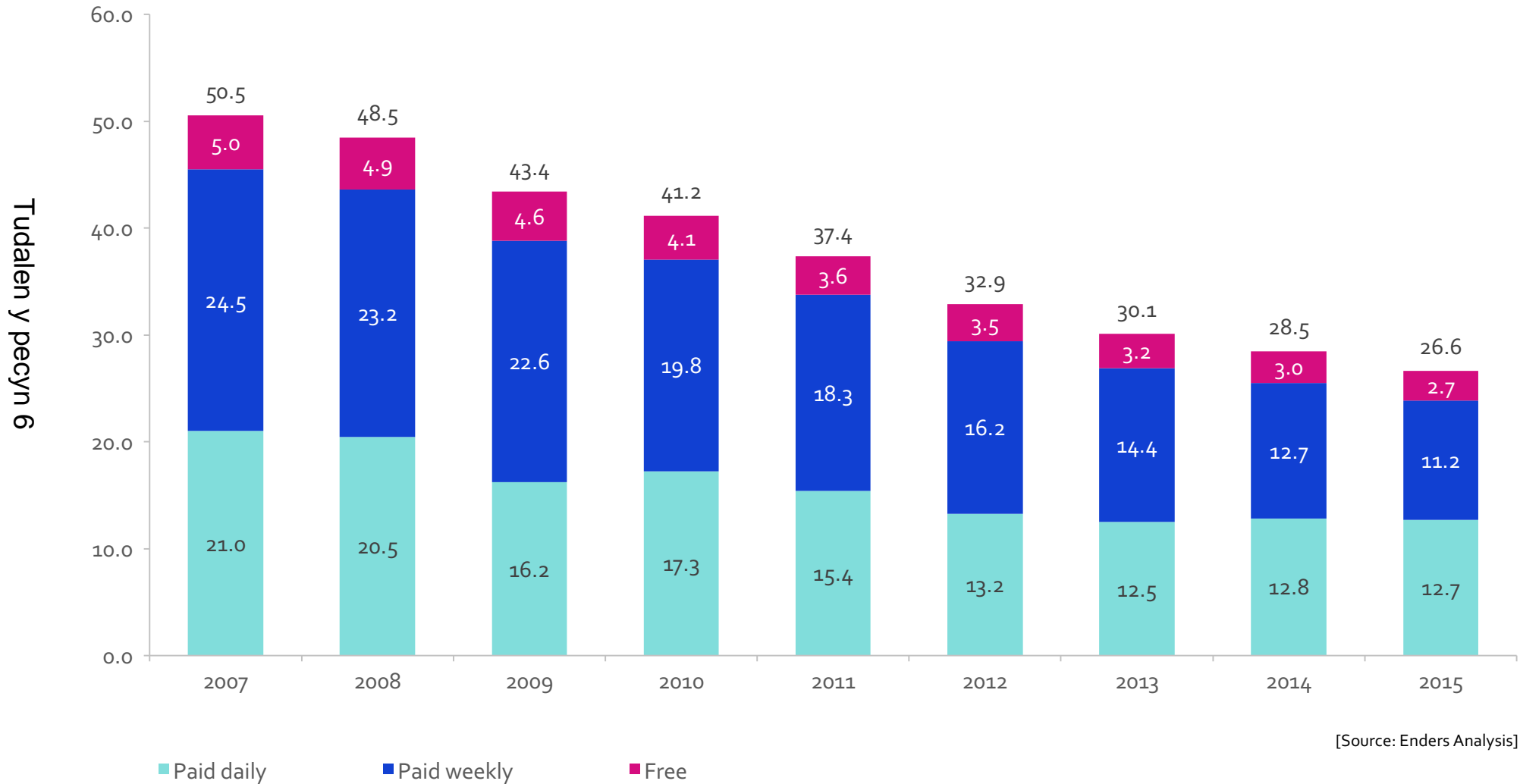
Shift from "quality" to "tabloid"

Circulation growth (Y-o-Y % change)



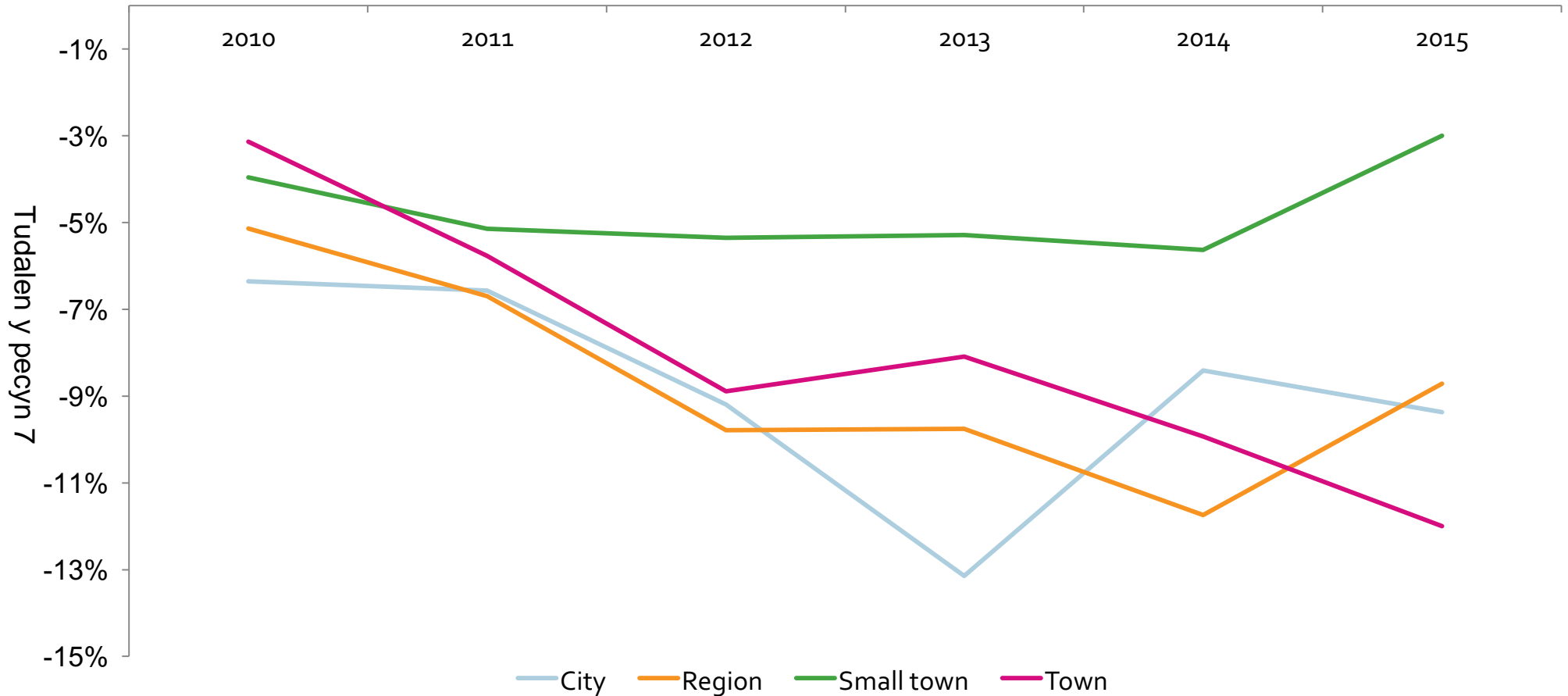
Local press volumes – falling even more quickly

Regional newspapers circulation per week



Local press – circulation more resilient in smaller towns

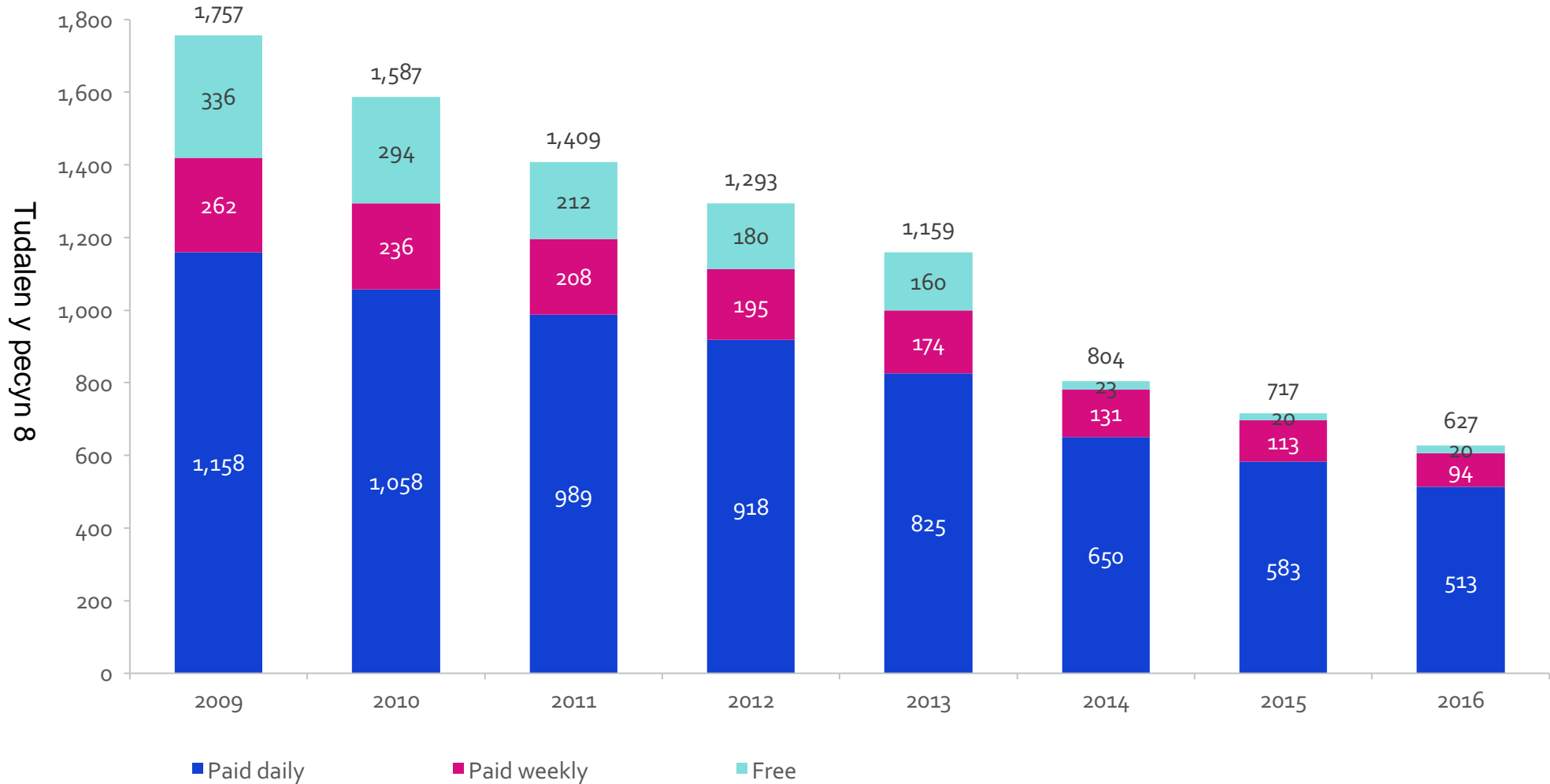
UK regional newspapers circulation by geography size y-o-y % change



[Source: Enders Analysis based on ABC]

Welsh press volumes follow UK trend

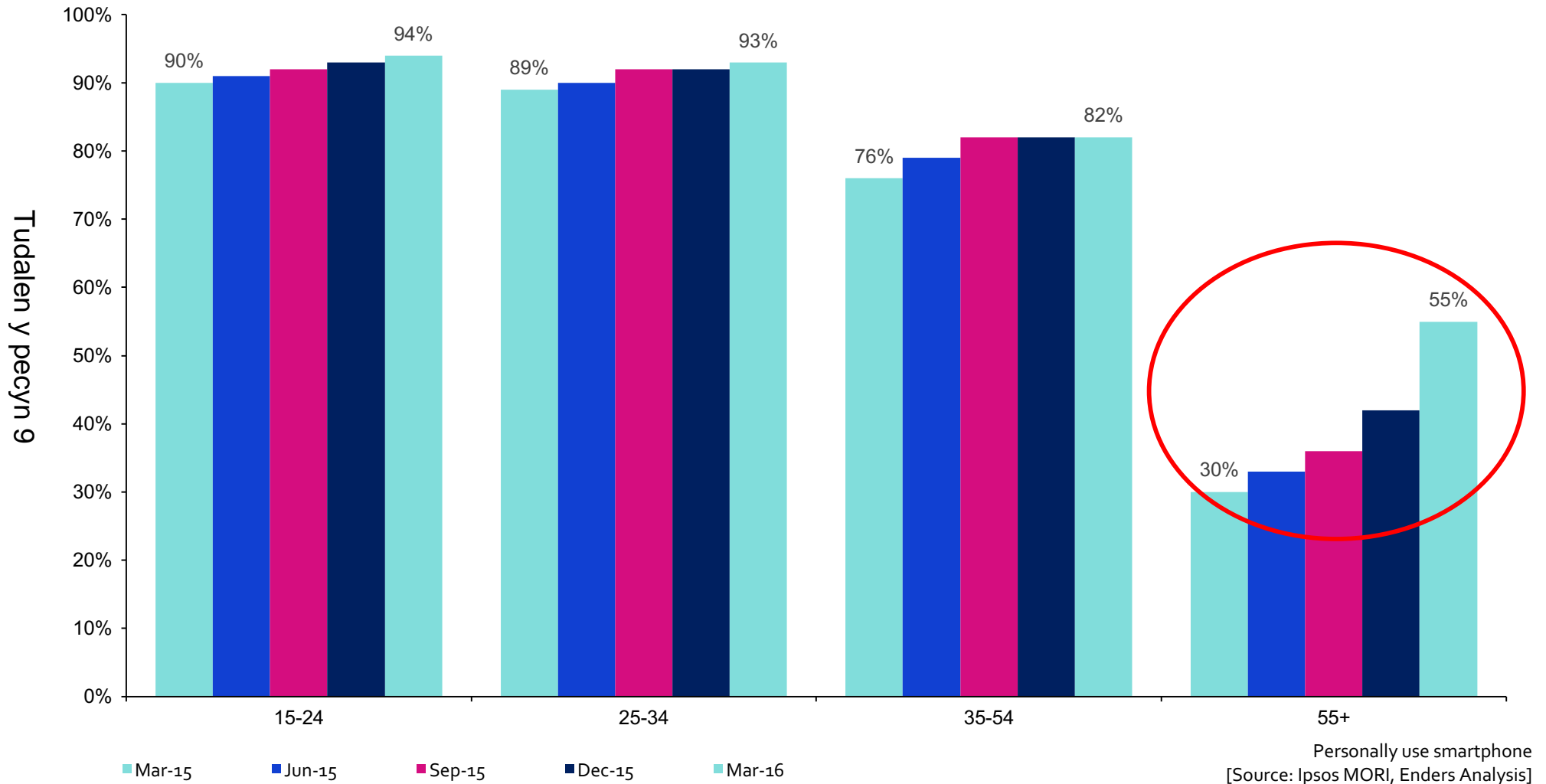
Welsh newspapers circulation per week (oocs)



[Source: Enders Analysis based on ABC]

Smartphones are a critical driver; and have shifted to older demographics

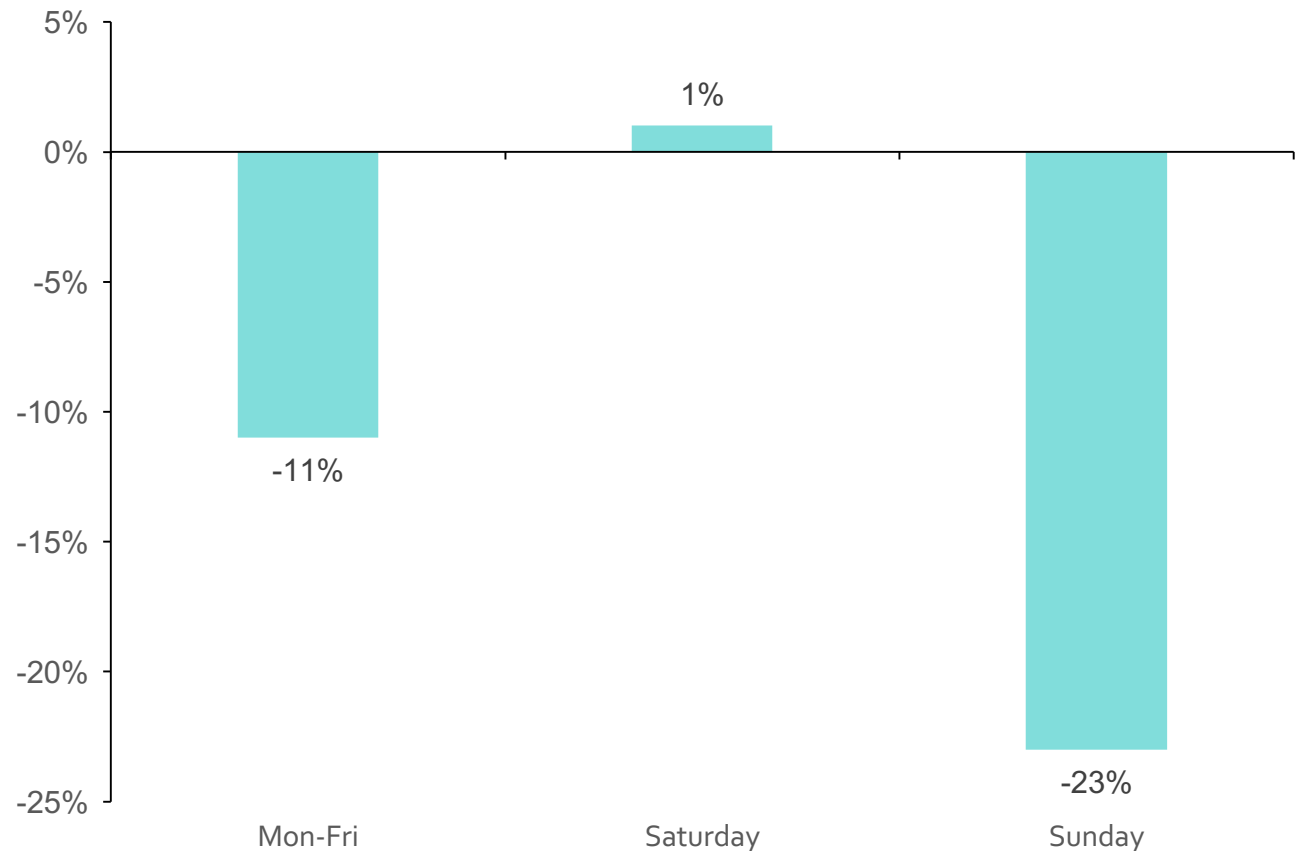
Smartphone adoption % by age group



The clear weekly trend: Saturday wins

- Erosion in daily newspaper purchasing is well understood, but the weekend market is changing more dramatically. Quality Saturday titles are very steady, while Sunday titles have fallen substantially. Sundays are turning into “just another day”, and the weekly digest – a very successful format in print – sits more comfortably at the start of the weekend than the end
- Greatest resilience in print news media – such as The Economist, the Weekend edition of the FT, The Week – provide weekly digest/commentary in a trusted brand package, which is a highly relevant print product in a 24/7 news environment
- Content that is not replicated anywhere online – Private Eye, for example – is relatively rare and also outperforms print media trends

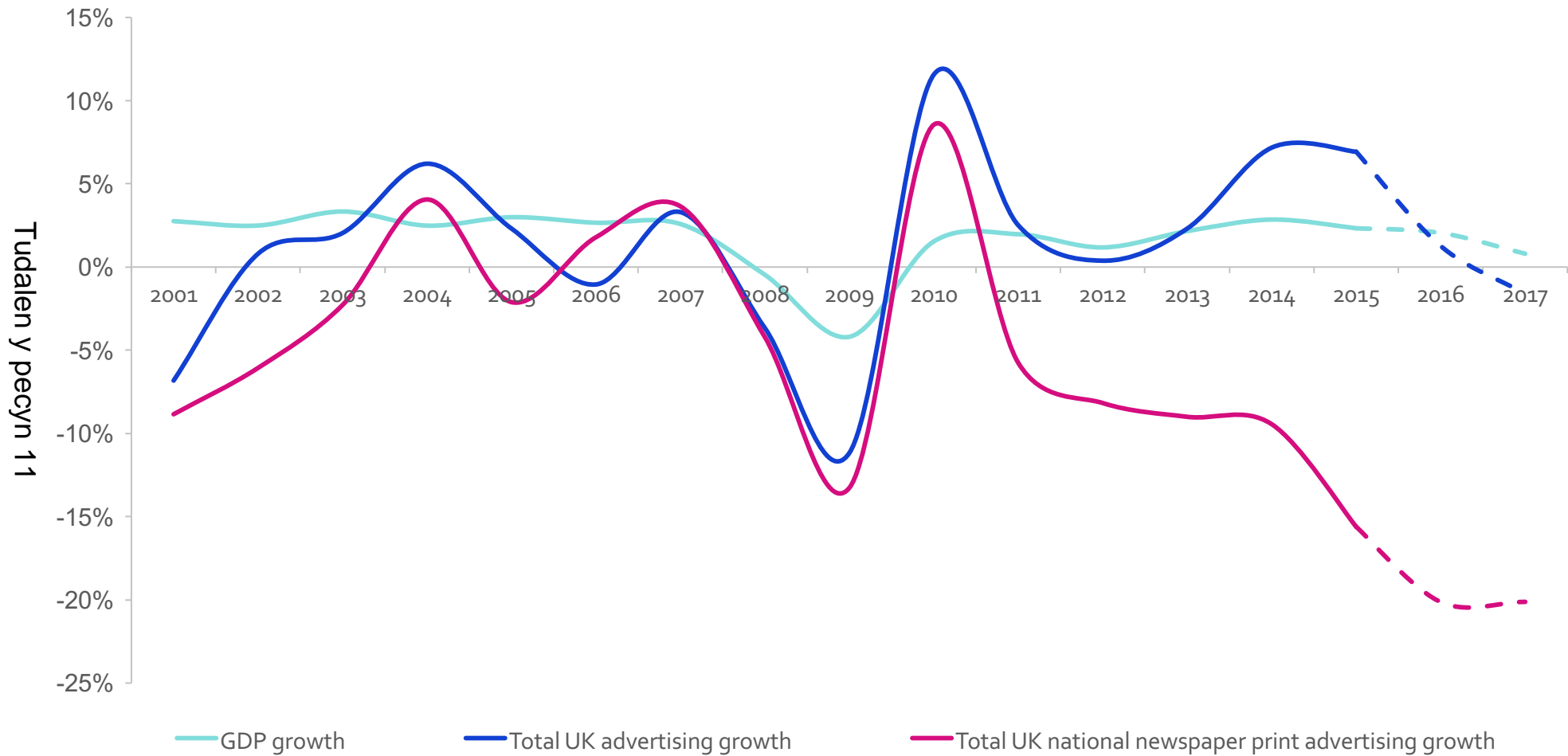
Sales volume growth, UK national quality press , 2012-2016



[Source: Enders Analysis]

Newspaper print advertising collapsed during an advertising boom

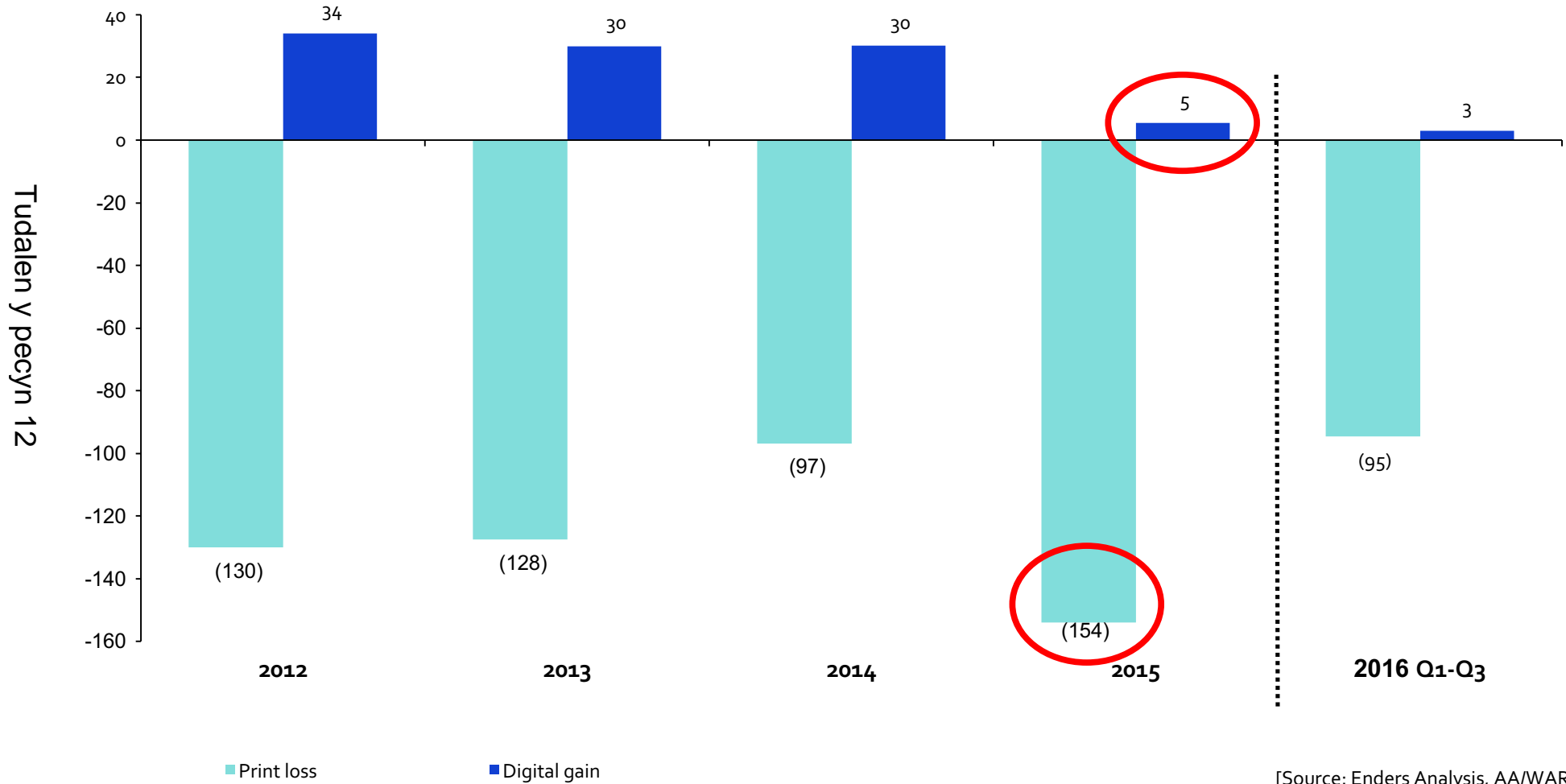
UK display advertising, national newspaper print display advertising and GDP (Y-o-Y % change)



[Source: AA/WARC, ONS, BoE, Enders Analysis]

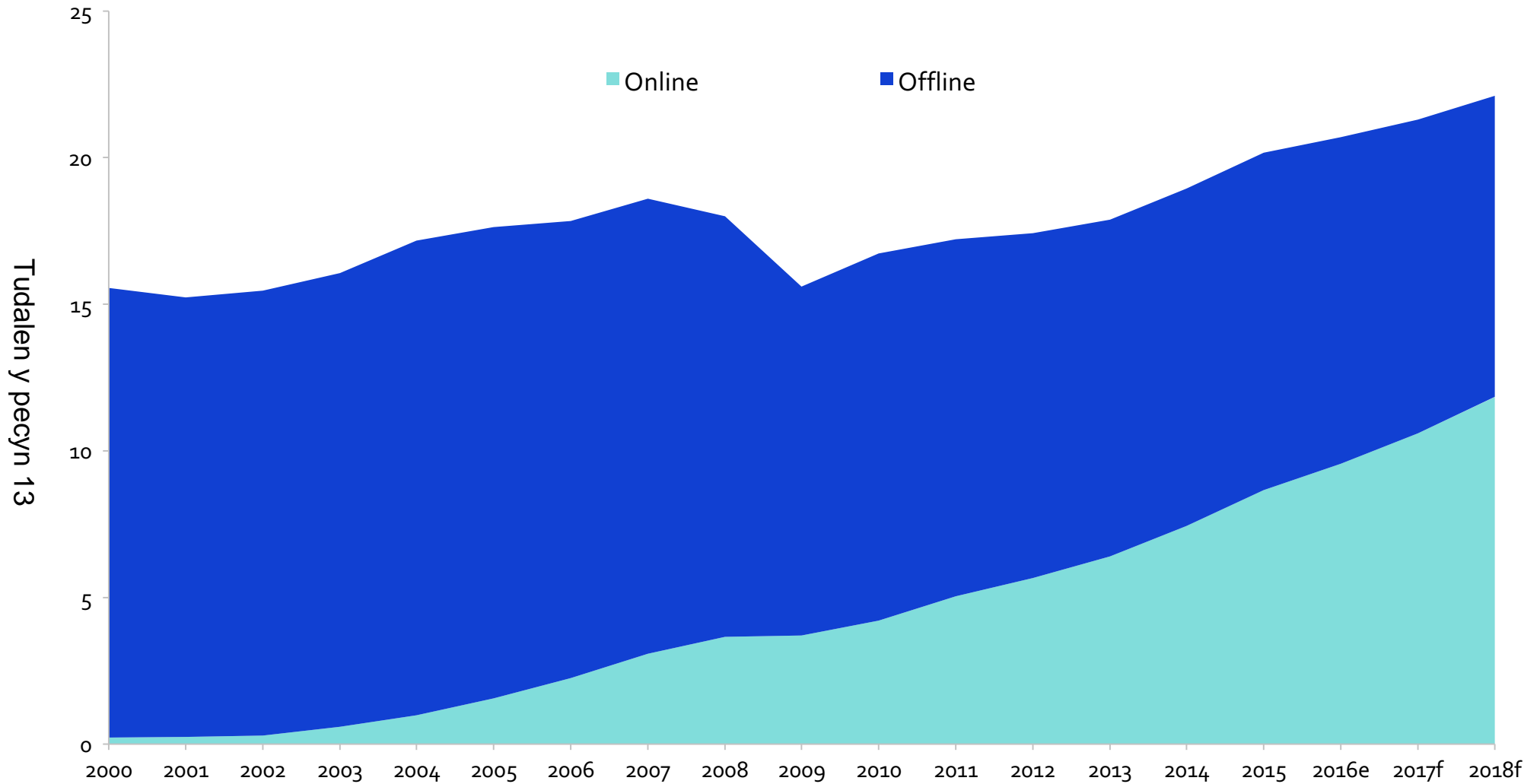
£30 in print lost for every £1 gained in digital

Digital gain versus print loss in national newspapers (£m)



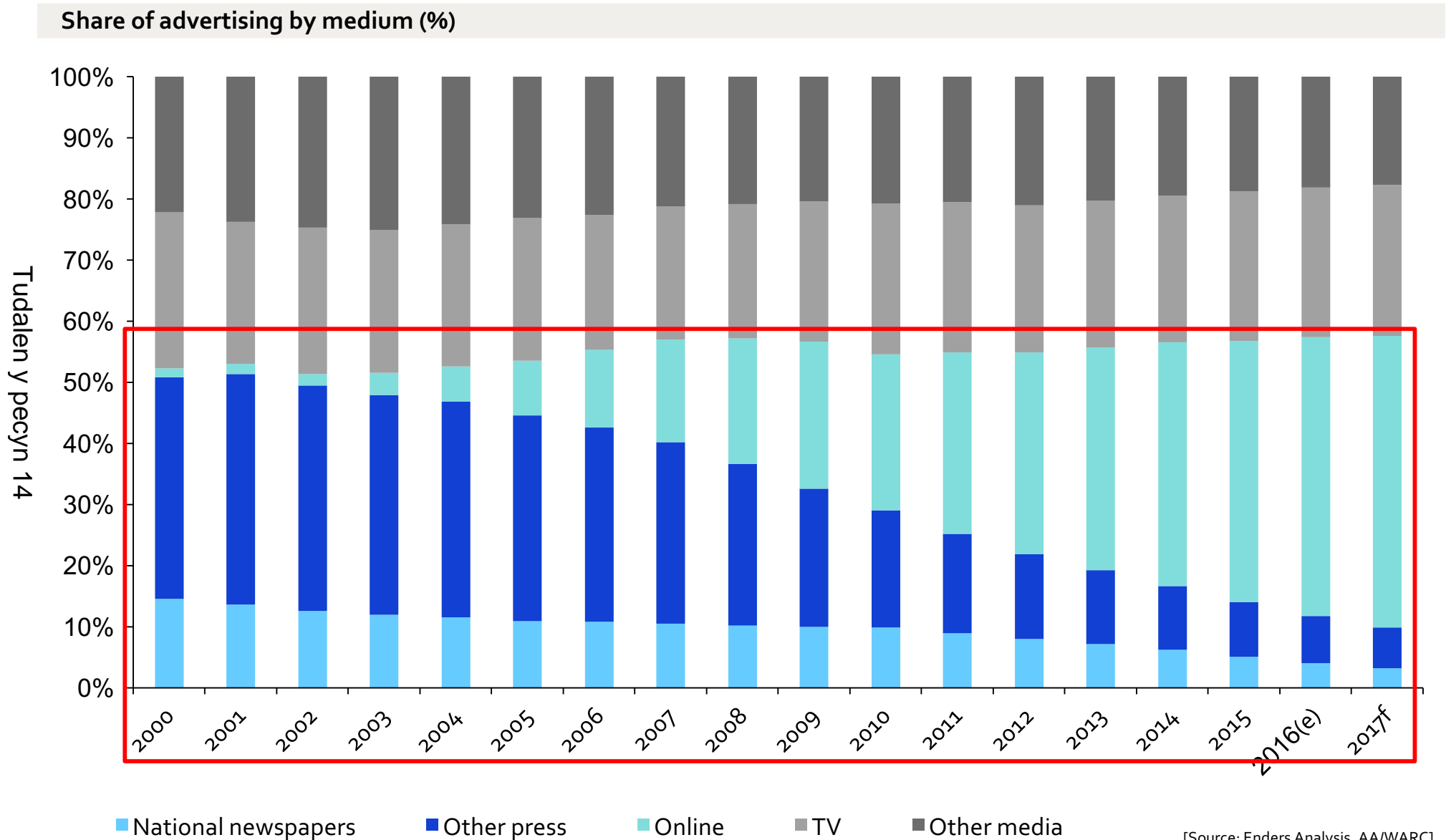
Digital advertising has reached a tipping point – 50% digital

UK advertising spend (£bn)



[Source: Enders Analysis based on AA/Warc]

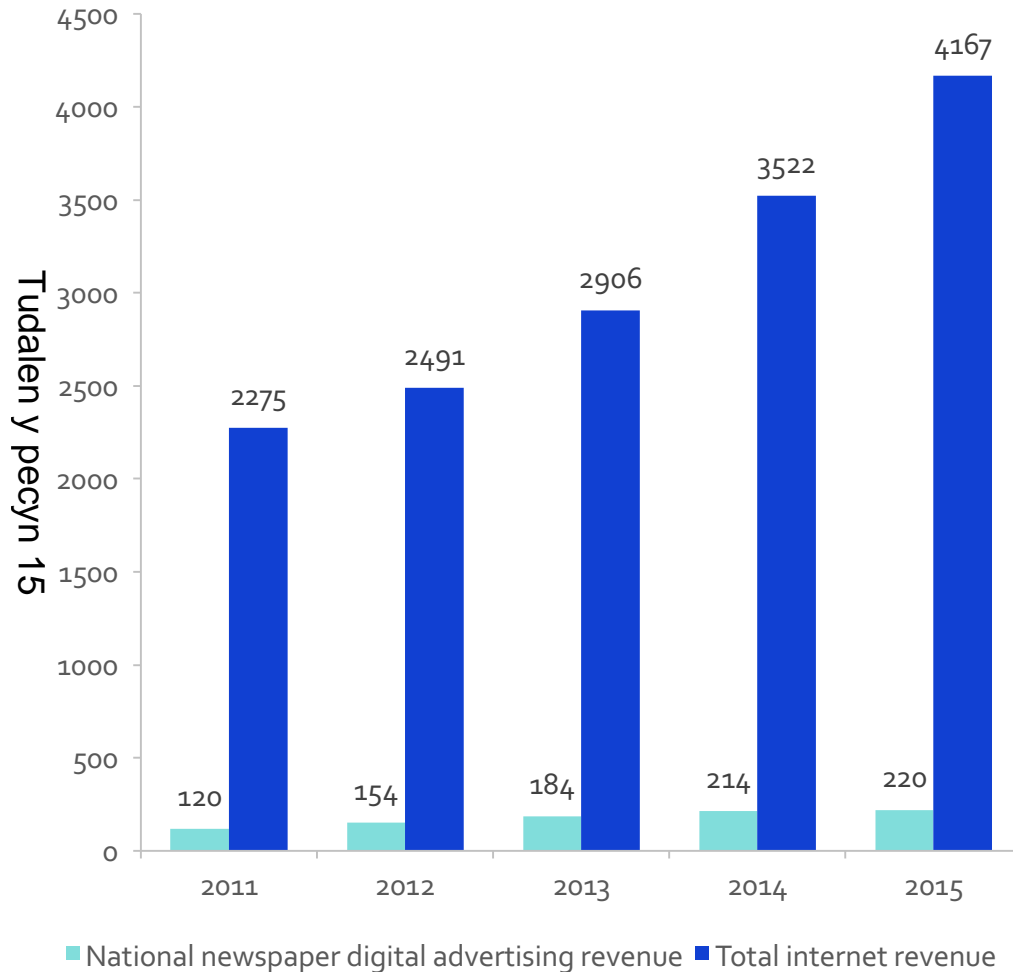
Press to online advertising substitution is very clear and accelerating



[Source: Enders Analysis, AA/WARC]

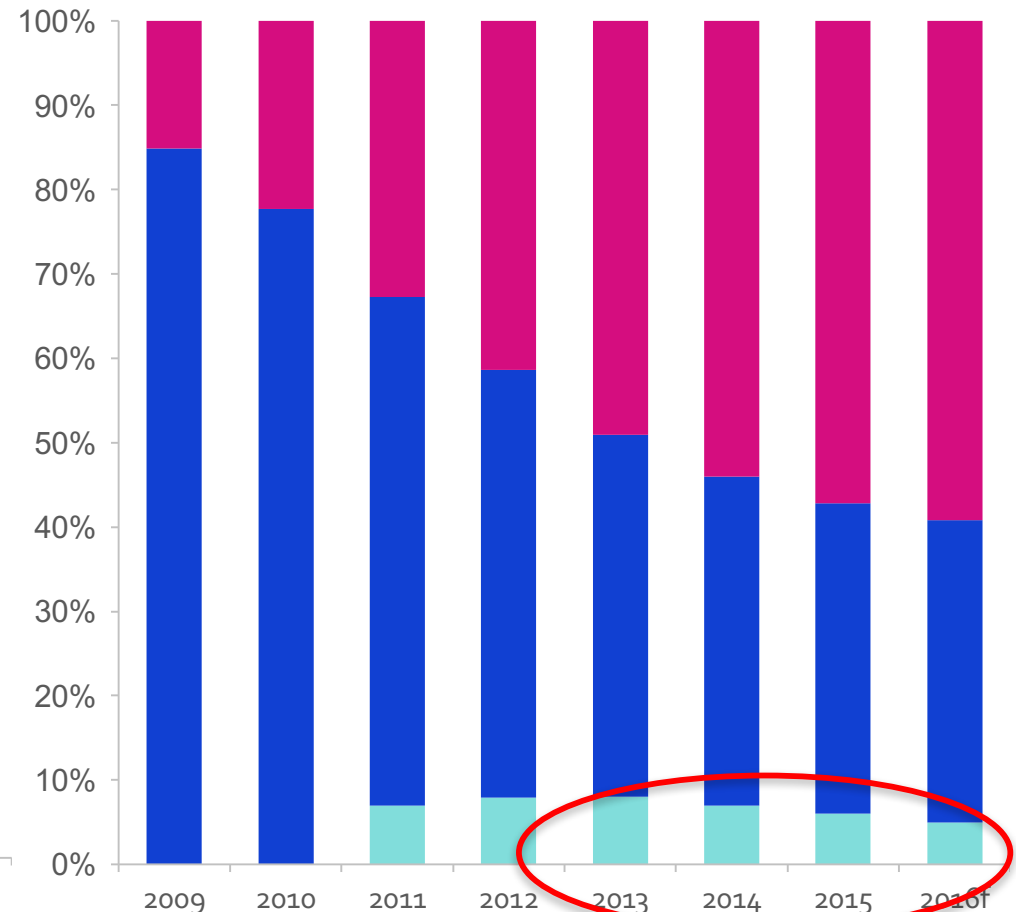
Newspapers are minnows in digital advertising and market share is falling

National news digital advertising vs total UK digital* (£m)



[Source: AA/WARC]
*Total UK digital advertising excludes search

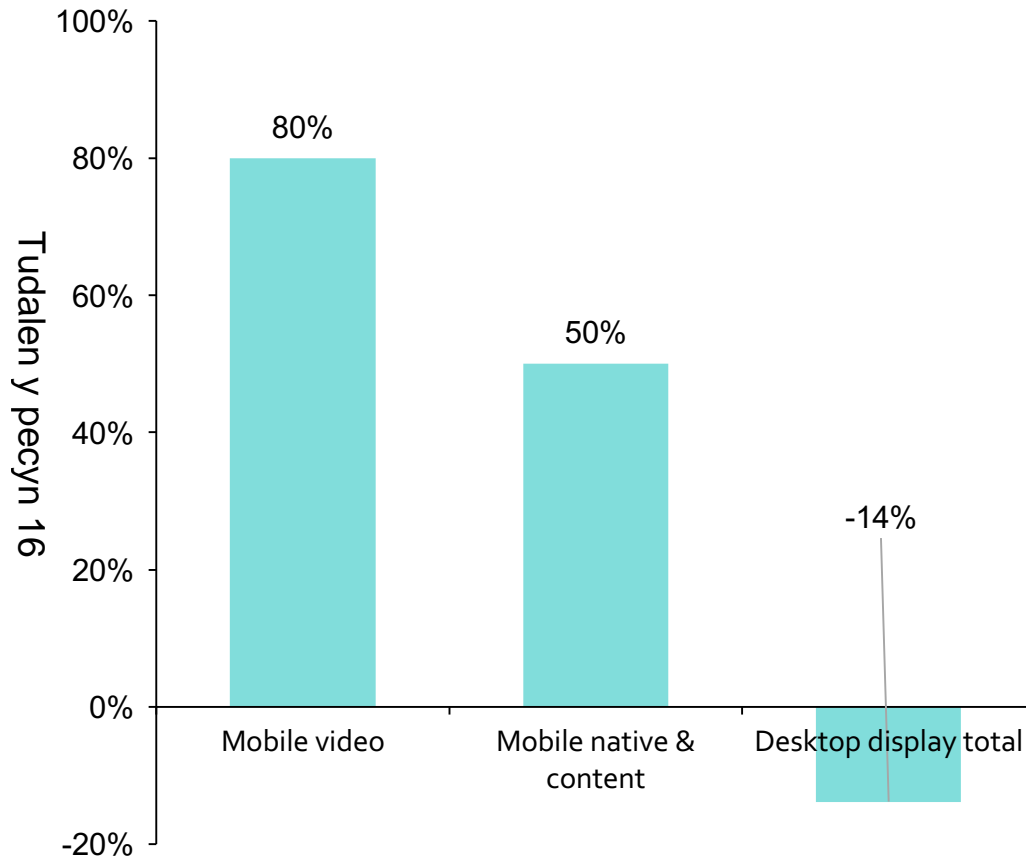
Internet display sales by publisher type (%)



[Source: Enders Analysis estimates based on IAB and AA/WARC]

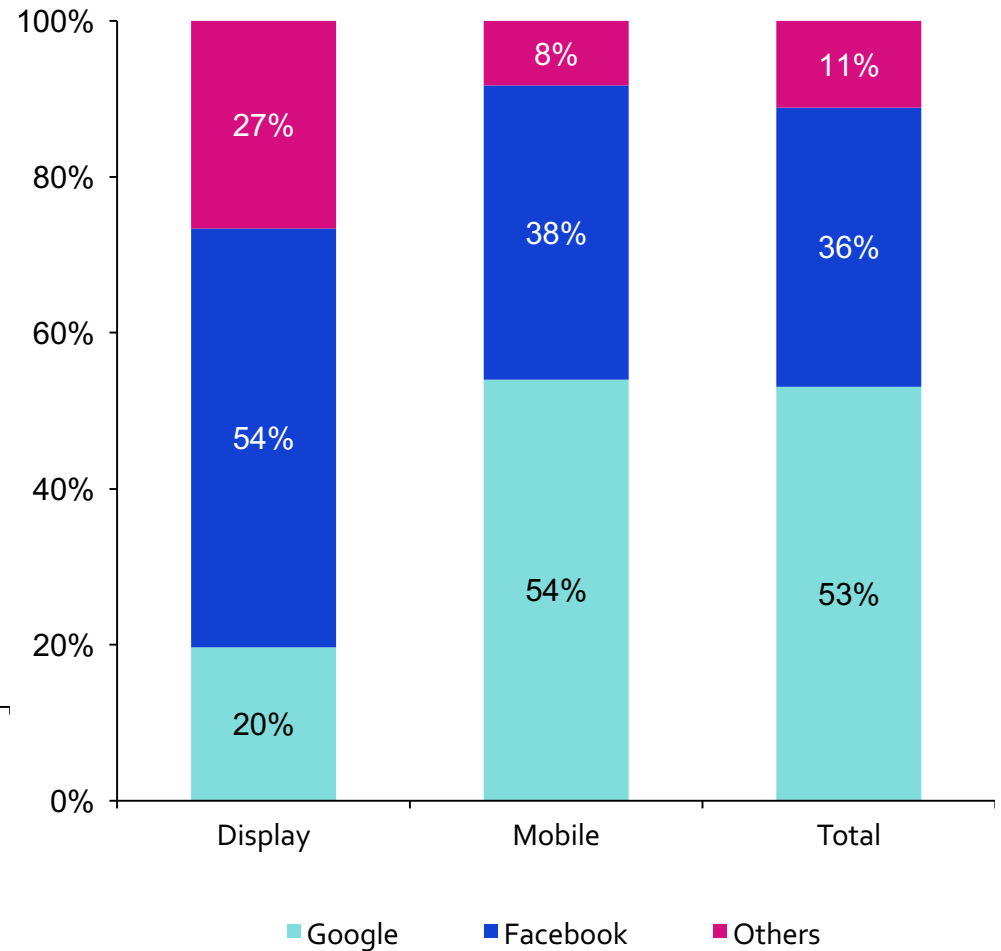
Digital adspend growth is Google and Facebook growth

2016 YoY growth, select display categories (%)



[Source: Enders Analysis]

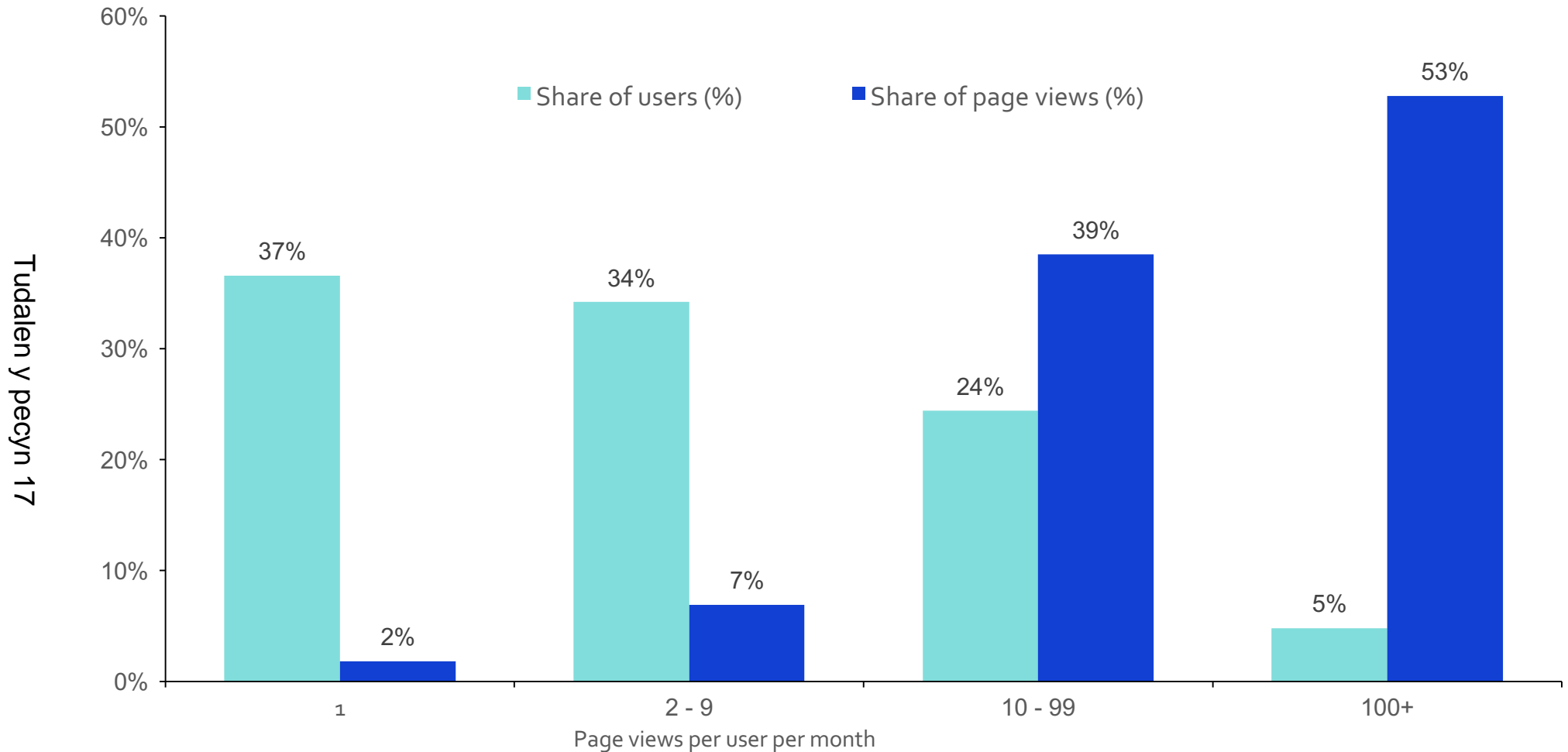
Google & Facebook shares of 2016 YoY growth, UK digital (%)



[Source: Enders Analysis]

Quality news brands chasing advertising is a fantasy

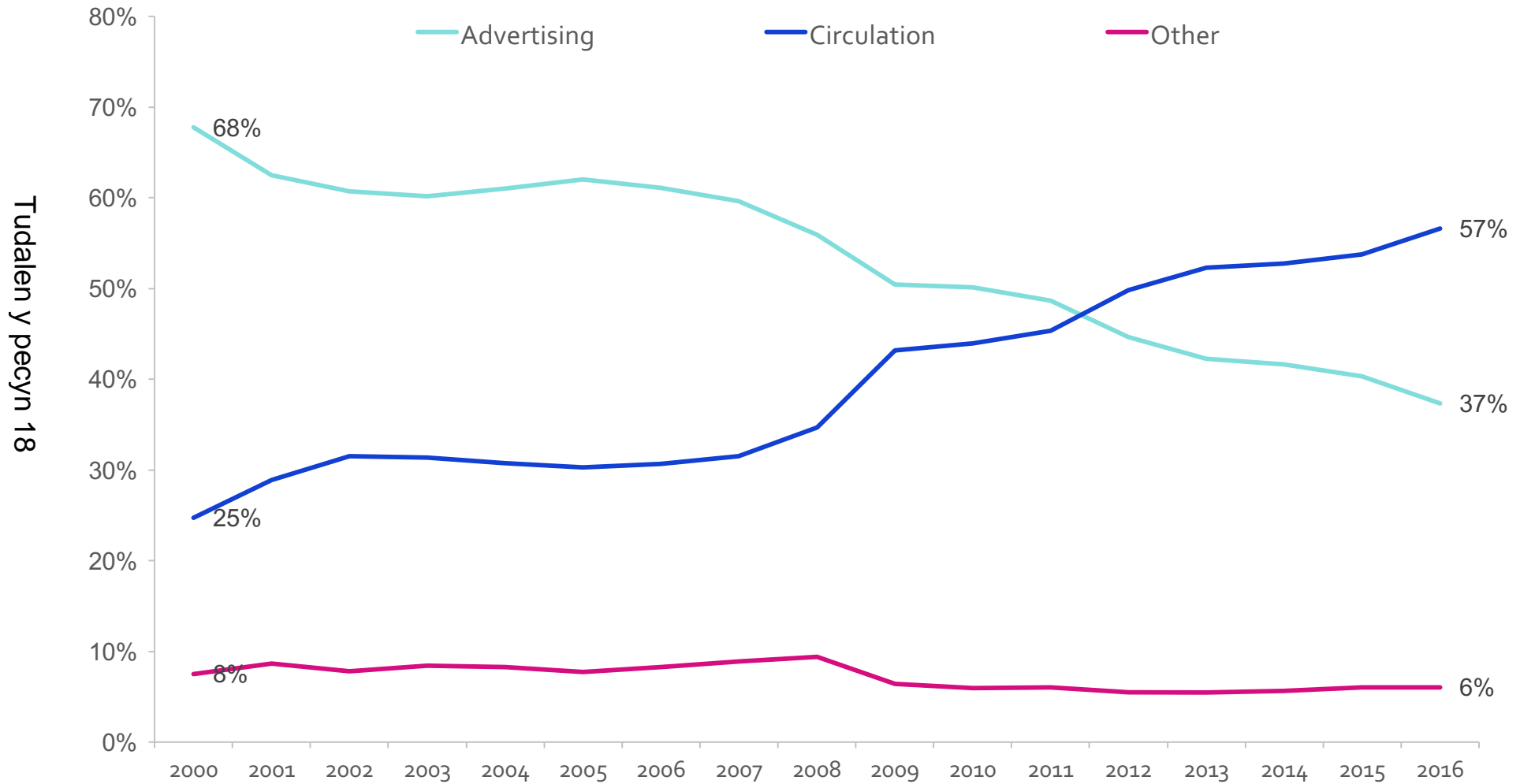
Newspaper online usage pattern



Based on an anonymised newspaper, September 2014
[Source: Enders Analysis from AGOF/Zeitung 2014/15
Bonn: Bundesverband Deutscher Zeitungsverleger (p.170)]

New York Times moves from split revenue to membership model

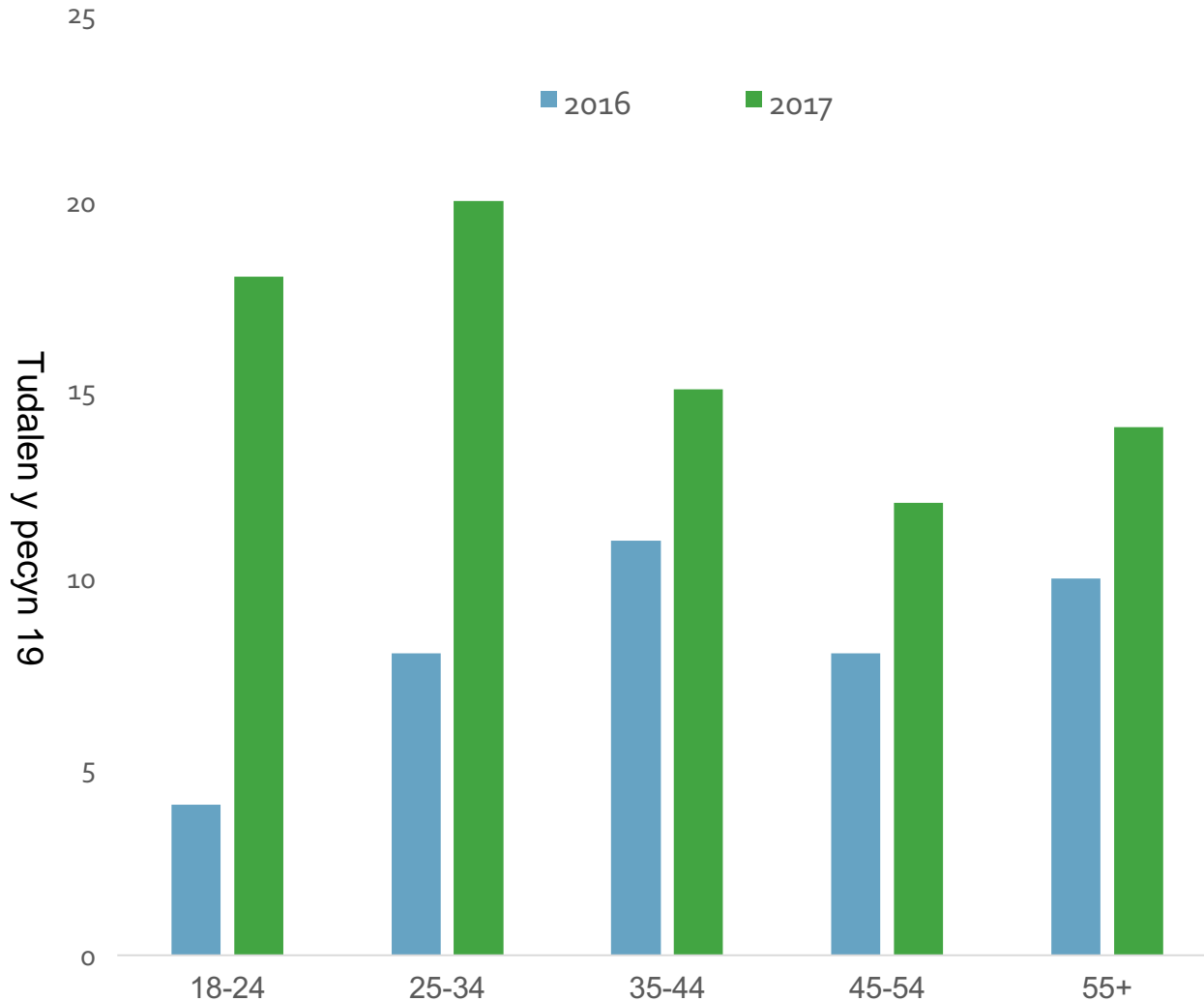
New York Times revenue mix 2000-16 (%)



[Source: New York Times Company and Enders Analysis]

Propensity to pay for news – signs of change?

Survey query: have you paid for online news in the last year?



1. Shift in attitude for a variety of reasons – “fake news”, extraordinary political change
2. Also a shift in attitudes to content media, with the **need** to pay for it replacing the expectation for free
3. Also, build the **right** service, and consumers subscribe – Spotify, Netflix
4. Contrary to assumptions – older demographics are stubbornly reluctant to pay

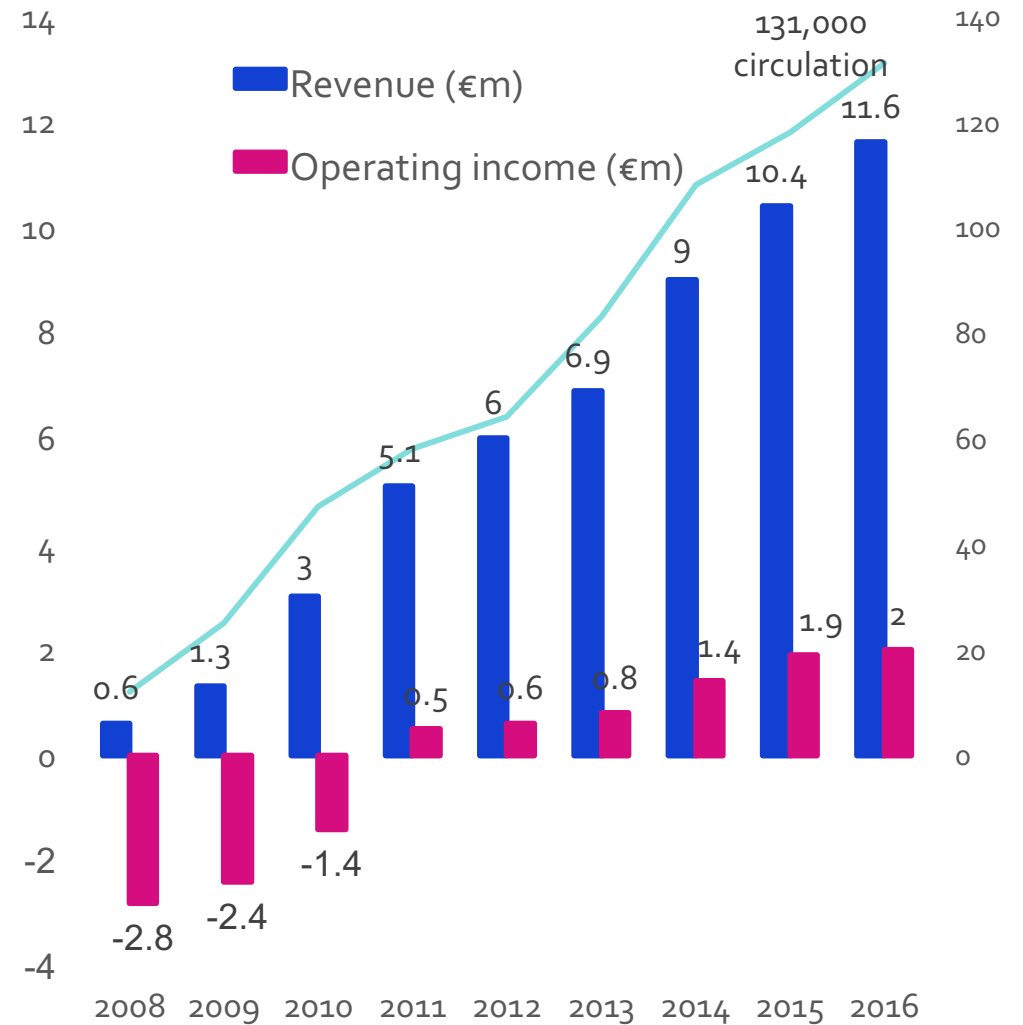
[Source: Reuters Institute Digital News Report 2017, US audience data]

Médiapart case study

- *Profitable, membership, native news service*
- Subscription only, hard paywall
- Investigation and opinionated journalism
- Scoops and star journalists on TV generate brand recognition and sampling
- 74 staff o/w 55 journalists, transparent P&L
- Founders and employee-owned
- Brand-support blogs, events, forums, publications: membership
- No advertising – therefore, an option to scale up?

Tudalen y pecyn 20

Médiapart: subscribers (000), revenue (€m) and operational result (€m)



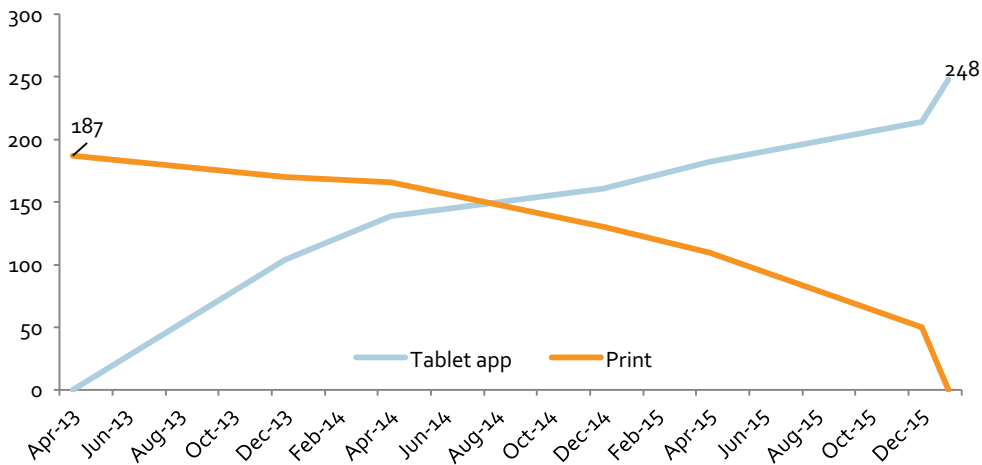
[Source: Enders Analysis from Médiapart]

La Presse case study

- La Presse in Canada abandoned its print edition and centred on a tablet service (which is HTML in a native wrapper)
- In so doing, it **increased** its editorial commitment, but dramatically reduced all other costs
- It transitioned relatively small advertising revenues over
- Broadly speaking La Presse went from breakeven to breakeven, though the business is little more than half the scale it was
- But the two revenue streams should be in growth, completely repositioning the spirit and opportunity of the organisation
- Users spend 44 mins per day – 20% greater than the UK reader’s engagement with **print editions**

Tudalen y pecyn 21

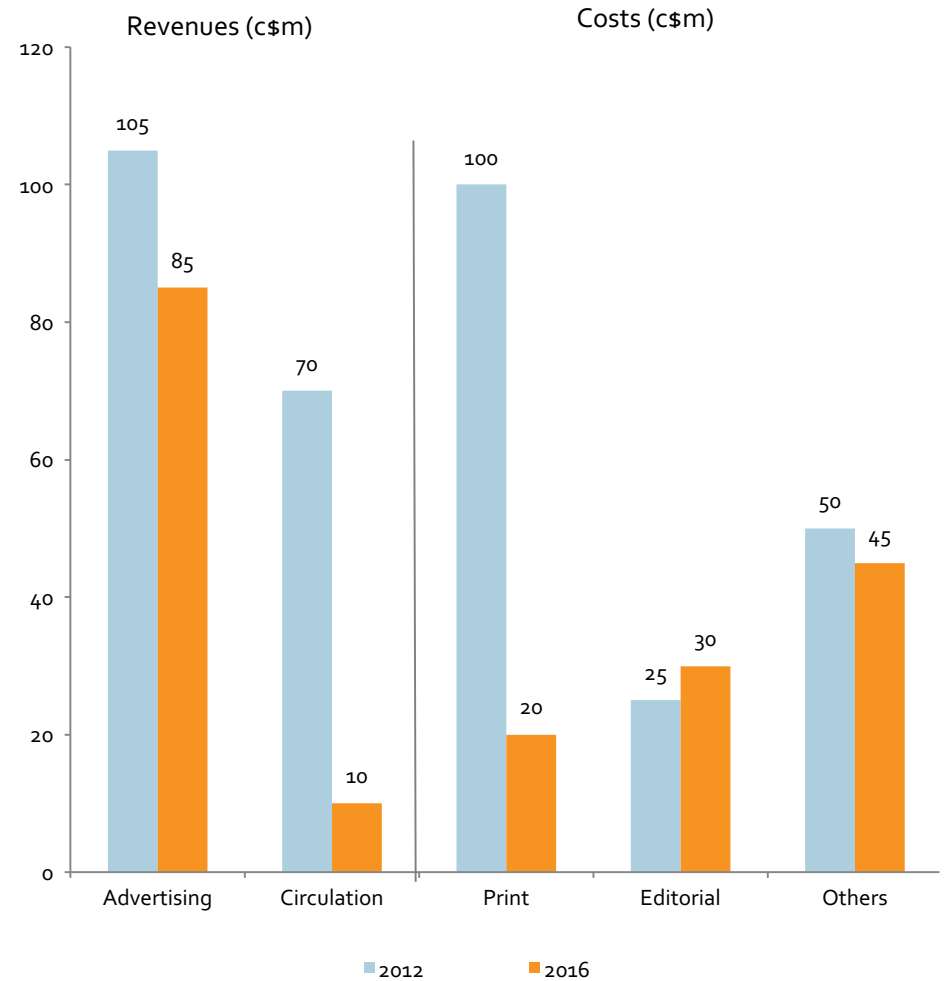
La Presse's M-F circulation per issue (oos)



Note: Print figure is average for the year

[Source: La Presse, AAM certified]

Revamped model, rising editorial resources



[Source: Enders Analysis estimates]

Local news media audience scale has grown substantially

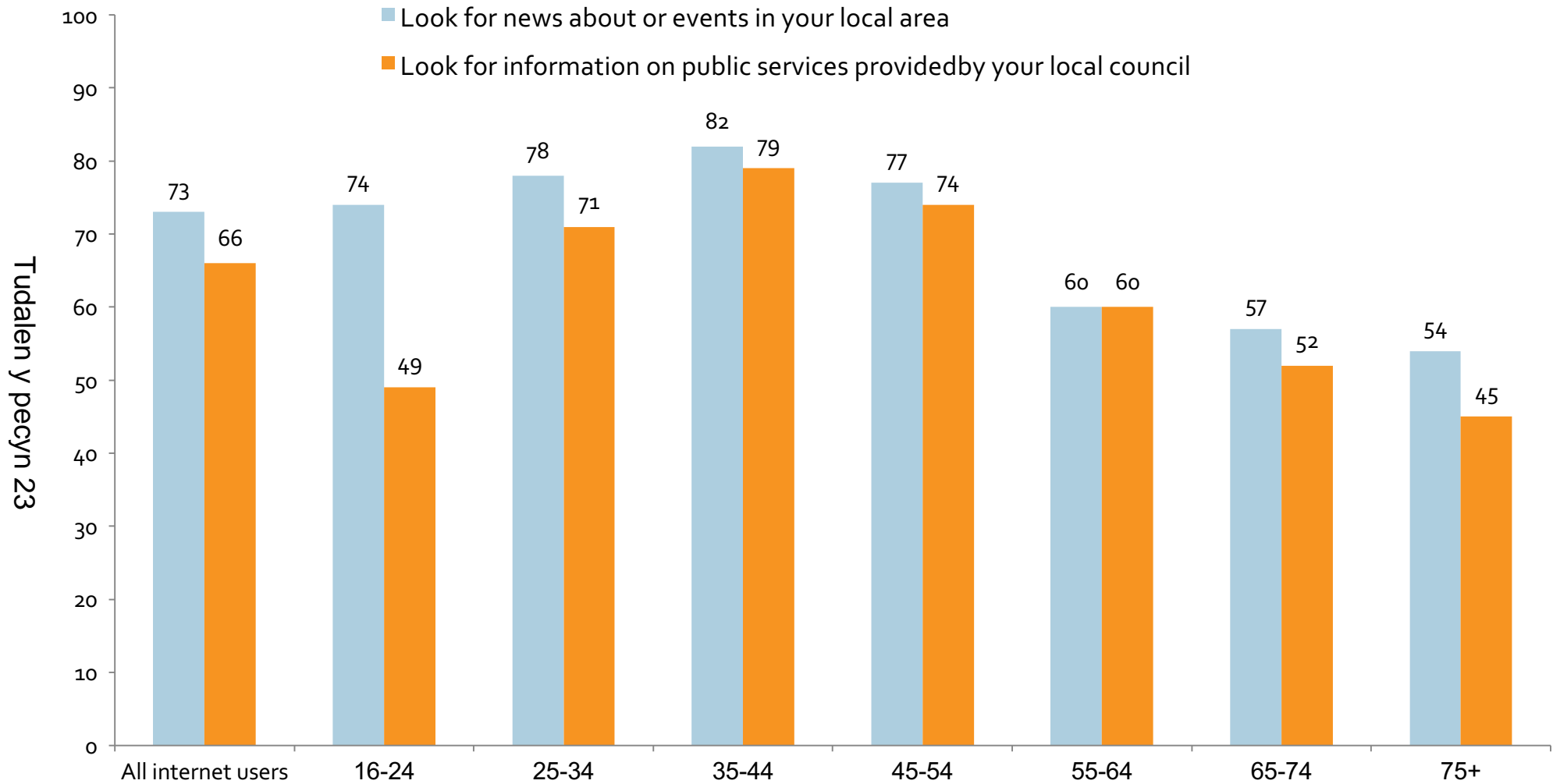
Digital traffic (monthly servers, m) H1 2009-H2 2016



[Source: ABC]

Young and old are looking for local info online

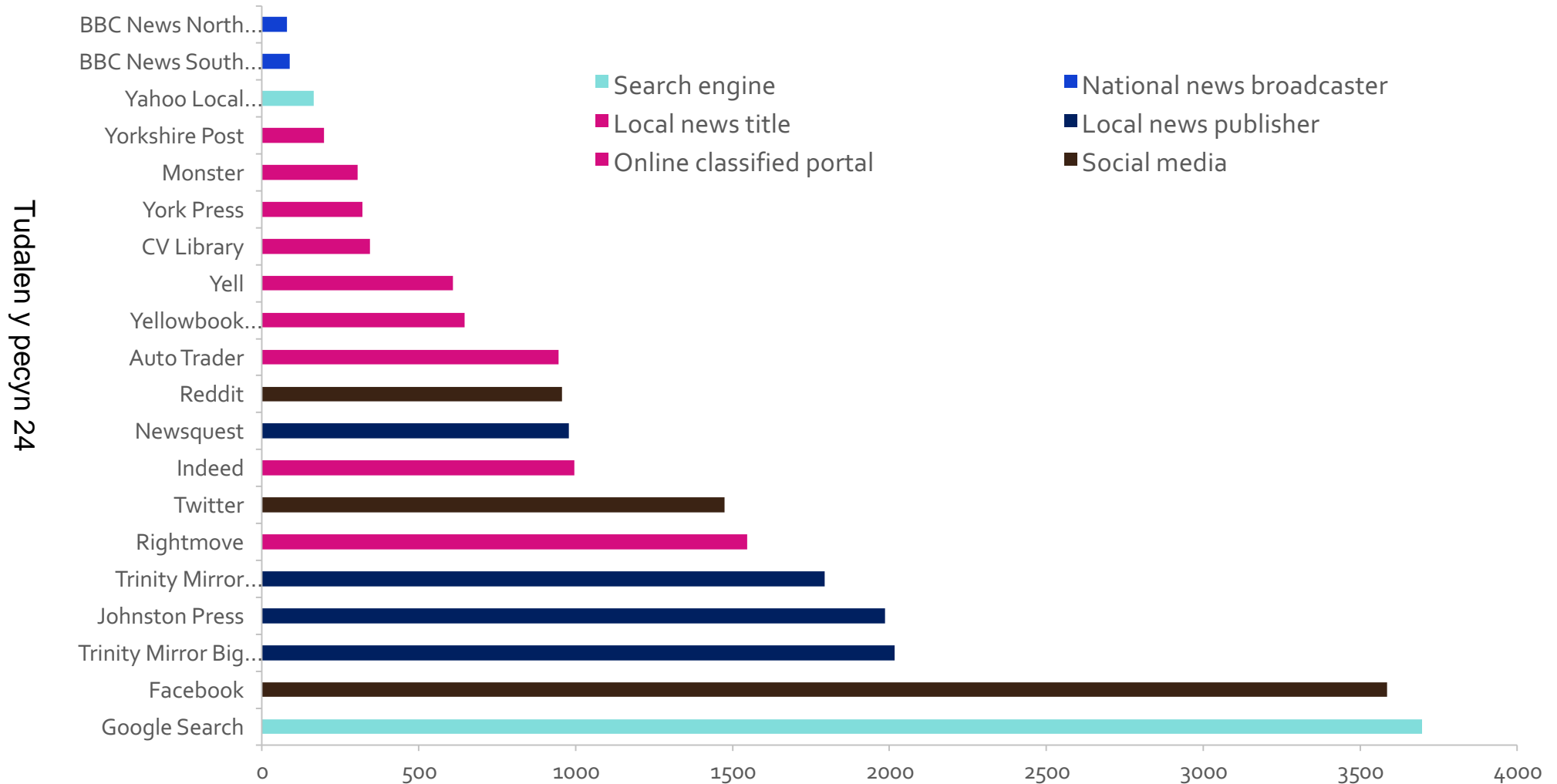
UK % share of age groups accessing local information online



[Source: Ofcom Media Usage Survey, April 2016]

Local example of local news media scale – Yorkshire

Yorkshire audience (ooo)



[Source: Enders based on comScore]

Use-case gap: who is looking for “an online newspaper”?

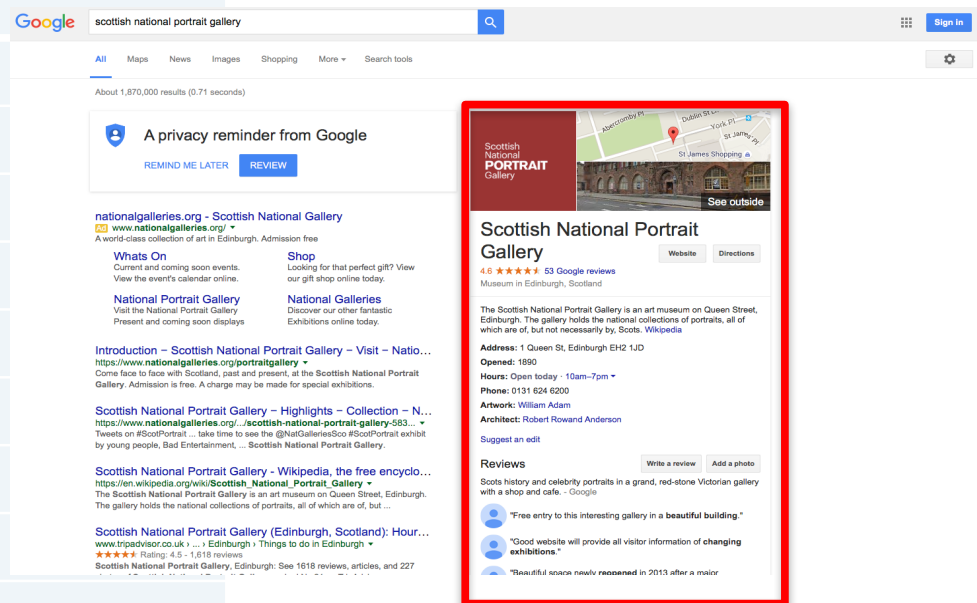
- Most local media publishers have helpful audience segments – by demographics and lifestyle
- However, it is critical for publishers to develop detailed *use-cases*, to
 - Optimise journeys;
 - Encourage consumer engagement;
 - Create compelling marketing opportunities for local and national businesses
- Too many publishers are publishing their local newspaper online, optimised for search and social
 - This model assumes the answer to any consumer query should be “a goo-word article”
- Meanwhile, publishers undervalue the power of the printed product in the multimedia strategy - perhaps this should be the *only* way of consuming some long-form journalism, for example?
- Most consumers are not looking for a local online newspaper. So what are they looking for?
 - Most consumers are looking for **information**: local news brand digital content should be selected, structured, curated as *inventory in a local information database first* – and, where appropriate, also *presented* as news
 - Many consumers will be inspired by an intelligent **local discovery** service. Discovery takes many forms – one of them is information; one of them is the opinion and authority of the local media brand; one of them is news
 - Many consumers are looking to be engaged, inspired, or to help develop some element of control within their local community: **campaigns and engagement tools** on key issues for a wide variety of age groups and parts of the community are a critical development
- In summary, if marketing and display marketing (and also employers) are the key commercial opportunities for local publishers, content models need to be reengineered to deliver on them – advertisers and recruiters are not looking for “local newspapers online”, any more than consumers are

Trivial but revealing example – the gap between supply and demand

Tudalen y pecyn 26

Scottish National Portrait Gallery – top 30 google search results

| | |
|---|--------------------------------|
| 1. National Galleries (introduction) | 16. Pagepark projects |
| 2. National Galleries (highlights) | 17. BBC News |
| 3. Wikipedia | 18. Saatchi Gallery |
| 4. Tripadvisor | 19. Lonely Planet |
| 5. Visitscotland | 20. Rampant Scotland |
| 6. National Portrait Gallery (collections) | 21. Culture24 |
| 7. National Portrait Gallery (beyond the gallery) | 22. About Britain |
| 8. Artfund | 23. Royal Collection |
| 9. The List | 24. Euan's Guide |
| 10. Facebook | 25. Parkopedia |
| 11. Twitter | 26. The Guardian (2011 review) |
| 12. Telegraph (review) | 27. Time Out |
| 13. Carbontrust | 28. ECS Scotland |
| 14. Tickets, Edinburgh Fringe | 29. Tripadvisor |
| 15. 38 Degrees | 30. Sophie Gerrard |



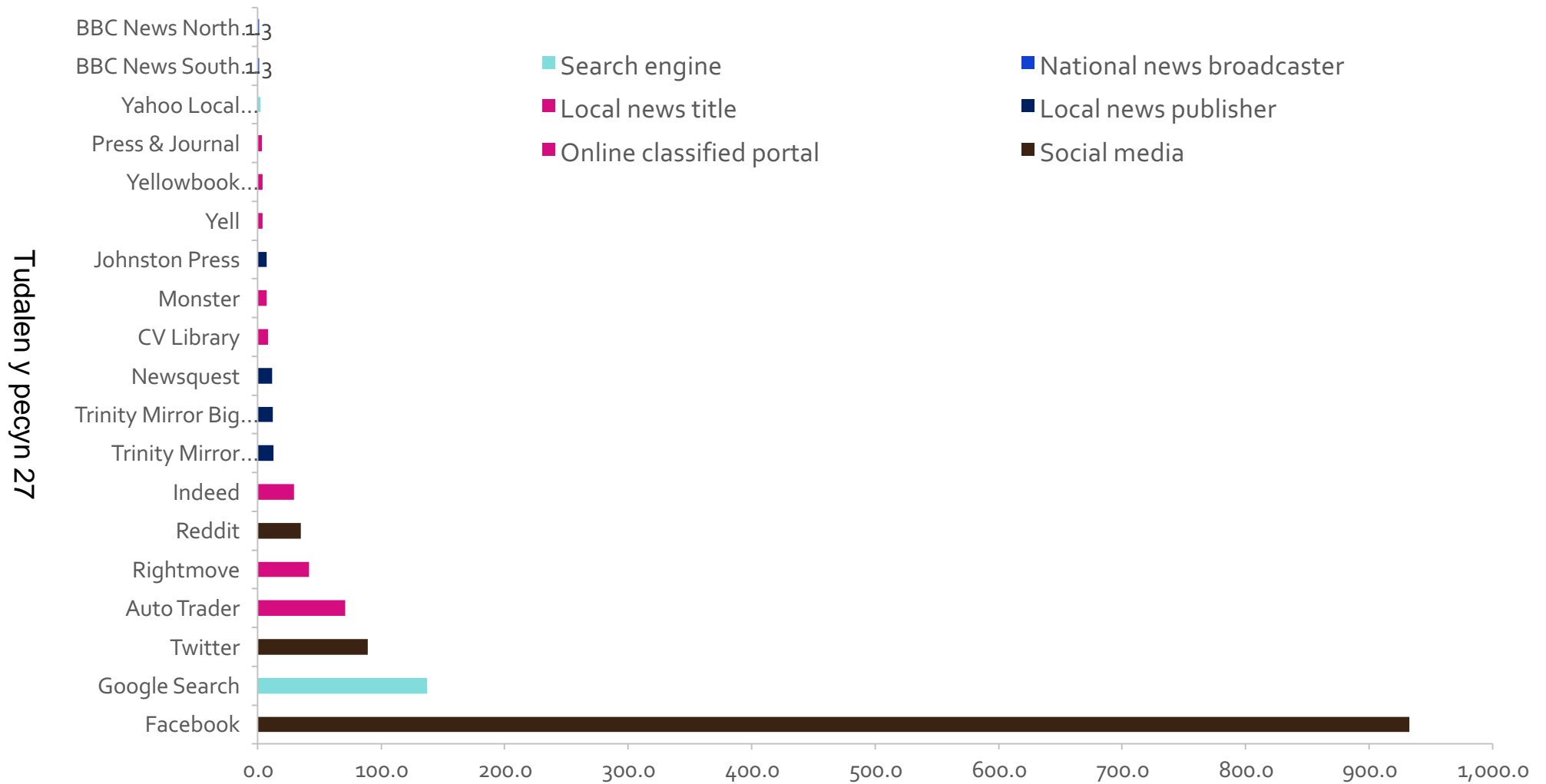
*Local newspapers run stories on (say) galleries when there is a new show, or when they burn down;

But they should have structured data about every such institution/person/business/body – and become *the* permanent content home and go-to place for locals and visitors to engage, discuss and contribute

[Source: Google UK search results for "Scottish National Portrait Gallery" on 5th May at 14:41]

But frequency and overall engagement is far greater

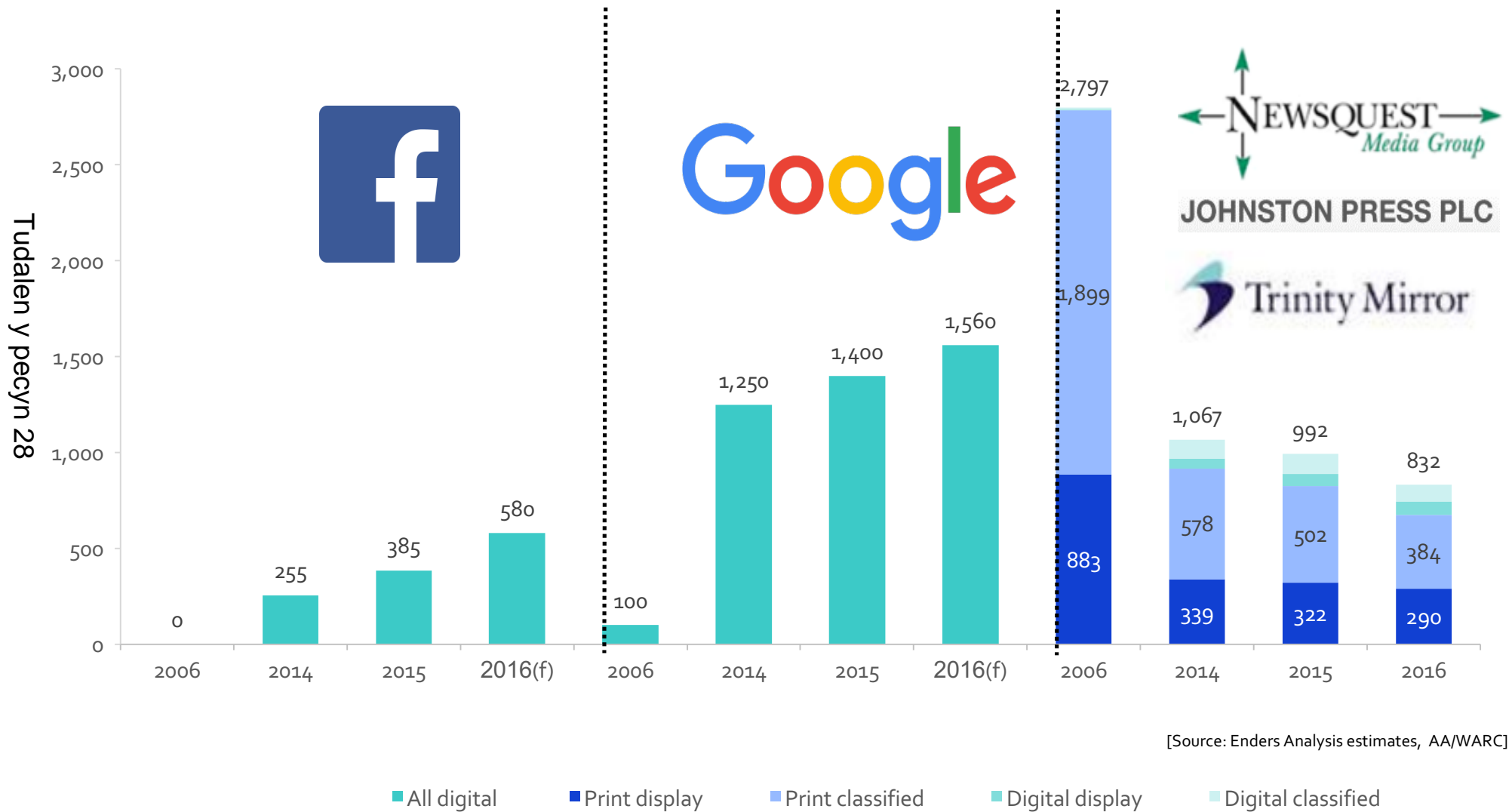
Yorkshire (minutes per user)



[Source: Enders based on comScore]

Facebook now bigger than the whole of local press in SME display

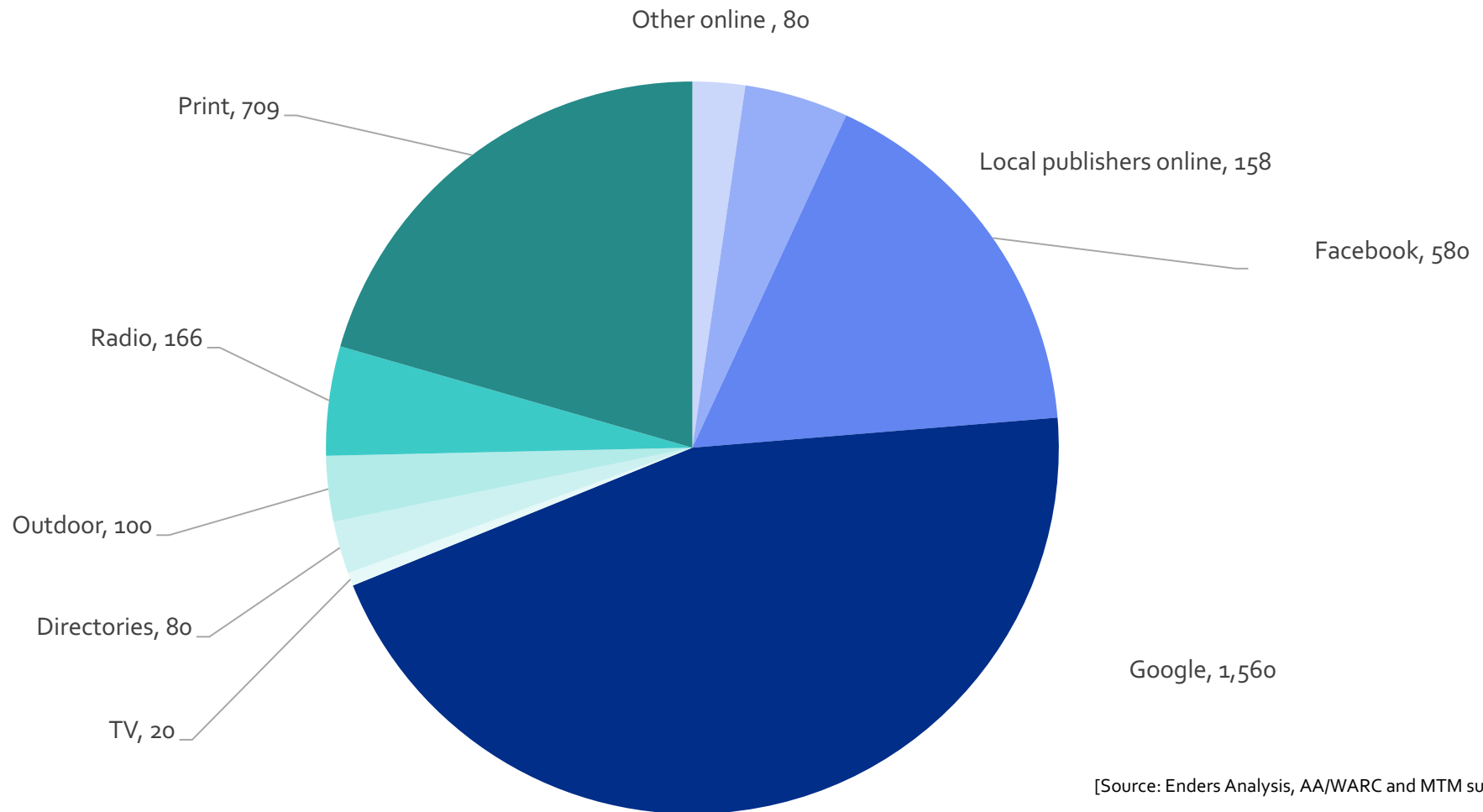
UK SME advertising spend Google, Facebook & local newspaper brands



Local advertiser spend in UK as a whole

UK local advertising spend 2016 (£m)

2016 UK total local advertising spend £3.5bn



[Source: Enders Analysis, AA/WARC and MTM surveys]

Tudalen y pecyn 29

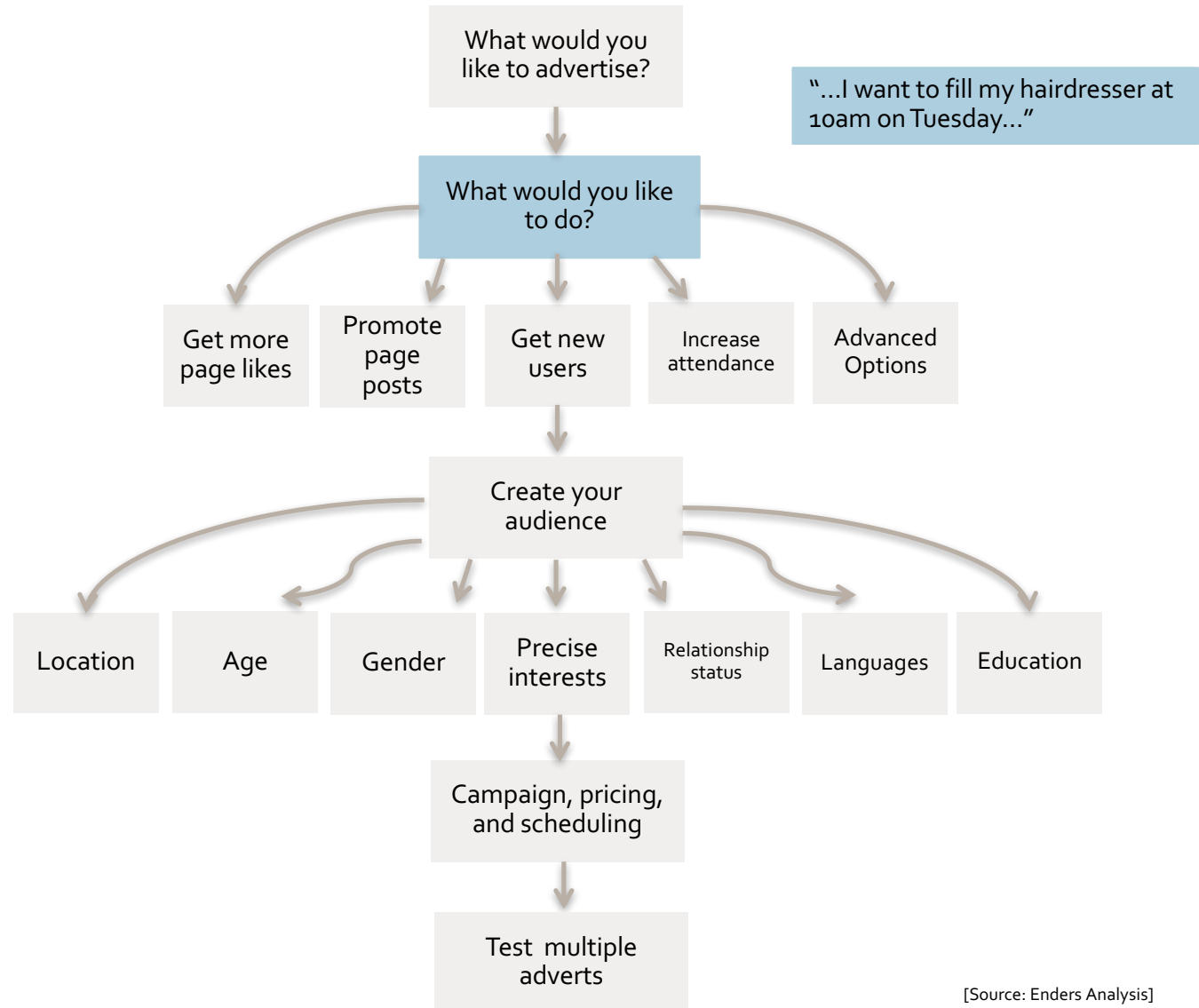
Self-service and new marketing expectations

Tudalen y pecyn 30

Traditional adverting route

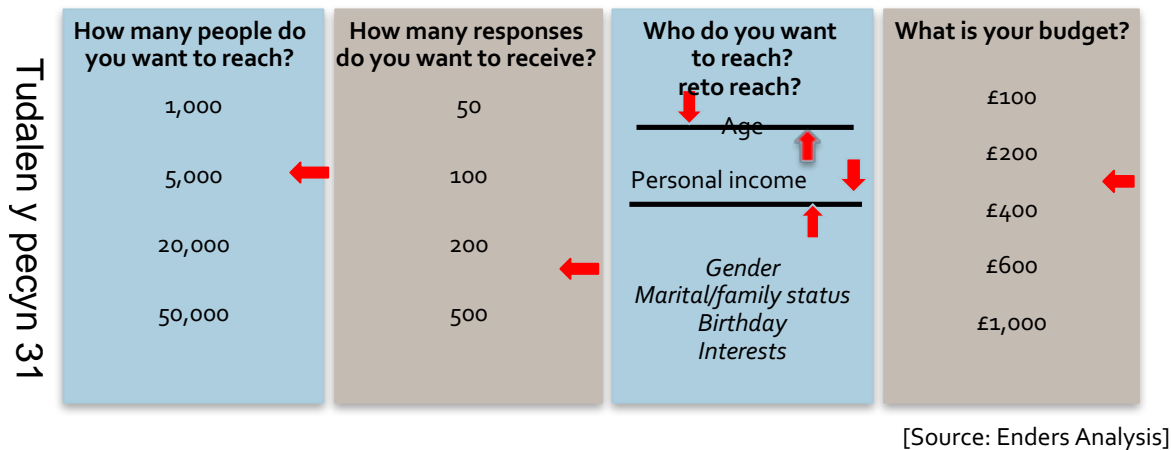


New marketing route



Self-service is critical: but with Facebook as a competitor, the solution has to be outstanding

Illustrative SME marketing administration self-service on a newsbrand local platform hub



- Local newspapers sell to circa 15% of all SMEs in their coverage area (Enders Analysis estimates, based on a range of conversations)
- This is not to say that local newspapers are on average missing out on 85% of expenditure value; but it does highlight a material gap
- Self-service is a critical means of bridging that gap
- With more native digital businesses, and fewer High Street locations, the “visibility” of sales opportunities for traditional sales teams is inevitably declining

Disclaimer

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Tudalen y pecyn 32

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Local media: new structures emerging

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16 April 2015 [2015-032]

Local newspaper circulation continues to decline precipitously, while decline in some categories of print advertising has slowed marginally

Digital traffic exploded in 2014, however, substantially outperforming the market generally, resulting in signs of stabilisation across print and digital in some marketing categories, notably recruitment and pockets of display

Industry leaders have moved beyond cost-cutting and are no longer reproducing their print products online: local platform solutions, and strategic technology and business partnerships, mean fundamentally different companies are emerging in local media

There are some hopeful signs in local media. Enormous traffic growth in the last year to 18 months provides some hints that a scale digital future at least looks a possible scenario for the most ambitious publishers. Some signs of stabilisation in aggregated print and digital advertising spend in some categories in some geographies are encouraging, even if it is far from certain that these trends will continue. A sharp downturn in the UK economy during the next few years, for example, could impose a vicious collapse in marketing commitment from Small and Medium Enterprises (SMEs). But, for now, the signals are more positive than otherwise, and our forecasts suggest total advertising decline could fall below 3% in the next year or two (though downside risks remain).

Furthermore, recent rumours that Trinity Mirror is in talks with Local World could trigger consolidation in what is still a highly fragmented, and over the last 10 years a massively shrunken marketplace. But even if this does not happen in the immediate future, developments by individual companies to rewire their businesses into local marketing platforms - often using external partners to step change the process, culture and quality of technology solutions - should accelerate companies to a more sustainable digital future.

In this report we look at the key local media trends in consumption and revenues, including advertising, but we also take the opportunity to explore how publishers are responding to structural challenges, observing that transformation strategies are creating fundamentally new types of organisation. We start by analysing the current market trends (and we provide our forecasts for advertising in figure 19 at the end of our report).

Part one: Overview of the current market

Print trends

Local newspaper circulation continued to fall through 2013/2014, albeit at a reduced rate, down -9.0% in 2014 after double digit declines in 2011 and 2012. According to our estimates, the industry now distributes 24m copies a week of which 15m are paid and 9m are free.

But at the same time fresh digital content strategies are starting to bear fruit as the four main regional news publishers all recorded significant upticks in traffic growth in 2014. Monthly global browser numbers submitted to ABC show that year-on-year traffic growth in the second half of 2014 ranged from 29% at Johnston Press to over 100% for Trinity Mirror's online regional news properties.

Figure 1: Regional and local newspaper industry KPIs

| | Value | | Year-on-year % change | |
|--------------------------------------|-------|-------|-----------------------|--------|
| | 2013 | 2014 | 2013 | 2014 |
| Circulation per annum (m)* | 1,381 | 1,257 | -9.4% | -9.0% |
| Of which UK paid (m) | 885 | 783 | -10.7% | -11.6% |
| Of which UK free (m) | 496 | 474 | -6.9% | -4.4% |
| Consumer spend (£m)* | 572 | 555 | -2.8% | -2.9% |
| Average cover price (£) | 0.65 | 0.71 | 8.8% | 9.8% |
| Print advertising spend (£m) | 1,161 | 1,075 | -7.4% | -6.1% |
| Of which display (£m) | 537 | 492 | -5.1% | -10.9% |
| Of which classified (£m) | 624 | 583 | -13.1% | -12.7% |
| Print advertising spend per copy (£) | 0.74 | 0.74 | -0.4% | 0.2% |
| Digital advertising spend (£m) | 139 | 172 | 8.0% | 23.7% |
| Digital as share of advertising (%) | 11% | 14% | ... | ... |

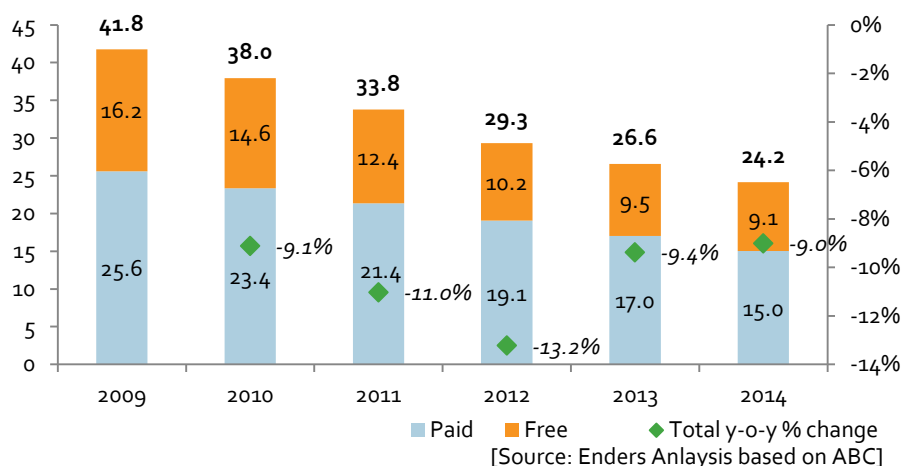
*Circulation and consumer spend are Enders estimates based on performance of titles continuing to report to ABC; average cover price is consumer expenditure divided by paid circulation per annum
Advertising spend sourced from WARC and incl. Evening Standard
[Source: Enders Analysis based on ABC and AA/WARC data]

Promising traffic growth to regional newsbrand websites is also being accompanied by improved revenue trends. Our latest advertising estimates based on WARC data for Q1-Q3 suggest digital spend on local news brands increased 23% in 2014 vs. a growth rate of 14% for total UK internet advertising spend. However, the monetisation of online audiences remains a pressing challenge as digital revenues still only accounted for 14% of local newsbrand advertising. To continue accelerating digital revenue growth and effectively compete with the search and social giants, local news brands will need to maintain their current audience growth rates while improving the targeting and general service of their digital platforms for advertisers.

Improved circulation performance in 2013/2014 has been driven by a marked recovery in free title distribution. In fact, the slowing of volume losses has been entirely dependent on publishers' supply of free newspapers as paid circulation has continued to accelerate reflecting the erosion of consumer demand for local news in print.

In 2012 we estimate that weekly circulation of free local newspapers shed 2m copies, down -17.5% year-on-year. This compares to a loss of 0.4m free copies per week in 2014. In contrast, paid circulation has now experienced three consecutive double digit annual percentage declines and accelerated to -11.6% last year.

Figure 2: Circulation per week (m)



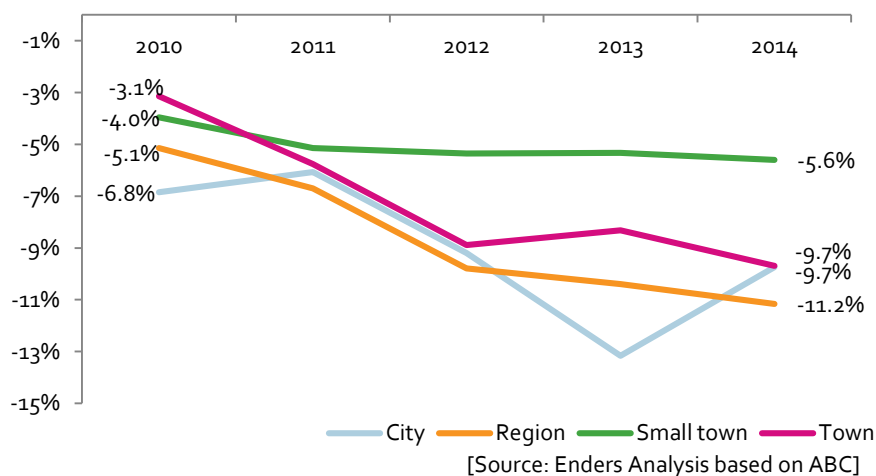
Paid print: Circulation decline across the board, revenues buttressed by pricing

This fall in demand is being felt across all paid local newspaper formats. On a like-for-like basis and excluding titles that changed frequency:

- Sunday paid circulation fell -10.4% to 0.6m copies per week
- Daily paid circulation fell -12.2% to 11.5m copies per week
- Weekly paid circulation fell -11.7% to 2.9m copies a week

Titles covering smaller geographic areas have outperformed the market significantly (see figure 3). Overall, decline is being driven by titles with larger circulations covering regions and cities such as the Birmingham Mail where circulation per issue fell -20% to 30,597 copies per issue in H2 2014 and the Express and Star where circulation fell -13% to 71,585. Publishers have continued to offset circulation falls with bold pricing strategies. As a result, local press consumer revenue has been comparatively stable, declining -8% over the 4 years to 2014 compared to a -26% decline for total advertising revenue.

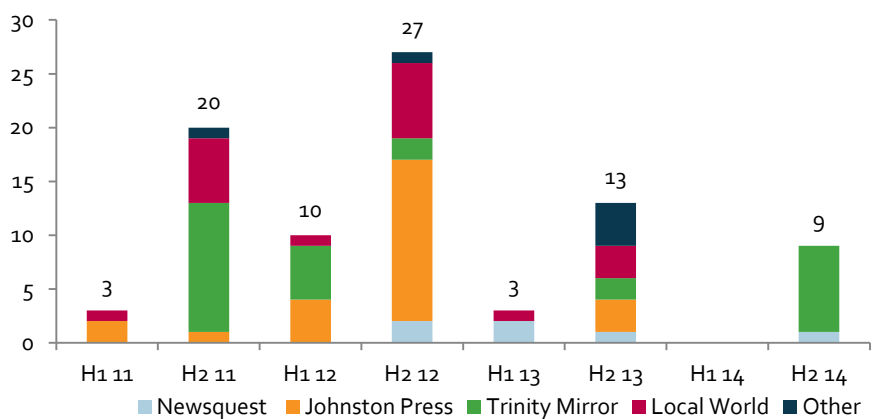
Figure 3: Circulation by geography y-o-y change (%)



Free print: Slowing of closures

Free newspapers' improved circulation can be attributed to a drop off in the number of newspaper closures in 2013/2014. After 37 closures among ABC audited titles in 2012, 35 of which were free publications, publishers have weeded out the weakest performers in their portfolios. We have identified only 9 title closures from the ABC audit for H2 2014 after Trinity Mirror announced the closure of 7 of its Surrey and West London titles in November. In 2012 we estimate that closed titles accounted for 28% of lost copies by ABC, this share fell to 8% in 2013 and 6% in 2014. Paid titles also constituted a significantly larger share of the copies lost to closures in 2013/2014. Of the 25 closures we have identified over the past two years, six have been paid titles, including Trinity Mirror's Reading Post, Surrey Herald and Liverpool Post.

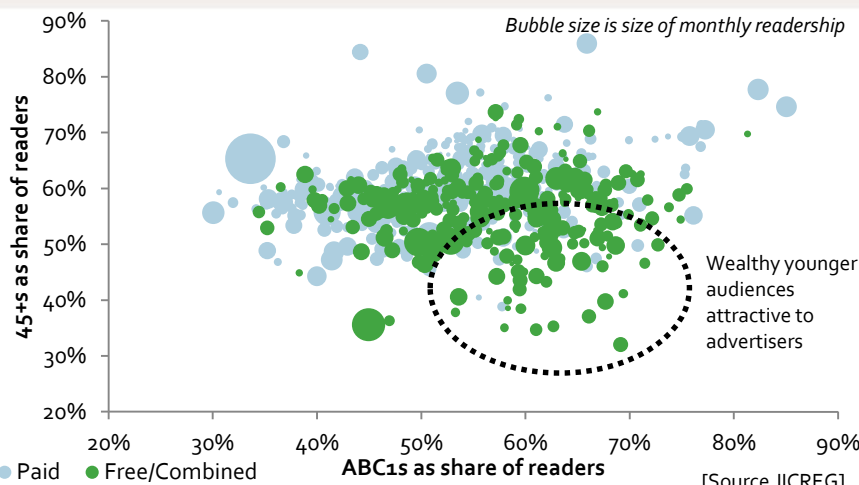
Figure 4: Title closures 2011-2014



[Source: Enders Analysis based on ABC]

The wider reach offered by free newspapers is augmented by their readership demographics which are broader than paid titles and more skewed towards the younger wealthier audiences that appeal to advertisers. Our analysis of JICREG data suggests that on average 40% of free local newspaper readers are over 45 compared to 45% of paid title audiences. The contrast is even starker in terms of socioeconomic status where 68% of free readers are ABC1 compared to 48% of paid title readers (see figure 5).

Figure 5: Regional newspaper demographics share

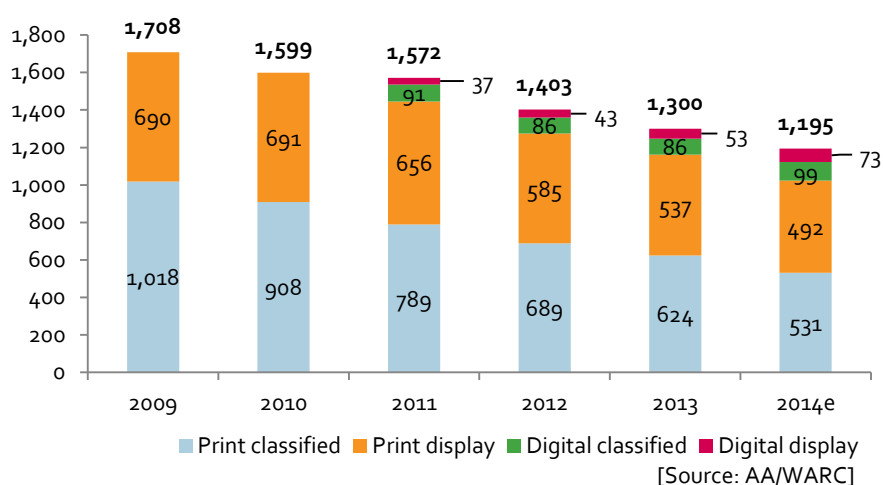


[Source JICREG]

Print advertising – revenue decline slows in improving economy

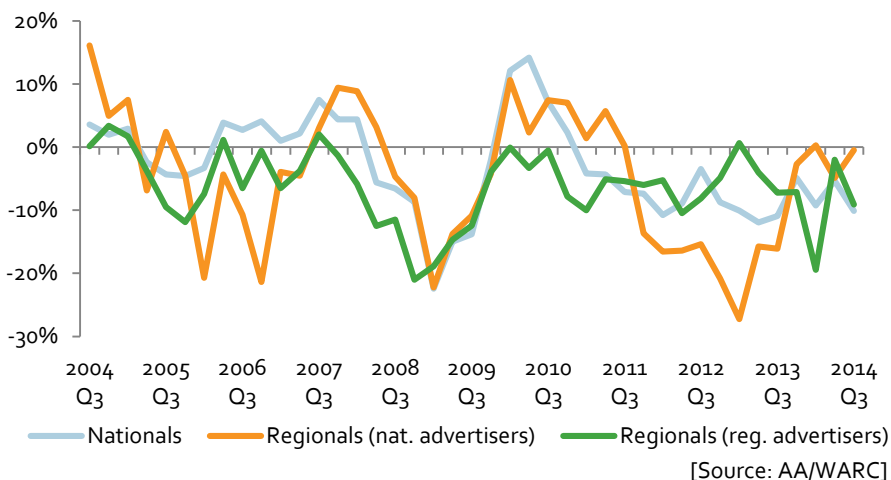
In line with circulation, print advertising revenue decline has moderately slowed, down -8.8% in 2013 and -7.4% last year compared to -11.9% in 2012, according to our estimates. We view this as primarily driven by cyclical factors; most notably a buoyant labour market which left recruitment classified revenues roughly flat in 2014 compared to a -13.2% decline the previous year. Other classified categories experienced a more minor reprieve with total print classified spend down roughly -7% for the year. The favourable market conditions in recruitment advertising enabled Johnston Press to report its first annual 'tipping point' in the company's results for FY 2014; total recruitment advertising revenue grew year-on-year with a print loss of -£0.3m outstripped by digital gains of £1m.

Figure 6: UK local newspaper ad spend (£m)



In print display, there has been a marked slowing of decline in national advertiser spend. After a -15.5% fall in 2013, spend fell -2% year-on-year in the first three quarters of 2014, outperforming the national newspaper advertising market as well as revenues from local advertisers (see (figure 7)).

Figure 7: Display ad spend y-o-y change (%)

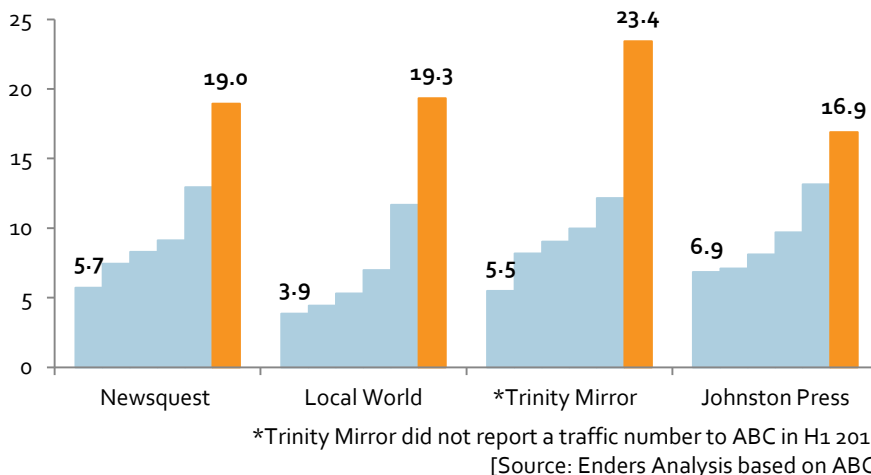


Our medium term outlook for print advertising is for the rate of decline to stay broadly constant at around -7% over the next 3-4 years in the context of a stable economy.

Digital

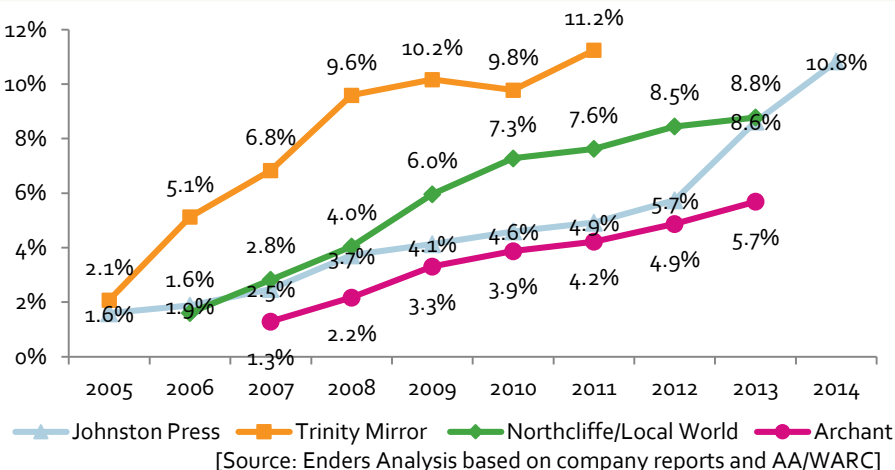
In 2014 the major publishers began to experience a significant uplift in digital traffic growth. Figures submitted to ABC show that Trinity Mirror and Local World monthly server traffic increased by 4.6x and 5.3x respectively between H1 2009 and H2 2014. Figure 15 illustrates all publishers will need to at least maintain this rate of growth in the next five years in order to provide a compelling alternative to Google and Facebook for local advertisers, but the recent growth patterns are promising signs that publishers’ digital content strategies are beginning to take effect. In this report, we predominately focus on the 4 largest local news publishers by revenue, print circulation and online traffic: Trinity Mirror, Local World, Johnston Press and Newsquest.

Figure 8: Global traffic H1 2009-H2 2014 (m)



The second problem facing these companies, as outlined in figure 9, is that converting traffic growth into significant digital revenue growth has so far proved very difficult for regional publishers. Trinity Mirror’s last reported digital advertising number for its regional news brands was artificially boosted by the inclusion of the company’s pure play digital classified businesses. Of the other three market leaders only Johnston Press has broken the barrier of 10% digital revenue share in its 2014 results published earlier this month.

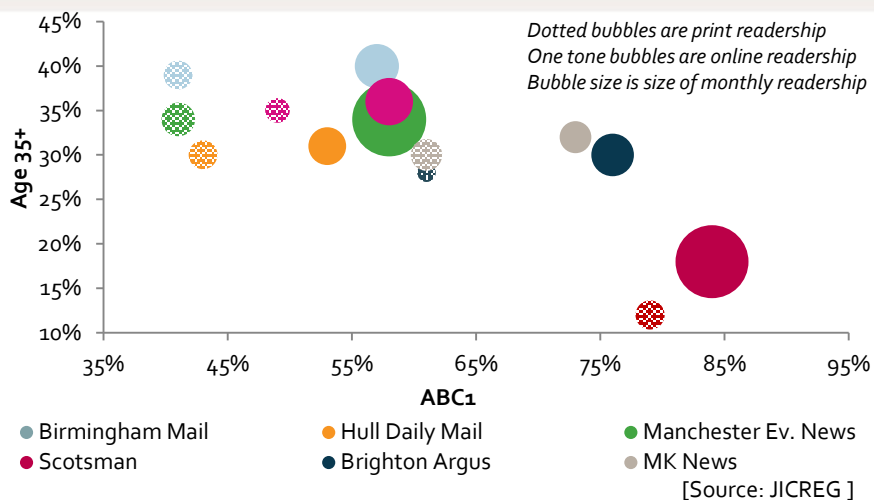
Figure 9: Digital revenue as share of total revenue



We do, however, see genuine signs of promise in the digital audience growth achieved by the four main publishers in the last 12 months and the acceleration in traffic growth is now beginning to feed into data supplied by WARC. We estimate that total digital display spend on national newsbrands increased 38% year-on-year in 2014, more than double the growth rate in 2012, and we believe that digital advertising will continue to grow at an annual rate of between 20-30% over the next three years (see advertising forecasts on p.23).

Studying a sample of regional titles in the latest JICREG readership data from October 2014 reveals that, as with free and paid print newspapers, the demographics of digital audiences are significantly more appealing to advertisers (see figure 10). Under 35s constituted 32% of digital readerships on average compared to 30% in print while ABC1s constituted 66% of online readerships compared to 54% in print.

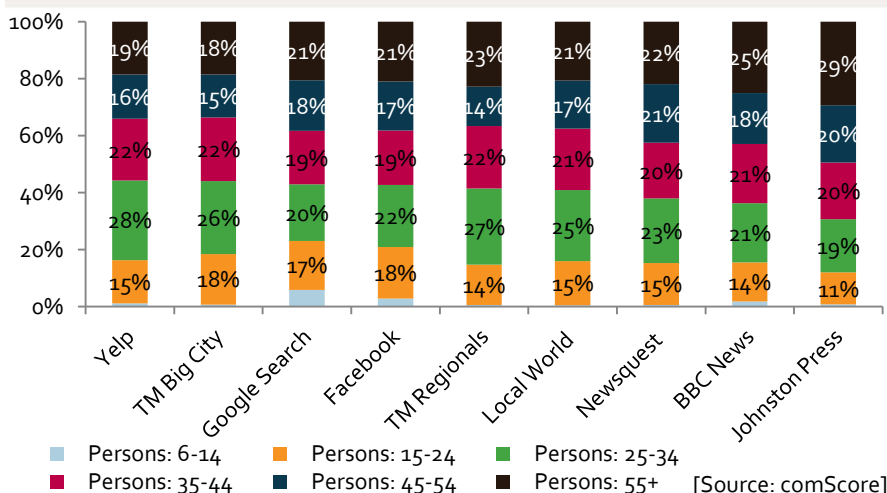
Figure 10: Online/print demographic readership share (%)



Regional newsbrands are also increasingly being consumed on smartphones and tablets although the share of page views by device varies significantly by publisher. comScore data for the UK in January 2015 shows that mobile devices accounted for 71% of page views on the Trinity Mirror city newsbrand websites while at Newsquest mobile share of page views was a comparatively meagre 33% - a telling reflection of the varying commitment of publishers' to mobile-first strategies.

When the online demographics of regional news brand audiences are compared with their main competitors for local advertising spend the numbers are also promising. comScore data from January shows the average share of traffic across the four main publishers in the 18-34 age group is 38% compared to 43% for both Google and Facebook suggesting that the lack of demand for local news in younger age groups is often overplayed.

Figure 11: UK traffic age group shares (Jan-14, %)



Market share and potential consolidation

In response to the rumoured acquisition of Local World by Trinity Mirror we have looked at company reports and industry numbers to try and piece together a rough sketch of market size and share across print and digital. The numbers in figure 12 are based on the published results of the top 4 local news publishers and include our estimates where data is incomplete or unavailable. The revenues at Trinity Mirror’s local news operations and Newsquest are particularly hard to gauge.

Trinity Mirror ceased reporting local numbers in 2012 after wrapping their national and local newspaper operations into a single publishing division. Newsquest is a subsidiary of the US media conglomerate Gannett, and broken out revenues have not been provided since Gannett’s 2012 annual report. In these cases we have relied on fairly broad assumptions to produce revenue estimates for the companies’ most recent reported financial years. For Trinity Mirror we have assumed a constant split between regional and national revenues since 2011 based on past results. For Newsquest, we have assumed total revenue growth in line with the total market for circulation and advertising revenue since 2012 and have split advertising into digital and print based on the split in the overall market and Newsquest’s share of digital traffic. Local World’s numbers are taken from the company’s reported results for the financial year ended December 2013 and are thus 12 months behind the numbers produced for Newsquest, Trinity Mirror and Johnston Press. Some top line estimates from our analysis of the Top 4 publishers’ market share:

- £820m in print consumer revenues (48% of total UK market)
- £1,614m in print advertising revenues (50% of total UK market)
- £172m in digital advertising revenues (54% of total UK market)
- Combined, Trinity Mirror’s local portfolio and Local World account for roughly £435m of regional newspaper brand revenues (25% of total UK market)

Figure 12: Regional publisher revenue estimates vs. total UK market (£m)

| | Johnston Press | Trinity Mirror | Local World | Newsquest Media | Total market |
|-----------------------------|----------------|----------------|-------------|-----------------|--------------|
| Circulation revenue | 78 | 59 | 61 | 67 | 555 |
| Print advertising revenue | 137 | 123 | 143 | 136 | 1,075 |
| Digital advertising revenue | 25 | 29 | 20 | 19 | 172 |

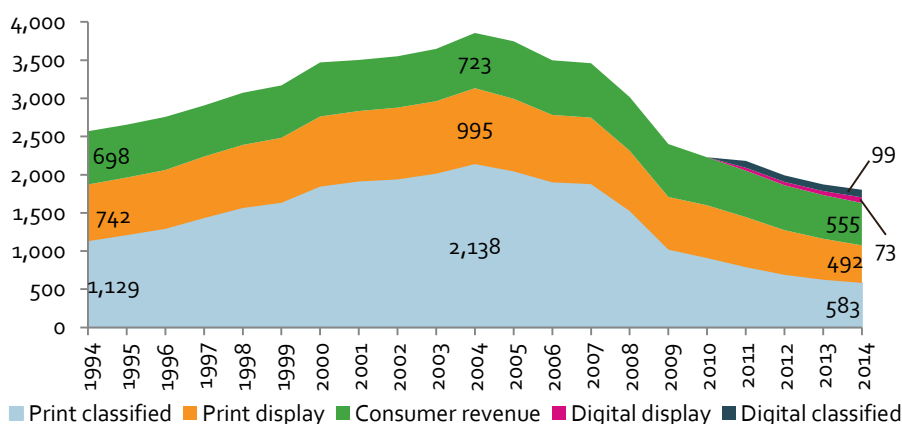
[Source: Enders Analysis based on company reports, ABC and AA/WARC]

Part two: the market challenge

Before we analyse strategic options available to publishers there is value in defining the market challenge that they face. Even today it is occasionally described as the migration of classifieds to digital—but this transition was merely an early (albeit impactful) manifestation of a much more profound structural shift.

To state it boldly: distribution rather than news has always been the local newspaper business model. Local newspapers were in effect local media monopolies, all value residing in the costly physical creation and transportation of the printed product. Circulations peaked in the mid 1950s when ITV launched, loosening the first bolts of that colossal barrier to market entry. But since the late 1990s, broadband, Google, smartphones, tablets and social media have systematically unscrewed the entire edifice, while two recessions and an increasingly urban, centralised and service based UK economy have given it a few violent shakes on the way down.

Figure 13: UK local newspaper brands revenue (£m)



[Source: Enders Analysis based on AA/WARC and ABC]

The collapse of the distribution monopoly leads to a myriad of challenges for publishers; as a result, they are fighting on many fronts simultaneously. For example, the loss of recruitment advertising to digital services was not just detrimental to revenues. There were many implications. For years local newspapers were receiving calls from SMEs and the public sector to place jobs adverts. These advertisers were typically offered a limited range of placement options and price points. This in turn determined the skills, scale and structure of the sales team, filled the newspapers with a depth of browsing content that motivated consumer demand, and created a weekly editorial and marketplace schedule. When recruitment advertising moved to digital every one of these operating assumptions was dismantled.

While recruitment is important in revenue terms, in the larger operation it is a relatively trivial example. The market challenges taken as a whole are much more complex and much deeper. Seemingly every digital trend negatively affects the local newspaper model. For example:

1. Mass “push” media is being replaced by personalised “pull” media, particularly now we have entered the mobile and social media era
2. There is a shift from generalist content provision, in bundles, to specialist services and aggregators (local is one of the few content categories that maps forward into the mobile, social era, but the execution has to be fundamentally different)
3. Platforms are to some degree replacing media: by platforms we mean a service that suppliers and users contribute to and develop
4. Effective business and service provision can be created, delivered and sustained on a much smaller cost base than ever before
5. In terms of demand, content bundles are less important for media consumption, with content increasingly atomised and consumed on a continuum, drawing from a myriad of publishers and services
6. All businesses now have many more marketing and sales channel options than in the pre-digital marketplace, replacing simplicity with complexity
7. Content and marketing (or more specifically, editorial and advertising) are either relentlessly converging (rise of native advertising and creative content solutions) or else they have been entirely separated (consumers search for properties on Rightmove)
8. Investment (from within the industry and from without) is increasingly allocated to the potential of the digital space rather than the existing revenues of legacy businesses, accelerating the supply-side trends

It is impossible in a short research paper to capture the scale and depth of strategic and operating challenges that these digital media trends throw at a local newspaper business. Almost everything such businesses were doing in 1995, and the way they were doing them, are fundamentally wrong in 2015. A manufacturing industry has moved into the service or retail sector in the blink of an eye. Furthermore, the local newspaper industry frequently talks about how the market functions today, with the unsaid assumption that today’s definitions and descriptions are somehow stable; that all publishers need to do is build an effective model for today’s technologies and consumption habits, and the job is done.

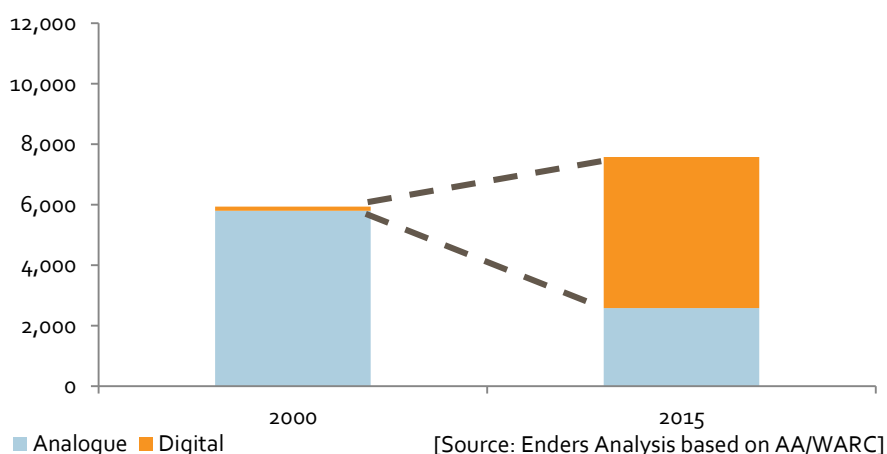
But this could hardly be further from the truth. Today’s marketplace is less stable than at any point in history precisely because the speed of service innovation and consumer expectations resulting from the development of digital technologies are accelerating, not decelerating. Print media was a fundamentally stable marketplace compared to the desktop internet. But the desktop internet was a fundamentally stable marketplace compared to the mobile one, and among the next waves of innovation will be apps and devices communicating with each other, doubtless generating new marketing, commerce, service and content business opportunities for local communities, and undermining existing businesses that do not adapt to changing circumstances quickly or effectively enough.

Next, has the competitive landscape for local media changed during this period of digital disruptive waves? The short answer to this is evidently yes; but it might also be reasonably argued that, overall, the competitive challenges thrown at local newspapers could have been even greater still. Based on experience of the last 15

years, new entrants are just as likely to fail as succeed, although some of the successes have been very big indeed.

We believe Google straddles both sides of the fence. On one side Google AdWords has generated more revenue from SMEs than many local newspaper businesses care to acknowledge. Some publishers believe local digital advertising has principally gone to Jobsite, Auto Trader and Rightmove. But we estimate that more than 200,000 SMEs are spending on average upwards of £7,000 per annum with Google, so in aggregate they are generating somewhere in the ballpark of £1.5 billion for the search giant, and potentially considerably more. And this effectively just covers the direct response or classified expenditure (see figure 14).

Figure 14: Classified ad expenditure (£m)



On the other side of the fence, over many years Google has launched and retreated from a wide variety of local initiatives, often in vertical marketplaces such as property and auto. Without local sales, knowledge, networks and authority, momentum for some types of service innovation is too slow even for a self-service and algorithm based solution as proficient and well implemented as Google.

Facebook has had considerable success with local communities and local commerce, and recent developments suggest they are increasing their interest not just in news content but in local content. We estimate more than 50% of Facebook's £510 million 2014 UK advertising income was generated from SMEs. Location but also precise consumer targeting are key to Facebook's success. Not so long ago the Exmouth Journal was the only way to target people in Exmouth. Online, this is not the case. The Exmouth Journal website has negligible traffic (according to Nielsen and comScore) and the publisher will have little data on these users beyond what they can backend from the IP address (no sign in is required). By comparison, in five minutes advertisers can place an advert targeting the 360,000 Facebook users who live within 25 miles of Exmouth, or, if they prefer, the 3,900 female Facebook users who live within 25 miles of Exmouth and have a birthday in the next seven days.

Of course publishers are developing targeting tools. For example, rather than just listing recruitment ads within their search facility (outsourced or otherwise), businesses can place recruitment ads on newspaper websites and using cookies target consumers by gender, age and income, but also by content/context. But this is not the same thing as Facebook's first party data approach (we will return to

this later). Facebook and other native businesses have deeper investment pockets and are moving much more rapidly.

Meanwhile, Facebook's initiative to host content directly on its site has started in discussions with the big national and global news brands, but will soon reach local media, providing a real dilemma for publishers. We have always considered the "local outrage" question a useful metonym for the local marketplace: if consumers go to Facebook when some local decision infuriates them, then local media have lost the battle. If consumers go to their local news website, then publishers have a chance of winning. Stories hosted on Facebook would blur the simplistic boundary we describe: share of advertising spend might be welcome, as would the audience reach, but at what long-term strategic cost?

We note that publisher backed hyperlocal and community sites have entered the marketplace with generally poor results. The Guardian pulled a local service initiative in 2011 which it had trialled in Edinburgh, Cardiff and Leeds, bargaining on the basis of these sites that a national network would be "unfeasible". Some local publishing groups have developed hyperlocal sites, and then retreated from them in waves. The challenges of building news led local advertising businesses are well demonstrated by Patch, the US hyperlocal news network. Founded in 2007 and acquired by AOL in 2009, Patch received \$300m in investment, creating more than 900 local markets, employing 1,000 journalists and soliciting contributions from 14,000 bloggers. AOL scaled it back to 600 sites, and then sold majority ownership last year, having incurred \$200m of losses over five years.

Nevertheless, thousands of startup sites have appeared in the UK, some of them are gathering considerable local traction. They tend to be small, independent businesses with limited commercial ambitions. Some of them are passionate champions of their local communities and local issues, while others are predominantly notice boards providing user reviews and/or ratings for local services. In terms of traffic, share of consumer time and share of SME expenditure, they are all competition for local publishers, albeit in a fragmented form.

TV broadcasters have also developed local media services, with both Sky and STV in the commercial sector notable for their active footprints in local news and community coverage. We consider these developments to be more of a threat to local newspaper publishers than the more formally organised Local TV initiative, which we have always strongly argued is destined to fail, at least on a sustainable, nationwide, commercial basis.

The BBC, however, is a different question, and its role in local news provision a report in its own right. At the same time the public service broadcaster is a critical player in a highly competitive and rapidly evolving landscape, and we did not want to ignore it here. Three separate developments have emerged in recent months.

1. James Harding, Director of BBC News and Current Affairs, made a speech at the February launch of a commissioned report, *The Future of News*: "In the UK, devolution and the decline of the regional press is creating a real need for local news coverage, a democratic deficit". The reports reasons: local journalism was "one of the biggest market failures in news in the last decade", and concludes the BBC should provide more local news
2. Separately, the BBC has started to pilot schemes to share stories with local newspapers and to link through to newspaper websites from BBC Local pages. The BBC has "promised to improve attribution of stories which originate in local papers and agreed to a formal audit of how many

BBC website stories originate in the local press. We have suggested other news organisations might consider covering such things as sport and courts for the BBC, we have hosted an industry event on data journalism and we are exploring joint ventures in local areas during the General Election campaign”

3. A recent Culture, Media and Sport Committee (CMS) report on the future of the BBC concluded, among other things: “the BBC should...support local media through extending the indie quota to include local news”

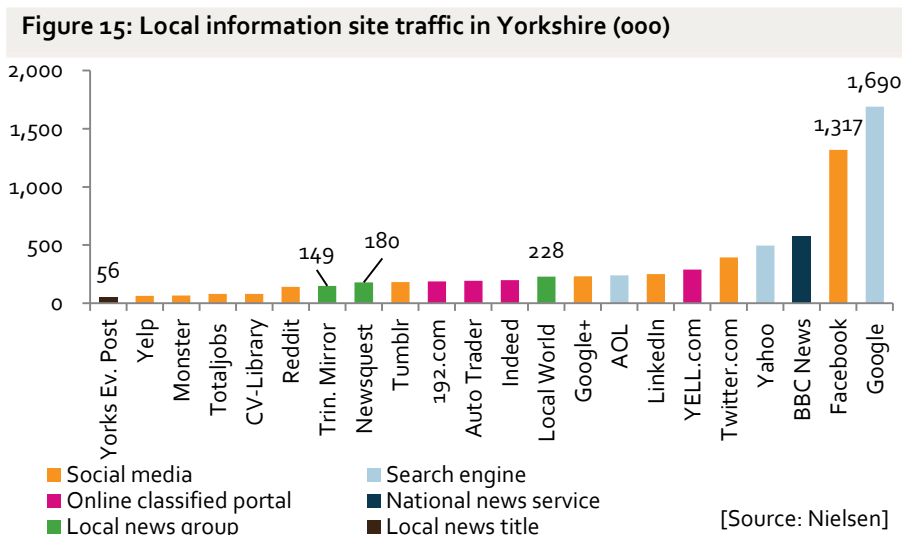
The implications of the first item above are that BBC developments could be *more* competitively threatening to local newspaper businesses, justified by the extent of newspaper closures (free titles), reduced frequency of titles (daily to weekly) and the 10 year loss of some 5,000 journalists, yet arguably ignoring or underrating publisher focus on digital investment, and in particular the rapid traffic growth of the last year or so. The BBC has long been criticised by local commercial media for filling its local radio, local online and local TV services with stories originated by newspapers. Tensions were particularly high when the BBC’s ambitions in local provision extended to a proposed local video initiative in 2008, before it was forcefully quashed by the BBC Trust.

However, both the second BBC item and CMS report suggest the BBC intends to support local media rather than more actively compete. This seems the more likely medium term outcome. Chancellor George Osborne announced in the Budget (18 March) that the Government should enter discussions with local newspaper publishers regarding tax breaks to help support the sector. The BBC’s role in local will certainly evolve in the next few years, and we consider it likely to become more entangled with local newspaper and native enterprises as it does so.

Finally on this point, while the decline in local journalists clearly has had an impact on local news provision, we do not believe publishers will reduce their content investment to the radical levels undertaken by commercial radio in recent years. Taken as a whole local commercial radio has increasingly filled schedules with syndicated, non-local content, massively reducing costs but at the expense of the breadth and depth of targeted, relevant local content. *Some* elements of non-local syndication are evidently worth exploring in the local press, but our sense is that publishers will not see this as an opportunity to save money in local journalism *per se* so much as one to reduce resources that have limited advantage being local.

In summary, publishers do not have a demand problem. Consumers still want to know what is going on locally and businesses still wish to reach consumers who are at least partly defined by location and a sense of shared community values. All the evidence suggests demand is robust. Indeed, after decades of rising disposable incomes, cheaper international travel, radically evolving lifestyles and neglected and declining town centres all of these socioeconomic trends have now moved into reverse. Local is relevant again: socially, we are becoming a *more* local nation.

But distribution has changed everything. The value of demand has been transformed. From a monopoly position newspaper publishers now compete to have a strong voice in the “noise” of available and overlapping services (see the example of competition for local traffic in Yorkshire in figure 15).



As we have previously opined, in order to move above this noise, local newspaper publishers need to try and grow their traffic 5x to 10x – and the substantial trend improvements in 2014 highlighted in Section 1 are very encouraging.

Part three: supplier options

Publisher responses to the structural challenges in the local media sector have largely been linear: publishers have reduced costs, and changed some reporting structures. There are many subtleties that this oversimplification misses. For example, some publishers have gone “digital first”, preparing content and marketing services for mobile devices, and “reverse engineering” daily and weekly print newspapers out of all that activity.

However, the majority of publishers have adapted their existing business into a digital business, and then created some reverse process elements. We consider this a subtle and sophisticated version of a *linear* response to the market challenge, rather than a deep rooted structural response.

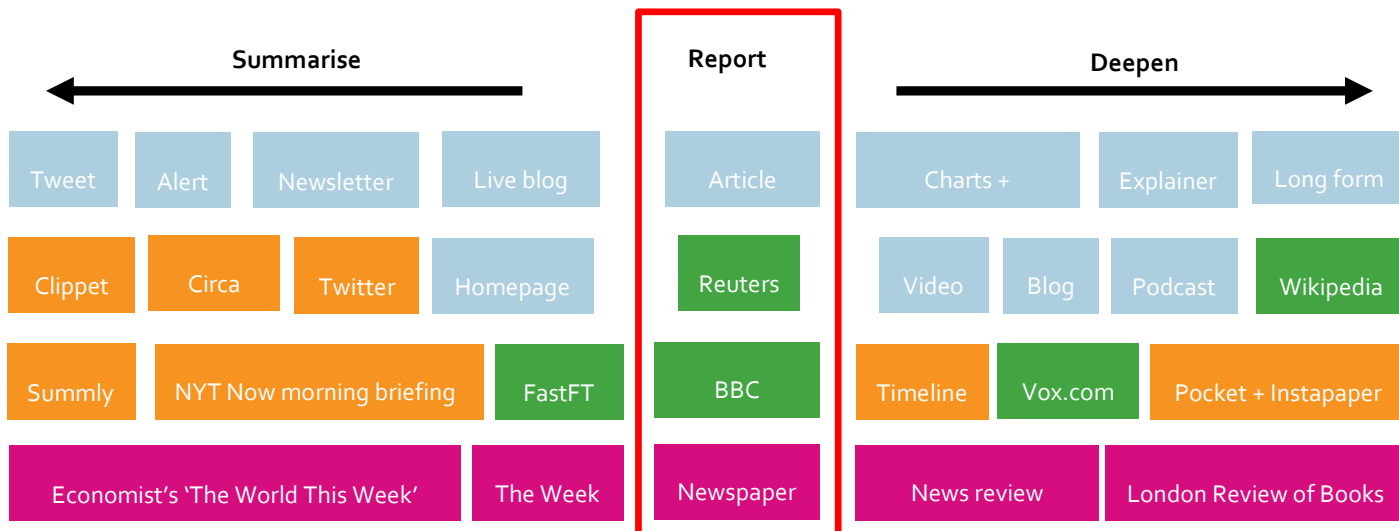
Linear responses are an optimal solution if the publisher is running the business to generate as much cash as possible in the medium term. Structural responses require more investment, damaging profit margins in the short and medium term, are a good deal more complex, are higher risk, and by their nature they are more disruptive of an existing business. (One way of thinking about a structural response is: if we wanted to destroy our current news brand tomorrow, what would we do?) For those organisations who wish to remain in the sector for the long-term, structural responses are necessary because their point is to build a sustainable service.

To put it in simple terms: local news brands have to evolve into local platforms, and build a communications, information, content and data service for local communities (citizens and businesses).

However, that is a good deal easier said than done. Distribution drives every aspect of the old model. For example: newspaper editorial content, including the length, design, tone and nature of all articles (see figure 16); how stories are treated and the timing of them; display and classified advertising, including the scale and execution of the adverts, and the range of SMEs interested in

advertising; the skills and experience of journalists; the employment infrastructure for journalists and commercial teams; the skills and experience of management; the management tools used for decision making; the very nature and frequency of management decision making.

Figure 16: Selling a news service to consumers



[Source: Enders Analysis]

David Broder, the former Washington Post commentator, defined a newspaper as “a partial, hasty, incomplete, inevitably somewhat flawed and inaccurate rendering of some of the things we heard about in the past 24 hours, distorted despite our best efforts to eliminate gross bias by the very process of compression that makes it possible for you to read it in about an hour”.

The magnitude of change from this publishing model to a retail or service model is immense and one of the critical questions is the degree to which a publisher can deliver this under its own steam, and the degree to which it needs to partner and outsource solutions. Our view is it is easy to underrate two things: the challenge of changing a highly established business culture and its focus on a 24 hour product provision; and the challenge of attracting the best technology talent so businesses can develop, and keep developing, the most relevant technological solutions.

Taking the latter point first, it is relatively easy to attract competent technology talent, but excellent developers are notoriously difficult to recruit outside of the technology sector. This is broadly understood. What is less frequently acknowledged is that the performance gap between competent and excellent technology people is a huge chasm, particularly when measured over years.

On the business culture point, changing culture from within is difficult precisely because existing management and staff are either resistant to change, or more usually can embrace only so much change: the pace is therefore almost always too slow compared to the speed of market developments.

Wholesale outsourcing of technology and transformation can enforce change to an agreed timetable and therefore create a new delivery and business culture in its wake. It is often reasoned such an approach cannot really carry the culture of a company: after all, these are just technology people writing code. But this description misses the point, even if you consider it accurate. A partnership of this nature is commonplace in many other industries including technology firms

themselves, and, when it is well handled by both sides, provides management with the tools to change company culture much more rapidly. Consider the following advantages, and it should become apparent how they effect change in the culture of the company itself:

- A service development roadmap is managed separately from company resources, in effect removing cultural issues that slow things down
- Expensive but relatively ineffective internal technology and process resources can be disposed, removing tensions between company functions and partially offsetting partnership costs
- Technology knowledge and implementation expertise is a much higher quality than publishers would be able to attract into their own organisations, even on a contractual basis
- Technology talent also keeps on top of developments in technology solutions; therefore, as the marketplace evolves so does the publisher's technology solutions
- Cost effectiveness - while major publishers (New York Times, Guardian, News UK) can afford massive tech teams, local publishers cannot
- Speed to market: rapid development deployment if/when required
- Technology solutions are not just about great code and architecture, they are also about developing efficiencies in process, automating activities where possible, creating timely and actionable data for all functional layers and management - and so on
- Technology resource can be scaled up and down as required much more efficiently than with in-house staff

Publishers have embraced substantially more outsourcing at a tactical level than they ever did in the past. They now routinely outsource a wide variety of activities, including printing, classified advertising search platforms, national advertising, advertising formats across devices, directory services and so on. But outsourcing - or partnering - at a more strategic level is still a big step for most publishers. Arguably it has taken the circumstances of Local World, a new organisation structured from traditional assets, to move from baby steps to such a transformational leap.

Northcliffe Media (DMGT's regional newspaper business) and Iliffe News and Media were sold into Local World in 2012, with shareholders including DMGT, Iliffe, Trinity Mirror, Odey Asset Management and Artefact Group. The company was valued at £100m. Launched with a paired back HQ and management team, Chairman David Montgomery described the spirit of Local World: "It will be unencumbered by the infrastructure of the industrial past such as property, printing presses and large scale distribution or any legacy issues such as high levels of debt." It therefore had opportunities to invest, and budgeted £10m for tech development from the outset.

Local World's vision to transform from a manufacturing to a service organisation generated two challenges. First, the company would have to access technical specialists to compete with global advertising giants like Facebook and Google. Second, Local World would have to run its IT function both more effectively and more efficiently. Management met with 10 consultancy firms and appointed Cognizant Technology Solutions. Cognizant provides IT, consulting and business process services and was selected essentially on the basis of one criterion: its high quality technology team. This team is tasked not just with delivery

of managed IT services, but creating all the tools and services that bring the new content and commercial strategies to life.

There is a world of difference between tactical outsourcing of discrete cost lines or revenue streams and collaborative outsourcing at a strategic level. Strategic partners work through the outsourcing options with companies and the configuration of the outsourcing. Strategic roles are always retained in the organisation.

Functions that local newspaper publishers would review cover both managed IT services and also those which would not be recognised as the key digital transformation elements. Our list here is not comprehensive, but is designed to demonstrate the breadth and depth of the collaborative process:

| Managed IT services | Digital transformation |
|--------------------------|------------------------|
| Service desk | Content |
| Data centre and networks | Advertising sales |
| Advertising system(s) | Commercial activities |
| Production | Digital projects |
| Editorial | Mobile |
| Finance | Web, social |
| Business applications | Analytics |

Publishers and the industry have many options, but outsourcing on this scale can accelerate the cultural transformation necessary to run a very different business model. In the meantime, it provides a clear illustration of the breadth and depth of the change that management need to achieve, whatever implementation approach they favour.

Emerging content models

Put simply, a local platform hub is a publishing model that the news brand controls, but which any registered user can contribute to. The publisher has editorial authority. News is an important category of information because news is change, which in turn affects search and social media and can drive targeted alerts. But a database is also critical. So, a trivial example: the Horniman Museum in Forest Hill in South East London has been a family attraction for decades. Occasionally it makes the news, perhaps when a major exhibition opens or a famous donor provides funding. But for the vast majority of the time its activities are not newsworthy, they are merely process.

If a consumer types Horniman into Google the museum site will be returned, and, very occasionally, the news brand site will be returned. But the local content platform should *always* be returned, because it knows everything about the Horniman: it knows every exhibition it has ever run, every donor it has ever had, its opening times, its history, its management team, the number of visitors it gets per annum, its most famous exhibits. The local platform has to be the Wikipedia of its community, not just its news service, and just as a Google search for an actor invariably highlights the Wikipedia page, so the local platform should be returned whenever a local personality, business, landmark, school, hospital, train time, golf course, shop, councillor - and so on - are searched for. Therefore, the technology and data architecture of local platform hubs, and content taxonomy and tagging, are all critical skills in this new business environment.

Location is also critical. With more than half of usage coming from mobile devices, and the proportion certain to grow, relevant segmentation and use cases need to be rigorously developed. The whole service should be built around the user's primary location, and provide a degree of content personalisation. Perhaps one page is a map, with every user's home at the centre of it, and all relevant content highlighted geographically. That page could be a personal homepage that alerts consumers when they check their phone first thing in the morning. "Local" has a wide variety of meanings and related use cases, but we believe there are three broad ones: nearby; community; and front door (for deliveries). Every element of the content (and commercial service, which we look at in our next section) can be developed in relation to these top level use cases.

Mobile is crucial. We estimate 75% of traffic to local digital services will be on mobile devices in the next two to three years. Notifications and alerts are evidently tools that drive traffic very effectively, but using these to link to long articles may be missing the point. It may be important to link to very short summaries (and then to longer articles as desired) or even very short videos. Local platforms need to understand how users engage with media on mobile: the content flow has to be fast (brief) and it has to be eminently social. Even BBC1's flagship Ten O'Clock News recently featured iPhone footage of delays at Heathrow.

All publishers are using the community as content contributors to a greater degree than ever before, and some have set ambitious targets around the scale of such contributions. Platform models - such as eBay, Etsy and Wikipedia - are by definition open to multiple users, and local media hubs should adopt the same publishing logic. After its launch Local World's David Montgomery spoke of a "truly digital" future in which journalists become "harvesters of content" and much of the "human interface" involved in the current publishing model disappears.

Newsroom 3.1, a 2014 Trinity Mirror initiative at its North East office (Newcastle Evening Chronicle, Sunday Sun and The Journal and Teesside's Evening Gazette), is arguably a less radical version of this approach. New roles such as Social Media Editor and Newsroom Planning Analyst were implemented in an editorial structure designed for planning and process rather than reaction. Editorial authority remains important, but it is not solely applied in a broadcast mode; its influence is more decentralised. A single top-down editorial approach is no longer the correct – or only correct – operating model. Nevertheless, curation and judgement remain critical.

Montgomery hosts a conference call with Local World's editors every weekday morning, reviewing each print and digital business, its editorial decisions, and the traffic being achieved. The goal of this meeting is to spread best practice by encouraging teams to emulate the values of the most successful content, and to avoid some of the mistakes of the least successful content. Such discussions focus on a huge range of editorial criteria such as timing, tone, positioning, layout, use of photography and other qualitative judgements: anything that would appear to influence the relevance and appeal of content for local communities (and, in a number of circumstances, a much broader audience too).

Key to the future of local platform hubs is a shift in editorial and journalistic mindset. Over a period of three decades local newspapers have arguably delivered on a promise of editorial independence at the expense of other relevant missions. We realise our thinking here is controversial. We are absolutely not arguing that local newspapers should ignore local council corruption or that its journalists should be paid to write positive copy about companies. However, what we *are*

arguing is that local newspapers should unashamedly champion their community and their towns and cities. Too often we suspect a relentless focus on editorial independence has led to a negative, combative tone that is counterproductive for a local media platform.

Local media platforms will need to celebrate local businesses, local personalities, successes large and small. Since its relaunch as a free title under Lebedev Holdings the Evening Standard has become substantially more of a champion of London than in the years prior to its sale. It is a campaigning media brand on behalf of a wide range of causes including the capital itself, rather than a neutral bystander as likely to knock the city as support it. Similarly, Hull is to be the 2017 UK City of Culture, and the Hull Daily Mail was a forceful champion of that outcome and its Editor Neil Hodgkinson is on the board overseeing the city's 2017 activities.

Overall, local platforms will have a life of their own, and not everything can be precisely planned or controlled. Nevertheless, in terms of in-house skills, platforms will need good content managers who can aggregate blogs, video, user-generated content, social media. They will also need data analysts who can track usage and prioritise service developments. Human interest stories will become more important. There will be objectives to find and promote local celebrities. More syndicated content for everything that is non-local will be developed by the large publishers, and perhaps an industry-wide solution would be the most cost-effective. Editing will be less top-down, more decentralised, but essential for strategy, leadership, curation and judgements. Editors will be the public face of the business- arguably closer to their role 100 years ago than they have been in recent times. Journalists - of which there will be fewer - will be promoted as stand-alone brands within this complex network of activity.

Emerging commercial models

The new business model is predicated on a shift from anonymous to known consumers. To put this model in place publishers need to have an engagement funnel, from anonymous, occasional visitors through to registered, regular users. We remain doubtful that large volumes of registered users will pay for access to a local platform, but it is not impossible to envisage the long-term development of a range of benefits some of which can only be realised by paying members. Our point is that the funnel will not just have two options (non-registered and registered users) but many options, from entirely free usage, through registered-user only content and services through to paid membership services.

Gathering consumer data is critical so that the platform evolves into an effective marketplace for every SME, public sector office and business in the community. In discussions with various local and regional publishers over the last year we have established that local sales teams are typically reaching about 10-15% of the SMEs listed within a relevant area (based on Office of National Statistics data). The sales system built over many decades was for repeat customers and inbound calls (recruitment, for example) rather than an outbound operation. Furthermore, newspaper businesses have always been surprisingly inflexible in the marketing opportunities they have offered. Customers have had to fit into a limited template of options, rather than buying what they want.

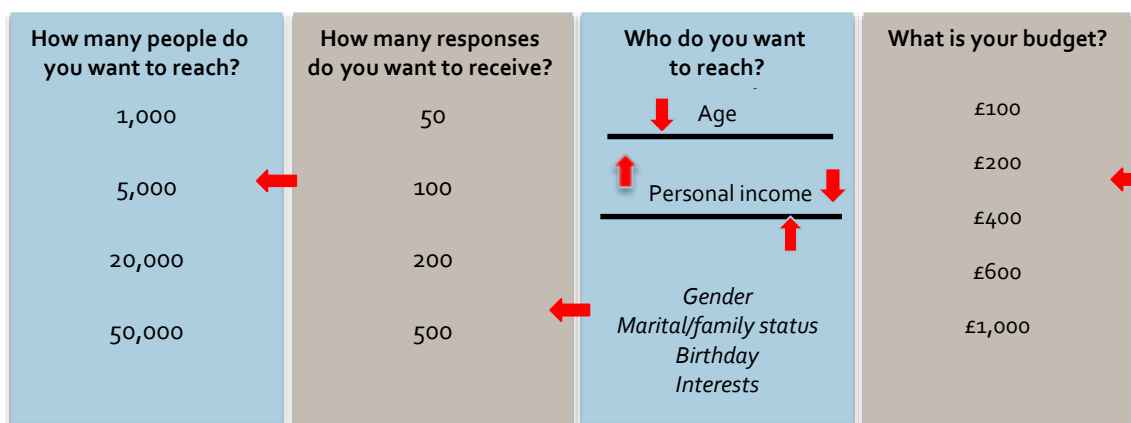
The local hairdresser does not necessarily want to take out a display advert in a local newspaper. S/he wants to fill his/her salon on Monday mornings when all too often it is empty. There may be a variety of ways to achieve that outcome: email

campaigns, discounting vouchers, targeted mobile and desktop display. There may be other marketing challenges and objectives that require SMEs to develop their search engine presence or social media strategy.

Therefore, the local platform solution has to be both entirely flexible, and also self-service. Some publishers have suggested to us that SMEs do not really want self-service but we estimate that in 2014 Google, Facebook, Auto Trader, Rightmove and Zoopla generated well over £2bn from SMEs. Local platforms need to have an integrated back-end administration system for SMEs that is based on key use cases and is as intuitive as the consumer front-end (see figure 17).

Figure 17: SME marketing administration (illustrative)

Illustrative SME marketing administration self-service on a newsbrand local platform hub



[Source: Enders Analysis]

Facebook, which generates nearly £300 million from SMEs by our estimates, has a huge advantage over traditional media because not only does it have access to good consumer data, but it is first party data. Some 34m UK adults access Facebook, and while the depth of data collected on consumers varies substantially, the density of usage, engagement (more than 20% of time online in the UK is on Facebook) and structured data is extraordinary compared to that collected by other media. Targeting data generally has become a sophisticated industry in recent years, but nothing is ever as valuable as rich first party data. This is why we are in no doubt that publishers need to consider the value of registrations and membership, even if they have decided they will never develop subscriptions.

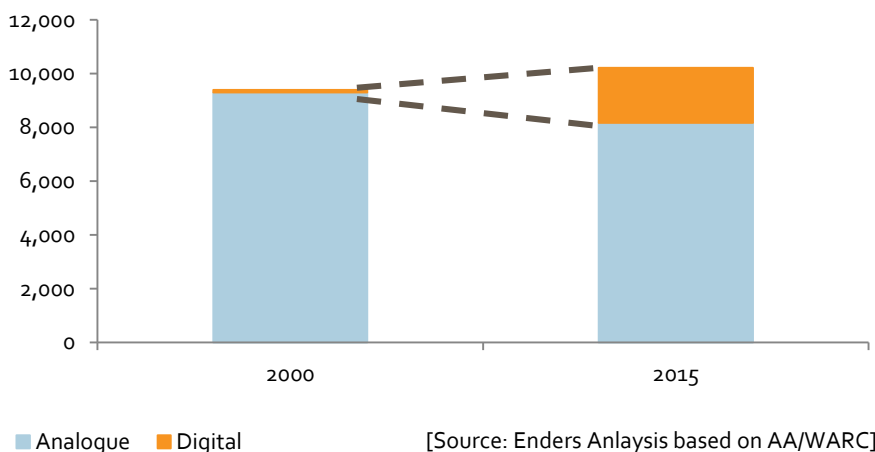
A fully evolved self-service infrastructure means sales teams have increasingly to be experts at upselling, targeting and educating new segments, in an effort to attract the missing 85% of SMEs that are not today using local publishing media.

In parallel, as physical newspapers retreat we believe a huge gap in the marketplace has opened up for local display marketing. Other traditional media options are relatively unchanged: outdoor and TV have marginally improved, with more digital inventory available and new options such as Sky Adsmart, sold locally by Johnston Press. Radio continues to be important for some objectives and organisations. But broadcast TV remains onerously expensive for many businesses and irrelevant for their marketing objectives.

However, digital has *not* replaced newspapers for display in the local media landscape. Digital display is still a relatively small part of the total display advertising marketplace (see figure 18), and Facebook clearly offers the most

effective option at present. But Facebook, and programmatic display advertising more generally, do not provide a solution for SMEs who want to market in an appealing and relevant quality local content environment (we touched on some of these issues in our advertising report, [Context is Queen, the value of media environment \[2015-019\]](#)). Businesses want to market themselves, they want to build their reputation, and local media platforms provide the best environment for them to achieve that. Not all communications are about direct response; and consumer ratings have not eliminated the need for businesses to deliver confident, controlled messages about themselves on a platform in which consumers are positively engaged by local content.

Figure 18: Display ad expenditure (£m)



We believe a local platform would stimulate SME display spend, provided it delivers six things:

1. Huge reach (penetration) of the local market
2. Density of usage- commensurate with Facebook usage
3. Ability to segment, and target relevant users according to a wide variety of criteria- deep data on users
4. A broad, highly flexible and easy-to-use range of marketing options
5. User-friendly self-service administration system that translates objectives into techniques, and measures marketing performance on simple dashboards
6. Editorially, the platform is a passionate local champion (though editorial independence remains core)

Commercial teams need the tools to segment and prioritise all plausible advertisers by business type; provide multiple and flexible marketing use cases to each segment; and to enable back-end performance optimisation tools to businesses. The platform needs to be effective – the sales teams have to be comfortable being measured on transparent performance metrics. And that is why it also needs to demonstrate that it is effective, and that through careful campaign manipulation that marketing solutions can always be further improved.

Arguably, the most optimal solution for the industry would be to develop a *nationwide* local platform. The biggest challenge to this innovation would probably be publishers themselves, who may still prefer to develop and own solutions rather than collaborate on a shared platform to compete with Google and Facebook.

However, effective national development in this way could make the local media attractive to national (and global) brands again. Mediaforce 1XL is a step in that direction, but it is a small step compared to an integrated local platform for the UK as a whole: that would be a very attractive option for national advertisers to reach audiences with exactly the right message at exactly the right time in exactly the right environment.

Many non-local publishers are positioning their digital services as trading platforms, and a nationwide local programmatic trading platform could be an astute, and strategically important long-term investment for the local press sector as a whole. Furthermore, it could help put local platforms on the front foot, by letting them focus on the key measures and attribution models preferred by SMEs and national brands, rather than those supplied by Facebook, Google and the agencies. Likewise, native and content marketing solutions for SMEs could arguably be better served through a centralised industry solution.

As mentioned above content syndication innovations - non-local features for print newspapers - may also work more effectively as an industry-wide solution, rather than as a series of individual publisher solutions. Consolidation in the marketplace could accelerate the industry towards such outcomes.

Publisher business models are shifting from two revenue streams to multiple revenue streams, though consumers, SMEs and the public sector remain the contributors. Many publishers already have myriad revenue streams, but the proportions of revenue will become materially much more mixed than they are today and than they have been historically. The advertising revenue bucket will dramatically change, with publishers increasingly providing marketing solutions for SMEs, only a small – and declining – proportion of which will be traditional advertising. In this outline, we are not limiting ourselves to service solutions such as Johnston Press's Digital Kitbag (for search ending marketing, website builds, and such like). Local platforms will be protean, learning from SME demand and marketing effectiveness, and continuously improving the services on offer.

Revenue streams will include:

- Audience targeted emails
- Location based alerts
- Sponsored editorial
- Creative content
- Search Engine Optimisation and Marketing
- Sponsored live events
- Membership access, offers, events
- Display advertising
- Mobile advertising
- Websites and mobile sites
- Direct response messages
- Video advertising

Sizing these various opportunities is difficult, but no different from forecasting the revenues of most native startups. However, traditional analysis of the local newspaper market tends to focus on the transition of audience expenditure and category advertising expenditure from print to digital. On this basis, it is hard to see how revenue can go anywhere but down. Johnston Press has recently highlighted that some advertising categories, aggregated across print and digital,

have now stabilised; this is encouraging, but the thinking undervalues the opportunities for local media platforms.

One of the reasons that recruitment advertising is stabilising for local newspaper publishers (aside from a fairly strong economy and a reasonably confident jobs market) is that their recruitment services are moving up the value chain, closer to the HR function of SMEs: they are evaluating CVs for businesses, and sending on a shortlist of the best candidates. A large proportion of the revenue opportunities listed above have historically been pursued on an ad hoc, rather than a systematic, basis. Some of the revenue streams were evidently impossible in a pre-digital world. Because as a rule of thumb commensurate digital advertising expenditure is discounted 80% compared to print, we think of digital platforms as being tiny businesses. But digital is also a far larger playground than print. Today, commercial teams are not only failing to reach 85% of SMEs in their regions, they are also failing to provide full service flexibility for 100% of them.

Local platform hubs should not be competing for the established few billion pounds of advertising spend by SMEs, but for a cut of the entire marketing, PR and even technology spend of all SMEs and a smaller cut from national brands. In total this is a huge pot, many times the magnitude of the UK's advertising spend. It has grown well beyond the level of inflation for the last decade, and should continue to do so for the foreseeable future.

Figure 19: UK local news brands advertising expenditure and forecasts

| | 2013 | 2014e | 2015f | 2016f | 2017f |
|--|------------|------------|------------|------------|------------|
| Local news brands advertising expenditure (£m) | | | | | |
| Print display | 537 | 492 | 462 | 434 | 407 |
| National display | 165 | 161 | 154 | 148 | 141 |
| Local display | 372 | 331 | 308 | 286 | 266 |
| Print classified | 624 | 583 | 547 | 511 | 475 |
| Recruitment class. | 103 | 103 | 101 | 98 | 93 |
| Non-recruitment class. | 521 | 480 | 446 | 413 | 382 |
| Digital display | 53 | 73 | 95 | 118 | 142 |
| Digital classified | 86 | 99 | 111 | 120 | 131 |
| Recruitment class. | 55 | 67 | 77 | 84 | 93 |
| Non-recruitment class. | 32 | 33 | 34 | 36 | 38 |
| Local news brands advertising expenditure (year-on-year % change) | | | | | |
| Print display | -8% | -8% | -6% | -6% | -6% |
| National display | -16% | -3% | -4% | -4% | -5% |
| Local display | -5% | -11% | -7% | -7% | -7% |
| Print classified | -9% | -7% | -6% | -7% | -7% |
| Recruitment class. | -13% | 0% | -2% | -3% | -5% |
| Non-recruitment class. | -9% | -8% | -7% | -8% | -8% |
| Digital display | 24% | 38% | 30% | 25% | 20% |
| Digital classified | 0% | 15% | 11% | 8% | 9% |
| Recruitment class. | 5% | 22% | 15% | 10% | 10% |
| Non-recruitment class. | -7% | 3% | 4% | 5% | 7% |

[Source: Enders Analysis based on AA/WARC]

About Enders Analysis

Enders Analysis is a research and advisory firm based in London. We focus on the media, entertainment, mobile and fixed telecoms industries, with a special focus on new technologies and media, and we cover all sides of the market, from consumers and leading companies to regulation. For more information see www.endersanalysis.com. Contact us at info@endersanalysis.com.

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News brands: Rise of membership as advertising stalls

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Brief overview

Print

National quality newspaper print circulation decline has slowed on the back of an extraordinary newsflow in 2016, and because the structural transition to mobile has largely been absorbed

However, popular press decline has continued to be the main driver of total circulation falls as smartphone adoption for these demographics has been in full flow since 2013. This matters because it has helped accelerate the structural shift in newspaper advertising to digital advertising: advertiser and agency sentiment and trading have rapidly shifted (with quality titles suffering every bit as much as popular titles)

Saturday and luxury (magazine supplement) environments are substantially outperforming print media – a trend we believe will become more accentuated as time goes on

Print is still substantially the most attractive solution for immersing readers in news and features, a consequence of the disconnected device and inherent serendipity of its layout and package. As membership models develop publishers will invest more in designing and enhancing their tablet and mobile services

Digital

News brands are losing market share to the tech and distribution platforms – we estimate 90% of UK digital display growth in 2016 was on Google and Facebook. As with print, high end, luxury and well-differentiated media are best placed

Services that can track users across devices will be particularly well placed over the next few years, as brands shift their attention from reach to targeting and attribution, enhanced by immersive engagement

Rise of member and subscription services

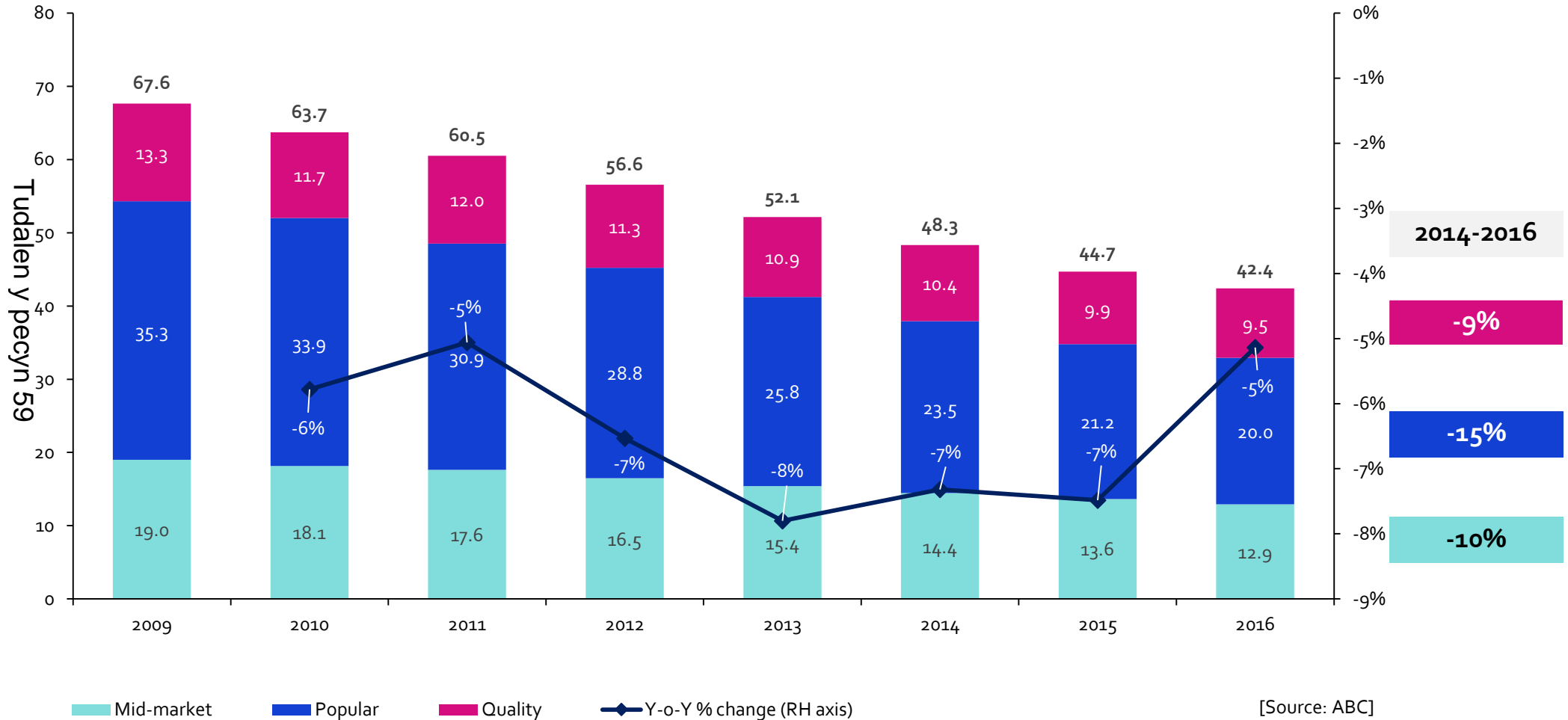
The rise of member and subscription services will diverge the marketplace: quality, immersive, partially closed experiences with membership fees; and open, scale services largely reliant on digital advertising

However, publishers are notoriously poor at *service*, undervaluing both the need to develop a holistic experience mindset (integrating data, design, tech and marketing) and the complexity and costs of deploying retailer skills effectively across the organisation

National newspaper circulation trends: qualities stabilise, as decline transfers to the popular press

As decline in newspaper shifts from the high-end, low-volume quality press to the popular and mid-market press the aggregated decline in volumes has increased, producing inevitable challenges to the economics of physical wholesale and distribution

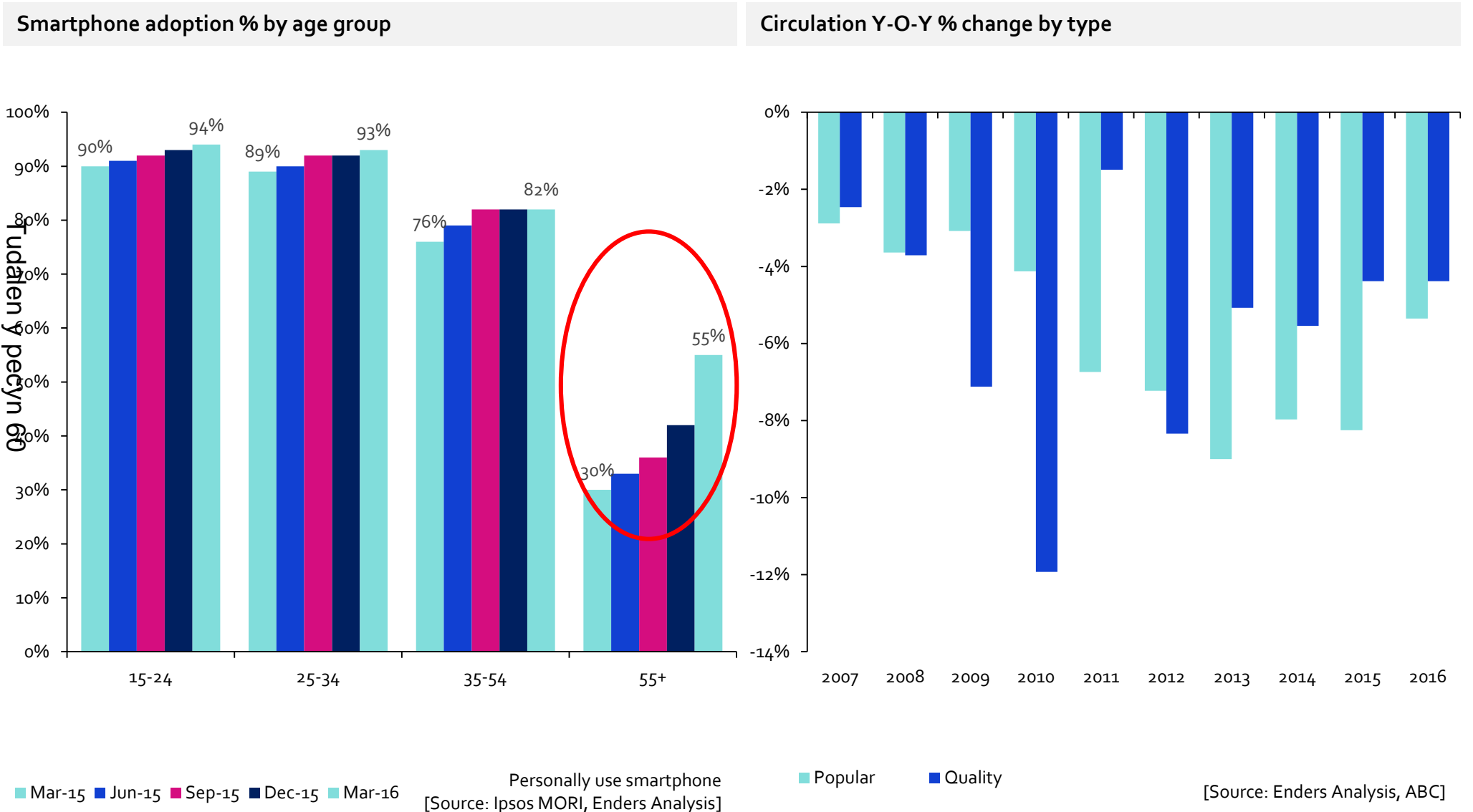
National newspapers circulation volumes per week (m)



[Source: ABC]

Smartphones are a critical driver of circulation decline

Smartphone adoption among the over 55s has grown exponentially since Q1 2015, and has been the main driver of decline in demand for daily print

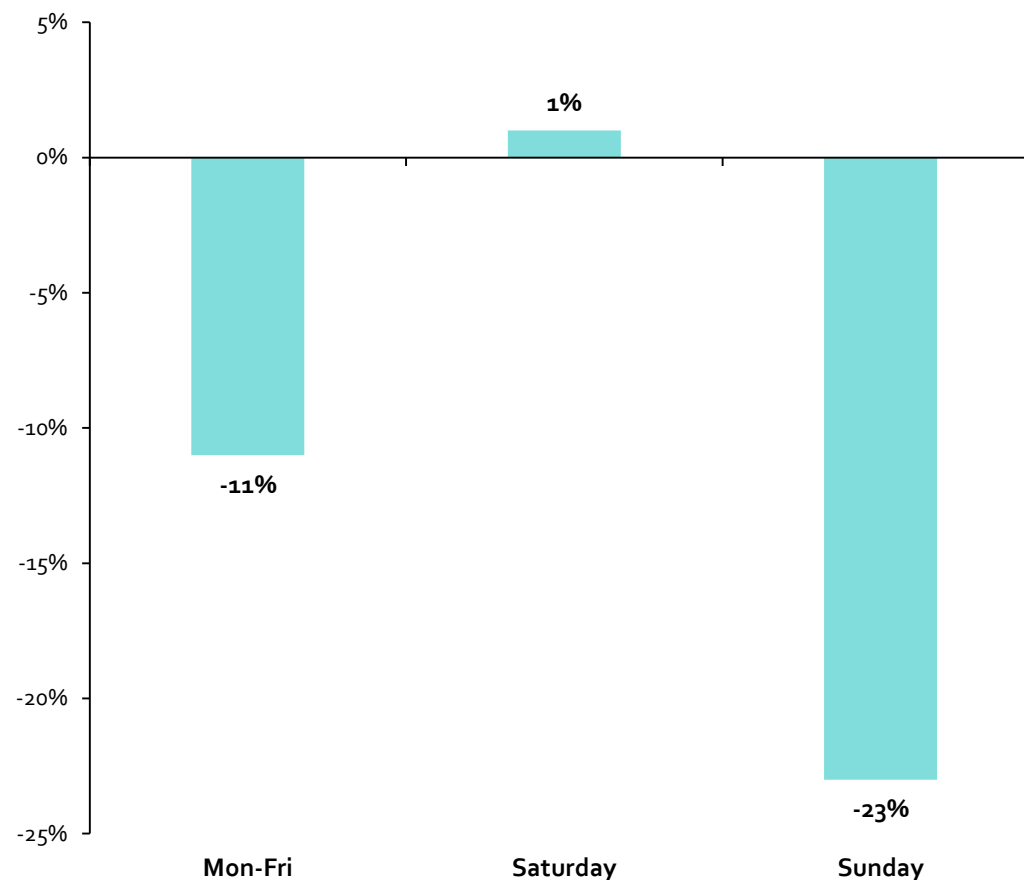


The clear weekly trend: Saturday wins

- Erosion in daily newspaper purchasing is well understood, but the weekend market is changing more dramatically. Quality Saturday titles are very steady, while Sunday titles have fallen substantially. Sundays are turning into “just another day”, and the weekly digest – a very successful format in print – sits more comfortably at the start of the weekend than the end
- Greatest resilience in print news media – such as The Economist, the Weekend edition of the FT, The Week – provide weekly digest/commentary in a trusted brand package, which is a highly relevant print product in a 24/7 news environment. Content that is not replicated anywhere online – Private Eye, for example – is relatively rare and also outperforms print media trends

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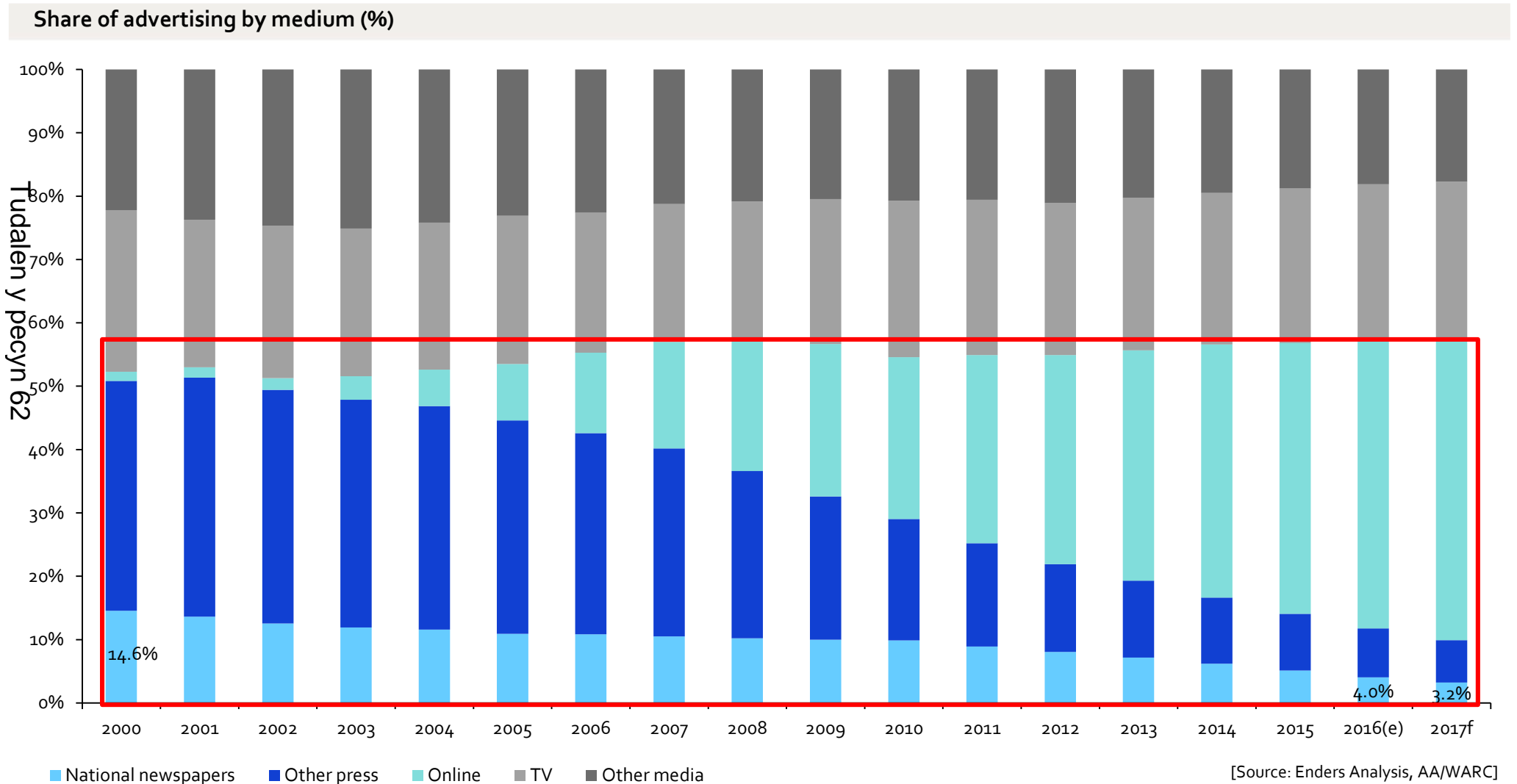
Sales volume growth, UK national quality press , 2012-2016



[Source: Enders Analysis]

Press to online advertising substitution is *very clear and accelerating*, with other media steady

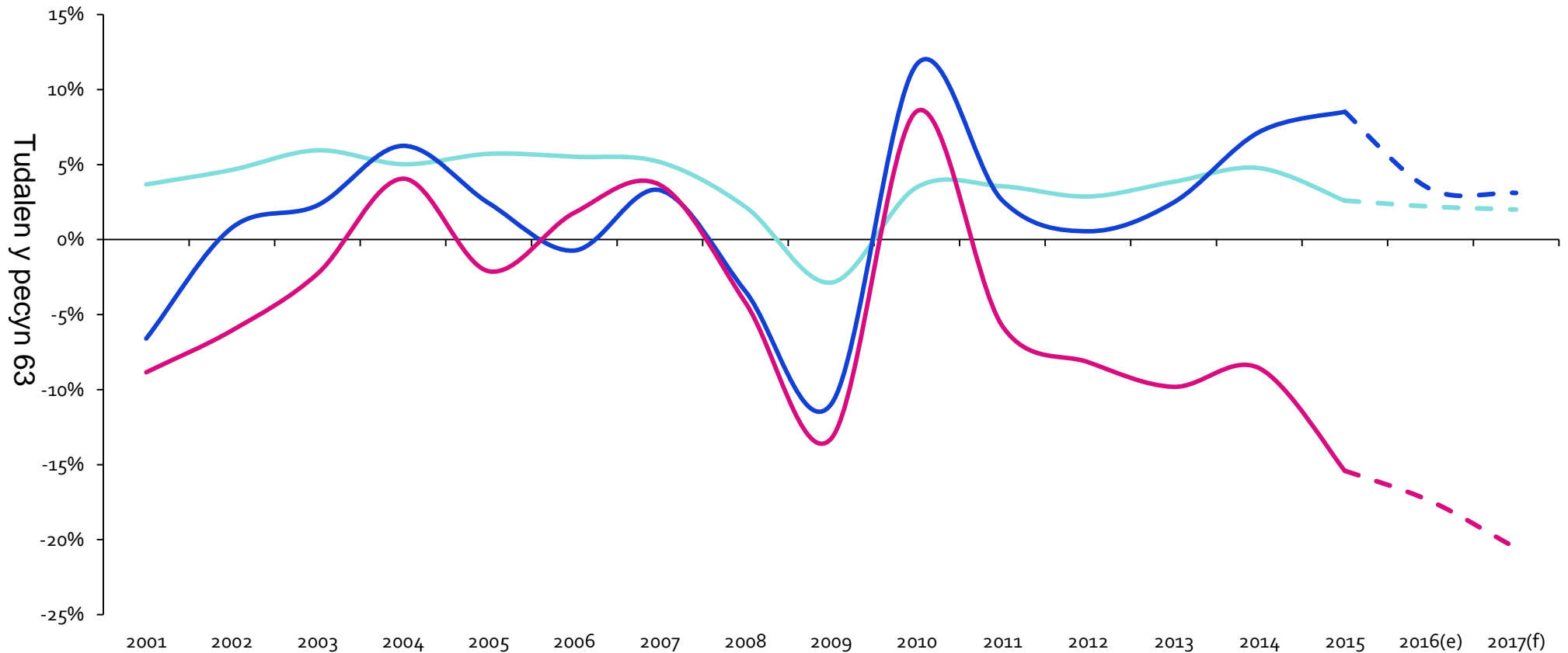
Substitution has been brutal: the growth of digital advertising has largely been at the expense of print media. For the first 10 to 15 years of this trend it was largely a story about print classifieds moving to general and specialist search (Google, Auto Trader). In the last two to three years, it has increasingly been a story about print *display* moving to digital platforms



Advertising trends in newspapers are equally challenging

Print display advertising decline accelerated substantially in 2015, then again in 2016: a structural decline which has been decoupled from steady growth of consumer demand, and counter to what has been a highly resilient advertising market generally, with TV, outdoor and most other media performing well

Nominal UK display advertising, national newspaper print display advertising and GDP (Y-O-Y % change)

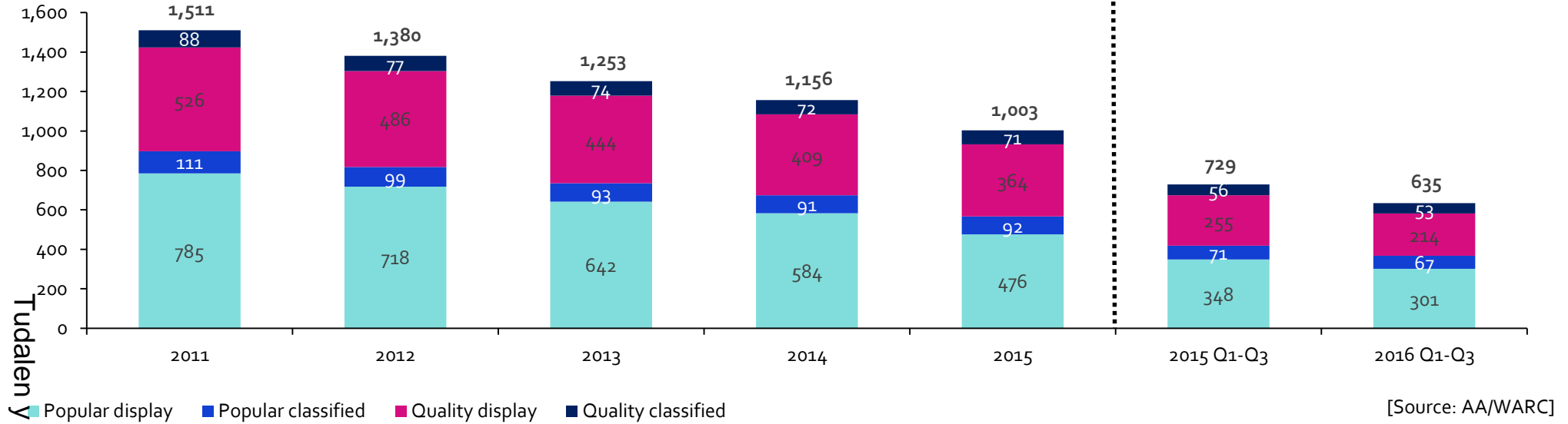


— GDP growth — Total UK advertising growth — Total UK national newspaper print advertising growth

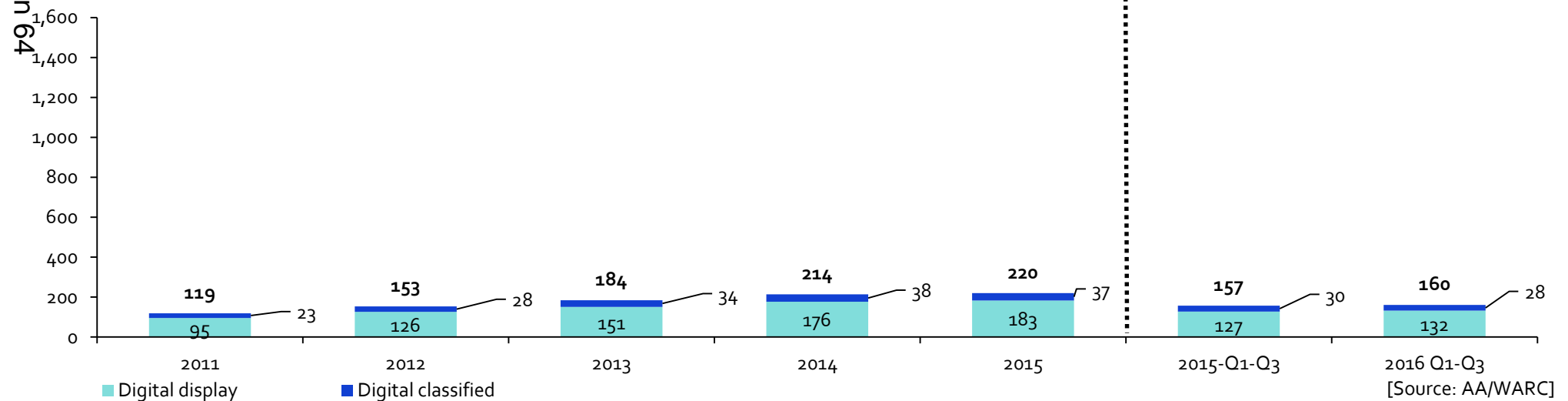
[Source: AA/WARC, ONS, BoE, Enders Analysis]

£5.80 print revenue lost for every £1 gain in digital (much of *that* revenue indirect from platforms)

National newspapers print advertising revenue (£m)



National newspapers digital advertising revenue (£m)

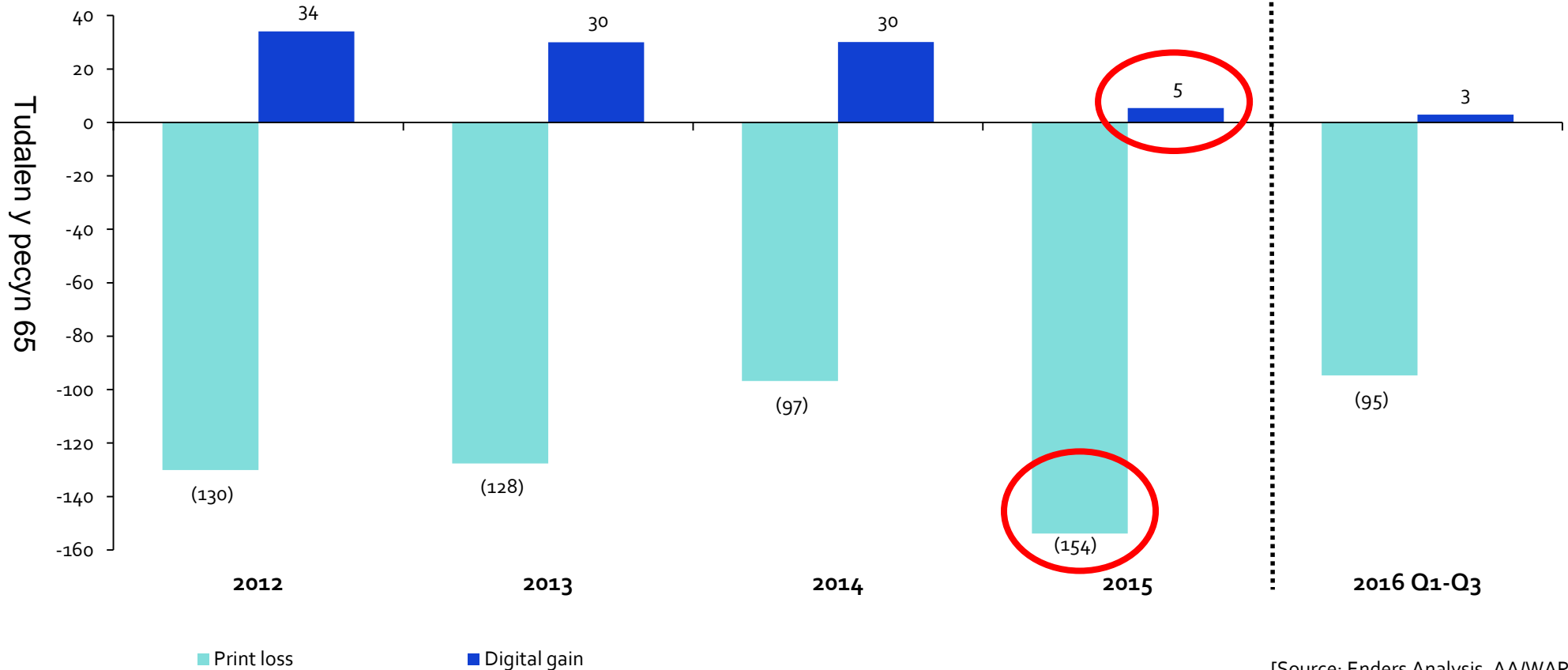


Trends were accentuated in 2015 – £31 in print lost for every £1 gained in digital

Digital growth almost stalled in 2015, and remained challenging in 2016 – this is the primary reason why some publishers have in the last year or two reviewed their membership, subscription or paywall options

New York Times switched its advert formats in part to thwart programmatic, and has accentuated the added-value *context* of its advertising model, now seen as a secondary revenue stream, not the joint core revenue stream

Digital gain versus print loss in national newspapers (£m)

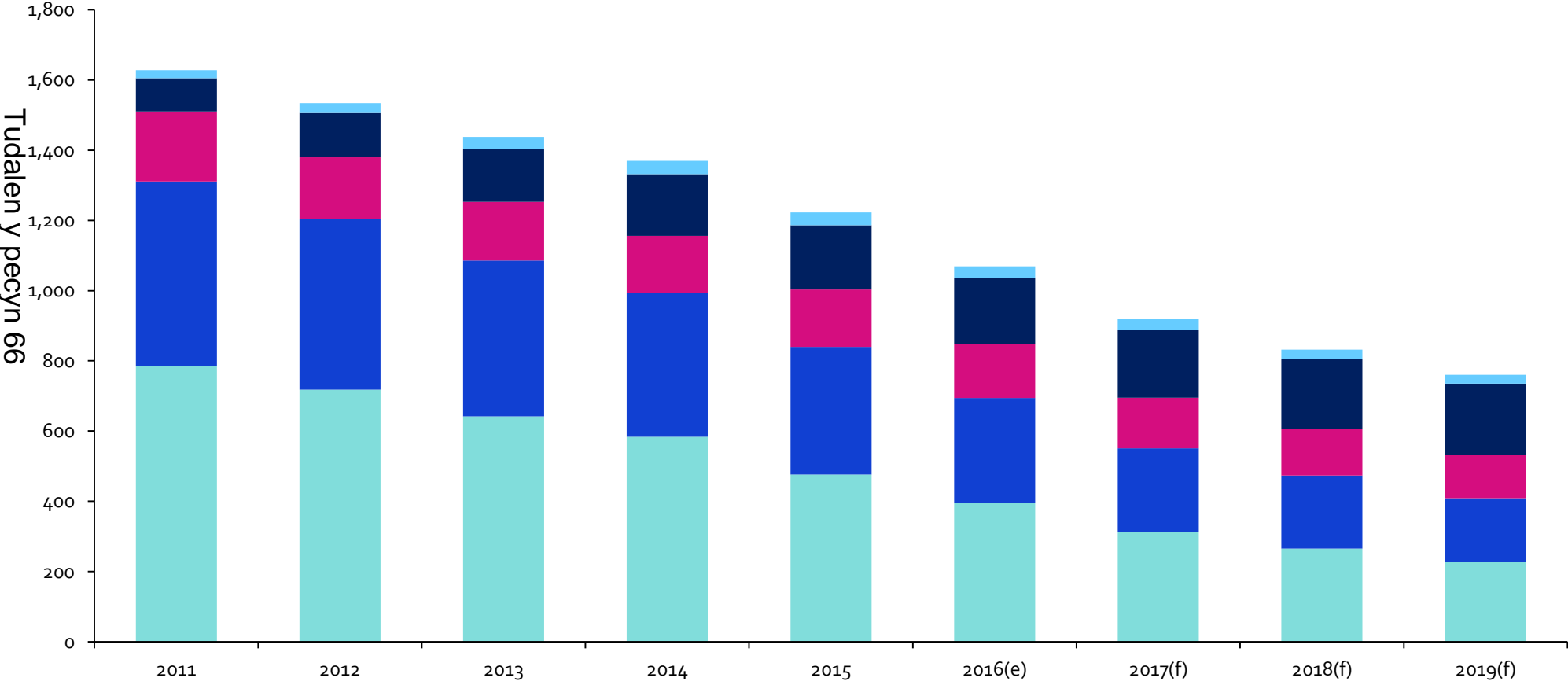


[Source: Enders Analysis, AA/WARC]

National press advertising outlook

Our forecasts assume recent trends continue. Discussions with a wide range of advertisers and media agencies in the last few months have provided us with no indications that the transition from print to digital is going to slow down this year or next year – and could *accelerate* before any slow down occurs further out

National newspaper advertising revenue (£m)



[Source: Enders Analysis, AA/WWARC]

National press advertising outlook

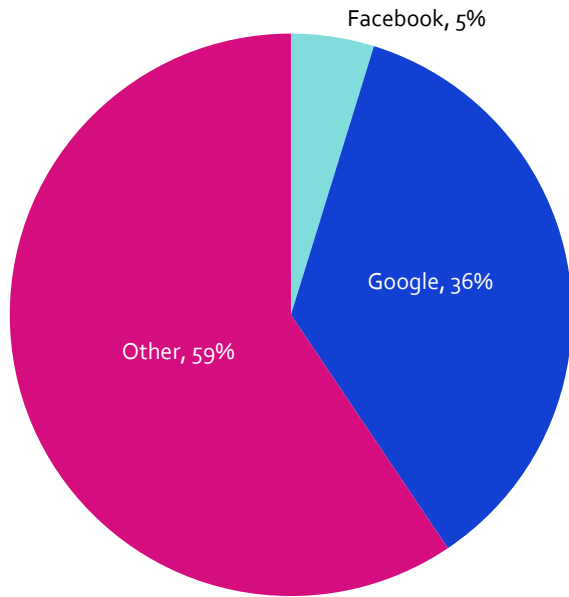
| National press advertising outlook (£m) | | | | | | | | | |
|---|--------------|--------------|--------------|--------------|--------------|--------------|------------|------------|------------|
| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016(e) | 2017(f) | 2018(f) | 2019(f) |
| Print display - popular | 785 | 718 | 642 | 584 | 476 | 395 | 312 | 265 | 228 |
| Print display - quality | 526 | 486 | 444 | 409 | 364 | 299 | 239 | 208 | 181 |
| Print classified | 199 | 176 | 167 | 163 | 163 | 154 | 144 | 134 | 124 |
| Total print | 1,510 | 1,380 | 1,253 | 1,156 | 1,003 | 848 | 695 | 607 | 533 |
| Digital display | 95 | 126 | 151 | 176 | 183 | 188 | 194 | 198 | 202 |
| Digital classified | 23 | 28 | 34 | 38 | 37 | 33 | 30 | 27 | 25 |
| Total digital | 117 | 151 | 181 | 213 | 219 | 222 | 224 | 225 | 227 |
| Total print and digital | 1,627 | 1,531 | 1,434 | 1,369 | 1,222 | 1,070 | 919 | 832 | 760 |

[Source: Enders Analysis estimates and forecasts based on AA/WARC]

Two thirds of national newspaper digital audiences come from Google and Facebook...

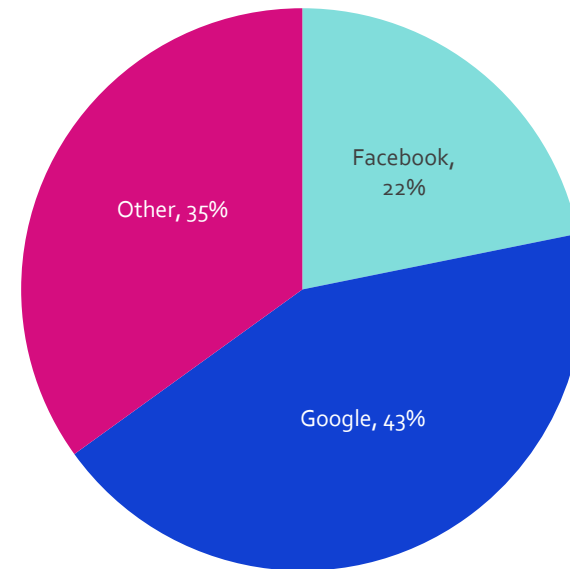
Google has grown in importance as a traffic source for news publishers over the last three years, but Facebook has grown between four and five times

National newspapers source traffic (July 2013)



[Source: Enders Analysis estimates based on comScore]

National newspapers source traffic (July 2016)



[Source: Enders Analysis estimates based on comScore]

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...but 90% of digital ad growth is Google and Facebook, with news losing share

- Google and Facebook have unmatched user understanding and valuable owned inventory in mobile search, native and video
- Google and Facebook are also expanding digital advertising among SMEs: their self-serve platforms are easy to use, billing options are flexible, no minimum fees
- Their strategies are *marketing*, not advertising – that’s a critical difference for a wide variety of businesses, from corporates seeking short term transaction growth to Small and Medium Enterprises seeking precise targeting or cost-effective brand exposure

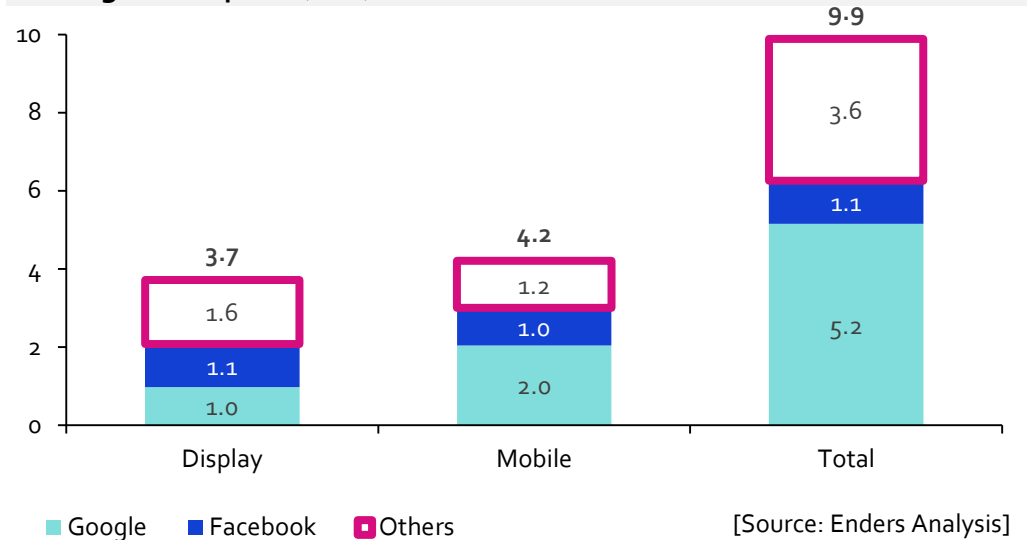
Tudalen y pecyn 69
Only a fraction of the ad spend on either platform goes through agencies

Traffic acquisition costs apply (Google pays 20% of advertising revenue to publisher and distribution partners)

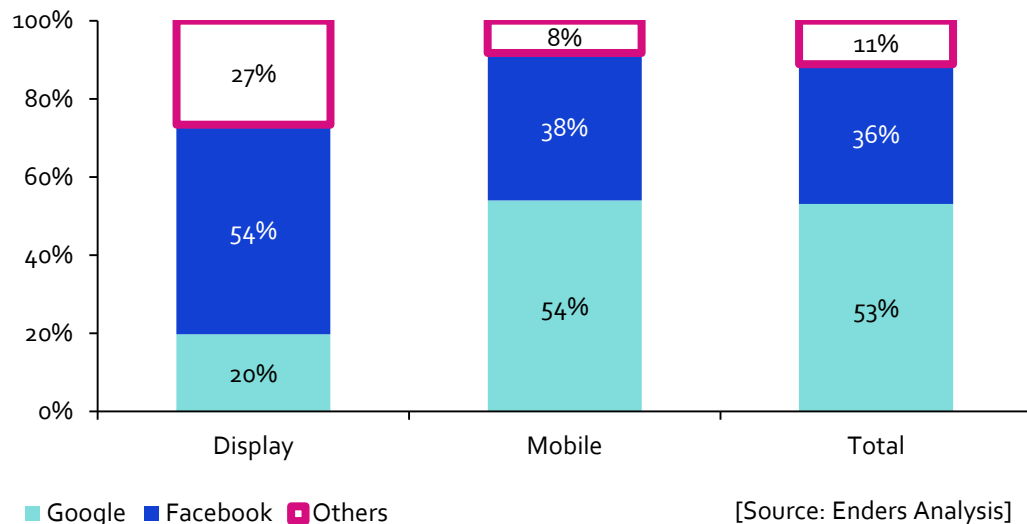
Amazon is coming: excellent identity layer, user understanding (purchasing not just intentions) and control of the most valuable opportunity: at the moment of purchase intent

- **Snap(chat) is coming:** unique, high-quality formats; highly engaged audience. Could be Twitter-scale in the UK this year, but much better performance metrics
- But of course overall traditional display advertising is being replaced by short term direct response marketing measurement (see next)

UK digital ad spend (£bn)



Google & Facebook shares of 2016 YoY growth, UK digital ad spend (%)

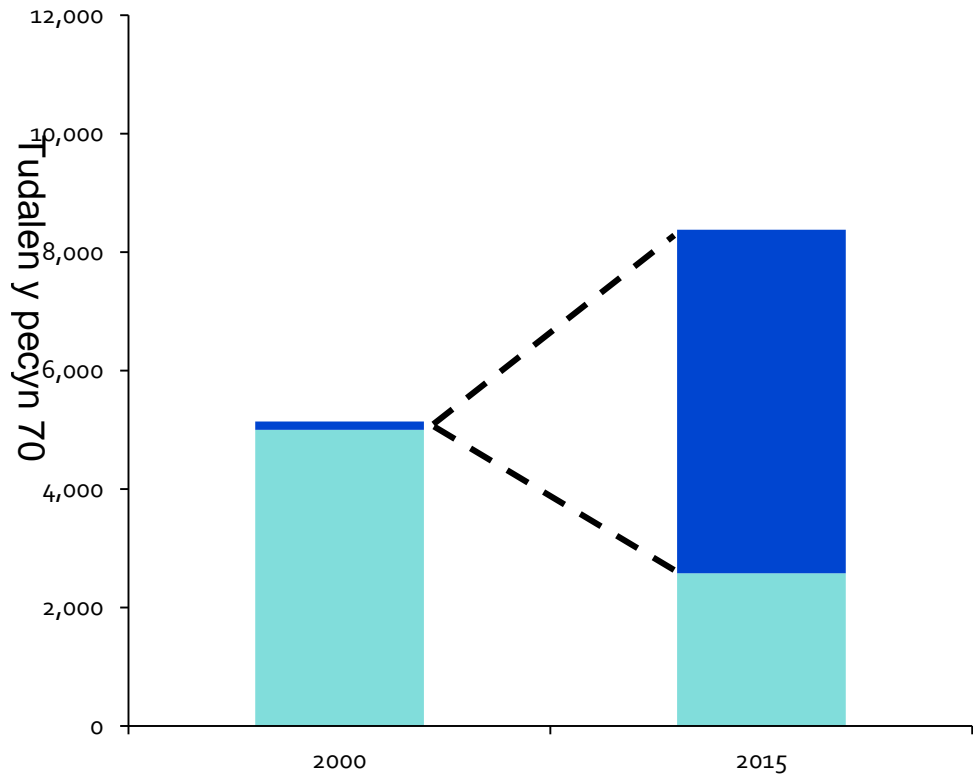


Marketing objectives in digital are overwhelmingly direct response rather than display

Much of the recent structural decline in print display advertising has been at the expense of digital, with this advertising largely measured on direct response or other short term activation measures, rather than longer term awareness, emotional brand connections and reputation measures

Print media, which has always felt to advertisers and agencies more *tactical* than TV, has lost out in this transition, and we have seen some marketing data which suggests print media is now being undervalued in the media mix compared to its effectiveness, particularly long term brand benefits

Direct response ad expenditure (£m)

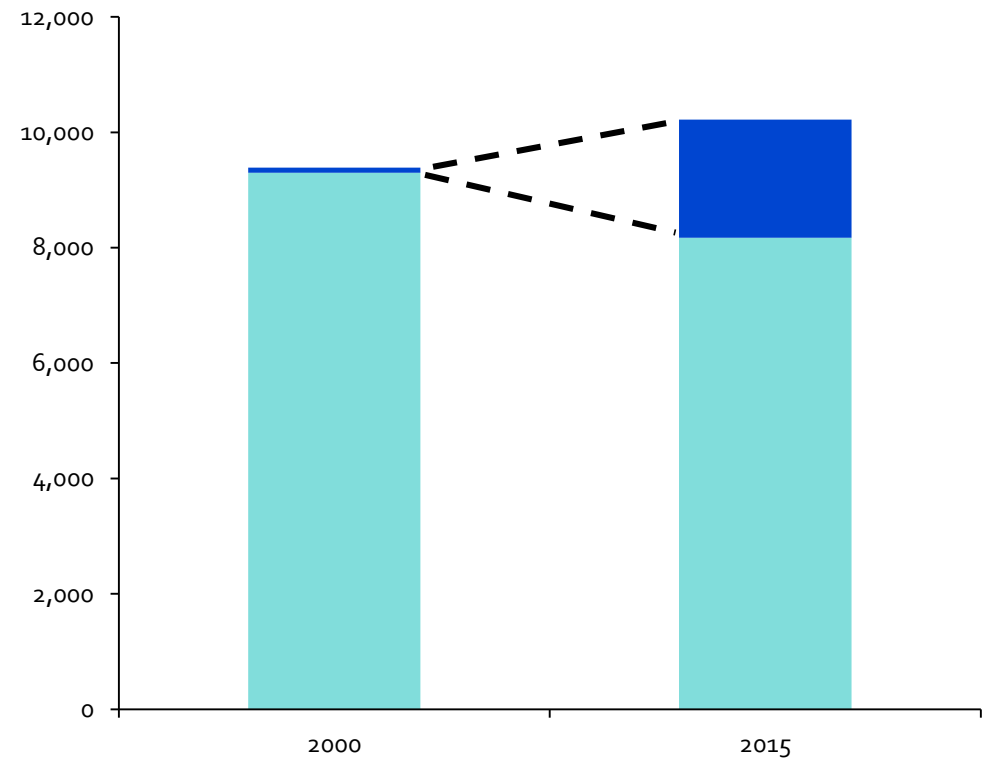


■ Analogue

■ Digital

[Source: AA/WARC]

Display ad expenditure (£m)



■ Analogue

■ Digital

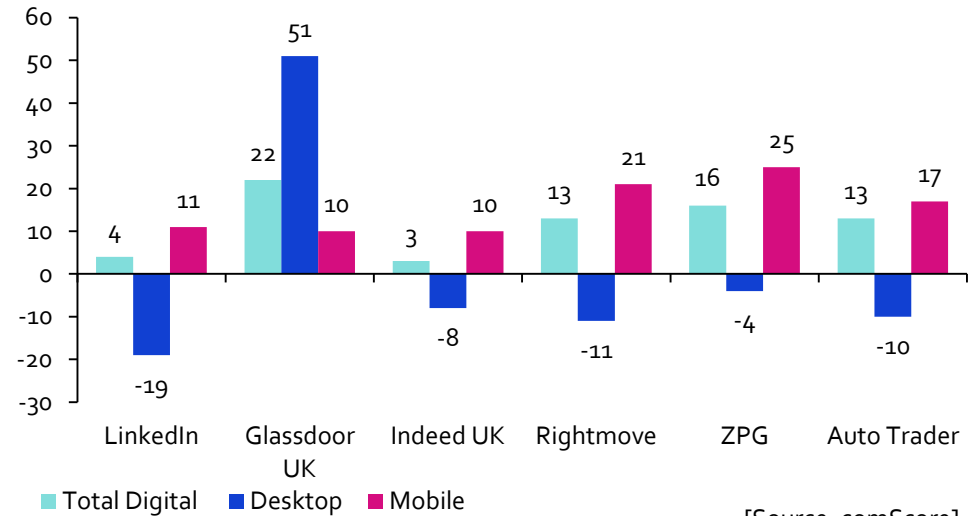
[Source: AA/WARC]

Among specialist services the rise of mobile is enabling market leaders to cement their position

- As with general content platforms, specialist services – for example classified markets – are becoming increasingly reliant on mobile
- Consumer research and interaction are growing and have transitioned from desktop to mobile devices
- We observe that the range of services achieving scale success is declining as the desktop retreats, because consumers only download one app for each interest
- As a result, brand awareness is critical, mobile deployment quality needs to be excellent, but with these factors assumed the market advantage of leading sites is cemented by mobile

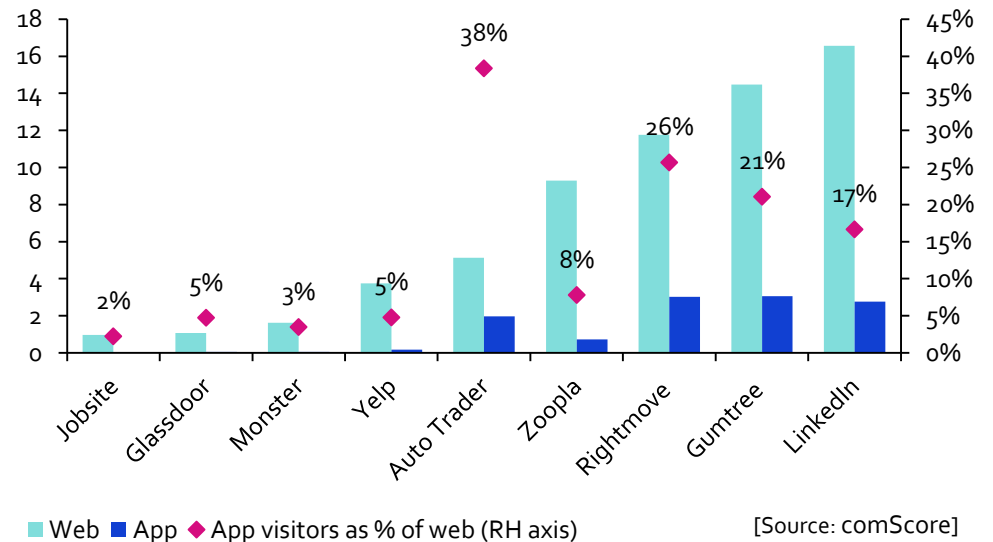
Tudalen y pecyn 71

Classified sites % change unique visitors Sep-15 to Sep-16



[Source: comScore]

Classified sites mobile unique visitors (m)



[Source: comScore]

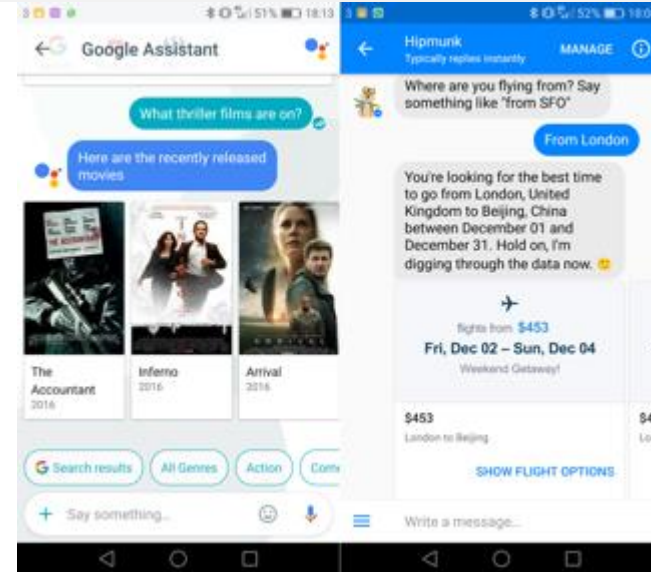
The future: from media to context and audience

- Over the next few years, advertising and other marketing will converge. Paid media will become less well defined
- **Content marketing** is a good example of these trends. The majority of spend is on owned media – will premium paid media lose or gain share?
- The rise of **messaging** (at the expense of social)
 - Combination of automated (business) and human interactions
 - It will fulfil ad-like functions on top of customer relations and a sales channel
 - It will involve few, probably no display units – no advertising *per se*
 - The billing model will be flexible, including entirely earned and organic, paid-for prominence, and pay-per-interaction, as well as billing by performance

Tudalen y pecyn 72

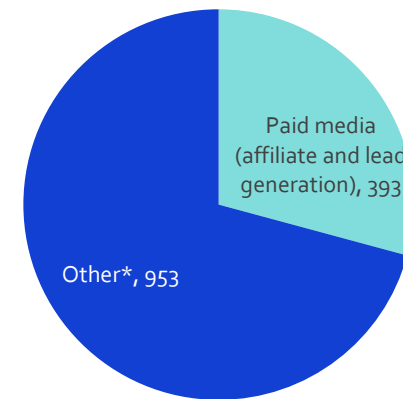
Affiliate links are another, more prosaic form of overlap – not paid media, but a potential revenue source for publishers and marketing expenditure for retailers (although with its own potential for abuse)

Google Assistant (l), flight search bot in Facebook Messenger (r)



[Source: Enders Analysis screenshots]

Est. 2015 UK affiliate and lead generation spend, online (£m)



*Price comparison and aggregator sites, gaming affiliate networks, B2B lead gen. etc.
[Source: PWC/IAB Online Performance Marketing Study 2015]

News brands: Rise of membership as advertising stalls [2017-011]

Future of marketing: B2B techniques shift to consumer markets, and rise of native services

Decline of paid media

- While we expect total digital marketing investment to continue to grow, options other than paid media are growing in importance
- Voice interfaces and AI assistants will provide new opportunities for sponsorships, affiliate models and customer acquisition marketing – outside current paid media and search advertising models
- Related to all this is the growing importance of data management platforms and “marketing clouds”, systems which help blend together customer relationship management, marketing and advertising

These models are expanding from highly personalised B2B marketing to consumer marketing

Decline of traditional media

The attraction of high-traffic services with uncontentious editorial-native solutions – think of Tastemade which has sponsored food and travel short videos distributed across social and even broadcast media, or Vice – will grow substantially in the next few years, undermining spend with some traditional media



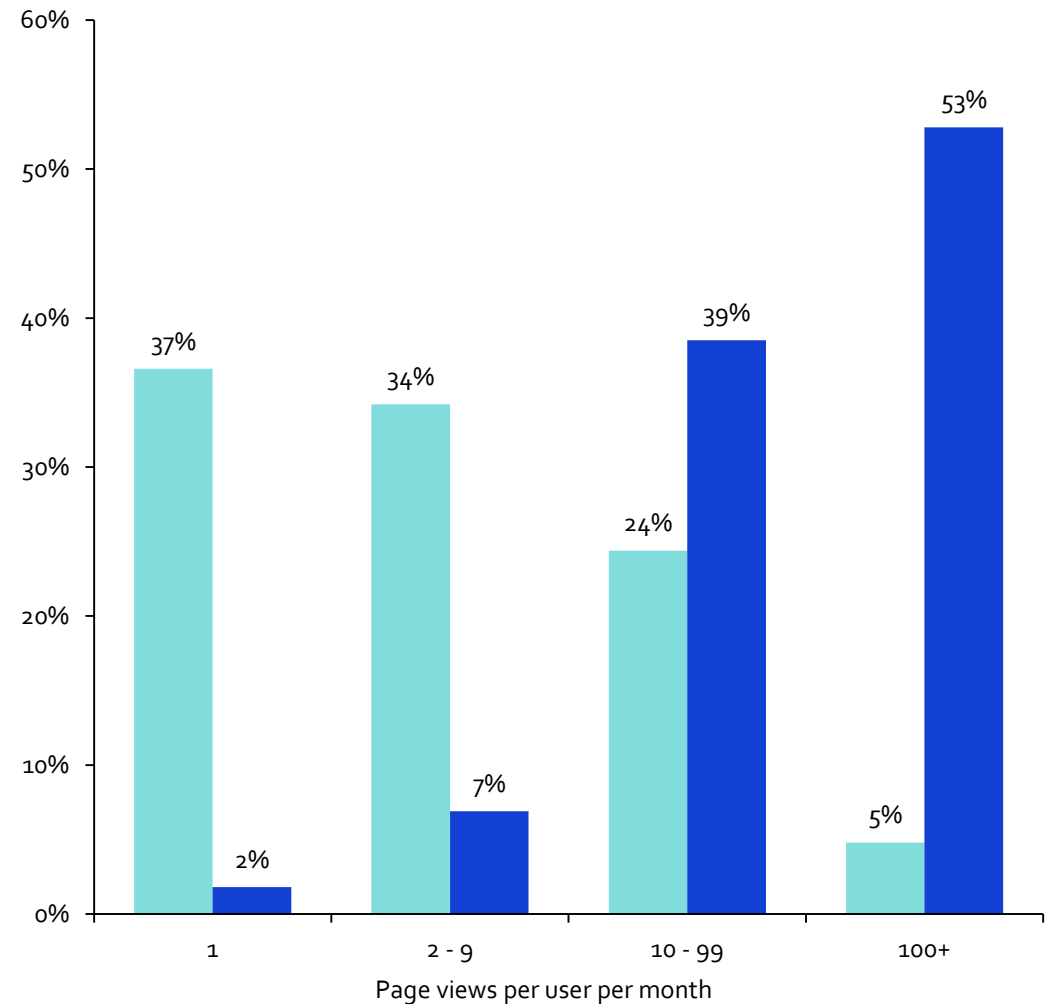
[Source: Google, Amazon]

Tudalen y pecyn 73

For news services a strategic shift (back) from reach to quality audiences and engagement

- Over the years Enders Analysis has assessed a large spread of content and access models, observing a *general failure to create closed, immersive and engaging user experiences*
- User engagement is key to
 - sustain news operations independent from platforms
 - build a critical reading volume, encouraging membership
 - create a quality advertising environment
- Most publishers to date have delivered a strategy that assumes brand strength, audience scale and user engagement grow together in a virtuous circle
 - *Digital scale is a mirage*: digitalisation has increased “readership” by an order of magnitude...
 - generates advertising revenues – but fails to cover costs
 - weakens brand differentiation and positioning
- Tudalen y pecyn 74 For a typical German online newspaper (see chart), less than 5% of users generate more than half of contacts – a ratio similar to that of 200,000 circulation against 10m unique users
- A focus on core users’ experience rather than on scale could grow subscriptions and a more valuable advertising space
 - The New York Times changed advertising formats, creating some programmatic friction, but emphasising the quality of its environment and the engagement of its attractive audience
- Will more curated tablet apps emerge, with rich (video?) brand advertising rather than direct response marketing?

Newspaper online usage pattern



■ Share of users (%)
■ Share of page views (%)

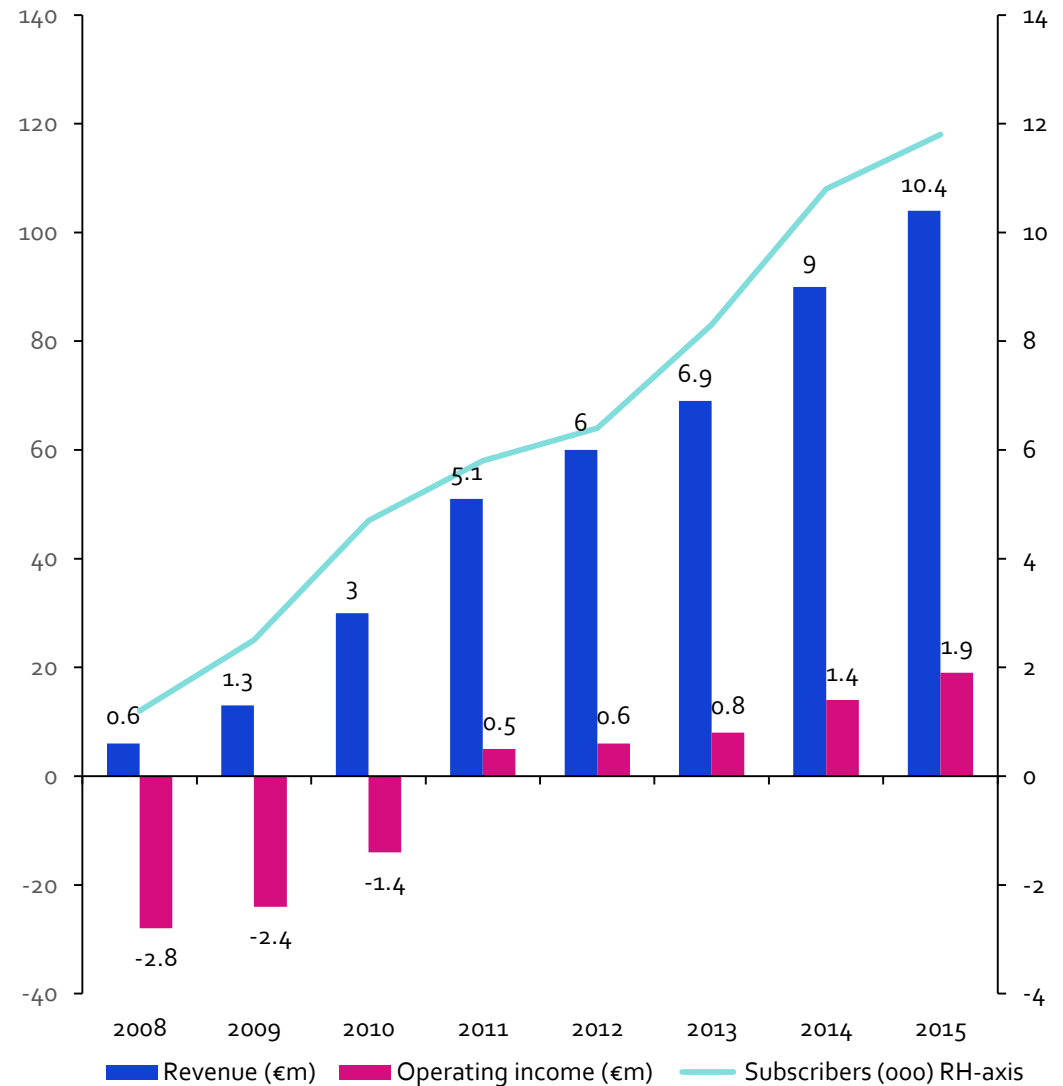
Based on an anonymised newspaper, September 2014
[Source: Enders Analysis from AGOF/Zeitung 2014/15
Bonn: Bundesverband Deutscher Zeitungsverleger (p.170)]

Médiapart – a case study in paid native digital news provision

- Created in 2008 by former Le Monde journalists, Médiapart is a subscription-only news site without advertising (€11/month)
- The service focuses on investigative and opinionated journalism
- High profile journalistic scoops have greatly helped brand recognition and sampling by readers
- With 65 staff including 39 journalists, Médiapart generated a €10.3 million turnover and €1.9 million operating income
- The subscriber count has increased steadily to 118,000
- Médiapart strives to create a community around its brand through printed publications, forums, blogs and events
- Médiapart has had notable impact on French politics – but its resources are thirty times smaller than Le Monde’s or Le Figaro’s
- We believe three factors are essential for consumers to consider paying for content media services
 - Perception that the content matters, and therefore has value, and the access price feels commensurate to the value
 - Perception that the content cannot be acquired any other way, at least not for free
 - Convenience and other customer service factors
- We note publishers have a poor track record at customer service, often undervaluing its importance, and underestimating the complexity and associated costs of deploying retail prowess across the business

• Tudalen y pecyn 75

Médiapart: subscribers (000), revenue (€m) and operational result (€m)



[Source: Enders Analysis from Médiapart]

Rise and rise of membership, and the challenge of micropayments

- The New York Times has added >500,000 digital subscriptions in the last year, and more than half of those in the weeks around the US presidential election
- In the UK digital models are changing
 - The Guardian has grown its members to some 200,000, while maintaining entirely free access
 - The Telegraph has adjusted its meter model to optimise usage and conversions
 - The FT introduced a free trial period to encourage *immersive* usage, again to encourage conversions
 - On the other hand, The Sun abandoned its paywall: this was always a very challenging solution for a content business that invented a hugely influential form of social media long before the internet
- Our thesis is that membership models will grow in the next few years
 - The dream of an advertising-funded free access solution for scale newsrooms looks increasingly dubious
 - As the branded package comes under threat we believe smaller-scale, more specialist (narrower editorial remit) services may gather traction – Mediapart, Politico
 - Large news brands may be able to have it both ways – Times Business, Telegraph Politics, Guardian Society, Sun Bingo, Mirror Football
- Micropayments remain a challenge, even if the consumer use-case may be gathering traction and there is no longer a technology hurdle. Two levels of friction remain – industry and consumer
 - Industry options include (1) shared industry wallet; (2) a supplier with everyone's cards on file to be a wallet provider (while taking a 0% cut to keep it profitable for publishers); (3) wait for every consumer to get bitcoin. The likelihood of these happening feels inversely proportionate to its chance of success if implemented
 - Certainly nothing will work for consumers unless publishers – newspaper, magazines and beyond – all use the same service. Jamatto and others are intuitive and pretty frictionless, easy to deploy and flexible in terms of variable publisher imperatives
 - But even successful solutions elsewhere – such as Blendle – will find the UK a difficult market. Publishers are fiercely competitive, there is no deep language moat and there is just too much free content

Disclaimer

About Enders Analysis

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Eitem 3

Mae cyfyngiadau ar y ddogfen hon

**Adolygiad Annibynnol o Gymorth ar gyfer Cyhoeddi a Llenyddiaeth
yng Nghymru.**

13 Mehefin 2017

Cynnwys

Rhagair

| | |
|--|-----|
| 1. Gorolwg | 5 |
| 2. Cylch Gwaith a Blaenoriaethau | 6 |
| 3. Dull Gweithredu | 8 |
| 4. Cyd-destun | 9 |
| 5. Themâu a negeseuon yn deillio o'r dystiolaeth | 46 |
| 6. Casgliadau ac Argymhellion | 82 |
| 7. Atodiad 1: Tirwedd Gyffredinol Cyhoeddi a Llenyddiaeth | 90 |
| 8. Atodiad 2: Rhestr o unigolion – trafodaethau a gynhaliwyd | 93 |
| 9. Atodiad 3: Tystiolaeth a dderbyniwyd | 95 |
| 10. Atodiad 4: Holiadur a ddsbarthwyd | 99 |
| 11. Atodiad 5: Dadansoddiad meintiol ac ansoddol o'r ymatebion i'r Holiadur | 100 |
| 12. Atodiad 6: Mapiau yn dangos lleoliad cyhoeddwr a llyfrwerthwyr yng Nghymru | 178 |
| 13. Atodiad 7: Cymariaethau rhyngwladol rhwng Cymru a gwledydd eraill | 180 |
| 14. Atodiad 8: Dyfyniadau o adroddiad interim a terfynol Adolygiad Diamond | 187 |
| 15. Atodiad 9: Uned Digwyddiadau Mawr Llywodraeth Cymru – Cefnogaeth i Lenyddiaeth a Gwyliau | 189 |
| 16. Atodiad 10 : Cyllid Cyngor Celfyddydau Cymru ar gyfer gweithgaredd llenyddol 2012/13 i 2015/16 | 191 |
| 17. Atodiad 11 : Cyllid Celfyddydau Rhyngwladol Cymru ar gyfer gweithgaredd llenyddol 2012/13 i 2015/16 | 210 |

Rhagair

Mae'r adroddiad annibynnol hwn yn cynnwys dadansoddiad o gymorth Llywodraeth Cymru ar gyfer cyhoeddi a llenyddiaeth yng Nghymru. Mae'n cynnwys dull sy'n seiliedig ar dystiolaeth ar gyfer gwerthuso'r sefyllfa bresennol gan wahodd rhanddeiliaid i gyflwyno gwybodaeth fanwl ynghylch y seilwaith presennol a'r cymorth ariannol sydd ar gael i hyrwyddo'r diwydiant cyhoeddi yng Nghymru.

Mae ecosystem llenyddiaeth a chyhoeddi Cymru yn cynnwys ystod amrywiol o weithgareddau sy'n cadarnhau pwysigrwydd cael cyllid priodol a sefydlu seilwaith a fydd yn dathlu hunaniaeth ddiwylliannol unigryw Cymru ymhellach. Fel y nodir yn yr adroddiad, rhaid ystyried hyrwyddo llenyddiaeth a chyhoeddi yng Nghymru, ar y cyd â'r holl gelfyddydau eraill, o fewn datganiad polisi clir gan Lywodraeth Cymru i ddatblygu cymdeithas gynhwysol a Chymru sy'n fwy hyderus, yn fwy cyfartal, yn fwy medrus ac yn fwy cadarn. Mae gan y diwydiant cyhoeddi a hyrwyddo llenyddiaeth ran allweddol i'w chwarae o ran gwella hunaniaeth ddiwylliannol ddwyieithog ein cenedl.

Rhoddodd yr adolygiad gyfle i ailystyried natur y seilwaith presennol o gymorth drwy seilwaith a'r ddynameg sy'n newid yn gyson yn y byd cyhoeddi. Roedd newidiadau o'r fath yn amrywio o'r ffyrdd creadigol y mae awduron yn arfer eu crefft, y datblygiadau digidol ar gyfer cyhoeddi a'r cyfleoedd sy'n ehangu i ddarllenwyr ymgysylltu â llenyddiaeth, boed hynny drwy ddiwyddiadau byw neu drwy ddulliau eraill.

Mae gan lenyddiaeth yng Nghymru draddodiad cyfoethog a bywiogrwydd cyfoes y dylid ei ddathlu a'i gefnogi. O ran hyrwyddo'r Gymraeg a datblygu cenedl ddwyieithog, mae pwysigrwydd creu llenyddiaeth a chyhoeddi yn allweddol er mwyn i'r llywodraeth gyrraedd ei thargedau strategol. Fodd bynnag, dyma'r amser priodol i Lywodraeth Cymru ystyried a oes angen unrhyw newidiadau strwythurol ychwanegol i hyrwyddo effaith gweithgarwch o'r fath. Ni ddylid tanamcangyfrif gwerth economaidd a chymdeithasol y gweithgaredd hwn. Mae angen cefnogaeth ar awduron Cymru a dylai'r cyllid presennol a gynigir i gefnogi datblygu'r seilwaith fod yn briodol ac yn addas at y diben, er mwyn gallu buddsoddi ymhellach ym maes datblygu talent a chyhoeddi, er mwyn meithrin cadernid yn y sector creadigol hwn.

Yng nghyd-destun presennol y newidiadau sylweddol ar ôl Brexit, bydd yn hanfodol i Lywodraeth Cymru ystyried ei pholisi diwylliannol a, lle y bo'n briodol, ei gydlynu ymhellach, er mwyn sicrhau ei bod yn bosibl dathlu 'Cymru greadigol' ar lwyfan rhyngwladol. Mae gan lenyddiaeth ran bwysig iawn i'w chwarae yn hyn o beth.

Rwy'n ddiolchgar i aelodau'r panel am eu proffesiynoldeb a'u gwaith caled. O ystyried y swm sylweddol o dystiolaeth a gyflwynwyd daeth yn amlwg bod angen amser ychwanegol i ganiatáu i'r ysgrifenyddiaeth ac aelodau'r panel ystyried y dystiolaeth yn fanwl. Roedd y trafodaethau gyda rhanddeiliaid yn angerddol ac yn dangos yn glir lefel y diddordeb proffesiynol yn y pwnc. Hoffwn hefyd gofnodi diolch y panel i swyddogion Llywodraeth Cymru a gefnogodd yr adolygiad hwn. Nodaf yn benodol waith caled a chyfraniad adeiladol Paul Kindred, Hywel Owen, Rachel Whitfield-Pierce a Lea Beckerleg.

Mae'r argymhellion yn yr adroddiad yn cynnig cyfle i Lywodraeth Cymru fyfyrion ar y cyfleoedd strategol sydd ar gael i wella'r ecosystem bresennol ar gyfer cynhyrchu llenyddiaeth a'r byd cyhoeddi yng Nghymru. Gydag unrhyw fuddsoddiad cyhoeddus, rhaid rhoi ystyriaeth briodol i bwysigrwydd gwerth am arian, atebolrwydd a threfniadau llywodraethu da. Rhaid i ecosystem effeithiol sy'n cefnogi llenyddiaeth a chyhoeddi allu dangos ei bod yn cyflawni amcanion strategol clir, boed y rheini'n gysylltiedig â chyfalaf economaidd, cymdeithasol neu ddiwylliannol.

Wrth wraidd yr adolygiad hwn mae'r cyfle i ddathlu Cymru - grym creadigol llenyddiaeth i ddisgrifio, dehongli a dathlu ein hunaniaeth. Mae gwerth mawr i'r grym hwnnw, ar lwyfan cenedlaethol a rhyngwladol. Dylem barhau i adeiladu ar y seilwaith presennol, gwella doniau creadigol ein hawduron a chefnogi seilwaith cyhoeddi deinamig ar gyfer ein gwlad.

Yr Athro Medwin Hughes DL



1. Gorolwg

Dyma'r adroddiad annibynnol cyntaf sy'n ystyried cymorth cyffredinol Llywodraeth Cymru ar gyfer cyhoeddi a llenyddiaeth yng Nghymru. Nid oes unrhyw banel annibynnol arall wedi ei gomisiynu gan Lywodraeth Cymru (na'r Swyddfa Gymreig, cyn 1999) i ystyried y maes hwn yn ei gyfanrwydd.

Yn ystod 2014 comisiynwyd adolygiad annibynnol o'r cymorth a roddir gan Lywodraeth Cymru i lyfrau o Gymru. Yn yr adolygiad hwnnw aseswyd:

- Y sail resymegol dros y cymorth a roddir gan Lywodraeth Cymru i lyfrau o Gymru.
- Ai Cyngor Llyfrau Cymru yw'r cyfrwng mwyaf priodol o hyd i ddarparu'r cymorth hwnnw.
- Y dystiolaeth o ran gwerth am arian y dull presennol.

Mae'r adroddiad a gynhyrchwyd gan yr adolygiad hwnnw ar gael ar wefan Llywodraeth Cymru¹

Nod yr adolygiad hwn yw cynnal dadansoddiad ehangach o'r cymorth gan Lywodraeth Cymru ar gyfer cyhoeddi a llenyddiaeth. Wrth wneud hyn rydym wedi bod yn ymwybodol o flaenoriaethau strategol ehangach Llywodraeth Cymru a'i ymrwymadau cyfreithiol i bobl Cymru, gan gynnwys y rhai hynny a amlinellir yn Neddf Llesiant Cenedlaethau'r Dyfodol (Cymru) 2015.

Rydym hefyd, fel y mwyafrif sydd â diddordeb yn y maes hwn, yn ymwybodol fod newidiadau sylweddol wedi bod i'r modd y cynhyrchir deunydd ysgrifenedig a chlywedol gan gynnwys, ond heb gyfyngu, i gynnydd plattformau digidol. Disgwylir newidiadau sylweddol pellach, nifer yn anhagwladwy ar hyn o bryd, dros y 5-10 mlynedd nesaf. Gydag hyn mewn golwg rydym wedi ffocysu ar yr angen am strwythurau cefnogol a fydd yn addas nid yn unig yn 2017 ond yn ddigon hyblyg i ymateb i esblygiad pellach yn y sector, gan barhau'n berthnasol ac adnabod cyfleoedd newydd i gefnogi cyhoeddi a llenyddiaeth ledled Cymru.

Mae tirwedd llenyddiaeth yn dechrau gyda'r awdur ac yn gorffen gyda'r darlennydd (neu i'r gwrthwyneb). Ceir trosolwg o'r broses gyhoeddi er mwyn deall yn well lle y gall cefnogaeth ariannol fod ar gael yn **Atodiad 1**

Yn ogystal mae **Atodiad 7** yn cynnwys cymariaethau rhwng y sectorau cyhoeddi a llenyddiaeth yng Nghymru a chenedloedd Ewropeaidd eraill – 'rhanbarthau ymreolaethol' neu 'ddeddfwrfeydd is-wladwriaethau' gwladwriaethau sofran.

Wrth gynnal yr adolygiad hwn, rydym wedi darllen, gwranddo ac ystyried barn rhanddeiliaid ar draws yr ecosystem cyhoeddi a llenyddiaeth yng Nghymru ac rydym yn ddiolchgar i bawb sydd wedi cyfrannu sylwadau ac wedi darparu dystiolaeth i'r Panel Arolygu

Mae'r adroddiad hwn yn cwblhau gwaith y Panel Adolygu. Mae'n cyflwyno dadansoddiad a chanfyddiadau allweddol y Panel ac, yn unol â'n cylch gwaith, yn cynnig cyfres o argymhellion yn ymwneud â darparu cymorth ar gyfer cyhoeddi a llenyddiaeth yn y dyfodol yng Nghymru.

¹ <http://gov.wales/docs/drah/publications/170609-review-of-support-for-books-from-wales-en.pdf>

2. Cylch gwaith a blaenoriaethau

2.1. Ym mis Mai 2015, cyhoeddodd y Dirprwy Weinidog Diwylliant, Chwaraeon a Thwristiaeth ar y pryd gyloch gorchwyl a blaenoriaethau ar gyfer yr Adolygiad hwn. ²

2.2. Yn fras cwmpas yr adolygiad yw asesu:

- i. Prif nodau Llywodraeth Cymru o safbwynt cynorthwyo'r diwydiant cyhoeddi a llenyddiaeth yng Nghymru, yn y ddwy iaith; h.y., beth rydym yn ceisio ei gyflawni, a hynny ar lefel ddiwylliannol, cymdeithasol ac economaidd? A yw'r nodau hyn yn addas i'w diben o hyd yn yr unfed ganrif ar hugain?
- ii. Cwmpas a graddfa'r cymorth a gaiff ei roi ar hyn o bryd i gyflawni'r nodau hyn, gan gynnwys y berthynas rhwng y cyrff sy'n gyfrifol am gyflenwi'r cymorth hwn.
- iii. Datblygiadau digidol o fewn y diwydiant cyhoeddi yng Nghymru.
- iv. Y trefniadau gweinyddol o ran cymorth Llywodraeth Cymru ar gyfer gwasanaeth newyddion ar-lein dyddiol Cymraeg ei iaith, yn ogystal ag ar gyfer papurau bro.
- v. Y cymorth ar gyfer cyhoeddi a llenyddiaeth mewn ardaloedd difreintiedig ar draws Cymru.

Nid oedd adolygiad penodol o gyhoeddiadau academaidd o fewn cylch gwaith a chyfrifoldebau'r adolygiad hwn o Gyhoeddi a Llenyddiaeth. Bydd hyn yn cael ei egluro yn fwy manwl yn hwyrach yn yr adroddiad.

Aelodau'r Panel

- **Yr Athro Medwin Hughes (Cadeirydd)**

Is-Ganghellor Prifysgol Cymru y Drindod Dewi Sant. **Yr Athro Elin Haf Gruffydd Jones (Is-Gadeirydd)**

Cyfarwyddwr y Gymraeg a Diwylliant ac Athro y Cyfryngau a'r Diwydiannau Creadigol, Prifysgol Aberystwyth.

- **John Williams**

Yn ysgrifennu nofelau, straeon byrion a sgrïptiau sydd wedi'u lleoli o fewn Caerdydd sy'n prysur newid. Ar hyn o bryd mae John yn ysgrifennu erthyglau ar gyfer y Mail on Sunday a'r Independent ac ef yw un o gyd-drefnyddion Gŵyl Talacharn.

- **Philippa Davies**

² <http://gov.wales/newsroom/culture-tourism-sport/2016/160315-literature-review/?skip=1&lang=cy>

Awdur a Seicolegydd Busnes, gyda 12 llyfr ffeithiol a ffuglen wedi eu cyhoeddi, ac hefyd yn ysgrifennu cynnwys gwe ar gyfer The Economist ac Udem.

- **Martin Rolph**

Ymgynghorydd. Cynhaliodd Martin adolygiad annibynnol o gymorth Llywodraeth Cymru ar gyfer llyfrau o Gymru sef Yr Adolygiad o Gymorth i Lyfrau o Gymru yn ystod 2014.

3. Dull gweithredu

3.1. Er mwyn asesu'r pum prif faes a nodwyd yn y Cylch Gorchwyl, aeth y Panel Adolygu ar drywydd dull yn seiliedig ar dystiolaeth wrth ddatblygu ei ddadansoddiad a'i gasgliadau, gan seilio ei argymhellion i Weinidogion Cymru ar y dystiolaeth honno. Er mwyn sicrhau bod gan y Panel fynediad i ddigon o dystiolaeth a barn eang i fod yn sail i'w drafodaethau, rhoddwyd cynllun cynhwysfawr ar waith i ymgysylltu â rhanddeiliaid.

3.2. Ymysg y gweithgareddau ymgysylltu roedd:

- Aelodaeth o'r Panel Adolygu: sefydlwyd panel o arbenigwyr a oedd yn cynnwys unigolion o sefydliadau allweddol neu ag arbenigeddau allweddol yn y sector;
- Cyfarfodydd o'r Panel Adolygu;
- Adolygiad o lenyddiaeth - deunydd cyhoeddus;

Sesiynau tystiolaeth - cynhaliwyd sawl cyfarfod o'r Panel i gymryd tystiolaeth ar ffurf ffeithiau a barn gan amrywiaeth o randdeiliaid yn y maes - mae rhestr lawn o'r rhai y cawsom gyfarfod â hwy yn **Atodiad 2**

- Adolygiad o dystiolaeth ysgrifenedig ychwanegol - darparodd nifer o randdeiliaid y cawsom drafodaethau â hwy dystiolaeth ysgrifenedig atodol, naill ai'n wirfoddol neu ar gais. Roedd rhywfaint o'r dystiolaeth hon eisoes ar gael ac yn wybodaeth gyhoeddus - mae rhestr lawn o'r dogfennau a dderbyniwyd gennym yn **Atodiad 3**;
- Holiadur ar-lein - rhan bwysig iawn o'r dystiolaeth a ystyriwyd gennym oedd yr ymatebion i'n holiadur. Mae copi o'r holiadur yn **Atodiad 4**, a dadansoddiad o'r ymatebion yn **Atodiad 5**.

1. Cyd-destun

Blaenoriaethau Llywodraeth Cymru - Diwylliant a'r Diwydiannau Creadigol

Wrth werthuso'r cylch gorchwyl a bennwyd ar gyfer yr adolygiad hwn rhoddodd y Panel sylw i flaenoriaethau strategol Llywodraeth Cymru fel yr amlinellir yn Symud Cymru Ymlaen 2016-2021³.

Nododd y Panel y datganiad clir o fwriad yn y ddogfen bolisi i ddathlu cyfoeth diwylliannol amrywiol Cymru ac adeiladu ar hynny. Cafwyd cadarnhad hefyd o fwriad datganedig y Llywodraeth i gefnogi a meithrin y celfyddydau yng Nghymru ymhellach hyn Neddf Llesiant Cenedlaethau'r Dyfodol (Cymru) 2015 a oedd yn dangos pwysigrwydd amgylchedd diwylliannol deinamig a bywiog.

Rhaid i hyrwyddo llenyddiaeth a chyhoeddi yng Nghymru gael ei ystyried ar y cyd â'r holl 'gelfyddydau' eraill o fewn datganiadau polisi clir Llywodraeth Cymru i ddatblygu cymdeithas gynhwysol, "Cymru sy'n fwy hyderus, yn fwy cyfartal, yn fwy medrus ac yn fwy cadarn". Mae datblygu a buddsoddi ymhellach mewn 'cyfalaf diwylliannol' yn allweddol i hyrwyddo hunaniaeth ddiwylliannol cenedl. Mae cyfoeth ac amrywiaeth o weithgareddau sy'n gysylltiedig â chyhoeddi a llenyddiaeth yng Nghymru yn cadarnhau'r ffaith bod ecosystem llenyddiaeth a chyhoeddi Cymru yn un helaeth a deinamig sy'n gwneud cyfraniad pwysig tuag at y blaenoriaethau a nodwyd gan y Llywodraeth wrth gefnogi mentrau diwylliannol yng Nghymru. Fodd bynnag, dyma'r amser priodol i ailystyried y seilwaith presennol.

Ar sail y dystiolaeth sylweddol a gyflwynwyd fel rhan o'r adolygiad hwn, nododd y Panel y rhwydwaith amrywiol o sefydliadau, mudiadau a grwpiau llenyddol sydd oll wedi chwarae rhan mewn diffinio ecosystem gyhoeddi ar gyfer Cymru. Rhoddodd yr adolygiad y cyfle i fyfyrion feirniadol ar effeithiolrwydd y deinameg presennol rhwng y gwahanol randdeiliaid allweddol.

Wrth adolygu'r gweithgareddau cyfredol sy'n gysylltiedig â chyhoeddi a hyrwyddo llenyddiaeth roedd y Panel yn ymwybodol iawn o bwysigrwydd cydnabod y ffactorau gwahanol sy'n gysylltiedig â chyhoeddi a hyrwyddo llenyddiaeth yn y Gymraeg a'r Saesneg. Rhaid cydnabod bod y model busnes ac ymyrraeth yn amrywio rhwng y ddwy iaith. Er mwyn i'r Llywodraeth gyrraedd ei tharged o sicrhau miliwn o siaradwyr Cymraeg erbyn 2050, bydd yn hanfodol adeiladu ymhellach ar y cysylltedd digidol rhwng cyhoeddi, addysg a llythrennedd yn y Gymraeg.

Diwydiannau Creadigol - yn y DU a Chymru

Rhaid i unrhyw ystyriaeth briodol o ecosystem gyhoeddi yng Nghymru ystyried y gweithgareddau amrywiol a gynigir ar hyn o bryd yng nghyd-destun y buddsoddiad a wneir o fewn y diwydiannau creadigol ehangach. Yn y gorffennol, mae diffinio'r diwydiannau creadigol wedi bod yn ddadleuol. Nododd y Panel y diffiniad a gynigir gan yr Adran dros Ddiwylliant, y Cyfryngau a Chwaraeon o lenyddiaeth a chyhoeddi, sef y diwydiannau hynny sy'n tarddu o greadigrwydd, sgiliau a thalent unigol ac sydd â'r potensial i greu cyfoeth a swyddi drwy gynhyrchu ac eiddo deallusol a manteisio arno⁴.

³ <http://gov.wales/about/programme-for-government/?lang=cy>

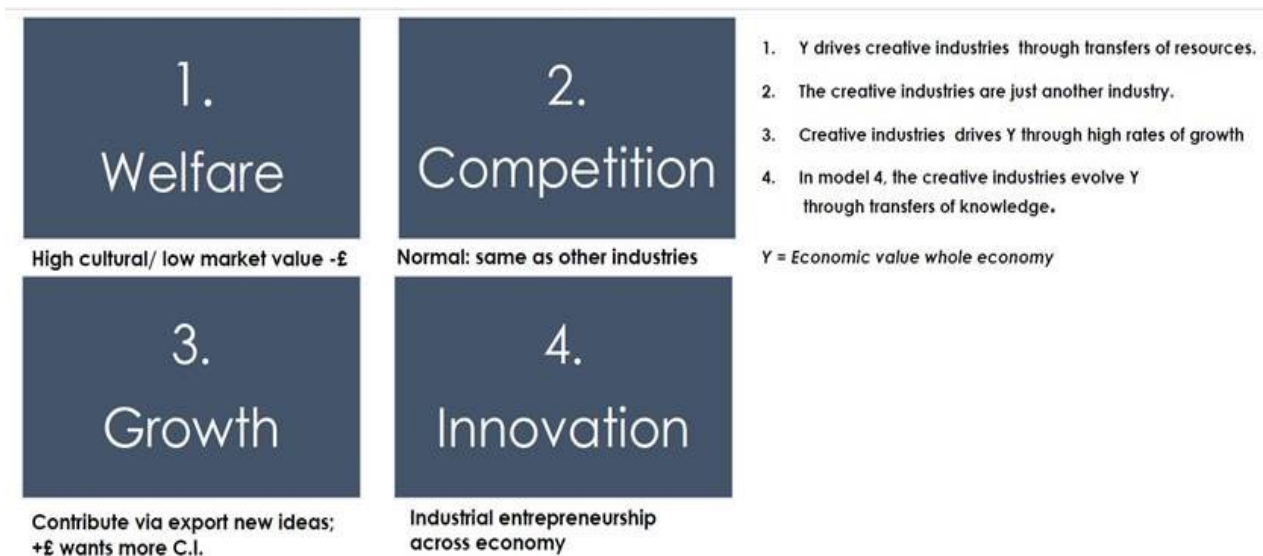
⁴ *Creative Industries Economic Estimates: Full Statistical Release*, Department for Culture, Media and Sport, 2011 t.6.

Yn y DU gyfan yn 2015, roedd 200,000 o swyddi cyhoeddi yn y diwydiannau creadigol - cynnydd o 3.7 y cant rhwng 2014 a 2015. Yn ogystal, mae gwerth y diwydiant cyhoeddi'r DU i'r economi yn parhau i gynyddu: yn 2014 gwelwyd cynnydd o 2.8 y cant yng ngwerth ychwanegol gros cyhoeddi o flwyddyn i flwyddyn, ac mae wedi cynyddu 1.6 y cant y flwyddyn ar gyfartaledd rhwng 2008 a 2013.

Yn ôl ystadegau diweddaraf Llywodraeth Cymru, mae 84,000 o bobl yn gweithio yn yr 'econi greadigol' yng Nghymru. O'r rhain, mae bron i 53,000 yn gweithio yn y diwydiannau creadigol, ac mae tua 31,000 yn gweithio mewn galwedigaethau creadigol y tu allan i'r diwydiannau creadigol. Mae rhagor o fanylion am y diwydiannau creadigol yng Nghymru yng nghyd-destun blaenoriaethau Llywodraeth Cymru ar gael ar wefan Llywodraeth Cymru⁵.

Wrth werthuso pa mor briodol yw'r buddsoddiad presennol gan Lywodraeth Cymru yn y cyd-destun hwn, ystyriodd y Panel y berthynas ehangach rhwng y diwydiannau creadigol a'u gwerth i'r economi. Mae ymchwil yn dangos sut y mae gwahanol fathau o'r diwydiannau hyn yn helpu twf economaidd.

Yn eu papur 'Four Models of the Creative Industries' (2008) ⁶ mae Potts a Cunningham yn dadansoddi'r berthynas rhwng y diwydiannau creadigol a'u gwerth i'r economi yn ei chyfanrwydd. Maent yn disgrifio pedwar model:



1. Lles: lle mae angen cymhorthdal a lle y ceir gwerth economaidd negyddol
2. Cystadleuaeth: ble mae'r diwydiannau creadigol yn gweithio fel unrhyw ddiwydiant arall
3. Twf: lle mae buddsoddiad a thwf yn flaenoriaethau
4. Arloesi: ble y caiff dyfeisgarwch yn y diwydiannau creadigol ei gefnogi er mwyn lledaenu i wahanol sectorau, er enghraifft drwy ddatblygu meddalwedd neu arloesi digidol.

Yn ei dadansoddiad o'r sectorau diwylliant a llenyddiaeth mae'r adolygiad hwn wedi canolbwyntio i raddau helaeth ar y model Lles, sy'n cynrychioli rhan helaethaf y gweithgarwch yng Nghymru.

Yn *Social Network Markets: A New Definition Of The Creative Industries* (2008) ⁷ mae Potts, Cunningham, Hartley ac Ormerod yn dadlau o blaid ddiffiniad mwy defnyddiol sy'n seiliedig ar y

⁵ <http://gov.wales/topics/businessandconomy/our-priority-sectors/creative-industries/?skip=1&lang=cy>

⁶ 'Four Models Of The Creative Industries' (2008)

⁷ [Social Network Markets: A New Definition Of The Creative Industries](#)

farchnad o ddiwydiannau creadigol, lle mae'r hyn sy'n cael ei greu a'i fwynhau yn dibynnu llawer mwy ar dafod leferydd, chwaeth, diwylliant, poblogrwydd ac adborth ar ffurf gwybodaeth, na diwydiannau eraill.

'The CIs, then, are properly defined in terms of a class of economic choice theory in which the predominant fact is that, because of inherent novelty and uncertainty, decisions both to produce and to consume are determined by the choice of others in a social network. This class of social network choice is, we suggest, the proper definition of the creative industries.'

Gall y goblygiadau ar gyfer polisi fod fel a ganlyn:

- Ystyrir diwydiannau creadigol yn llai fel lles cymdeithasol ac yn fwy fel systemau arloesi
- Newid o'r model cydadferol o'r brig i lawr i fodel hwyluso ac arloesi arbrofol o'r bôn i fyny.
- Datblygu microddata manylach a gwell ar gwmnïau, swyddi a phatrymau gweithgaredd, gan fwrw goleuni ar fecanweithiau twf economaidd a'r rhyngweithio ymysg gweithredoedd a sefydliadau diwylliannol, cymdeithasol ac economaidd.

Yn ei lyfr *Positive Linking* mae cydawdur y papur uchod yn trafod sut mae rhoi pwyslais ar bobl fel creaduriaid cymdeithasol yn arwain at oblygiadau o ran llunio polisiâu, gyda normau, pwysau gan gyfoedion a dylanwadwyr yn pennu ei weithrediad llwyddiannus:

'A key point here is that when network effects are present, the most effective policies are unlikely to be generic, across-the-board changes to incentives. Careful prior analysis and thoughtful targeting become the order of the day. If we can get right, or even approximately right, less can be more. Fewer resources used more intelligently can potentially lead to much more effective strategies'.

Gellir ystyried polisi ar lenyddiaeth a chyhoeddi yn allweddol i dwf yn y diwydiannau creadigol, i helpu i ddatblygu ysgrifenyddwyr copi ar gyfer y we, y rhai sy'n ysgrifennu gemau chwaraeon, awduron sgrïpt ar gyfer ffilm, teledu ac animeiddio, yn ogystal â ffuglen y gellir defnyddio eu creadigaethau ar wahanol lwyfannau.

Manteision Economaidd

Os yw cefnogaeth ariannol y Llywodraeth ar gyfer cyhoeddi yng Nghymru yn mynd i sicrhau manteision economaidd mwy sylweddol, yna mae angen i'r diwydiant ddeall bod cyfraniad y diwydiant cyhoeddi a llenyddiaeth at ddatblygiad economaidd yn dibynnu'n hollbwysig ar gynhyrchu gwaith sydd â gwerth eiddo deallusol gwreiddiol o ran hawlfraint. Ac mae hyn yn cynnwys datblygu seilwaith ar gyfer busnesau cyhoeddi a datblygu talent awduron yng Nghymru.

Mae dau gwestiwn allweddol i'w hystyried o ran manteision datblygu economaidd a llenyddiaeth a chyhoeddi yng Nghymru:

- A yw'r cyllid hwn yn helpu i ddatblygu seilwaith cyhoeddi?
- A yw'r cyllid hwn yn cyfrannu at lwybrau talent i awduron?

Swyddi Cynaliadwy

Yn 2015, roedd 200,000 o bobl yn cael eu cyflogi yn y diwydiant cyhoeddi ledled y DU. Nid oes data penodol ar gael ar statws cyflogaeth o fewn y diwydiant cyhoeddi yng Nghymru - boed yn llawn amser neu'n rhan amser. Fodd bynnag, mae'r Cyngor Llyfrau yn cyfeirio'n rheolaidd at y ffaith bod tua 1,000 o bobl yn cael eu cyflogi yn y sector cyhoeddi yng Nghymru a dyna'r unig

ffynhonnell sydd ar gael. Mae'r gyfradd yng Nghymru, felly, yn amlwg yn is na'r cyfartaledd cenedlaethol (h.y tua dim ond 0.5% o gyfanswm y DU o gymharu â chyfanswm gweithlu Cymru sydd tua 5% o gyfanswm gweithlu'r DU). Fodd bynnag, mae'n werth nodi nad oes gan Gymru gyhoeddwr mawr fel y rhai a geir yn Llundain, Caeredin a Rhydychen. Ar yr un pryd, mae'r diwydiant cyhoeddi yng Nghymru wedi ei leoli yn bennaf mewn ardaloedd lle mae canran y siaradwyr Cymraeg yn uwch na'r cyfartaledd ledled Cymru

Ni fanteisiwyd ar gyfleoedd digidol i gynhyrchu cyfryngau newydd megis llyfrau llafar. Mae angen datblygu sgiliau newydd ar gyfer cynhyrchu llenyddiaeth ar gyfer amrywiol lwyfannau: creu a rheoli cymuned ar-lein; creu a chynhyrchu pigion fideo a marchnata ar draws platfformau megis Amazon.

Fodd bynnag, mae patrymau cyflogaeth a swyddi cynaliadwy yn y byd llenyddiaeth a chyhoeddi yn newid ledled y byd. Yn gynyddol, mae arbenigeddau megis golygu a dylunio yn cael eu rhoi ar gontractau allanol i weithwyr llawrydd, ac mae llwyfannau digidol yn cynnig cyfleoedd i awduron fod yn hunangyhoeddwr, yn hybrid - sy'n cyhoeddi'n draddodiadol ac yn hunangyhoeddi - ac i gael mynediad hawdd i farchnadoedd byd-eang yn ogystal â marchnadoedd lleol. Mae arbenigedd digidol a dealltwriaeth o farchnata ar-lein yn bwysig iawn o ran y sianelau dosbarthu newydd hyn, fel y dangoswyd gan Book Swarm⁸, asiantaeth ddigidol ar gyfer busnesau llyfrau a bookbridgr⁹, cymuned flogio, a sefydlwyd gan y cyhoeddwr Hodder Headline.

Mae dewisiadau amgen, yn hytrach na bod ar domen llawysgrifau digymell yn swyddfa cyhoeddwr, yn dod i'r amlwg. Mae Lisa Hall¹⁰ yn ysgrifennu blog llyfrau poblogaidd, ac yn sgil ei chysylltiadau gyda chyhoeddwr bu'n haws iddi sicrhau bod ei nofel *Between You and Me*¹¹ yn cael ei chyhoeddi'n draddodiadol, tra bod ei phresenoldeb sylweddol ar-lein yn helpu adolygiadau a gwerthiannau.

Yn yr un modd ag y mae newyddiadurwyr bellach yn cael eu cyflogi'n gynyddol mewn rolau cysylltiadau cyhoeddus ac fel awduron technegol, mae rhai awduron creadigol yn ategu eu harbrofion llenyddol drwy ysgrifennu papurau gwyn, copi ar lein, cylchlythyrau a chynnwys ar gyfer blogiau i gleientiaid sy'n barod i dalu iddynt. Mae gwefannau fel *Upwork*¹² yn gweithredu fel brocer ar-lein er mwyn i'r awduron hyn allu masnachu ledled y byd.

Er bod ysgrifennu ar gyfer y sgrin yn hynod gystadleuol, gyda Hollywood yn cyflogi rhwng 7 - 8000 o awduron yn ôl yr amcangyfrifon, mae'r twf mewn fideos ar-lein yn aml yn golygu bod gwaith lleol ar gael i ysgrifenywyr sgrïptiau i helpu busnesau i gyfleu eu neges.

Yn aml, mae gwaith lleol ar gyfer ysgrifenywyr sgrïptiau i helpu busnesau i gyfleu eu neges. Yn ôl y papur gwyn hwn gan Cisco¹³, rhagwelir mai fideo fydd 80% o draffig y rhyngwyd erbyn 2019.

Mynychodd tua 140,000 o bobl Eisteddfod Genedlaethol 2016 yn y Fenni, ac mae'r ffigurau presenoldeb yn dangos cynulleidfa weddol sefydlog a rhagweladwy ar gyfer y diwylliant Cymraeg. Fel y mae chwilio yn ôl iaith ar Google yn dangos, byddai'r gynulleidfa hon yn niche pendant ar gyfer cynnwys arloesol ar-lein ar draws llwyfannau. Mae rhywfaint o gefnogaeth i'r

⁸ <http://bookswarm.co.uk>

⁹ <http://www.bookbridgr.com/>

¹⁰ <http://www.lisahallauthor.co.uk/>

¹¹ <https://www.amazon.co.uk/Between-You-Me-bestselling-psychological-ebook/dp/B01B7RRNB8>

¹² <https://www.upwork.com/hire/business-writers/>

¹³ <http://www.cisco.com/c/en/us/solutions/collateral/service-provider/visual-networking-index-vni/complete-white-paper-c11-481360.html>

syniad hwn yn sgil poblogrwydd cynyddol Grwpiau Dysgwyr ar Facebook fel 'Dwi'n Dysgu Cymraeg' (4340 o aelodau) a 'Say Something in Welsh' (3452 o aelodau), sy'n dangos brwdfrydedd ac awydd am gynnwys Cymraeg mewn amrywiol fformatau, y gellid ei gael o wefan ganolog.

Cyfyngau Print yng Nghymru

Mae'n werth ystyried yn gryno sefyllfa bresennol y cyfyngau print yng Nghymru.

Cyfeiriodd tystiolaeth a dderbyniwyd gan y Panel, yn cynnwys ymatebion i'r arolwg ar-lein, at bwysigrwydd y diwydiant cyhoeddi a llenyddiaeth yng Nghymru oherwydd gwendid y cyfyngau print yng Nghymru - trafodir hyn yn fanylach yn y dadansoddiad o'r arolwg yn **Atodiad 5**. Yn ogystal, nid yw'r papurau sydd â'r cylchrediad mwyaf yng Nghymru megis *The Sun*, *The Daily Mail* yn rhoi llawer o sylw i Gymru yn gyffredinol, heb sôn am y diwydiant cyhoeddi. Yn ystod y blynyddoedd diwethaf, bu gostyngiad cyson yn nifer y darllenwyr papurau newydd dyddiol yng Nghymru. Dangosodd ffigurau diweddaraf y Swyddfa Archwilio Cylchrediad ym mis Chwefror 2017 mai *The Daily Post* bellach yw'r papur newydd rhanbarthol sy'n gwerthu orau yng Nghymru - gan werthu 22,251 o gopïau ar gyfartaledd yn 2016 o gymharu â 23,645 o gopïau wedi'u hargraffu a werthwyd yn 2015. Mae'r tabl isod yn adlewyrchu'r gostyngiad yn y ffigurau cylchrediad.

| | 1979 | 1997 | 2005 | 2015 | 2016 |
|--------------------------|---------|--------|--------|--------|--------|
| Daily Post | 50,000 | 52,000 | 40,835 | 23,645 | 22,251 |
| South Wales Evening Post | 69,000 | 67,185 | 56,487 | 23,870 | 21,031 |
| Western Mail | 94,000 | 61,541 | 43,247 | 18,063 | 15,697 |
| South Wales Echo | 120,000 | 74,246 | 57,852 | 17,820 | 15,140 |
| South Wales Argus | 53,000 | 30,597 | 30,295 | 11,475 | 10,808 |

Fodd bynnag, bu cynnydd yn nifer yr ymwelwyr ar-lein ar gyfer y mwyafrif o deitlau. Tyfodd cynulleidfa Wales Online 13.1% gan gyrraedd cyfartaledd o 292,824 o borwyr unigryw dyddiol, yn ôl ffigurau diweddaraf ABC yn 2017. Tyfodd gwefan y Daily Post 5.1% i gyrraedd 81,125 o borwyr unigryw dyddiol. Er bod y ffigurau ar-lein yn galonogol, nid ydynt yn cynhyrchu'r math o incwm a allai ddisodli'r gwerthiannau a'r refeniw hysbysebu a gollir gan bapurau newydd.

Sylw yn y cyfyngau i'r sectorau cyhoeddi a llenyddiaeth

Nododd y Panel y prinder sylw i'r diwydiant yn y wasg yn gyffredinol mewn papurau newydd a chan ddarleddwyr yng Nghymru. Roedd hyn yn cynnwys adolygiadau o lyfrau yn ogystal â rhaglenni penodol. Er bod rhaglenni fel *Heno* ar S4C yn cynnwys eitemau rheolaidd ar y diwydiant, gan gynnwys digwyddiadau lansio llyfrau, nid oes darpariaeth debyg yn Saesneg ar BBC Cymru neu ITV Cymru. Awgrymodd y Panel, felly, y dylid gwella'r cysylltiadau rhwng y sector a'r cyfyngau prif ffrwd yng Nghymru. Dylai'r darleddwyr wneud llawer mwy i drafod llyfrau o Gymru a dylid trafod llyfrau Cymraeg gan y cyfyngau Seisnig, ynghyd ag i'r gwrthwyneb, er mwyn croesi'r ffiniau rhwng y ddau ddiwylliant a thraddodiad y genedl.

Sut y mae Llenyddiaeth a Chyhoeddi yn cyfrannu at bolisiau Llywodraeth Cymru

Gofynnwyd i'r Panel asesu a oedd prif amcanion Llywodraeth Cymru o ran cefnogi'r diwydiant cyhoeddi a llenyddiaeth yng Nghymru, yn y ddwy iaith, yn briodol ac yn addas at y diben. Dim ond os bydd yn cefnogi'n glir y rhaglen a gytunwyd ar gyfer y Llywodraeth y bydd modd cyfiawnhau unrhyw wariant gan Lywodraeth Cymru. Ystyriodd y Panel ddogfen strategaeth y Llywodraeth *Symud Cymru Ymlaen 2016-2022*¹⁴ fel y datganiad polisi cyffredinol a gwerthuswyd y buddsoddiad presennol yn unol â'r blaenoriaethau a nodwyd.

Ystyriodd hefyd weledigaeth Llywodraeth Cymru ar gyfer diwylliant yng Nghymru a amlinellwyd yn y ddogfen *Golau yn y Gwyll: Gweledigaeth ar gyfer Diwylliant yng Nghymru*¹⁵ a lanswyd ym mis Rhagfyr 2016.

Mae'n amlwg y bydd cefnogi a gwella diwydiant cyhoeddi dwyieithog llwyddiannus yng Nghymru nid yn unig yn gwneud cyfraniad at y strategaeth twf economaidd sy'n gysylltiedig â'r diwydiannau creadigol yng Nghymru, ond hefyd yn cefnogi'r mentrau microfusnes niferus sydd wedi'u sefydlu, ar y cyfan, mewn cyd-destunau gwledig ac yn cefnogi'r iaith Gymraeg a diwylliant Cymru. Mae cyfarwyddebau polisi cysylltiedig sy'n canolbwyntio ar ddiwylliant a threftadaeth Cymru, datblygu system addysgol newydd a'r gofyniad i gynhyrchu a chyhoeddi deunyddiau dwyieithog hefyd yn cadarnhau pa mor briodol yw parhad cymorth ariannol gan y Llywodraeth ar gyfer cyhoeddi yng Nghymru.

Yn yr un cyd-destun mae hyrwyddo llenyddiaeth yng Nghymru wrth wraidd polisi diwylliannol a chreadigol deinamig. Bydd Cymru greadigol llwyddiannus yn gweld gwerth buddsoddi mewn hyrwyddo talent lenyddol yn y Gymraeg a'r Saesneg. Gan gydnabod y ffaith bod gan Gymru un o'r traddodiadau lenyddol a llafar hynaf yn Ewrop, mae hefyd yn hanfodol bod cefnogaeth barhaus yn cael ei rhoi yn y ddwy iaith i ddatblygu talent lenyddol greadigol Cymru ymhellach. Er mwyn cyflwyno Cymru greadigol ar lwyfan rhyngwladol, rhaid cynnwys y cyfoeth o dalent lenyddol fodern sydd gennym yn y ddwy iaith. Bydd buddsoddi mewn cyfieithu a marchnata rhyngwladol yn allweddol i ddangos Cymru 'gysylltiedig' gyda pholisi diwylliannol cryf.

Ystyriodd y Panel hefyd y rhwymedigaethau cyfreithiol a nodir yn Neddff Llesiant Cenedlaethau'r Dyfodol (Cymru) 2015¹⁶ ac ystyriwyd pe bai'r Llywodraeth yn dangos yn llwyddiannus y rôl bwysig y mae diwylliant yn ei chwarae wrth wella iechyd a llesiant, yna roedd parhau i fuddsoddi mewn datblygu, hyrwyddo a chyhoeddi llenyddiaeth yn gwbl briodol.

¹⁴ <http://gov.wales/about/programme-for-government/?lang=cy>

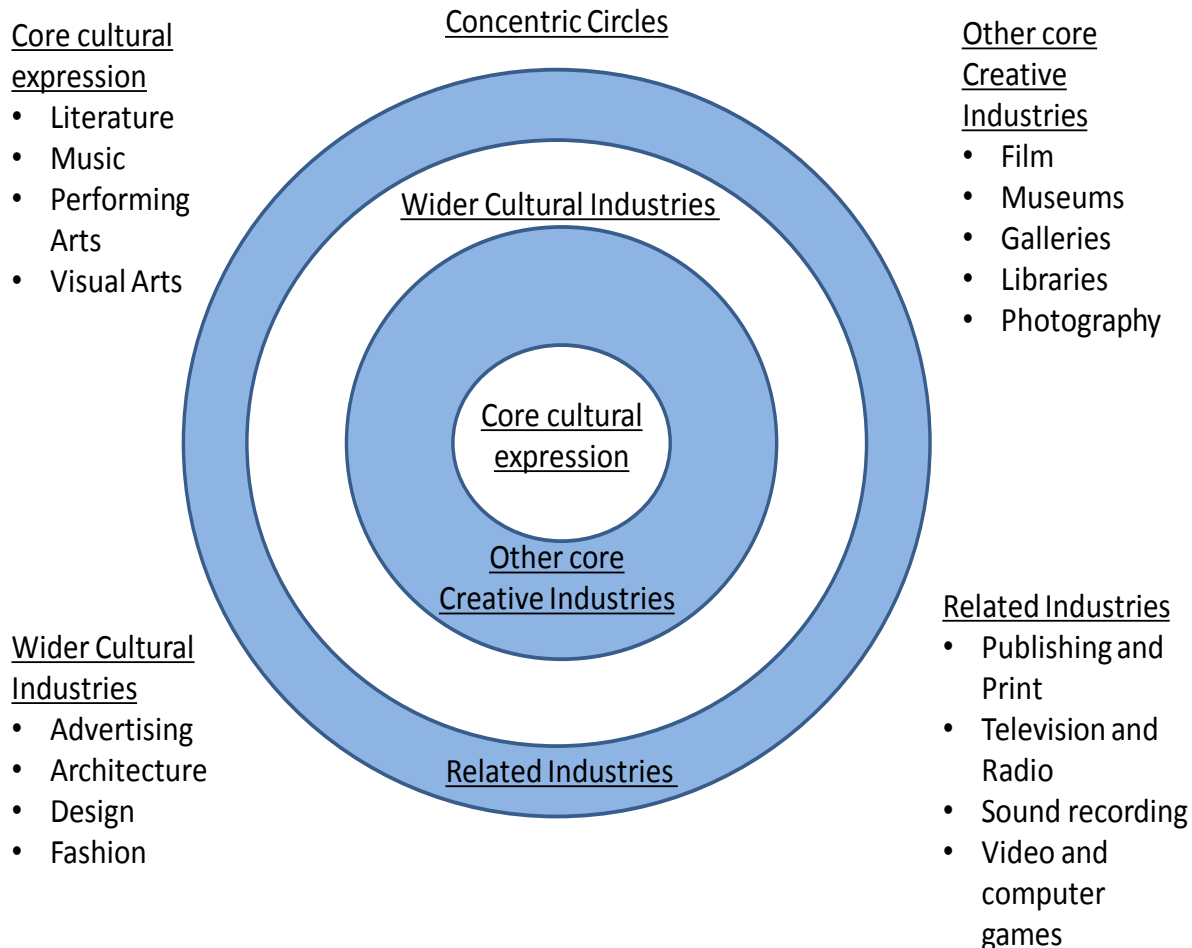
¹⁵ <http://gov.wales/topics/culture-tourism-sport/arts/a-vision-for-culture-in-wales/?skip=1&lang=cy>

¹⁶ <http://gov.wales/topics/people-and-communities/people/future-generations-act/?lang=cy>

Cymorth gan Lywodraeth Cymru

Model cylchoedd consentrig y diwydiannau diwylliannol

Wrth ystyried lle llenyddiaeth a chyhoeddi yn y diwydiannau creadigol neu ddiwylliannol yn eu cyfanrwydd, mae'r model isod yn ddefnyddiol fel cyfraniad at osod y cyd-destun¹⁷.



Cyngor Llyfrau Cymru (y Cyngor Llyfrau)

Mae Llywodraeth Cymru yn cefnogi'r diwydiant cyhoeddi yng Nghymru drwy'r Cyngor Llyfrau, sy'n gorff anstatudol (ac elusen gofrestrdig) sy'n darparu gwasanaethau arbenigol i'r fasnach cyhoeddi llyfrau a chylchgronau yng Nghymru. Mae'r Cyngor Llyfrau wedi diffinio ei gylch gwaith fel cefnogi a datblygu'r diwydiant cyhoeddi yng Nghymru yn y ddwy iaith (Cymraeg a Saesneg).

Mae'r grŵp gorchwyl a gorffen ar gyhoeddi yn 2001 a gadeiriwyd gan Delyth Evans yn argymhell nifer o newidiadau i'r trefniadau cyllido ar gyfer y Cyngor Llyfrau. Yn dilyn yr adolygiad hwn, penderfynodd Llywodraeth Cymru y dylai'r cyllid yr oedd y Cyngor Llyfrau yn ei gael gan Fwrdd yr Iaith Gymraeg ac awdurdodau lleol ddod yn uniongyrchol gan Lywodraeth Cymru. Yn dilyn hynny yn 2003, penderfynwyd y byddai'r cyllid ar gyfer cyhoeddiadau Saesneg a ddarparwyd gan Gyngor y Celfyddydau ar gyfer llyfrau Saesneg yn cael ei drosglwyddo i Lywodraeth Cymru a'i weinyddu gan y Cyngor Llyfrau.

Cyn 2003, felly roedd y Cyngor Llyfrau ond yn ymwneud â'r byd cyhoeddi Cymraeg.

¹⁷ Throsby, David. Cultural Trends Cyf. 17, Rhifyn 3, tudalennau 147-164, Cyhoeddwyd ar Iain 26 Medi 2008)

Y Sefyllfa Ariannu

Cyllideb 2016-17

Derbyniodd y Cyngor Llyfrau £3.6 miliwn gan Lywodraeth Cymru yn ystod y flwyddyn ariannol 2016-17, wedi'i rannu fel a ganlyn:

| Prif gategoriâu gwariant y Cyngor Llyfrau yn 2016-17 | £ |
|--|---------------|
| Staff arbenigol sy'n cefnogi cyhoeddwr ac eraill ¹⁸ | 748 |
| Grantiau Cyhoeddi | 2,299 |
| Gweinyddu Grantiau | 184 |
| Cyfalaf | 60 |
| Costau Rhedeg Craidd | 295 |
| Cyfanswm | £3,586 |

Mae Grant Cyhoeddi'r Cyngor Llyfrau yn cefnogi cyhoeddiadau Cymraeg a Saesneg, gyda 1,632,550 miliwn yn cael ei ddyrannu i gyhoeddiadau Cymraeg a £666,450 i gyhoeddiadau Saesneg

Mae dadansoddiad pellach o'r symiau hyn fel a ganlyn:

¹⁸ h.y. darparu gwasanaethau megis golygu, dylunio, gwasanaethau llyfryddiaethol a marchnata i gyhoeddwr

Grantiau Dosbarthu 2016/17

Cyhoeddiadau Cymraeg

| | £ |
|--|------------------|
| Cyhoeddwy Rhaglenni | 360,800 |
| Grantiau Cyhoeddi Unigol | 80,000 |
| Taliadau Perfformiad ac ati | 14,600 |
| Penodiadau a Hyfforddiant | 209,375 |
| Taliadau i Awduron a Darlunwyr | 322,775 |
| Marchnata | 50,000 |
| Llyfrwerthwyr | 45,000 |
| Cyhoeddi Electronig | 15,000 |
| Gemau | 0 |
| Cylchgronau | 345,000 |
| Cymorth i'r Wasg Gymraeg | 190,000 |
| Ymchwil i'r Farchnad | 0 |
| Cyfanswm y Grantiau ar gyfer Cyhoeddiadau Cymraeg | <u>1,632,550</u> |

Cyhoeddiadau Saesneg

| | £ |
|--|----------------|
| Cylchgronau Refeniw | 175,000 |
| Llyfrau Refeniw | 228,154 |
| Grantiau Cyhoeddi Unigol | 60,000 |
| Grantiau Bach a Hyfforddiant | 8,500 |
| Blaendaliadau i Awduron | 52,000 |
| Cymorth ar gyfer Swyddi | 64,240 |
| Marchnata | 41,056 |
| Clasuron | 37,500 |
| Cyfanswm y Grantiau ar gyfer Cyhoeddiadau Saesneg | <u>666,450</u> |

Grantiau Cyngor Llyfrau Cymru

Mae Cyngor Llyfrau Cymru yn cefnogi'r diwydiant cyhoeddi yng Nghymru drwy dair prif ymyrraeth - drwy gynnig gwasanaethau arbenigol â chymhorthdal am ffi fechan i'r cyhoeddwy ym meysydd golygu, dylunio, gwerthu a marchnata a hefyd drwy roi cymorth grant i tua 300 o deitlau bob blwyddyn (200 o deitlau Cymraeg a 100 o deitlau Saesneg). Yn ogystal, mae ei Ganolfan Ddosbarthu yn stocio teitlau o ddiddordeb Cymreig yn y ddwy iaith, gan ddosbarthu'r rhain i dros 800 o safleoedd gwerthu.

Mae'r Cyngor Llyfrau yn sianelu grantiau drwy gyhoeddwy i gefnogi a datblygu diwydiant cyhoeddi ffyniannus a hyfyw. Gall awduron wedyn fanteisio ar sgiliau cyhoeddi a ddarperir gan gyhoeddwy unigol gan gynnwys golygu copi creadigol a marchnata.

Mae cyfran sylweddol o'r grant yn cael ei roi i gyhoeddwr fel grant bloc blynyddol ar gyfer cyhoeddi rhaglen sy'n cynnwys nifer penodol o deitlau (roedd cyllido rhaglen yn un o'r argymhellion a wnaed yn adroddiad y Grŵp Gorchwyl a Gorffen ar Gyhoeddi yn 2001, a gomisiynwyd gan Lywodraeth Cymru). Mae'r Cyngor Llyfrau hefyd yn cynnal cynllun cyhoeddi fesul teitl ar gyfer cyhoeddwr sy'n dymuno gwneud cais.

Yn dilyn argymhellion gan nifer o adroddiadau ac ymgynghori â rhanddeiliaid yn y diwydiant, mae'r Cyngor Llyfrau wedi ymestyn ei gymorth grant i gynnwys ystod ehangach o deitlau masnachol gyda mwy o bwyslais ar ffuglen boblogaidd, cofiannau a chwaraeon er mwyn cyrraedd nifer fwy o ddarllenwyr o amrywiaeth ehangach o gefndiroedd.

Crynodeb o gyllideb y Cyngor Llyfrau ers 2010-11

| | 2010-11 £ | 2011-12 £ | 2012-13 £ | 2013-14 £ | 2014-15 £ | 2015-16 £ | 2016-17 £ |
|---|------------------|------------------|------------------|------------------|------------------|------------------|--------------|
| Costau Rhedeg* | 1,305 | 1,258 | 1,207 | 1,153 | 1,103 | 1,043 | 1,043 |
| Grantiau | 2,768 | 2,773 | 2,773 | 2,773 | 2,623 | 2,483 | 2,483 |
| Cyfalaf | 25 | 25 | 25 | 25 | 25 | 60 | 60 |
| Cyfanswm y cyllidebau gwariant | 4,098 | 4,056 | 4,005 | 3,951 | 3,751* | 3,586 | 3,586 |
| Incwm gwirionedd ol: | 3,511,758 | 3,567,611 | 3,510,200 | 3,533,475 | 3,327,779 | 2,943,806 | dd/b |
| o Ganolfan Ddosbarthu, adrannau eraill a'r Adran Addysg a Sgiliau | | | | | | | |

*gan gynnwys cost y gwasanaethau arbenigol a ddarperir gan staff y Cyngor Llyfrau

**gan gynnwys gweinyddu grant (£184,000 yn 2016-17)

Mae rhagor o fanylion am y Cyngor Llyfrau ar gael ar ei wefan¹⁹; yn Adroddiad Blynyddol 2015²⁰; yng Nghynllun Gweithredol 2016-17²¹ ac yn y Cynllun Strategol²².

¹⁹ <http://www.clc.org.uk/>

²⁰ <http://www.clc.org.uk/ni-us/cyhoeddiadau-publications/dogfennau-documents?diablo.lang=cym>

²¹ <http://www.clc.org.uk/ni-us/cyhoeddiadau-publications/dogfennau-documents?diablo.lang=cym>

Cyflwynodd y Cyngor Llyfrau yr wybodaeth gefndir ganlynol i'w hystyried gan y Panel pan roddodd dystiolaeth lafar:

- Er gwaethaf yr awgrym yn enw'r sefydliad yn Saesneg, mae'r Cyngor Llyfrau yn gweithredu ac yn cefnogi cyhoeddi a llenyddiaeth yn y Gymraeg a'r Saesneg.
- Mae cyhoeddwy'r yng Nghymru yn gweithio mewn economi gymhleth ac ansicr, gan gystadlu â'r diwydiant cyhoeddi masnachol sydd wedi'i leoli yn Llundain yn bennaf.
- Nod y Cyngor Llyfrau yw galluogi busnesau ac awduron bach i ddod i amlygrwydd a datblygu.
- Mae'r Cyngor Llyfrau yn gweithio ar draws ardaloedd difreintiedig.
- Mae cyfrifoldeb craidd y Cyngor Llyfrau yn ymwneud â'r diwydiant cyhoeddi ac mae ganddo bryderon difrifol am unrhyw ostyngiad pellach yn y gyllideb a fyddai'n niweidio ei allu i ddarparu a datblygu ei wasanaeth presennol.

Cyngor Llyfrau Cymru - Strategaeth a Strwythur

- Mae dogfen y Cyngor Llyfrau *Edrych Ymlaen* yn edrych tua'r dyfodol, ac yn cynnwys manylion am weithio mwy gyda phrifysgolion a sefydliadau addysgol, gan gynnwys rhoi arweiniad i athrawon i ganfod deunydd darllen addas.
- Pwysleisiodd y Cyngor Llyfrau ei bod yn hanfodol cael strwythur clir i sicrhau datblygiad. Eglurwyd rôl gwahanol Baneli'r Cyngor Llyfrau, sy'n cynnwys y Panel Grantiau Cyhoeddi Cymraeg, y Panel Grantiau Cyhoeddi Saesneg a Phanel Llyfrau Plant a Hyrwyddo Darllen.
- Mae cymorth y Cyngor Llyfrau i awduron yn mynd drwy'r cyhoeddwy'r.
- Mae'r Cyngor Llyfrau yn annog ffurfio grwpiau a chyrrff (e.e. Cwllwm Cyhoeddwy'r) ac mae'n annog cyhoeddwy'r Saesneg i ffurfio grŵp tebyg.

Cyngor Llyfrau Cymru - Swyddogaethau a Gwasanaethau

- Mae gwasanaethau'r Cyngor Llyfrau yn cynnwys y Ganolfan Ddosbarthu sy'n cynrychioli cangen fasnachol y Cyngor Llyfrau. Mae'n cyfrannu'n sylweddol at incwm y Cyngor Llyfrau gyda thros 10,000 o deitlau mewn stoc ac mae'n derbyn tua 1000 o deitlau newydd bob blwyddyn - 55% o'r rhain yn deitlau Saesneg.
- Gwasanaeth dylunio a golygu sy'n cynnig gwasanaeth cymorth i gyhoeddwy'r, yn enwedig cwmnïau cyhoeddi llai, sy'n awyddus i ddatblygu a thyfu.
- Un o nodau allweddol y Cyngor Llyfrau yw galluogi awduron o Gymru i gystadlu ag awduron o Loegr yn ogystal ag annog awduron o Gymru i ddychwelyd i Gymru.
- Targedu ardaloedd difreintiedig a grwpiau difreintiedig a mynd â llyfrau i gefnogi ysgolion sy'n tanberfformio.
- Mae'r Cyngor Llyfrau hefyd ynghlwm mewn mentrau gan gynnwys:
 - Blwyddyn Darllen Genedlaethol
 - Stori Sydyn/Quick-Reads
 - Dathlu Roald Dahl

²² <http://www.cllc.org.uk/ni-us/cyhoeddiadau-publications/dogfennau-documents?diablo.lang=cym>

- Yr Ymgyrch Dinas-Ranbarth - datblygodd y Cyngor Llyfrau gais am gyllid ar gyfer Dinas Darllen Abertawe sy'n cael ei ystyried ar hyn o bryd.

Sut y mae'r cyllid y mae'r Cyngor Llyfrau yn ei dderbyn gan Lywodraeth Cymru yn cyfrannu at gyflawni nifer o flaenoriaethau Llywodraeth Cymru

Mae'r Cyngor Llyfrau wedi diffinio ei gylch gwaith fel cefnogi a datblygu'r diwydiant cyhoeddi yng Nghymru yn y ddwy iaith (Cymraeg a Saesneg). Mae'r cylch gwaith eang hwn yn caniatáu iddo gyfrannu'n sylweddol at agenda strategol Llywodraeth Cymru mewn nifer o feysydd:

(a) Y Gymraeg

Mae gan y Cyngor Llyfrau fandad allweddol i hyrwyddo'r diwydiant Cyhoeddi Cymraeg. Llyfrau a chyhoeddiadau Cymraeg a dwyieithog yw sylfaen cymorth Llywodraeth Cymru ar gyfer y defnydd ehangach o'r iaith Gymraeg a chyfrannu at gyflawni strategaeth iaith Gymraeg Llywodraeth Cymru a'r nod o gyrraedd miliwn o siaradwyr Cymraeg erbyn 2050.

Er enghraifft, ariennir Golwg 360, y gwasanaeth newyddion Cymraeg ar-lein, gan Lywodraeth Cymru drwy'r Cyngor Llyfrau. Mae Golwg 360 wedi cyfrannu at ddyhead Llywodraeth Cymru i weld gwasanaethau newyddion lluosog yng Nghymru oherwydd hebdo BBC Cymru fyddai'r unig wasanaeth newyddion Cymraeg ar-lein. Mae gwefan lyfryddiaethol a gwerthu llyfrau y Cyngor Llyfrau, gwales.com, yn ganolbwynt digidol ar gyfer y diwydiant cyhoeddi yng Nghymru, yn brif ffynhonnell ar gyfer e-gyhoeddiadau Cymraeg ac yn darparu gwasanaeth cwbl ddwyieithog i'w defnyddwyr.

Mae dros 65% o'r cyllid a gaiff y Cyngor Llyfrau gan Lywodraeth Cymru yn cael ei sianelu tuag at gyhoeddiadau Cymraeg. Er enghraifft, yn ystod y flwyddyn ariannol 2016-17 dyrannwyd £1,632,550 i gyhoeddiadau Cymraeg a chlustnodwyd £666,450 ar gyfer cyhoeddiadau Saesneg. At hynny, mae pob aelod o staff y Cyngor Llyfrau yn ddwyieithog. Mae nifer y cyhoeddwy'r a'r llyfrwerthwyr o fewn ardaloedd lle y ceir cyfrannau uwch o siaradwyr Cymraeg yn fwy na'r hyn y byddai rhywun yn ei ddisgwyl pe baent yn cael eu dosbarthu ar draws Cymru ar sail poblogaeth pro rata ac felly maent yn galluogi gweithwyr proffesiynol a medrus i aros o fewn cymunedau lleol, sy'n aml yn gymunedau gwledig.

Mae siopau llyfrau sy'n gwerthu cyfran fawr o lyfrau Cymraeg a deunyddiau eraill yn ganolbwynt bach i siaradwyr rhugl a dysgwyr ar gyfer yr iaith, ei llenyddiaeth a chyfeirio pobl at weithgareddau Cymraeg.

(b) Datblygu Economaidd a Chynaliadwyedd

Mae cyhoeddwy'r, argraffwyr a llyfrwerthwyr yn cynnig amrywiaeth o gyfleoedd cyflogaeth medrus iawn a lled-fedrus.

Amcangyfrifir bod tua 1,000 o bobl yn cael eu cyflogi'n uniongyrchol yn y diwydiant ac eithrio awduron - mwy os bydd cyflogaeth eraill sy'n ymwneud â llyfrau, megis llyfrgellwyr, yn cael eu cynnwys. Mae llawer sy'n cynnig gwasanaethau dylunio a golygu yn gwneud hynny fel gweithwyr llawrydd. Mae llawer o'r cwmnïau a'r unigolion hyn wedi'u lleoli yng Nghymru wledig ac yn cyfrannu at yr economi leol.

Mae rhai tai cyhoeddi a siopau llyfrau wedi'u lleoli mewn ardaloedd difreintiedig gwledig ac ôl-ddiwydiannol. Gwnânt gyfraniad cadarnhaol at economi fregus yr ardaloedd hyn. Caiff hyn ei adlewyrchu yn **Atodiad 6** gyda mapiau yn dangos lleoliad cyhoeddwy a siopau llyfrau ledled Cymru.

Mae'r Cyngor Llyfrau yn rhedeg Canolfan Ddosbarthu (cyfanwerthwr i bob pwrpas) sy'n ariannu ei hun ar gyrion Aberystwyth. Mae ganddi drosiant o tua £5 miliwn gros a dyma yw sylfaen gwerthiant y rhan fwyaf o gyhoeddwy yng Nghymru.

(c) Llyfrau i Blant a Darllenwyr Ifanc

Gwelwyd datblygiadau sylweddol yn y byd llyfrau Cymraeg gyda chydbwysedd o deitlau gwreiddiol ac addasiadau'n cael eu cyhoeddi ar draws yr ystodau oedran. Mae cyhoeddwy newydd megis Firefly Press hefyd wedi cyfoethogi'r amrywiaeth o lyfrau plant Saesneg sydd ar gael dros y blynyddoedd diwethaf

Mae deunydd darllen addas yn ganolog i ddatblygu gallu a chymhelliant plentyn i ddarllen sydd, yn ei dro, yn sail i sgiliau ysgrifennu a sgiliau llafar. Mae ymchwil yn dangos bod darllen er pleser yn gwella cyrhaeddiad ar draws holl feysydd y cwricwlwm.

Ers dros ddeugain mlynedd, mae'r Cyngor Llyfrau wedi trefnu gwobr Tir Na n-Og bob blwyddyn sy'n dathlu'r llyfrau plant gorau yn y Gymraeg a'r Saesneg.

(ch) Llythrennedd a Darllen

Mae'r Cyngor Llyfrau yn cefnogi gweithgareddau sy'n helpu Llywodraeth Cymru i gyflawni'r ymrwymiad yn ei Rhaglen Lywodraethu i wella rhifedd a llythrennedd a datblygu Addysg Cyfrwng Cymraeg. Mae'r ystod eang o lyfrau a gyhoeddir yn addas ar gyfer darllenwyr o wahanol gefndiroedd ac yn ennyn eu diddordeb. Mae prosiectau llythrennedd, megis y cynllun Stori Sydyn llwyddiannus, wedi cael eu datblygu i wneud llyfrau'n hygyrch i'r rhai sy'n llai hyderus o ran eu sgiliau darllen. Yn fwy cyffredinol, yn ystod y blynyddoedd diwethaf datblygwyd ystod eang o ddeunydd darllen deniadol a phoblogaidd sy'n ennyn diddordeb y cyhoedd.

Mae'r Cyngor Llyfrau yn cefnogi datblygu cyhoeddiadau digidol gan gyhoeddwy yn y Gymraeg a'r Saesneg, a datblygu llwyfannau eraill fel apiau ar gyfer cylchgronau yn y ddwy iaith. Mae ei wefan, gwales.com, yn darparu modd i ddarllenwyr gael mynediad i e-lyfrau Cymraeg a Saesneg.

(d) Trechu tlodi a gweithio mewn ardaloedd o amddifadedd

Mae Strategaeth Tlodi Plant y Cyngor Llyfrau yn ddogfen fyw sy'n cyfrannu at waith Llywodraeth Cymru yn y maes hwn ac yn cefnogi argymhellion adroddiad y Farwnes Kay Andrews ar Ddiwylliant a Thlodi.²³

Mae gwaith y Cyngor Llyfrau yn cyfrannu at liniaru effeithiau tlodi. Caiff hyn ei gyflawni drwy hyrwyddo a chefnogi gweithgareddau yn y meysydd hyn mewn perthynas â chynlluniau'r Cyngor Llyfrau i hyrwyddo darllen, a thrwy weithgarwch ariannu ar y cyd ag awdurdodau addysg a llyfrgelloedd. Bydd y gweithgareddau yn sail i gyfraniad y Cyngor Llyfrau at fynd i'r afael â thlodi, yn enwedig ymhlith plant.

²³ <http://gov.wales/docs/drah/publications/140313-culture-and-poverty-cy.pdf>

Mae'r Cyngor Llyfrau yn cydlynu Sialens Ddarllen yr Haf ac mae'n gweithio'n agos gyda llyfrgelloedd ac ysgolion i sicrhau bod plant yn cael budd o'r prosiectau hyn. Bydd y gweithgareddau yn sail i gyfraniad y Cyngor Llyfrau at fynd i'r afael â thlodi, yn enwedig ymhlith plant.

Caiff strategaeth gyhoeddi y Cyngor Llyfrau ei llywio gan ei Strategaeth Tlodi Plant ac mae'n cynnwys gweithgareddau i hyrwyddo darllen fel sgil i drechu tlodi ymhlith teuluoedd, yn enwedig ymysg plant a phobl ifanc. Er enghraifft, mae digwyddiadau a drefnir ar y cyd â Diwrnod y Llyfr yn hyrwyddo cynhwysiant a chydweithredu ar draws y sector sy'n gysylltiedig â datblygu llythrennedd.

Mae'r Cyngor Llyfrau yn cydlynu'r gwaith o gyhoeddi teitlau Stori Sydyn/Quick Reads i'r rhai sy'n llai hyderus o ran eu sgiliau darllen ac yn hyrwyddo darllen fel sgil sy'n angenrheidiol i leddfu tlodi. Mae Adran Addysg Llywodraeth Cymru a'r Gwasanaethau Cyhoeddus yn rhoi arian ar wahân i'r Cyngor Llyfrau ar gyfer hyn.

(dd) Amrywiaeth Diwylliannol

Mae'r diwydiant cyhoeddi yn adlewyrchu i raddau helaeth, ond nid yn gyfan gwbl, amrywiaeth diwylliannol Cymru drwy gymysgedd o ysgrifennu clasurol, llenyddol a chyfoes mewn gwahanol genres. Mae'r Cyngor Llyfrau wedi gwneud penderfyniad bwriadol yn ystod y tair blynedd diwethaf i roi pwyslais ar ymestyn yr ystod o deitlau yn y ddwy iaith. Mae hyn wedi cyfrannu at hyrwyddo cydraddoldeb ymhlith darllenwyr yn ogystal â chynnig ystod o brofiadau darllen i bob darllenydd

Yn ei Gynllun Strategol, mae'r Cyngor Llyfrau yn rhestru sut y mae'n cyfrannu at gyflawni blaenoriaethau strategol Llywodraeth Cymru mewn nifer o feysydd:

- Cyflwyno diwylliant a threftadaeth Cymru drwy ystod eang o ddeunydd darllen amrywiol sy'n cyflwyno hanes Cymru a'i phobl
- Hybu a hyrwyddo'r iaith Gymraeg drwy ei chyflwyno fel iaith fyw a pherthnasol
- Hybu llythrennedd a darllen fel sgiliau hanfodol bywyd
- Cyfrannu at raglen sy'n mynd i'r afael â thlodi ac amddifadedd drwy sicrhau deunydd darllen sy'n amrywiol ac yn gynhwysol
- Hyrwyddo iechyd pobl Cymru gan bwysleisio budd darllen i les yr unigolyn
- Cyfrannu at economi Cymru drwy gefnogi diwydiant cynhenid a'i gyrhaeddiad ledled Cymru
- Cyfannu diwylliannau Cymru drwy gynnig cefnogaeth a gwasanaethau ar gyfer y ddwy iaith
- Cefnogi'r sector addysg drwy ddarparu deunydd darllen sy'n atodol i'r deunyddiau addysgol a noddir gan y Llywodraeth
- Hybu Cymru dramor drwy ei llenyddiaeth gyfoethog a bri ei hawduron
- Cyfrannu at y disgwrs cenedlaethol drwy gefnogi cylchgronau materion cyfoes a llenyddol ynghyd â deunydd academaidd

- Cefnogi deunydd digidol a hybu arloesedd yn y maes.

CYNGOR CELFYDDYDAU CYMRU

Mae Cyngor Celfyddydau Cymru yn gweithredu gyda chyfuniad o gymorth grant gan Lywodraeth Cymru ac arian y loteri. Yn ystod 2016/17, derbyniodd Cyngor y Celfyddydau £30.6 miliwn gan Lywodraeth Cymru ac £16 miliwn o arian y loteri. Mae gan Gyngor y Celfyddydau sefydliadau cenedlaethol ac mae Llenyddiaeth Cymru yn un ohonynt ar hyn o bryd. Nod Cyngor y Celfyddydau yw gwneud y celfyddydau mor ganolog ag y bo modd i fywydau a llesiant y genedl a chefnogi a meithrin y celfyddydau a rhoi llwyfan iddynt. Mae Cyngor y Celfyddydau yn annog mwy o bobl i gymryd rhan yn y celfyddydau ac i feithrin talent ifanc. Mae'r cyfryngau digidol yn dod yn rhan gynyddol o fecanwaith cyflawni'r Cyngor.

Celfyddydau Rhyngwladol Cymru yw'r gangen o Gyngor Celfyddydau Cymru sy'n ysgogi ac yn cefnogi ymgysylltiad rhyngwladol a phartneriaethau rhyngwladol. Nod Celfyddydau Rhyngwladol Cymru yw rhoi llwyfan rhyngwladol i gelfyddydau Cymreig a chodi proffil Cymru yn rhyngwladol.

Fel y nodwyd eisoes, yn dilyn adroddiad y grŵp gorchwyl a gorffen ar gyhoeddi yn 2003, trosglwyddwyd y cyllid a ddarparwyd gan Gyngor y Celfyddydau ar gyfer cyhoeddiadau Saesneg i Lywodraeth Cymru yn 2003 ac fe'i gweinyddir gan Gyngor Llyfrau Cymru. Cadwodd Cyngor y Celfyddydau y cyfrifoldeb dros gefnogi datblygiad awduron a hyrwyddo llenyddiaeth o Gymru yn y ddwy iaith. Ym maes llenyddiaeth a chyhoeddi rhyngwladol cefnogir Cyfnewidfa Lên Cymru hefyd gan Gyngor Celfyddydau Cymru.

Yn 2011, trosglwyddodd Cyngor y Celfyddydau ei gyfrifoldebau eraill dros weithgareddau sy'n gysylltiedig â llenyddiaeth i gorff newydd, Llenyddiaeth Cymru. Mae crynodeb o'r cymorth i lenyddiaeth a ddarparwyd ar ran Llywodraeth Cymru drwy Gyngor y Celfyddydau rhwng 2012-2016 ac hefyd y gefnogaeth strategol gan Gelfyddydau Rhyngwladol Cymru yn y tabau yn **Atodiadau 10 a 11**.

Mae rhagor o fanylion am weithgareddau Cyngor y Celfyddydau ar ei wefan;²⁴ yn Adroddiad Blynyddol 2015-16;²⁵ yn Llythyr Cylch Gwaith 2016-17;²⁶ ac yn ei Gynllun Gweithredol ar gyfer 2016-17²⁷

Cyngor y Celfyddydau - cyflawni blaenoriaethau Llywodraeth Cymru

Amlinellir blaenoriaethau Llywodraeth Cymru yn y Llythyr Cylch Gwaith blynyddol. Darperir gwybodaeth isod am sut y mae Cyngor y Celfyddydau wedi cyflawni yn erbyn blaenoriaethau Llywodraeth Cymru a amlinellir yn ei Llythyr Cylch Gwaith.

Deddf Llesiant Cenedlaethau'r Dyfodol (Cymru) 2015

Mae Cyngor y Celfyddydau yn un o'r cyrff cyhoeddus yng Nghymru sy'n dod o fewn cylch gwaith y

²⁴ <http://www.arts.wales/?diablo.lang=cym>

²⁵ http://www.arts.wales/c_adroddiadau-blynyddol/adroddiad-a-datganiadau-ariannol-2015-16

²⁶ <http://gov.wales/docs/drah/publications/170307-acw-remit-letter-cy.pdf>

²⁷ http://www.arts.wales/c_corporate-plans-and-strategies/cynllun-gweithredol?diablo.lang=cym

Ddeddf. Caiff gweithgareddau Cyngor y Celfyddydau eu harwain a'u monitro gan Grŵp Monitro Cenedlaethau'r Dyfodol, ac mae wedi datblygu a chyhoeddi Strategaeth a Chynllun Gweithredu ar Ddatblygu Cynaliadwy. Mae hefyd wedi buddsoddi mewn prosiectau 'blaenllaw', megis *Syniadau: Pobl: Lleoedd* sy'n hyrwyddo llesiant a datblygu cynaliadwy.

Bod yn Greadigol Egnïol

Blaenoriaeth allweddol yw annog mwy o bobl i fwynhau'r celfyddydau a chymryd rhan ynddynt. Mae Cyngor y Celfyddydau yn mesur cynnydd yn erbyn y nod hwn drwy ddefnyddio amrywiaeth o ddata ac ymchwil. Y prif ffynonellau gwybodaeth yw:

Arolwg Portffolio Celfyddydau Cymru: Rhwydwaith cenedlaethol Cyngor y Celfyddydau o 67 o sefydliadau allweddol sy'n cael arian refeniw yn flynyddol yw Portffolio Celfyddydau Cymru. Y prif ffigurau ar gyfer mynychu digwyddiadau portffolio yn 2015/16 oedd: (a) cyfanswm o 3,740,833 o fynychiadau (gostyngiad o 3.9% ers y flwyddyn flaenorol) a (b) cyfanswm o 18,336 o ddigwyddiadau (gostyngiad o 7.7%). Mae ffigurau cyfranogiad wedi cynyddu, fodd bynnag. Y ffigurau yn 2015/16 oedd 1,141,730 (cynnydd o 2.1% ers 2014/15) a chyfanswm o 71,728 o ddigwyddiadau cyfranogol (cynnydd o 4.2%).

Arolwg Omnibws Plant: Mae Cyngor y Celfyddydau yn comisiynu arolwg blynyddol o bresenoldeb a chyfranogiad ymhlith plant a phobl ifanc. Mae'r prif ffigurau ar gyfer 2016 yn cynnwys: (a) mynychodd 82.9% o blant a phobl ifanc yng Nghymru ddigwyddiad celfyddydol unwaith y flwyddyn neu'n amlach (gostyngiad o 5.8% ers 2015), (b) cymerodd 86.3% o blant a phobl ifanc ran mewn gweithgareddau celfyddydol unwaith y flwyddyn neu'n amlach (gostyngiad o 2.2% ers 2015).

Pobl anabl yn mynychu digwyddiadau celfyddydol: Mae Cyngor y Celfyddydau wedi creu'r cynllun *Hynt*, menter a gynlluniwyd i'w gwneud yn haws i bobl anabl a'u cymdeithion/gofalwyr fynychu digwyddiadau celfyddydol. Mae gwaith ymchwil diweddar wedi dangos bod 26 o leoliadau yn cymryd rhan yn y prosiect hwn a bod o leiaf draean o tua 8000 o ddeiliaid cardiaid Hynt wedi defnyddio eu cardiaid yn ystod y 18 mis diwethaf.

Ar y cyfan, er bod cyfranogiad wedi cynyddu, mae cyni economaidd parhaus yn sicr yn cael effaith. Mae Cyngor y Celfyddydau yn ystyried pa gynlluniau newydd y bydd angen iddo eu rhoi ar waith i fynd i'r afael â gwahaniaethau parhaus mewn cyfraddau ymgysylltu ar draws Cymru.

Addysg a Sgiliau

Y rhaglen *Dysgu Creadigol drwy'r Celfyddydau* yw'r prif weithgaredd yn y maes hwn. Rhaglen pum mlynedd gwerth £20 miliwn, a ariennir ar y cyd gan Gyngor y Celfyddydau a Llywodraeth Cymru yw *Dysgu Creadigol drwy'r Celfyddydau*.²⁸ Cafodd y rhaglen ei dyfeisio i gyflawni argymhellion yr adroddiad "Y Celfyddydau mewn Addysg yn Ysgolion Cymru" gan yr Athro Dai Smith (2013).²⁷ Mae tri prif amcan i'r rhaglen: (i) cynyddu a gwella profiadau a chyfleoedd creadigol mewn ysgolion, (ii) gwella cyrhaeddiad drwy greadigrwydd, a (iii) cefnogi athrawon ac ymarferwyr y celfyddydau i ddatblygu eu sgiliau. Mae dwy elfen i'r rhaglen - *Cynllun yr Ysgolion Creadigol Arweiniol a Rhaglen y Celfyddydau ac Addysg Cymru Gyfan*.

Mae Cynllun yr Ysgolion Creadigol Arweiniol yn dod â disgyblion, athrawon, asiantau creadigol ac ymarferwyr y celfyddydau ynghyd i archwilio a datblygu dulliau creadigol o addysgu a dysgu. Ar hyn o bryd mae 279 o ysgolion yn cymryd rhan weithredol yn y cynllun. Yn 2017-2018, bydd hyn yn

²⁸ <http://gov.wales/topics/educationandskills/publications/wagreviews/arts-in-education-review/?skip=1&lang=cy>

cynyddu i dros 530 o ysgolion. Mae'r elfen y Celfyddydau ac Addysg yn canolbwyntio ar gynyddu a gwella profiadau a chyfleoedd celfyddydol i ysgolion. O dan yr elfen hon mae Cyngor y Celfyddydau wedi sefydlu pedwar *Rhwydwaith Rhanbarthol y Celfyddydau ac Addysg*, a'u cylch gwaith yw: (a) creu a sefydlu cyfleoedd rhwydweithio ar gyfer athrawon, artistiaid a sefydliadau celfyddydol, (b) darparu hyfforddiant a Datblygiad Proffesiynol Parhaus (DPP) i athrawon a gweithwyr proffesiynol yn y celfyddydau, (c) darparu gwasanaeth broceriaeth rhwng artistiaid, sefydliadau celfyddydol ac ysgolion, a (ch) rheoli a chydgyssylltu rhaglen i adnabod arbenigwyr celfyddydol mewn ysgolion a'u cefnogi i rannu'r arbenigedd gydag ysgolion eraill.

Mae *Cronfa Profi'r Celfyddydau* yn rhoi grantiau i ysgolion, drwy gynllun "Ewch i Weld" er mwyn mynychu digwyddiadau celfyddydol a diwylliannol. Mae cyllid ar gael hefyd drwy "Cydwethio Creadigol", cynllun i annog ysgolion i ddyfeisio prosiectau celf arloesol mewn cydweithrediad â sefydliadau celfyddydol.

Celfyddydau Cenedlaethol Ieuencid Cymru: partneriaeth rhwng Tŷ Cerdd (y mae ei gylch gwaith yn cynnwys Band Pres Cenedlaethol Ieuencid Cymru, Band Pres Symffonig Cenedlaethol Ieuencid Cymru, Côr Cenedlaethol Ieuencid Cymru, Côr Hyfforddi Cenedlaethol Ieuencid Cymru, Jazz Cenedlaethol Ieuencid Cymru a Cherddorfa Chwyth Genedlaethol Ieuencid Cymru) a Chyd-bwyllgor Addysg Cymru (sydd â chyfrifoldeb am Gerddorfa Genedlaethol Ieuencid Cymru, Theatr Genedlaethol Ieuencid Cymru a Dawns Genedlaethol Ieuencid Cymru). Ar hyn o bryd mae Cyngor y Celfyddydau yn arwain newidiadau i strwythur sefydliadol Celfyddydau Cenedlaethol Ieuencid Cymru, sy'n anelu at helpu i ddatblygu model busnes mwy cynaliadwy.

Gwaddol Cenedlaethol ar gyfer Cerddoriaeth: Ym mis Chwefror 2017, cymeradwyodd Ysgrifennydd y Cabinet dros Addysg ac Ysgrifennydd y Cabinet dros yr Economi a Seilwaith y penderfyniad i greu Gwaddol Cenedlaethol ar gyfer Cerddoriaeth. Y nod yw gwella ffurfiau presennol o gyllid sydd ar gael i helpu pobl ifanc i gymryd rhan mewn cerddoriaeth ac i ddatblygu eu talentau yn y maes.

Trechu Tlodi

Mae'r *Rhaglen Cyfuno* yn dechrau ar gyfnod newydd yn ei hanes yn sgil dirwyn mecanwaith cyllido Cymunedau yn Gyntaf i ben. Yn dilyn blwyddyn gyntaf lwyddiannus, mae nifer yr Ardaloedd Arloesi wedi cynyddu o chwe ardal i ddeg. Mae Cyngor y Celfyddydau yn ymwneud â phob un o'r rhain, ac mae'n parhau i chwarae rhan ragweithiol yn y Grŵp Gweithrediadau sy'n helpu i lunio'r rhaglen *Cyfuno* newydd.

Cynaliadwyedd a chynyddu'r elw ar fuddsoddiad i'r eithaf

Arian portffolio: Yn dilyn cyhoeddiad Llywodraeth Cymru y bydd yn cynyddu'r cymorth grant ar gyfer 2017-18 3.5%, trosglwyddodd Cyngor y Celfyddydau yr un lefel o gynnydd i'w sefydliadau portffolio.

Gwynwch: rhan allweddol o ddull gweithredu Cyngor y Celfyddydau yw ei raglen "Gwynwch" newydd ar gyfer ei sefydliadau portffolio. Mae hyn yn cynnwys cyngor diagnostig arbenigol, a buddsoddiad cyfalaf (os gellir ei gyfiawnhau) i alluogi newid a meithrin gallu. Derbyniodd Cyngor y Celfyddydau 53 o ymatebion gan sefydliadau portffolio mewn ymateb i'w alwad am ddatganiadau o ddiddordeb. Ochr yn ochr â hyn, datblygodd Cyngor y Celfyddydau hefyd gyfres o ddosbarthiadau meistr a gweithdai arweinyddiaeth, sy'n ymdrin â materion fel rheoli newid, codi arian, eiddo deallusol, a datblygu partneriaethau.

Diogelu Seilwaith y Celfyddydau

Cefnogi gwaith partneriaid cyllido: Mae Grŵp Prosiect Awdurdodau Lleol Cyngor y Celfyddydau wedi bod yn targedu'r Byrddau Gwasanaethau Cyhoeddus ledled Cymru wrth iddynt geisio datblygu eu hasesiadau o anghenion lleol. Byddant yn llunio strategaeth a chynllun gweithredu i ddangos sut y byddant yn cyflawni yn erbyn Deddf Llesiant Cenedlaethau'r Dyfodol (Cymru) 2015.

I gefnogi'r gwaith hwn, mae Cyngor y Celfyddydau wedi datblygu *Llyfryn Eiriolaeth* sy'n cael ei ddosbarthu i bob cadeirydd Byrddau Gwasanaethau Cyhoeddus, Prif Weithredwyr ac Arweinwyr awdurdodau lleol, Prif Weithredwyr Byrddau Iechyd ac Ysgrifenyddion Cabinet Llywodraeth Cymru. Nod hyn yw amlygu potensial y celfyddydau, a rôl y sector wrth gefnogi'r gwaith o roi'r Ddeddf ar waith yn lleol. Mae pob un o'r awdurdodau lleol yn cynhyrchu asesiadau o anghenion lleol erbyn diwedd mis Mawrth 2017, fel rhan o'u hymrwymiad i ddeddfwriaeth Llesiant. Byddant yn gofyn am farn Cyngor y Celfyddydau, fel ymgynghorai swyddogol.

Brand Cymru

Gweithgareddau rhyngwladol: Yn ystod 2016-17 - ac yn enwedig ers y refferendwm ar yr Undeb Ewropeaidd - mae Cyngor y Celfyddydau wedi rhoi mwy o bwyslais ar weithio'n rhyngwladol, fel rhan o naratif Llywodraeth Cymru sy'n datblygu yn y maes hwn. Mae Cyngor y Celfyddydau wedi bod yn gweithio gyda'r British Council ar raglen prosiect grant ar y cyd ar gyfer *India Cymru*, a lansiwyd gan Ysgrifennydd y Cabinet dros yr Economi a Seilwaith ym mis Chwefror. Mae dathlu 70 mlynedd ers annibyniaeth India yn cynnig cyfle pwysig i Gymru ac India adfywio a chryfhau'r cysylltiadau sydd eisoes yn bodoli, a datblygu cyfleoedd newydd i gydweithio'n greadigol.

Mae Cyngor y Celfyddydau hefyd wedi helpu Llywodraeth Cymru i ymateb i'w *Memorandwm Cyd-ddealltwriaeth diwylliannol â Tsieina*. Chwaraeodd ran ganolog o ran trefnu elfen ddiwylliannol Taith Fasnach Llywodraeth Cymru i Tsieina ym mis Chwefror 2017. Mae Cyngor y Celfyddydau hefyd yn ymwneud â pharatoi presenoldeb Cymru yn *Biennale Fenis* yn 2017 a fydd yn canolbwyntio ar waith yr artist James Richards.

Technoleg Ddigidol

Ymchwil a Datblygu Digidol: Mae gan Gyngor y Celfyddydau berthynas agos â NESTA, sydd wedi arwain at sefydlu Cronfa Arloesedd Digidol. Mae pum prosiect wedi mynd drwy'r broses Ymchwil a Datblygu lawn. Mae'r ddau sefydliad wrthi'n trafod y cam nesaf. Y meddylfryd presennol yw ehangu'r cwmpas i gynnwys mwy o sefydliadau am lai o gost fesul prosiect.

The Space: Cynhaliodd The Space, ar y cyd â Chyngor y Celfyddydau ac Academi'r BBC, ddiwrnod celfyddydau digidol ym mis Tachwedd 2016. Mynychodd dros 90 o gynrychiolwyr y digwyddiad, a oedd yn cynnwys trafodaethau panel, arddangosiadau rhyngweithiol a gweithdai ar themâu yn amrywio o gyfleu'r celfyddydau ar sgrin i greu profiadau rhyngweithiol gyda thechnoleg i gynulleidfaoedd.

Y Celfyddydau ac Iechyd

Datblygu Polisi: Mae gwaith wedi dechrau i ddatblygu dull cydgysylltiedig o greu strategaeth ar gyfer y dyfodol, rhwng Cyngor y Celfyddydau a Llywodraeth Cymru.

Mae Grŵp Trawsbleidiol ar Gelfyddydau ac Iechyd, o dan gadeiryddiaeth Eluned Morgan AC, yn ystyried y syniad o gyd-gomisiynu ac ariannu astudiaeth i'r Celfyddydau ac Iechyd yng Nghymru, gyda Chyngor Celfyddydau Cymru yn gyfrifol am fwrw ymlaen â'r astudiaeth ymchwil. Yn y cyfamser, mae rhwydweithiau Celfyddydau ac Iechyd yn parhau i dyfu'n organig. Mae ENGAGE, y

sefydliad celfyddydau gweledol, yn cydlynu rhwydwaith Cymru gyfan, ac yn cynnal cyfarfodydd yn y De a'r Gogledd.

Mae Bwrdd Iechyd Prifysgol Betsi Cadwaladr wedi atgyfodi ei gyfarfodydd Grŵp Llywio ar draws Gogledd Cymru.

Yn sgil symposiwm a gynhaliwyd ym mis Tachwedd 2016 gan Fwrdd Iechyd Prifysgol Aneurin Bevan, cododd diddordeb mewn sefydlu 'Cymuned o Ddiddordeb' yn ymwneud â'r Celfyddydau ac Iechyd o dan faner *1000 o Fywydau* (y gwasanaeth gwella cenedlaethol ar gyfer y GIG yng Nghymru a ddarperir gan Iechyd Cyhoeddus Cymru). Mae i hyn botensial cyffrous i ddod â chydweithwyr ynghyd o'r sectorau iechyd a chelfyddydol, sydd â diddordeb yn y maes, ar ffurf rhwydwaith sy'n gysylltiedig â gwella o fewn system y GIG.

Drwy gydol mis Hydref a mis Tachwedd 2016, cynhaliwyd cyfres o ddigwyddiadau ledled Cymru fel rhan o *Muriau*, yr ail Wyl Celfyddydau ac Iechyd Meddwl a drefnwyd gan Celfyddydau Anabledd Cymru, Ynys Môn a Mind Gwynedd, a Making Minds. Mae'r wyl yn anelu at chwalu'r stigma sy'n gysylltiedig ag Iechyd meddwl, a chynyddu mynediad i'r celfyddydau ar gyfer y rhai sy'n dioddef salwch meddwl yn ogystal â rhoi llwyfan i artistiaid sy'n byw gyda salwch meddwl.

LLENYDDIAETH CYMRU

Mae Cyngor y Celfyddydau wedi dynodi Llenyddiaeth Cymru yn Gwmni Cenedlaethol ar gyfer datblygu llenyddiaeth yng Nghymru. Fe'i sefydlwyd ym mis Ebrill 2011 ar ôl uno Academi, yr Asiantaeth Hyrwyddo Llenyddiaeth Genedlaethol a gweinyddwr yr Academi Gymreig (Cymdeithas Awduron Cymru) a Chanolfan Ysgrifennu Tŷ Newydd sydd wedi'i lleoli mewn tŷ a chanddo gysylltiadau hanesyddol gyda David Lloyd George.

Rôl Llenyddiaeth Cymru yw hwyluso ac ysgogi rhaglenni a digwyddiadau llenyddol ledled Cymru, a hyrwyddo'r gorau o blith ein llenyddiaeth yn rhyngwladol. Mae hefyd yn datblygu ac yn cefnogi llenorion Cymru ar bob cam o'u taith lenyddol.

Fel yr adlewyrchir ar wefan Llenyddiaeth Cymru, ers 2011, mae'r sefydliad wedi:

- ymgysylltu â thros 700,000 o gyfranogwyr, gan gynnwys 255,000 o bobl ifanc mewn gweithgareddau llenyddol dros Gymru
- dyfarnu 140 o Ysgoloriaethau i Awduron gan gynnwys 57 i awduron newydd. Mae llawer o'r derbynwyr hyn wedi mynd ymlaen i gyflawni llwyddiant ac ennill gwobrau o bwys am waith ysgrifenedig gyda chefnogaeth yr ysgoloriaethau, gan gynnwys Jonathan Edwards (Enillydd Gwobr Farddoniaeth Costa 2014), a Kate Hamer (a gyrhaeddodd y rhestr fer ar gyfer Gwobr Nofel Gyntaf Costa 2015). Ysgoloriaethau a ddyfarnwyd hyd yma: £481,000
- dwysáu ei gwaith gyda phlant a phobl ifanc drwy sefydlu'r rôl newydd Awdur Llawryfog Pobl Ifanc Cymru a chryfhau cysylltiadau â phrosiectau eraill yng Nghymru, megis Bardd Plant Cymru, yn ogystal â dod â'r model Americanaidd poblogaidd, Slam, i Gymru
- ymestyn cyrhaeddiad Menter Datblygu Llenyddiaeth De Cymru drwy gydweithio ag amryw o bartneriaid gan gynnwys Mind, Celf Gwent mewn Iechyd, National Literacy Trust, Grŵp Cymorth i Geiswyr Lloches Bae Abertawe ac Awdurdodau Lleol
- arwain ar ddathliadau canmlwyddiant nodweddiadol megis Gŵyl Dylan Thomas 100, R S Thomas a Roald Dahl 100 Cymru trwy greu rhaglen twristiaeth lenyddol a phrosiectau

addysg ac ymgysylltu ar ran Llywodraeth Cymru, gyda chefnogaeth Cyngor Celfyddydau Cymru.

- ailddatblygu Canolfan Ysgrifennu Tŷ Newydd, gyda chefnogaeth Cyngor Celfyddydau Cymru, yr Ashley Family Foundation a'r Academi Gymreig
- creu'r prosiect digidol newydd, Her 100 Cerdd, er mwyn dathlu Diwrnod Cenedlaethol Barddoniaeth. Mae'r her i bedwar bardd ysgrifennu 100 cerdd mewn 24 awr yn denu cynulleidfa ar-lein o dros 10,000 yn flynyddol a thros 2,500 o ddarllenwyr unigol.

Caiff Llenyddiaeth Cymru ei rheoli gan gyfarwyddwyr anweithredol di-dâl. Mae Llenyddiaeth Cymru yn Gwmni Cyfyngedig drwy Warant ac yn Elusen gofrestredig. Caiff ei reoli gan Fwrdd o un ar ddeg o Gyfarwyddwyr, sydd hefyd yn Ymddiriedolwyr.

Cyngor y Celfyddydau sy'n ariannu Llenyddiaeth Cymru ac mae wedi bod yn rhan o'i bortffolio o sefydliadau sy'n cael Arian Refeniw ers rhai blynyddoedd. Mae Cyngor y Celfyddydau yn trin Llenyddiaeth Cymru fel cwmni cenedlaethol sy'n gyfrifol am ddatblygu a hyrwyddo Llenyddiaeth. Yn dilyn 'Adolygiad Buddsoddi' Cyngor y Celfyddydau yn 2015, mae'r Cyngor yn parhau i ddiffinio Llenyddiaeth Cymru fel Sefydliad sy'n cael Arian Refeniw. Mae Cyngor y Celfyddydau yn cefnogi gweithgareddau llenyddol eraill (e.e. digwyddiadau megis Gŵyl y Gelli).

Yn 2016-17, rhoddodd Cyngor y Celfyddydau £717,163 o arian refeniw craidd i Llenyddiaeth Cymru o gronfa cymorth grant y Cyngor. Neilltuodd Cyngor y Celfyddydau hefyd £151,000 mewn cyllid prosiect i Llenyddiaeth Cymru o'i gyllideb Loteri Genedlaethol

Mae Llenyddiaeth Cymru yn cynrychioli buddiannau awduron Cymreig o fewn Cymru ac yn rhyngwladol ac yn annog pobl i fwynhau gwaith ysgrifennu gan eraill ac i ysgrifennu eu hunain, drwy raglen o weithdai, cyrsiau, gwyliau a chystadlaethau. Ymysg gwasanaethau Llenyddiaeth Cymru mae mentora, ysgoloriaethau, gwybodaeth a chyngor i awduron, ac asesiad annibynnol o lawysgrifau. Nod Llenyddiaeth Cymru yw rhoi llenyddiaeth wrth galon agendâu llesiant, llythrennedd, cyflogaeth a sgiliau ac mae'n ymdrechu i sicrhau bod llenyddiaeth yn cael ei gweld fel rhan hanfodol o fywyd cytbwys, ymgysylltiedig ac iach. Mae'n gwneud hyn drwy:

➤ Wella cyfleoedd i gymryd rhan mewn llenyddiaeth:

- Awduron ar Daith
- Llyfr y Flwyddyn
- Mentrau Datblygu Rhanbarthol
- Lolfeydd Llenyddiaeth mewn gwyliau
- Twristiaeth Lenyddol

➤ Darparu llwyfannau ar gyfer plant a phobl ifanc o bob oed, gallu a chefnidir i greu a mwynhau'r byd llenyddol o'u cwrpas:

- Awdur Llawryfog Pobl Ifanc
- Bardd Plant Cymru
- Gweithdai ysgrifennu creadigol mewn ysgolion - Dylanwad ac Awduron ar Daith
- Cyfnodau preswyl i Ysgolion yn Nhŷ Newydd

- Sgwadiâu Sgwennu Pobl Ifanc
 - Slam Cymru
 - Gŵyl Llên Plant Caerdydd
- Datblygu a chefnogi awduron ar bob cam o'u taith ysgrifennu er mwyn cyflawni eu llawn botensial:
- Ysgoloriaethau i Awduron
 - Mentora a Gwasanaethau Beirniadol
 - Cyrsiâu Ysgrifennu a Dosbarthiadau Meistr yn Nhŷ Newydd
 - Gwybodaeth a hyfforddiant
- Gweithio mewn partneriaeth er mwyn codi proffil rhyngwladol awduron a gwaith o Gymru:
- Cyllid ar gyfer grantiau cyfieithu drwy Gyfnewidfa Llên Cymru
 - Rôl lysgenhadol Bardd Cenedlaethol Cymru
 - Gweithio ar ddigwyddiadau mawr a dathliadau canmlwyddiant e.e. Dylan Thomas100 a Roald Dahl 100
- Cynyddu ymgysylltiad â llenyddiaeth drwy lwyfannau digidol:
- Her 100 Cerdd
 - Y Neuadd
 - Cerdd Fawr Dylan
 - Lansio rhestr fer Llyfr y Flwyddyn ar lein.

Mae manylion pellach am weithgareddau Llenyddiaeth Cymru ar ei gwefan,²⁹; i Cynllun Busnes³⁰ ac adroddiad Ymddiriedolwyr Llenyddiaeth Cymru a Datganiadau Ariannol 2015-16³¹

Cyflwynodd swyddogion ac aelod o Fwrdd Llenyddiaeth Cymru yr wybodaeth gefndir a ganlyn i'w hystyried gan y Panel pan roddodd dystiolaeth lafar iddo:

- Mae'r diffiniad o lenyddiaeth yn hollbwysig i gylch gorchwyl yr adolygiad. Nid yw llenyddiaeth yn perthyn i'r llyfr cyhoeddedig yn unig ond y gellir ei llefaru, ei pherfformio, yn ogystal â'i chyhoeddi ac mae llenyddiaeth yn perthyn i bawb.
- Ers ei sefydlu yn sgil uno Academi a Thŷ Newydd, mae Llenyddiaeth Cymru wedi ehangu ac mae'n sefydliad sy'n croesawu newid.

²⁹ <http://www.lenyddiaethcymru.org/>

³⁰ https://issuu.com/llencymru-litwales/docs/literature_wales_business_plan_2016

³¹ https://issuu.com/llencymru-litwales/docs/literature_wales_signed_accounts_20

- Mae Llenyddiaeth Cymru yn cwmpasu pob math o ysgrifennu gan gynnwys llwyfannau digidol, ac mae'r ffocws ar ddarllenwyr yn ogystal ag awduron, plant yn ogystal ag oedolion, cymunedau o bob cenedl a'r difreintiedig.
- Pum strategaeth allweddol Llenyddiaeth Cymru yw:
 - Cymryd Rhan
 - Cefnogi Awduron
 - Plant a Phobl Ifanc
 - Rhyngwladol
 - Creadigrwydd digidol
- Cynllun Busnes presennol Llenyddiaeth Cymru yw'r ail gynllun o'r fath ers ei sefydlu, ac mae'n amlinellu nodau a gwerthoedd y sefydliad.
- Dros y blynyddoedd diwethaf, mae Llenyddiaeth Cymru wedi datblygu perthynas â Llywodraeth Cymru, ac mae'n gweithio gyda sefydliadau eraill gan gynnwys yr Ymddiriedolaeth Genedlaethol, Amgueddfa Cymru a'r British Council.
- Mae Llenyddiaeth Cymru yn ceisio alinio ei hun gyda Themâu Llywodraeth Cymru; Blwyddyn Antur, Blwyddyn Chwedlau a Blwyddyn y Môr, ac yn cydblethu'r rhain yn ei rhaglen weithgaredd.
- Ymysg cynlluniau Llenyddiaeth Cymru ar gyfer y Flwyddyn Chwedlau yn 2017 mae datblygu strategaeth twristiaeth lenyddol yn ogystal â gweithio gyda Chymdeithas Bêl-droed Cymru ar brosiect barddoniaeth i ddatlu Gêm Derfynol Cynghrair Pencampwyr UEFA yng Nghaerdydd, gan y bydd hyn yn denu sylw rhyngwladol.
- Cafodd y bardd Llion Jones arian gan Llenyddiaeth Cymru i ysgrifennu barddoniaeth yn ystod Pencampwriaethau Pêl-droed Ewrop yn Ffrainc yn ystod Haf 2016.
- Mae gan Llenyddiaeth Cymru berthynas dda gyda'r wasg yng Nghymru a thu hwnt, gan gynnwys cyfarfodydd rheolaidd gyda'r BBC, a chysylltiadau cadarn gyda *Radio 4* a *The Guardian*.
- Mae Llenyddiaeth Cymru yn un o saith elfen a gefnogir gan Cyngor y Celfyddydau ac maent yn cyfarfod yn rheolaidd i drafod strategaethau ar y cyd.
- Mae Llenyddiaeth Cymru hefyd yn gweithio gyda Theatr Genedlaethol Cymru ac mae'n aml yn gweithio gydag Opera Cenedlaethol Cymru.
- Mae Llenyddiaeth Cymru yn datblygu strategaeth newydd ar drechu tlodi mewn diwylliant ac mae'n cysoni ei blaenoriaethau â nodau Deddf Llesiant Cenedlaethau'r Dyfodol (Cymru) 2015. Mae Llenyddiaeth Cymru wedi cynllunio rhaglen o ddigwyddiadau gan gynnwys gweithio y tu allan i'r maes lenyddol gyda chwaraeon, digartrefedd a'r diwydiant twristiaeth.
- Gweledigaeth Llenyddiaeth Cymru yw bod Llenyddiaeth yn perthyn i bawb.
- Ar hyn o bryd mae Llenyddiaeth Cymru yn gweithio ar strategaeth monitro a gwerthuso.

Cymryd Rhan

Nod Llenyddiaeth Cymru yw cynyddu amrywiaeth o weithgareddau llenyddol, gweithio gyda phobl sydd dan anfantais (e.e. y rhai nad ydynt mewn addysg na hyfforddiant) a gweithio gyda phartneriaid cymunedol cynaliadwy.

Yn ddiweddar mae Llenyddiaeth Cymru wedi gweithio gyda'r canlynol:

- Slam Wreccsam
- Awdur Pobl Ifanc Sophie McFinne sy'n gweithio gyda chymunedau i annog y cyfranogwyr i ysgrifennu darn o waith i'w berfformio ar lwyfan.
- Canmlwyddiant Roald Dahl
- Ffoaduriaid
- Clwb Pêl-droed Dinas Caerdydd

Cefnogi Awduron

- Cefnogi awduron i ragori ar bob cam o'u gyrfa
- Buddsoddi mewn ysgoloriaethau i awduron (300 yn ystod y ddwy flynedd ddiwethaf, ers cymryd yr awenau oddi wrth Academi)
- Cefnogi Writers At Work yng Ngŵyl y Gelli

Plant a Phobl Ifanc

Mae Llenyddiaeth Cymru yn gweithio gyda:

- Gwobr Costa
- Y Fedal Ryddiaith
- Ysgoloriaethau i awduron newydd.

Strategaeth Ryngwladol

- Mae Llenyddiaeth Cymru yn gweithio i hyrwyddo awduron Cymreig ar lwyfan rhyngwladol, a chymerodd ran yn sioe Ryngwladol Llenyddiaeth Prydain, gan weithio gyda'r British Council a Chelfyddydau Rhyngwladol Cymru.
- Yng Ngŵyl y Gelli, mae Llenyddiaeth Cymru yn gweithio gydag awduron i hyrwyddo eu hunain ymhellach, yn y Gymraeg a'r Saesneg.

Strategaeth Ariannol

- Mae Llenyddiaeth Cymru yn derbyn £1.2 miliwn, a daw £717,000 o hynny gan Lywodraeth Cymru drwy Gyngor y Celfyddydau, gydag arian y loteri a grantiau uniongyrchol penodol (gan gynnwys grant gan Lywodraeth Cymru) ac incwm elusennol yn ategu hyn.
- Caiff 80% o hyn ei wario ar bobl (staff, awduron cymorth) gyda miliynau'n cyrraedd unigolion ac yn cyfrannu at yr economi.
- Hefyd, mae 80% o'r holl wariant ar brynu yn cael ei wario gyda chyflenwyr Cymreig.
- Mae Llenyddiaeth Cymru wedi gweithio i sefydlu ffrydiau incwm newydd drwy nawdd ac i gynyddu cysylltiadau busnes. Mae'r gwaith hwn wedi cynnwys cynyddu aelodaeth a gweithgaredd codi arian. Mae Llenyddiaeth Cymru eisoes wedi bod yn llwyddiannus gyda cheisiadau (gan gynnwys ceisiadau i The Barbican) ac mae'n gobeithio y bydd 10% o'i holl incwm yn dod o nawdd a thrwy arian masnachol erbyn 2019.

Tŷ Newydd

- Daeth Tŷ Newydd yn rhan o Lenyddiaeth Cymru - nid oedd wedi bwriadu cymryd yr awenau ond rhoddwyd y cyfrifoldeb i Lenyddiaeth Cymru ac roedd cyflwr yr adeilad wedi dirywio. Bellach mae Llenyddiaeth Cymru yn gweithio mewn partneriaeth â'r Ymddiriedolaeth Genedlaethol a Phortmeirion.
- Mae Tŷ Newydd yn darparu cyrsiau a gweithdai ac mae wedi datblygu perthynas gyda phobl leol a'r amgueddfa leol. Mae'r lleoliad bellach wedi'i drwyddedu ar gyfer priodasau a bydd ar gael ar gyfer digwyddiadau corfforaethol er mwyn ceisio denu incwm.

Sylwadau Eraill

- Roedd ecoleg yn ystyriaeth gref, a'r ffaith bod gan wrando ar farddoniaeth le cadarn mewn ecoleg yn yr un modd â gig neu ddarllen llyfr.
- Fel rhan o gefnogaeth Llenyddiaeth Cymru i wyliau, bydd y ffocws yn symud yn fwy tuag at hwyluso pobl eraill yn hytrach na rheoli digwyddiad.
- Cwestiynodd Llenyddiaeth Cymru Gylch Gorchwyl y Panel ac awgrymodd y dylai'r Panel ystyried argymhell i'r Gweinidogion bod angen ymarfer mapio cynhwysfawr o'r hyn sy'n digwydd yn awr yn y meysydd darllen, ysgrifennu a digidol, er mwyn llywio'r gwaith o ddatblygu strategaeth sy'n 'wynebu'r dyfodol' (gyda chyfraniad gan Lenyddiaeth Cymru a Chyngor Llyfrau Cymru).

Cyfnewidfa Lên Cymru

Mae Cyfnewidfa Lên Cymru a leolir yn Sefydliad Mercator ym Mhrifysgol Aberystwyth, wedi ei ariannu gan Gyngor Celfyddydau Cymru ac yn cysylltu awduron, cyfieithwyr, cyhoeddwr ac asiantaethau eraill sydd yn ymwneud â hwyluso cyfnewid llenyddol rhwng Cymru a'r byd. Mae ganddi Gronfa Cyfieithu (£20k y flwyddyn) sydd ar gael i gyhoeddwr i gefnogi costau cyfieithu cyhoeddi llenyddiaeth Gymraeg a Saesneg (o Gymru). Sefydlwyd Cyfnewidfa Lên Cymru yn 1988 fel Llenyddiaeth Cymru Dramor gan ail-frandio ar ôl hynny er mwyn cydnabod natur gyfatebol ei gwaith. Mae'n gweithio'n agos gyda Llenyddiaeth ar Draws Ffiniau (Platfform Ewropeaidd ar gyfer Cyfnewid Llenyddol a Thrafodaeth ar Bolisi), Celfyddydau Rhyngwladol Cymru, Llenyddiaeth Cymru, y Cyngor Prydeinig, , prifysgolion, cyfieithwyr, cyhoeddwr, awduron, asiantaethau cyfnewid llenyddiaeth tebyg a rhan-ddeiliaid allweddol ledled y byd

Ymchwil i weithio'n rhyngwladol yn y sector llenyddiaeth yng Nghymru

Yn ystod 2016, cwblhaodd Arad, y cwmni ymchwil annibynnol, ei astudiaeth ymchwil i weithio'n rhyngwladol yn y sector llenyddiaeth yng Nghymru: 'Ymchwil i weithio'n rhyngwladol ym maes llenyddiaeth yng Nghymru'³². Mae'r Crynodeb Gweithredol wedi cael ei gyhoeddi, ond nid yr adroddiad llawn (dim ond drwy wneud cais i Gelfyddydau Rhyngwladol Cymru y mae ar gael ar hyn o bryd)

Yr argymhellion oedd:

1. Dylid datblygu strategaeth ymgysylltu rhyngwladol drosfwaol, gynhwysol ac uchelgeisiol sy'n canolbwyntio ar anghenion artistig a masnachol y sector llenyddol;

³² <http://www.wai.org.uk/news/6883?diablo.lang=cym>

2. Dylai swyddogaethau sefydliadau unigol gael eu diffinio'n well, a'u cysylltu â'r gwaith o wireddu'r strategaeth mewn strwythur partneriaeth cydlynol. Dylai'r broses hon fod yn gysylltiedig â chyllido sefydliadau'n gymesur yn ôl eu swyddogaethau a'u harbenigedd;
3. Mae preswylfeydd awduron, grantiau cyfieithu a chymorth i deithio i gyd yn rhan ganolog o gefnogi artistiaid i ymgysylltu'n rhyngwladol, a dylid eu cyllido mewn modd cynaliadwy. Dylai'r cyllid hwn fod yn gysylltiedig â nodau cyffredinol y strategaeth, a'r gwaith o fonitro'r effaith a gân;
4. Dylid adolygu'r lefelau cymorth presennol yn unol â'r swyddogaethau ac arbenigedd sefydliadol a ragwelir er mwyn gwella mynediad ac ansawdd. Dylai hyn fod yn gysylltiedig â mwy o waith hyrwyddo ar draws y sector ynglŷn â'r mathau o gymorth sydd ar gael, a'r sefydliad a all roi'r cymorth hwnnw yn y modd mwyaf effeithiol;
5. Dylai Cyfnewidfa Lên Cymru gael cymorth ychwanegol drwy'r strategaeth, er mwyn ei galluogi i ychwanegu at ei harbenigedd o ran cyfieithu a datblygu rhwydweithiau rhyngwladol;
6. Dylai grantiau marchnata gael eu cyflwyno unwaith eto i gefnogi gweithgareddau ymgysylltu masnachol Cyngor Llyfrau Cymru mewn ffeiriau llyfrau rhyngwladol a digwyddiadau perthnasol eraill. Dylai'r gweithgareddau hyn fod yn gysylltiedig â'r cynllun marchnata a amlinellir isod yn argymhellid 7;
7. Dylid datblygu cynllun realistig a dargedir er mwyn canfod marchnadoedd rhyngwladol. Dylai hwn fod yn gysylltiedig â strategaethau Llywodraeth Cymru a Chyngor Celfyddydau Cymru, a dylai ychwanegu at waith ymgysylltu rhyngwladol blaenorol lle bo'n berthnasol;
8. Dylid rhoi systemau ar waith i fonitro a rhannu data rhwng sefydliadau ynglŷn â'r effaith y mae gwaith ymgysylltu rhyngwladol wedi ei chael;
9. Dylid targedu cyllid cynaliadwy at ddenu awduron a chyhoeddwyr rhyngwladol i Gymru fel rhan o ymgyrch i gefnogi a datblygu gwyliau a rhwydweithiau teithio ar lawr gwlad;
10. Dylai gweithgarwch cenedlaethol a rhyngwladol fod yn gysylltiedig, drwy sicrhau bod cysylltiadau rhwng awduron a sefydliadau sy'n gweithio'n rhyngwladol gyda rhaglenni llenyddol a gweithgareddau twristiaeth ddiwylliannol yng Nghymru.

Ymatebodd Cyngor y Celfyddydau i adroddiad ARAD drwy gydnabod ei rôl o ran cyflawni yn erbyn argymhellion yr adroddiad ac yn ymrwmo i gamau gweithredu penodol i sicrhau bod sefydliadau yn dod at ei gilydd yn ôl yr angen i wneud hynny.

Gweithgareddau a ariennir gan Adran Addysg a Gwasanaethau Cyhoeddus Llywodraeth Cymru

Cyfanswm y cyllid gan yr Adran hon o Lywodraeth Cymru yn ystod 2016-17 ar gyfer ymyriadau i gefnogi codi safonau llythrennedd a rhifedd yw **£860,475**. Mae hyn yn ychwanegol at y cyllid a roddwyd i Gonsortia Addysg Rhanbarthol drwy'r Grant Gwella Addysg i ddarparu cefnogaeth ar lythrennedd a rhifedd

Darpariaeth Book Trust Cymru - Elusen sy'n cwmpasu'r DU gyfan yw Book Trust sy'n cynnal rhaglenni i hyrwyddo llyfrau a darllen. Mae Book Trust Cymru, fel sefydliad ar wahân, yn rheoli pedair rhaglen sy'n gweithredu yng Nghymru, a ariennir gan yr Adran (cyfanswm y grant ar gyfer 2016-17 - **£ 700,000**):

- **Dechrau Da** - i annog pob rhiant/gofalwr i rannu llyfrau, straeon a rhigymau gyda'u plant o oedran ifanc ac yn rheolaidd er mwyn cefnogi eu datblygiad gwybyddol, cymdeithasol-emosiynol a chyn-lythrennedd, gan gynnwys datblygu sgiliau lleferydd, iaith a chyfathrebu drwy ddsbarthu bagiau llyfrau ac adnoddau dwyieithog drwy Ymwelwyr Iechyd yn y flwyddyn gyntaf o fywyd ac eto yn 18-27 mis. (grant - **£348,475**)

Pori Drwy Stori: Llythrennedd - i godi safonau Llythrennedd ymysg plant dosbarthiadau Derbyn ac yn y tri maes dysgu craidd yn y Cyfnod Sylfaen drwy ddarparu adnoddau a hyfforddiant o ansawdd uchel i gefnogi ysgolion i gynnwys rhieni/gofalwyr yn addysg eu plant a chreu cyswllt cadarnhaol rhwng yr ysgol a'r cartref. (grant - **£124,902**).

- **Pori Drwy Stori: Rhifedd** - adnoddau i gefnogi dealltwriaeth a defnydd o sgiliau rhifedd sylfaenol drwy gynnwys plant a rhieni/gofalwyr mewn gemau a gweithgareddau mathemateg pleserus yn y cartref ac yn yr ysgol, ac annog chwarae gyda rhifau a sgwrsio am rifau. Mae'r adnoddau yn annog rhieni/gofalwyr i gynnwys eu plant mewn gweithgareddau rhifedd yn eu bywydau bob dydd. (grant - **£93,628**)
- **Clwb Blwch Llythyrau** - i wella rhagolygon addysgol ar gyfer plant mewn gofal maeth drwy gynnwys plant mewn gweithgareddau darllen er pleser a rhifedd yn y cartref. Mae'r Clwb Blwch Llythyrau ar gael i blant ym Mlynnyddoedd 1 i 8, gyda pharseli ar gael i blant am yn ail flwyddyn. (grant - **£132,995**)

Rhaglen Hybu Darllen -

Mae'r Adran Addysg a Gwasanaethau Cyhoeddus yn darparu cyllid grant blynyddol i Gyngor Llyfrau Cymru i gefnogi'r Rhaglen Hybu Darllen. Y ffocws yw hybu, annog a chynyddu gwerthfawrogiad a diddordeb mewn darllen a llenyddiaeth ymysg plant a phobl ifanc.

Cyfanswm grant Llywodraeth Cymru ar gyfer Rhaglen Hybu Darllen Cyngor Llyfrau Cymru ar gyfer 2016-17 yw **£160,475**. Mae'r rhaglen yn cynnwys y pedair elfen a ganlyn.

- **Stori Sydyn** - adnodd i oedolion yn bennaf sy'n canolbwyntio ar hybu darllen; mae'r cyllid yn cwmpasu comisiynu 4 teitl (2 deitl Cymraeg a 2 deitl Saesneg), ynghyd â deunyddiau hyrwyddo a chostau dosbarthu (grant - **£55,100**) Mae'r llyfrau *Stori Sydyn* wedi cyflwyno cannoedd ar filoedd o bobl newydd i ddarllen, ac wedi annog darllenwyr presennol i ddarllen mwy. Maent wedi cyrraedd rhai o'r bobl fwyaf economaidd ddifreintiedig, gan helpu i wella mynediad i ddarllen. Defnyddir y teitlau Cymraeg yn helaeth hefyd gan ddysgwyr neu'r rhai nad ydynt mor hyderus o ran eu sgiliau Cymraeg.
- **Diwrnod y Llyfr** - ymgyrch ledled y DU, sy'n dathlu llyfrau a darllen. Mae Cyngor Llyfrau Cymru yn paratoi pecynnau athrawon sy'n gysylltiedig â'r digwyddiad, gan weithio gyda gwasanaethau addysg a llyfrgelloedd ar draws awdurdodau lleol i ddarparu amrywiol weithgareddau lleol. (grant - **£58,500**)
- **Sialens Ddarllen yr Haf** - rhaglen a weithredir mewn partneriaeth â'r Asiantaeth Ddarllen, sy'n canolbwyntio ar annog plant i barhau i ddarllen drwy gydol gwyliau haf yr ysgol (grant - **£26,400**)
- **Cystadleuaeth Ysgrifennu Creadigol** - cynnal a rheoli cystadleuaeth ysgrifennu creadigol wedi'i hysbrydoli gan Roald Dahl a chyhoeddi blodeugerdd o'r ceisiadau buddugol yn y Gymraeg a'r Saesneg. Bydd y gweithgaredd hwn yn cael ei gynnal ochr yn

ochr ag amrywiaeth o weithgareddau swyddogol a drefnwyd gan bartneriaid Grŵp Llywio Roald Dahl 100 Cymru, ac yn ategu'r gweithgareddau hynny. (grant - £20,475)

Gangen Adnoddau'r Gymraeg mewn Addysg Llywodraeth Cymru

Mae'r gangen yn canolbwyntio ar adnoddau addysgol Cymraeg a dwyieithog. Mae'r gangen yn comisiynau adnoddau nad ydynt yn cael eu cynhyrchu'n fasnachol i gynnal a gwella'r ddarpariaeth ar gyfer dysgwyr 3-19 oed. Mae'r gangen yn cynhyrchu adnoddau cyfrwng Cymraeg (print a digidol) ar gyfer pob pwnc, oedran a gallu, o'r Cyfnod Sylfaen i bynciau 14-19, yn ogystal ag adnoddau i gefnogi dysgu Cymraeg fel iaith gyntaf ac ail iaith. Caiff adnoddau hefyd eu cynhyrchu'n ddwyieithog os ydynt yn cefnogi'r gwaith o gyflawni agweddau sy'n benodol berthnasol i Gymru ar y Cwricwlwm Cenedlaethol. Roedd llai na 5% o'r teitlau a gefnogir gan y Gangen yn rhai llenyddiaeth yn unig.

Mae gan Gangen Adnoddau'r Gymraeg mewn Addysg gyllideb o £2.65 miliwn i wella darparu deunyddiau i gefnogi dysgu ac addysgu yn y cwricwlwm cenedlaethol gan gynnwys rhifedd a llythrennedd. Mae'r Gangen wedi comisiynu apiau Cymraeg yn sgil nodi bod diffyg adnoddau digidol.

Mae Llywodraeth Cymru yn ariannu fersiynau Cymraeg o adnoddau asesu a chymwysterau a gynhyrchwyd yn fasnachol gan gyhoeddwr yn Lloegr i sicrhau bod fersiynau Cymraeg ar gael.

Ar gyfer adnoddau print mae Llywodraeth Cymru yn ariannu'r gwahaniaeth rhwng cost cynhyrchu a'r incwm posibl i gyflenwyr o werthu'r deunyddiau. Mae Llywodraeth Cymru yn darparu cyllid llawn ar gyfer adnoddau digidol.

Mae'r broses gomisiynu yn dechrau drwy nodi bylchau yn yr adnoddau sydd ar gael drwy gynnal cyfarfodydd o baneli athrawon o bob cwr o Gymru ar gyfer pob pwnc yn y cwricwlwm. Mae'r anghenion a nodir yn bwydo i'r rhaglen gomisiynu. Ar hyn o bryd mae tua 100 o deitlau newydd bob blwyddyn.

Caiff adnoddau eu comisiynu yn bennaf drwy fframwaith o gyflenwyr cymeradwy. Mae 23 o ddarparwyr ar y fframwaith. Caiff rhai prosiectau eu comisiynu y tu allan i'r Fframwaith drwy dendrau unigol lle mae cyflenwr mewn sefyllfa unigryw i gynhyrchu'r adnodd, ee rhesymau hawlfraint. Caiff tendrau eu barnu ar sail nifer o feini prawf gan gynnwys cost, cynnwys ac arbenigedd addysgol. Y gymhareb bresennol o adnoddau digidol i ddeunydd print yw 60:40. Dyfarnwyd contract i gynhyrchu'r teitlau a gomisiynir mewn fformatau sy'n addas i ddysgwyr dall a rhannol ddall i RNIB.

Mae'r Gangen Adnoddau'r Gymraeg mewn Addysg yn cyd-drafod gyda'r Cyngor Llyfrau fel rhan o'i waith comisiynu adnoddau dysgu er mwyn nodi synergeddau posibl o ran comisiynu.

Un o ofynion y contract yw i'r holl adnoddau print a gomisiynir gan y gangen gael eu dosbarthu gan Ganolfan Ddosbarthu'r Cyngor Llyfrau. Golyga hyn y gall yr adnoddau gael eu harchebu a'u prynu o siopau llyfrau ledled Cymru. Mae gwybodaeth lyfryddol am yr holl deitlau a gomisiynir ar gael ar wefan y Cyngor Llyfrau www.gwales.com³³. Mae adnoddau digidol a gomisiynir gan y gangen ar gael yn rhad ac am ddim ar Hwb.

Roedd gwaith Cymraeg gwreiddiol ar gynnydd, a'r gymhareb rhwng gwaith gwreiddiol ac addasiadau yw tua 70:30. Nid yw Llywodraeth Cymru yn cyflenwi ysgolion yn uniongyrchol ac mae ysgolion yn prynu deunyddiau'n uniongyrchol gan y Cyngor Llyfrau neu o siopau llyfrau.

³³ www.gwales.com

Mae Swyddogion Ysgol y Cyngor Llyfrau yn ymweld yn rheolaidd ag ysgolion cynradd ac uwchradd i alluogi ymarferwyr i edrych yn fanwl ar yr adnoddau cyn eu prynu. Er mwyn sicrhau bod ganddynt yr wybodaeth ddiweddaraf, mae'r Gangen Adnoddau'r Gymraeg mewn Addysg yn cwrdd â Swyddogion Ysgol y Cyngor Llyfrau bob blwyddyn i rannu gwybodaeth am yr adnoddau sydd i'w cyhoeddi a'r adnoddau a gomisiynwyd yn ddiweddar. Mae Swyddogion Ysgol y Cyngor Llyfrau hefyd yn hysbysu'r gangen am awgrymiadau ar gyfer adnoddau newydd y maent wedi'u casglu gan ymarferwyr.

Mae cyngor ymarferwyr addysg yn ganolog i'r broses o adnabod a blaenoriaethu adnoddau i'w comisiynu, a chaiff syniadau a gesglir gan y Cyngor Llyfrau eu cynnwys yn nhrefnadaethau'r panel cynghori a gynhelir gan y gangen. Mae'r paneli cynghori yn cynnwys ymarferwyr o'r sectorau addysg cynradd, uwchradd a phellach ac yn cael eu harwain gan arbenigwyr pwnc a benodir gan Lywodraeth Cymru. Cynhelir ymarfer tendro ar gyfer yr adnoddau sy'n cael eu blaenoriaethu i'w comisiynu o fewn Cytundeb Fframwaith Ewropeaidd. Mae'r adnoddau a gynhyrchir yn destun proses sicrwydd ansawdd gan grŵp o ymarferwyr a arweinir gan arbenigwr pwnc Llywodraeth Cymru i sicrhau bod y cynnyrch terfynol yn bodloni gofynion y cwricwlwm a'r fanyleb wreiddiol. Ar hyn o bryd mae'r gangen hefyd yn darparu cyllid grant i CBAC er mwyn cynhyrchu fersiynau Cymraeg o adnoddau sy'n cael eu hysgrifennu'n benodol i gefnogi manylebau arholiadau CBAC.

Roedd y BBC yn arfer mynychu cyfarfodydd blynyddol y paneli. Fodd bynnag, mae'r berthynas rhwng y Gangen a'r BBC bellach yn fwy ad hoc, e.e. roeddent wedi cyd-drafod adnoddau ar gyfer Cymraeg i oedolion, ac roedd y BBC wedi cysylltu â'r adran ynglŷn â Bitesize a Jam i sicrhau na fyddai'n cael effaith negyddol ar y cyhoeddwy. Cyfarfu'r Gangen hefyd ag S4C yn ddiweddar i ymchwilio i bosibiliadau ar gyfer cydweithio.

Ar 26 Ebrill 2017, trefnodd Llywodraeth Cymru uwchgynhadledd yng Nghaerdydd i fynd i'r afael â phryderon am y cyflenwad a chreu adnoddau cyfrwng Cymraeg a chyfrwng Saesneg ar gyfer cymwysterau newydd Cymru a'r cwricwlwm newydd sy'n cael ei ddatblygu ar hyn o bryd. Daeth yr uwchgynhadledd â chynrychiolwyr ynghyd o Lywodraeth Cymru, CBAC, Cymwysterau Cymru, Coleg Cymraeg Cenedlaethol, consortia addysg, CYDAG ac eraill i edrych ar ddarparu'r deunyddiau cywir ar gyfer y system addysg yng Nghymru.

Ystyriodd yr uwchgynhadledd y canlynol:

- Y sefyllfa bresennol ar gyfer adnoddau cyfrwng Cymraeg.
- Nodi'r heriau a'r materion ar gyfer y dyfodol ar gyfer adnoddau Cymraeg a Saesneg i ddiwallu anghenion y cwricwlwm a'r cymwysterau diwygiedig.
- Cyfle i gynnig syniadau ar gyfer y ffordd ymlaen.

Mae Ysgrifennydd y Cabinet dros Addysg yn ymrwymedig i sicrhau bod adnoddau ar gael yn y ddwy iaith ar yr un pryd a bod angen sefydlu seilwaith Cymru gyfan a fydd yn galluogi cynhyrchu adnoddau dwyieithog i ddiwallu anghenion ein cwricwlwm newydd.

Cwricwlwm Newydd i Gymru

Mae cwricwlwm newydd i Gymru yn cael ei ddatblygu gan Lywodraeth Cymru, ar y cyd â gweithwyr addysg proffesiynol ledled Cymru. Yr uchelgais yw y gallai fod ar gael i leoliadau ac ysgolion mor gynnar â 2018 a'i ddefnyddio fel sail i ddysgu ac addysgu ar gyfer plant a phobl ifanc 3-16 oed o fis Medi 2021 ymlaen.

Cyhoeddwyd adolygiad annibynnol yr Athro Graham Donaldson o'r cwricwlwm a'r trefniadau asesu yng Nghymru³⁴, *Dyfodol Llwyddiannus*, ym mis Chwefror 2015 ac roedd yn cynnwys y sylfeini ar gyfer cwricwlwm yr unfed ganrif ar hugain yn seiliedig ar y meddylfryd cenedlaethol a rhyngwladol diweddaraf.

Bydd y cwricwlwm newydd yn rhoi mwy o bwyslais ar baratoi pobl ifanc ar gyfer bywyd. Bydd yn adeiladu ar eu gallu i ddysgu sgiliau newydd a chymhwyso eu gwybodaeth am eu pwnc yn fwy cadarnhaol a chreadigol. Wrth i'r byd newid, byddant yn fwy abl i addasu mewn modd cadarnhaol.

Byddant hefyd yn meithrin dealltwriaeth ddofn o sut i ffynnu mewn byd sy'n fwyfwy digidol. Mae fframwaith cymhwysedd digidol newydd ar gael sy'n cyflwyno sgiliau digidol ar draws y cwricwlwm, gan baratoi pobl ifanc ar gyfer y cyfleoedd a'r risgiau a ddaw yn sgil byd ar-lein. Bydd athrawon yn cael mwy o ryddid i ddysgu mewn ffyrdd y byddant yn teimlo a fydd yn arwain at y deilliannau gorau i'w dysgwyr.

Prif ffocws y trefniadau asesu fydd sicrhau bod dysgwyr yn deall sut y maent yn perfformio a'r hyn y mae angen iddynt ei wneud nesaf. Bydd pwyslais o'r newydd ar asesu ar gyfer dysgu fel nodwedd hanfodol ac annatod o ddysgu ac addysgu.

Mae rhwydwaith o Ysgolion Arloesi yn chwarae rhan ganolog yn natblygiad y cwricwlwm newydd ar gyfer Cymru. Mae'r ysgolion arloesi hyn yn gweithio mewn partneriaeth â sefydliadau fel Estyn, y consortia rhanbarthol, cyflogwyr a rhanddeiliaid eraill yn cynnwys arbenigwyr o Gymru ac arbenigwyr rhyngwladol i lunio fframwaith y cwricwlwm newydd. Maent wedi bod yn canolbwyntio ar lunio strwythur y cwricwlwm ac ystyried dyluniad strategol ac egwyddorion craidd fframwaith y cwricwlwm newydd. Maent wedi bod yn datblygu'r agweddau canlynol:

- Asesu a Chynnydd
- Cyfrifoldebau Trawsgwricwlaidd
- Cyfoethogi a Phrofiadau
- Y dimensiwn Cymreig, safbwyntiau rhyngwladol a sgiliau ehangach

Mae'r gweithgoreu bellach wedi cael eu sefydlu i ddechrau ar y gwaith o dylunio Meysydd Dysgu a Phrofiad lefel uchel cyn gweithio ar ddatblygiad manylach pob un o'r chwe Maes Dysgu a Phrofiad a amlinellir yn *Dyfodol Llwyddiannus*, adolygiad annibynnol yr Athro Donaldson o'r cwricwlwm a'r trefniadau asesu yng Nghymru. Y meysydd hyn yw:

- Celfyddydau Mynegiannol
- Iechyd a Lles
- Dyniaethau
- Ieithoedd, llythrennedd a chyfathrebu
- Mathemateg a rhifedd
- Gwyddoniaeth a thechnoleg

Bydd hefyd yn cynnwys tri chyfrifoldeb trawsgwricwlaidd: llythrennedd, rhifedd a chymhwysedd digidol.

Gall y cwricwlwm newydd olygu bod angen mwy o adnoddau Cymreig unigryw. Mae'n bosibl y gallai Cyngor Llyfrau Cymru chwarae rôl gefnogol yn natblygiad y cwricwlwm newydd. Mae

³⁴ <http://gov.wales/docs/dcells/publications/150317-successful-futures-cy.pdf>

trafodaethau wedi'u cynnal rhwng Gweinidogion a swyddogion Llywodraeth Cymru a'r Cyngor Llyfrau am y rôl y gall y Cyngor Llyfrau ei chwarae o ran cynhyrchu deunyddiau dosbarth Cymreig a chyfrwng Cymraeg ar gyfer y cwricwlwm newydd.

Adolygiad *Diamond* o Drefniadau Cyllido Addysg Uwch a Chyllid Myfyrwyr yng Nghymru

35

Dechreuodd y Panel ar ei waith ym mis Ionawr 2016, ychydig wythnosau ar ôl cyhoeddi Adroddiad interim *Diamond*³⁶ yn dilyn adolygiad o drefniadau cyllido addysg uwch a chyllid myfyrwyr yng Nghymru. Yn Adroddiad Interim *Diamond* cafwyd sawl cyfeiriad at gyhoeddiadau academaidd, gan gynnwys cyhoeddiadau academaidd yn yr iaith Gymraeg, cyhoeddiadau ymchwil yn ymwneud â Chymru, yn ogystal â chyfeiriad penodol at Wasg Prifysgol Cymru. [gweler y dyfyniadau yn **Atodiad 8**]. Mae cyhoeddiadau academaidd yn y ddwy iaith yn rhan bwysig o'r byd cyhoeddi yng Nghymru, fel y cydnabuwyd gan y rhai a ymatebodd i holiadur cyhoeddus y Panel [**Atodiad 5**]. Fodd bynnag, o gofio bod cyhoeddiadau academaidd amlwg yn cael eu hystyried gan Adolygiad *Diamond*, a hefyd o ystyried cyfansoddiad y Panel [5 aelod, 2 academydd, ac Is-ganghellor Prifysgol Cymru yn Gadeirydd arno], roedd yn amlwg nad oedd adolygiad penodol gyhoeddiadau academaidd o fewn cylch gwaith a chyfrifoldebau yr adolygiad hwn o gyhoeddi a llenyddiaeth.

Cyhoeddwyd Adroddiad Terfynol *Diamond* ym mis Medi 2016 a, heb ymgynghori â'r Panel, cyfeiriodd at yr Adolygiad o Gyhoeddi a Llenyddiaeth yn ogystal ag at Wasg Prifysgol Cymru a chyhoeddiadau academaidd yn y Gymraeg ac yng Nghymru [gweler y dyfyniadau yn **Atodiad 8**]. Yn ei gyfarfod a gynhaliwyd ar 11 Hydref 2016, trafododd y Panel yr agweddau hyn ar Adroddiad *Diamond*. Cynhaliwyd y drafodaeth hon yn absenoldeb y Cadeirydd ac fe'i cadeiriwyd gan Is-Gadeirydd y Panel. Glynodd y Panel at ei farn nad oedd adolygiad penodol o gyhoeddiadau academaidd o fewn ei gylch gwaith.

Defnyddiodd nifer fawr o'r rhai a ymatebodd i'r Alwad am Dystiolaeth y cyfle hwn i dynnu sylw at yr angen i sefydliadau Addysg Uwch yng Nghymru gael cyfrifoldeb dros addysgu diwylliant a hanes Cymru a/neu gefnogi cyllido Gwasg Prifysgol Cymru. Hysbyswyd y Panel Adolygu nad yw'n ofynnol i brifysgolion Cymru gynnwys astudiaeth o Gymru, ddoe a heddiw, yn rhan annatod o'u rhaglenni addysgu, ymchwil neu gyhoeddi ar hyn o bryd ac na ddisgwylir iddynt wneud hynny; mae hyn yn gwneud y pwnc, ar draws sbectrwm eang o ddisgyblaethau, yn fregus. Roedd yr ymatebwyr yn cynnwys cynrychiolwyr o'r sector Addysg Uwch, yn gorfforaethol ac yn unigolion, yn ogystal ag unigolion preifat.

Awgrymwyd bod angen ymrwymiad clir a phendant, gan Lywodraeth Cymru a phrifysgolion, i gefnogi a hyrwyddo addysgu, ymchwil a chyhoeddi yn y maes hwn o ysgolheictod, er mwyn sicrhau ei ddyfodol yn yr hirdymor. Hysbyswyd y Panel Adolygu hefyd mai swm cymharol fach o arian sydd ei angen i gefnogi Gwasg Prifysgol Cymru er mwyn sicrhau manteision sylweddol. Amlygwyd bod Gwasg Prifysgol Cymru yn derbyn cymhorthdal blynyddol oddi wrth ei riant sefydliad, Prifysgol Cymru, er mwyn gweithredu ac yn y dyfodol, efallai na fydd yn bosibl cyhoeddi rhywfaint o ymchwil ar Gymru oherwydd y diffyg cyllid ychwanegol o ffynonellau eraill. Cyflwynodd Geiriadur Prifysgol Cymru hefyd gais i gefnogi parhad ei gyllid. Nid yw Adroddiad Terfynol *Diamond* yn trafod y mater ymhellach ac mae darnau perthnasol o'r Crynodeb Gweithredol a chorff yr adroddiad wedi'u cynnwys yn **Atodiad 8**.

³⁵ <http://gov.wales/topics/educationandskills/highereducation/reviews/review-of-he-funding-and-student-finance-arrangements/?lang=cy>

³⁶ <http://gov.wales/docs/dcells/publications/160927-he-review-final-report-cy.pdf>

Cronfa Ddysgu Undebau Cymru

Lle mae llenyddiaeth yn chwarae rhan wrth ddatblygu sgiliau llythrennedd hanfodol aelodau undebau, efallai y bydd gan brosiectau a ariennir gan Gronfa Ddysgu Undebau Cymru ran i'w chwarae hefyd. Mae amcanion penodol prosiectws cyfredol Llywodraeth Cymru/TUC Cymru yn cynnwys:

"Ehangu cyfranogiad..." [o ran dysgu yn y gweithle] "...drwy gefnogi ymyriadau sy'n canolbwyntio ar gyfle cyfartal, sy'n lleihau allgau cymdeithasol, ac sy'n ennyn diddordeb dysgwyr anhraddodiadol;"

"... annog mwy o bobl i ddysgu." ³⁷

Uned Digwyddiadau Mawr Llywodraeth Cymru

Mae Uned Digwyddiadau Mawr Llywodraeth Cymru yn darparu cymorth i nifer o sefydliadau a gwyliau a chanddynt gysylltiad â llenyddiaeth a chyhoeddi. Ceir dadansoddiad o'r cyllid a ddarparwyd yn ystod 2016-17 yn **Atodiad 9**.

Is-adran y Gymraeg Llywodraeth Cymru

Yn ogystal, mae cymorth ar gyfer gwyliau eraill yn cael ei sianelu drwy adrannau eraill Llywodraeth Cymru. Er enghraifft, caiff cymorth ar gyfer Eisteddfod Genedlaethol Cymru (£603,000 yn 2016-17) ac Eisteddfod yr Urdd (£287,280 yn 2016-17 - cyllid cyffredinol Urdd Gobaith Cymru yw £852,184) ei sianelu drwy Is-adran y Gymraeg.

Papurau Bro

Yn ystod 2016-17 dyrannodd Llywodraeth Cymru £87,810 i 52 o bapurau bro. Mae Llywodraeth Cymru drwy ei Chynllun Grant i hyrwyddo a hwyluso defnydd o'r Gymraeg, yn cefnogi papurau bro ledled Cymru.

Mae gan y papurau bro gylchrediad eang gyda thros 45,000 o bapurau'n cael eu cyhoeddi bob mis. Gwirfoddolwyr lleol sy'n gyfrifol am gyhoeddi'r papurau ac maent yn rhan annatod o wead cymunedau Cymraeg eu hiaith ar hyd a lled Cymru. Mae cylchrediad y papurau bro wedi bod yn hynod sefydlog yn ystod y blynyddoedd diwethaf er gwaethaf nifer o heriau. Gan fod y ffordd y mae pobl yn rhannu ac yn darllen newyddion yn newid yn sgil datblygiadau technolegol, ceir enghreifftiau o bapurau bro yn symud yn raddol i lwyfannau newydd ar y rhyngwyd.

Cymorth gan Lywodraeth Cymru i Lyfrgelloedd ³⁸

Mae darparu llyfrgelloedd cyhoeddus yn ddyletswydd statudol ar awdurdodau lleol, fel y nodir yn Neddf Lyfrgelloedd Cyhoeddus a Deddf Amgueddfeydd 1964. Mae'r un Ddeddf yn gosod dyletswydd ar Weinidogion Cymru i arolygu a hyrwyddo'r defnydd o lyfrgelloedd cyhoeddus yng Nghymru. Mae Llywodraeth Cymru yn buddsoddi mewn llyfrgelloedd drwy raglenni referniw a chyfalaf a arweinir gan ei His-adran Amgueddfeydd, Archifau a Lyfrgelloedd. Cafwyd tair

³⁷ Prosiectws Cronfa Ddysgu Undebau Cymru 2016-18 Sgiliau a Chyflogaeth: Cymru/TUC Cymru Tachwedd 2015 ISBN Digidol 978 1 4734 5146 9

³⁸ <http://gov.wales/topics/culture-tourism-sport/museums-archives-libraries/libraries/?lang=cy>

strategaeth flaenorol ar gyfer llyfrgelloedd Cymru ac ar hyn o bryd mae Llywodraeth Cymru yn gweithio gyda'r sector llyfrgelloedd a rhanddeiliaid allweddol i gwblhau cynllun cyflawni yn y dyfodol ar gyfer llyfrgelloedd yng Nghymru. Bydd y cynllun yn parhau i ganolbwyntio'n gryf ar weithio mewn partneriaeth, gan barhau i roi prosiectau arloesol ar waith megis y system rheoli llyfrgelloedd a rennir ar gyfer llyfrgelloedd cyhoeddus a'r gwasanaeth llyfrgell digidol cenedlaethol, yn ogystal â chefnogi'r gweithlu a sicrhau bod y sector llyfrgelloedd yn gynaliadwy ac yn gydnherth.

Llyfrau yw'r rheswm y mae llawer o gwsmeriaid yn defnyddio llyfrgelloedd, ar ffurf papur yn ogystal â fformatau electronig. Mae llyfrgelloedd cyhoeddus Cymru wedi gweithio gyda'r Cyngor Llyfrau er mwyn sicrhau bod e-lyfrau Cymraeg ar gael o fewn gwasanaeth e-lyfrau Cymru gyfan, sy'n cael ei gefnogi gan Lywodraeth Cymru. Mae llyfrgelloedd yn gweithio'n agos ag awduron, cyhoeddwyr a rhanddeiliaid perthnasol megis Llenyddiaeth Cymru a'r Cyngor Llyfrau, er mwyn darparu mynediad i'r allbwn creadigol gan gyhoeddwyr ac awduron yng Nghymru, a bydd hyn yn parhau yn y dyfodol.

Cymru Greadigol

Y sector creadigol yw'r sector economaidd â blaenoriaeth sy'n tyfu gyflymaf yng Nghymru, ac mae'n ehangu'n gyflymach nag unrhyw le arall yn y DU, y tu allan i Lundain. Mae'r diwydiannau creadigol yng Nghymru wedi rhoi Dr Who, Sherlock a lluo o gynyrchiadau drama eraill o ansawdd uchel i'r byd. Fodd bynnag, mae twf parhaus y sector yn gofyn am ymagwedd ystyryth er mwyn cystadlu â Hollywood, Llundain a'r goreuon. Yn dilyn ymrwymiad ym maniffesto'r Blaid Lafur, ar gyfer Etholiadau'r Cynulliad 2016, cyhoeddodd Llywodraeth Cymru y bydd yn:

- Sefydlu is-gwmni ym mherchnogaeth lwyf Llywodraeth Cymru, sef Cymru Greadigol, i gefnogi'r sector yng Nghymru. Wrth wneud hynny, bydd Llywodraeth Cymru yn anelu at gynnal o leiaf 850 o swyddi a £40 miliwn y flwyddyn mewn gwariant cynhyrchu.
- Sicrhau cydweithio agosach gyda'r sector addysg i sicrhau cyflenwad cyson o sgiliau i gefnogi twf y sector.
- Manteisio ar lwyddiant digyffelyb y Diwydiannau Creadigol yng Nghymru i hybu'r wlad ar draws y DU a'r byd.

Nod craidd Cymru Greadigol fydd cefnogi twf economaidd y sector, gan helpu busnesau sy'n creu cynnwys creadigol ac sy'n manteisio arno i ymateb i'r cyfleoedd yn yr economi greadigol fyd-eang.

Er ei bod yn wir y gall denu cynyrchiadau ffilm a theledu, a datblygu'r diwydiant sgrin yng Nghymru roi hwb enfawr i'r economi leol, mae'r pwyslais hanesyddol ar gymorth i ffilm a theledu wedi golygu llai o sylw i is-sectorau eraill newydd o'r diwydiannau creadigol sydd hefyd yn cynnig twf posibl ac effaith ar yr economi economaidd. Mae'n amlwg bod y dirwedd economaidd wedi newid wrth i'r diwydiannau creadigol ddatblygu. Mae hyn yn rhywbeth y mae angen ei ystyried wrth sefydlu Cymru Greadigol. Mae angen i wasanaethau cymorth adlewyrchu blaenoriaethau cyfredol a blaenoriaethau'r dyfodol, yn hytrach na threfniant hanesyddol, ac mae angen i fformat a strategaeth y sefydliad cymorth gyd-fynd ag anghenion presennol y diwydiant er mwyn darparu gwasanaethau effeithiol.

Bydd angen i Gymru Greadigol barhau i fuddsoddi mewn sicrhau mewnfuddsoddiad a sicrhau bod cymorth priodol ar gael i helpu busnesau creadigol Cymru i fanteisio ar y cyfleoedd a gaiff eu creu yn sgil ein llwyddiannau diweddar. Rydym am sicrhau twf parhaus y diwydiannau creadigol yng Nghymru a sicrhau bod sector cynaliadwy hirdymor yn cael ei greu. Er mwyn gwneud hyn mae angen cefnogaeth fwy cydgysylltiedig yn cwmpasu:

- a) Meithrin llwybrau talent a chymorth sgiliau wedi'u arwain gan ddiwydiant
- b) Mynediad i gyfalaf (preifat a chyhoeddus)
- c) Seilwaith, rhwydweithiau a gweithio mewn partneriaeth

Y cyferbyniad rhwng y byd cyhoeddi Cymraeg a'r byd cyhoeddi Saesneg yng Nghymru

Cyn mynd ymhellach, mae'n bwysig gwahaniaethu rhwng y byd cyhoeddi Saesneg yng Nghymru a'r byd cyhoeddi Cymraeg. Mae'r byd cyhoeddi Saesneg yn bodoli yng nghyd-destun diwydiant rhyngwladol anferth ac, yn benodol, yng nghyd-destun y diwydiant cyhoeddi yn Llundain nid nepell oddi wrthym. Yn gyffredinol, menter fasnachol yw'r byd cyhoeddi Saesneg yn y Deyrnas Unedig. Busnesau masnachol yw cyhoeddwy'r Saesneg fel arfer, boed yn gyhoeddwy'r 'masnachol' neu 'lenyddol'.

Fodd bynnag, bydd y byd cyhoeddi Cymraeg bob amser yn ei chael hi'n anodd bod yn fasnachol hyfyw yn y farchnad ar hyn o bryd. Yn realistig, dim ond gyda chefnogaeth y Llywodraeth y gall fodoli yn ei amrywiaeth. Fodd bynnag, o ystyried bod Llywodraeth Cymru wedi ymrwmo i gefnogi'r Gymraeg, yr unig gwestiwn sydd i ni yw a yw'r gefnogaeth honno'n cael ei darparu'n effeithlon. Yn achos y byd cyhoeddi yn yr iaith Saesneg yng Nghymru, mae yna hefyd gwestiwn sylfaenol ynghylch a ellid - neu yn wir a ddylid - gadael y ddarpariaeth i'r farchnad.

Dylid nodi bod un maes lle mae'r byd cyhoeddi Saesneg a'r byd cyhoeddi Gymraeg yn dod ynghyd, sef dosbarthu - gan fod y Cyngor Llyfrau yn dosbarthu llyfrau yn y ddwy iaith drwy Gymru.

Felly mae'r byd cyhoeddi Cymraeg a'r byd cyhoeddi Saesneg yng Nghymru yn farchnadoedd cwbl wahanol o ran maint, cystadleurwydd, cyfleoedd i gydweithio, crynhoad a chydgyfeirio.

Er y gall fod angen cymorth ar lenyddiaeth a chyhoeddi yn y Gymraeg bob amser a chysylltiad â pholisi Llywodraeth Cymru tuag at dwf y Gymraeg, ni ddylai hyn olygu na all ddadansoddi a rhoi cyfrif am sut y mae'n cynnig gwerth am arian. O ran cyhoeddi a llenyddiaeth yn naill ai Saesneg neu'r Gymraeg mae angen craffu ar 'gyllido dwbl', lle mae'r cyhoeddwr a'r awdur yn derbyn cymorth.

Datblygiadau Newydd

Amazon

Mae'n anodd goramcangyfrif grym aflonyddgar Amazon ar y byd cyhoeddi llyfrau a diwydiannau eraill, ac mae'n parhau i fod yn ddadleuol o safbwynt monopoli, arferion gwaith a chwestiynau anodd o ran rheoleiddio sy'n codi o farchnadoedd digidol. Ochr yn ochr â'i bresenoldeb ar-lein amlwg, mae busnesau mawr y rhyngryd megis Netflix ac Airbnb yn cael eu pweru gan Amazon Web Services³⁹ yn y cefndir.

O safbwynt yr adolygiad hwn, dylid nodi bod:

- Amazon yn galluogi awduron i hunangyhoeddi a dosbarthu eu gwaith yn fyd-eang. Mae llwyfannau eraill ar gael ond maent yn fach iawn o gymharu.
- Mae hyn yn golygu y gall llyfrau ar bynciau arbenigol gael cyrhaeddiad eang ar draws y byd, ac roedd gwerthiannau e-lyfrau yn y DU ar gyfer 2015 tua £381.5 miliwn.
- Mae Amazon wedi ariannu hunangyhoeddwy'r llwyddiannus yng Nghymru i gynhyrchu fersiynau llyfrau llafar o'u llyfrau, yn seiliedig ar y galw a nifer y gwerthiannau

³⁹ <https://www.theatlantic.com/technology/archive/2015/04/the-unbelievable-power-of-amazon-web-services/391281/>

- Yn ôl Enillion Awduron, y DU yw'r farchnad fwyaf ond un yn y byd ar gyfer e-lyfrau, yn ail i Amazon.com yn yr Unol Daleithiau
- Mae 66% o brynwyr llyfrau print yn y DU yn siopa ar Amazon.co.uk (Mintel)
- Bellach, mae Amazon.com yn rhentu gwerslyfrau i fyfyrwyr yn yr Unol Daleithiau, a hynny'n rhatach na chyhoeddwr addysgol traddodiadol megis Pearson. Dywedodd John Fallon, y Prif Swyddog Gweithredol fod rhentu wedi arwain at leihad yng ngwerthiannau llyfrau newydd ac wedi cael effaith fwy na'r disgwyl, yn sgil gostyngiad o £2 biliwn yng ngwerth y cwmni ym mis Ionawr 2017
- Mae Amazon wedi agor siopau yn yr Unol Daleithiau ac wedi cofrestru ei nod masnach yn y DU. Mae angen ap Amazon i siopa ac mae casglu data am ddefnyddwyr yn flaenoriaeth.
- Er bod Amazon yn gweithredu fel galluogwr dylid nodi hefyd ei fod yn rym ddominyddol yn y farchnad ar-lein.

Mae e-Lyfrau ac e-Ddarllenwyr yn risg ac yn gyfle. Os bydd cyhoeddwr yn derbyn newid, yn trawsnewid eu prosesau, yn hyfforddi gweithwyr cyflogedig, ac yn cynnig eu cynnwys mewn fformatau lluosog - yn ddigidol neu mewn print, wedi'u rhwymo neu ar gais, ar ffurf PDF neu ePUB - ac ar bob llwyfan, bydd ganddynt siawns dda o ddatblygu model busnes digidol hyfyw. Cyhoeddwr sy'n gwrthsefyll newid, sy'n gweld y broses ddigideiddio yn ddim byd ond cost ychwanegol, ac yn ceisio amddiffyn eu cynnwys a'u modelau busnes presennol, fydd yn wynebu'r peryglon mwyaf.⁴⁰

TWF HUNANGYHOEDDI

Yn ôl amcangyfrif diweddar, mae dros 1000 o awduron hunangyhoeddedig ar hyn o bryd sy'n ennill dros \$50,000 y flwyddyn o Amazon yn unig ond amcangyfrifir mai enillion cyfartalog awdur yn y DU ar hyn o bryd yw tua £7000⁴¹

Gall dilynwyr ar-lein fod yn ddefnyddiol i awdur o ran cael gafael ar gyhoeddwr traddodiadol. Gwelodd Hazel Cushion o Accent Books botensial yr awdur poblogaidd Jodi Taylor, pan welodd fod ganddi 400+ o adolygiadau ar Amazon.

Mae'r hunangyhoeddwr mwyaf llwyddiannus yn fedrus wrth farchnata eu gwaith eu hunain, yn aml gan ddefnyddio grwpiau facebook i drefnu hyrwyddiadau dwyochrog. Bydd Amazon yn aml yn cysylltu ag awduron â gwerthiant uchel ar gyfer eu hargraffnodau eu hunain (a gyhoeddodd dros 2000 o deitlau y llynedd) neu i gynnig cymorth er mwyn creu fersiynau sain o'u teitlau ar gyfer eu hadran llyfrau sain, Audible, a gafodd ddau biliwn o oriau o wrandawyr yn 2016⁴².

Dylanwadau pwysig

TWF TECHNOLEG DDIGIDOL

⁴⁰ <https://www.pwc.co.uk/assets/pdf/ebooks-trends-and-developments.pdf>

⁴¹ <http://authorearnings.com/report/may-2016-report/>

⁴² <https://janefriedman.com/9-statistics-writers-know-amazon/>

Mae'r we wedi cael effaith ddramatig ar sut mae defnyddwyr yn derbyn, yn darllen ac amgyffred cynnwys. Mae'r hafaliad syml 'cyhoeddi = argraffu' wedi esblygu'n gyflym i'r hafaliad mwy cymhleth, 'cyhoeddi = argraffu, ar-lein, e-ddarllenwyd a symudol'. Gydag amrywiaeth o fformatau newydd ar gael i ddefnyddwyr ac yna fwy o offer ar gael i gyhoeddwyr - gan eu galluogi i gyrraedd eu marchnadoedd a chynulleidfaoedd targed mewn modd nas gwelwyd erioed o'r blaen - mae'r posibiliadau i'r diwydiant yn sgil y don ddigidol yn aruthrol. Un enghraifft dda o hyn yw The Bookseller⁴³.

Oherwydd goruchafiaeth Amazon, mae'n anodd cystadlu ag ef:

More than 50% of all traditionally published book sales of any format in the US now happen on Amazon.com.

That's just the traditionally published books, though.

In addition, roughly **85% of all non-traditionally published book sales of any format** in the US also happen on **Amazon.com**.

TWF MEWN DIGWYDDIADAU A YSGOGIR GAN AWDURON, Y MAE'R WE YN EU HELPU

Yn ystod 2016 cynhaliwyd nifer o wyliau gan gynnwys Gŵyl Talacharn, Gŵyl Penfro, Ffeiriau Awduron a Gwyliau Llên yn Ninbych y Pysgod, Solfach, Y Fenni, Llandeilo, Llangwm, Rhondda, a Chaerfyrddin

Roedd y digwyddiadau hyn yn cynnwys awduron adnabyddus fel Ian Rankin (Talacharn) a Griff Rhys Jones (Llangwmlitfest), cystadlaethau, gweithdai a'r gymuned yn ymgysylltu â busnesau lleol, stiwardiaid gwirfoddol a llety. I raddau amrywiol cafwyd ymgysylltiad â'r gymuned ar-lein hefyd,.

⁴³ <https://www.thebookseller.com/futurebook/digital-crossroads>

5. Themâu a negeseuon yn deillio o'r dystiolaeth

Mae'r adran hon o'r adroddiad yn edrych ar themâu a negeseuon cyffredin sydd wedi dod i'r amlwg yn yr Adolygiad yn ystod y cam ymgysylltu â rhanddeiliaid ehangach a chasglu dystiolaeth. Maent hefyd wedi llywio meddylfryd ac argymhellion y Panel ac wedi dylanwadu arnynt. Mae'r themâu a'r negeseuon sy'n cael eu cyfleu yma wedi llywio meddylfryd y Panel Adolygu. Ni ddylent, fodd bynnag, gael eu trin fel adlewyrchiad o farn gyfunol aelodau'r Panel. Nid oes unrhyw farn wedi'i llunio, ac ni ellir rhoi unrhyw sicrwydd ychwaith, mewn perthynas â dilysrwydd, cywirdeb, arwyddocâd, neu fel arall, y farn a'r wybodaeth a gasglwyd gan eraill.

Paratowyd crynodeb o'r ymatebion i'r cwestiynau penodol a godwyd yn yr holiadur galwad am dystiolaeth a bydd yn cael ei gyhoeddi ochr yn ochr â'r adroddiad hwn yn **Atodiad 5**.

Mae'r safbwyntiau hyn wedi cael eu grwpio gyda'i gilydd mewn rhai achosion at ddiben yr adroddiad, ond nid ydynt wedi'u gosod mewn unrhyw drefn blaenoriaeth.

Mae'r themâu a'r negeseuon yn cael eu dadansoddi isod o dan yr ail a'r pumed pennawd yn y cylch gorchwyl ar gyfer yr Adolygiad hwn (mae'r pennawd cyntaf yn ymdrin â sut y gellid gwella cymorth; amlinellir ein casgliadau ar hyn yn y bennod ar argymhellion sy'n dilyn):

Er hwylustod rhestrir y penawdau isod:

- Prif nodau Llywodraeth Cymru o safbwynt cynorthwyo'r diwydiant cyhoeddi a llenyddiaeth yng Nghymru, yn y ddwy iaith; h.y., beth rydym yn ceisio ei gyflawni, a hynny ar lefel ddiwylliannol, cymdeithasol ac economaidd? A yw'r nodau hyn yn addas i'w diben o hyd yn yr unfed ganrif ar hugain? (Gweler Pennod 6 'Argymhellion')
- Cwmpas a graddfa'r cymorth a gaiff ei roi ar hyn o bryd i gyflawni'r nodau hyn, gan gynnwys y berthynas rhwng y cyrff sy'n gyfrifol am gyflenwi'r cymorth hwn.
- Datblygiadau digidol o fewn y diwydiant cyhoeddi yng Nghymru.
- Y trefniadau gweinyddol o ran cymorth Llywodraeth Cymru ar gyfer gwasanaeth newyddion ar-lein dyddiol Cymraeg ei iaith, yn ogystal ag ar gyfer papurau bro.
- Y cymorth ar gyfer cyhoeddi a llenyddiaeth mewn ardaloedd difreintiedig ar draws Cymru.

Cwmpas a graddfa'r cymorth a gaiff ei roi ar hyn o bryd i gyflawni'r nodau hyn, gan gynnwys y berthynas rhwng y cyrff sy'n gyfrifol am gyflenwi'r cymorth hwn.

Cyhoeddwy - Cymraeg a Saesneg

Yn ystod cyfarfodydd gyda chynrychiolwyr o gwmnïau cyhoeddi yng Nghymru, gofynnodd y Panel Adolygu i gyhoeddwy rannu eu barn am yr hyn y maent yn ei weld fel y prif heriau a'r cyfleoedd sy'n wynebu'r diwydiant cyhoeddi. Ymysg rhai o'r themâu allweddol a ddaeth i'r amlwg roedd:

Mae'n bwysig nodi fod y sylwadau isod wedi eu cyflwyno fel tystiolaeth i'r Panel Arolygu – nid ydynt yn sylwadau Aelodau'r Panel

Technoleg ddiigidol

- Roedd y cyhoeddwy yn cytuno bod Cymru yn gyffredinol yn araf o ran symud tuag at dechnoleg ddiigidol, ond gwnaed mwy o gynnydd gydag e-lyfrau.
- Yn gyffredinol, nid oes llawer o lyfrau llafar yn cael eu cyhoeddi. Dywedodd un cyhoeddwr fod angen mynd i'r afael â'r prinder llyfrau llafar Cymraeg, er gwaethaf y ffaith bod hynny'n gostus.
- Yn ddelfrydol, dylai prisiau e-lyfrau gael eu cadw mor agos â phosibl at bris copïau print, er mwyn osgoi rhoi pwysau ychwanegol ar siopau llyfrau.

Cyngor Llyfrau Cymru

Cymorth i Gyhoeddwy

- Er bod y cymorth marchnata a golygyddol gan Gyngor Llyfrau Cymru yn ddefnyddiol iawn, gwnaed toriadau i'r gyllideb hon yn ddiweddar.
- Roedd rhai o'r cyhoeddwy a ymddangosodd gerbron y Panel yn elwa ar wasanaeth prawfddarllen y Cyngor Llyfrau.
- Mae rhai cyhoeddwy hefyd yn defnyddio'r gwasanaethau golygyddol, dylunio a marchnata â chymhorthdal a gynigir gan y Cyngor Llyfrau, y credir eu bod yn ddefnyddiol iawn.
- Pwysleisiodd Cwlwm Cyhoeddwy pa mor werthfawr a chefnogol yw'r Cyngor Llyfrau i'w aelodau.

Cyllid a'r System Grantiau

- Teimlai'r cyhoeddwy fod y system bresennol yn gweithio'n dda, ond y gall y system grantiau fod yn anodd ei deall. Fodd bynnag, roedd y rhan fwyaf yn credu bod y cymorth dosbarthu a ddarperir drwy'r Cyngor Llyfrau yn amhrisiadwy.

- Mae'r system cyllid grant yn gweithio ar hyn o bryd er na fydd hyn o bosibl yn gynaliadwy yn y tymor hwy oni bai bod lefel y cyllid yn cael ei adolygu.
- Mae'r broses o wneud cais am gyllid gan y Cyngor Llyfrau yn well ac yn llai llafurus nag yr oedd.
- Bu system arloesol y Cyngor Llyfrau o roi Blaendaliadau i Awduron yn llwyddiannus o ran denu awduron mwy adnabyddus i Gymru.
- Yn gyffredinol roedd y cyhoeddwr a ymddangosodd gerbron y Panel, ar wahân i Accent Press, yn ddibynnol ar gyllid y Cyngor Llyfrau - dim ond lleiafrif bychan o lyfrau a gyhoeddwyd heb gefnogaeth y Cyngor Llyfrau.
- Awgrymodd y cyhoeddwr y byddai neilltuo rhagor o gyllid ar gyfer marchnata o fudd mawr; roedd y Cyngor Llyfrau wedi trefnu hysbysebion teledu cyn y Nadolig, ond mae angen parhau â'r rhain drwy gydol y flwyddyn. Dywedodd un cyhoeddwr y byddai Cronfa Hysbysebu o fudd i awduron, gwerthwyr llyfrau a chyhoeddwr.
- Nododd un cyhoeddwr mai'r Cyngor Llyfrau yw'r cyfrwng gorau i wasanaethu'r diwydiant cyhoeddi yng Nghymru, ond bod ffyrdd y gallai wella.
- Er bod pencadlys y Cyngor Llyfrau yn Aberystwyth, nododd un cyhoeddwr a oedd wedi lleoli yn ne-ddwyrain Cymru nad oedd hyn yn peri unrhyw broblemau

Dosbarthu a Gwerthiannau

- Mae'r gwasanaethau a ddarperir ar gyfer cyhoeddi a dosbarthu gan y Cyngor Llyfrau yn unigryw ac yn addas at y diben yng Nghymru, ond mae ymestyn y gwasanaeth dosbarthu y tu hwnt i Gymru yn anodd.
- Byddai'n fuddiol i'r Cyngor Llyfrau ddefnyddio cynrychiolwyr llawrydd i gynyddu gwerthiant llyfrau sydd â photensial i apelio i'r DU gyfan. Er y gall y Cyngor Llyfrau ddosbarthu y tu allan i Gymru, nid oes unrhyw gynrychiolwyr yn gweithio y tu allan i Gymru er mwyn cynyddu'r gwerthiant i'r eithaf.
- Roedd y Cyngor Llyfrau yn cefnogi'r cyhoeddwr a ddywedodd fod gwneud amcangyfrifon cywir o werthiannau (fel sy'n ofynnol gan y Cyngor Llyfrau) yn dod yn fwyfwy anodd. Mae cyhoeddwr yn defnyddio'r Cyngor Llyfrau i ddosbarthu o fewn Cymru (fel sydd rhaid ar gyfer teitlau sy'n cael cymorth grant) tra bod dosbarthwyr eraill yn cael eu defnyddio i ddosbarthu ledled y byd.
- Roedd deialog anffurfiol rheolaidd rhwng cyhoeddwr am dwf a diffyg twf busnes. Nodwyd bod gan y Cyngor Llyfrau adnoddau i gynnal ymchwil o'r farchnad, er mai adnoddau cyfyngedig oedd y rheini, ac y gellid cael gafael arnynt drwy'r Ganolfan Ddosbarthu. Roedd barn gadarnhaol am y cymorth a ddarperir gan y Cyngor Llyfrau. Nododd un cyhoeddwr y bydd y Cyngor Llyfrau yn rhoi rhywfaint o adborth ar yr hyn sy'n gwerthu'n dda ond mai cyhoeddwr unigol sy'n gyfrifol am eu gweithgaredd marchnata eu hunain. Roedd nifer y swyddogion a oedd yn canolbwyntio ar farchnata yn amrywio rhwng cyhoeddwr. Yn gyffredinol, mae diffyg cyllideb farchnata yn ei gwneud yn anodd i gyhoeddwr llai, gan fod cwmnïau mwy yn gallu buddsoddi mwy mewn gwefannau a chynnwys y we.

- Fel rhan o'r cytundeb gyda'r Cyngor Llyfrau, ni all cyhoeddwy'r werthu yn uniongyrchol i werthwyr llyfrau mawr yng Nghymru, ond gall cwmnïau cyhoeddi wneud trefniadau unigol gyda siopau llyfrau bach ac ysgolion.
- Mae'r ffaith bod gwerthiant yn cael ei sianelu drwy Ganolfan Ddosbarthu'r Cyngor Llyfrau yn gyfyngol a byddai o fudd mawr pe gallai'r Cyngor Llyfrau wneud trefniadau gydag archfarchnadoedd, er y cydnabuwyd yr anawsterau o ran ymdrin â hwy.
- Mae angen i'r Cyngor Llyfrau allu cynnig mwy o ostyngiadau er mwyn i werthu llyfrau fod yn fwy deniadol i werthwyr llyfrau mawr, ac i sicrhau bod y llyfrau yn cael eu hyrwyddo mewn siopau mwy o faint.
- Mae angen diweddarau'r system ddata bresennol a ddefnyddir gan ganolfan ddosbarthu'r Cyngor Llyfrau ac mae angen y rhifyn diweddaraf o'r System werthu VISTA a fyddai'n darparu gwybodaeth gywir a chyfredol am werthiannau i gyhoeddwy'r; byddai hyn yn arbed amser ac yn llai llafurus
- Mae gan y Cyngor Llyfrau gynrychiolwyr gwerthu sy'n ymweld ag ysgolion a meithrinfeydd i hyrwyddo llyfrau, ond mae nifer y llyfrau a brynir gan ysgolion yng Nghymru yn lleihau.
- Yn sgil y gostyngiad y mae cyfanwerthwyr eraill yn ei gynnig, dylid rhoi ystyriaeth i sut y gallai'r Cyngor Llyfrau gynyddu'r gostyngiad y mae'n gallu ei gynnig i gyhoeddwy'r, e mwyn bod yn fwy cystadleuol.
- Mae'n mynd yn fwy anodd dosbarthu llyfrau am amrywiaeth o resymau, gan gynnwys cystadlu yn erbyn cyhoeddwy'r Llundain i'w dosbarthu, ond hefyd o ganlyniad i gau nifer o siopau llyfrau ledled Cymru, a arferai fod yn 'ffenestr siop' i lenyddiaeth.
- Nid oes gan y Cyngor Llyfrau ddigon o staff sy'n meddu ar wybodaeth fasnachol.

Rhyngwladol

- Byddai'n fwy buddiol gwario arian ar gynorthwyo cwmnïau i gael eu stondinau eu hunain mewn ffeiriau llyfrau ac i ddatblygu eu brandiau eu hunain. Mae'r Adran Masnach Ryngwladol wedi darparu cymorth o 50% i gyhoeddwy'r mewn ffeiriau llyfrau tramor.
- Mae gan Urdd Rhyngwladol y Cyhoeddwy'r stondin yn Ffair Lyfrau Llundain gyda chiwbiclau ar wahân, sy'n galluogi cwmnïau i gael eu hunaniaeth eu hunain ac i hyrwyddo eu deunydd eu hunain heb fynd i'r gost o gymryd stondin gyfan.
- Nododd un cyhoeddwr mai Cymru oedd yr unig wlad o Ewrop heb stondin yn Llundain neu Frankfurt a bod cael presenoldeb yn dangos hunaniaeth genedlaethol glir.
- Yn y gorffennol, collodd y Cyngor Llyfrau gyfle pan oedd yn Frankfurt ac roedd diffyg ffocws i'r ymweliadau gan nad oedd y rhai a oedd yn mynychu yn ymwybodol o'r cyfleoedd.

- Dywedodd un cyhoeddwr mai Ffair Lyfrau Llundain yw'r 'ffenstr siop i'r byd', gan ei bod yn cyrraedd cynulleidfa ryngwladol, ac awgrymodd y byddai cynrychiolaeth gydlynol o Gymru yn helpu i gynyddu gwerthiant a dosbarthu i gyhoeddwyr Cymru.
- Mae Teithiau Masnach yn werthfawr, ond mae angen sesiynau briffio er mwyn sicrhau bod cyfranogwyr yn meddu ar yr wybodaeth i wneud y gorau o gyfleoedd.

Cyffredinol

- Yn gyffredinol, nododd y cyhoeddwyr mai anaml yr oeddent yn dod i gysylltiad â Llenyddiaeth Cymru ac roeddent o'r farn mai sefydliad i awduron ydoedd.
- Mae safonau wedi codi ers datganoli a'r her fwyaf sy'n wynebu cyhoeddwyr Cymru yw cystadlu yn erbyn cyhoeddwyr mawr Llundain.
- Nid oes digon o siopau llyfrau yng Nghymru sy'n cadw stoc o lyfrau Cymraeg ac sy'n eu hyrwyddo.
- Erbyn hyn mae'n fwy anodd nag erioed cyflwyno llyfrau i ddarpar ddarllenwyr ac mae'r broblem hon wedi dwysáu gan fod sawl ardal ledled Cymru bellach lle nad oes siopau llyfrau mwyach.
- Mae cost cyfieithu deunyddiau llenyddol yn uchel iawn a phrin yw'r cymorth sydd ar gael; mae Cyfnewidfa Lên Cymru yn cefnogi hyn, ond roedd y gyllideb yn llai na £10,000 [wedi cynyddu i £20,000 yn 2016]
- Pwysleisiodd y cyhoeddwyr yr effaith gadarnhaol y gall hyrwyddo llyfrau ei chael ar werthiant, ond ei bod yn fwyfwy anodd sicrhau bod llyfrau'n cael eu dewis i'w hyrwyddo.
- Dylid ystyried y posibilrwydd o gefnogi marchnata ar Facebook ar gyfer cwmnïau cyhoeddi
- Mae gan Waterstones bolisi rhanbarthol ar gyfer yr Alban ac Iwerddon, ond nid oes polisi rhanbarthol ar gyfer Cymru. Byddai o fudd mawr i'r diwydiant cyhoeddi yng Nghymru pe bai polisi Cymreig yn cael ei ddatblygu a fyddai'n sicrhau mwy o amlygrwydd i lenyddiaeth o Gymru yn siopau Waterstones.
- Mae marchnata a chysylltiadau cyhoeddus yn allweddol i lwyddiant.
- Dywedodd y cyhoeddwyr mai prif fanteision defnyddio cyhoeddwr yn hytrach na hunangyhoeddi oedd bod yn gysylltiedig â brand a chael mynediad i ddeunyddiau marchnata proffesiynol a'r fasnach lyfrau.
- Y consensws cyffredinol ymhlith cyhoeddwyr oedd nad yw'n realistig i gyhoeddwyr fod yn hunangynhaliol, yn bennaf oherwydd y gystadleuaeth o'r tu allan i Gymru. Roedd cyfrifoldeb i ddewis llyfrau nad ydynt yn gwbl fasnachol ond sy'n rhai diwylliannol hefyd.
- Mewn ymateb i drafodaeth ynghylch a yw cwmnïau cyhoeddi yng Nghymru yn credu y dylent gael cymhorthdal pan fyddant yn gwerthu cynnyrch masnachol, nododd un cyhoeddwr o ran teitlau Cymraeg, ei bod yn anos o safbwynt masnachol a bod ei gwmni hefyd yn gwmni argraffu sy'n cynnal adran gyhoeddi'r busnes. Heb gymhorthdal ni fyddai'n bosibl i'w gwmni barhau cyhoeddi.

- Nododd un cyhoeddwr fod diffyg adnoddau yn arwain at amharodrwydd i gymryd risg, a phe bai gan ei gwmni adnoddau digonol byddai'n gallu cymryd y risg o fethu. Cyfeiriwyd at 'fargen ddyddiol' Amazon a sut mae Penguin wedi datblygu perthynas gydag Amazon a Waterstones drwy weithio'r farchnad, gan ei gwneud yn anodd i deitlau gan gwmnïau llai gael eu cynnwys yn y fargen ddyddiol.
- Nododd y cyhoeddwr eu bod yn ceisio datblygu awduron newydd, ifanc a'r rhai sy'n dod i'r amlwg sy'n edrych am well trefniadau cyhoeddi gyda chyhoeddwr Llundain.
- Nid yw'r cynnydd yn nifer y bobl ifanc sy'n cael addysg Gymraeg yn cael ei adlewyrchu yn ffigurau gwerthiant diweddar llyfrau Cymraeg.
- Mae safon llyfrau Cymraeg wedi codi.
- Er mwyn i'r diwydiant dyfu mae angen dwbl yr arian sydd ar gael, neu leihau'r disgwyliad o ran nifer y llyfrau a gyhoeddir er mwyn rhoi mwy o amser a lle i lyfrau unigol ar silffoedd siopau llyfrau.
- Mae cefnogaeth y Llywodraeth i gyhoeddi yn Gymraeg yn hanfodol i hwyluso cyhoeddi na fyddai fel arall yn fasnachol hyfyw ac na fyddai'n digwydd.

Datblygodd llawer o gwmnïau cyhoeddi Cymraeg o'r diwydiant argraffu, sydd bellach yn fodel braidd yn hen ffasiwn y tu hwnt i Gymru. Mae eu ffocws ariannol ar argraffu yn hytrach na chyhoeddi (sydd wedyn, i bob pwrpas, yn cael ei gynnal drwy arian o'r incwm argraffu).

- Ar hyn o bryd mae gormod o lyfrau i blant yn cael eu cyhoeddi a gormod ohonynt yn cael eu hariannu, sy'n cyfyngu ar y cyfle iddynt gael eu harddangos ar silffoedd siopau llyfrau.
- Byddai'n ddoeth ail-gydbwyso'r cyllid er mwyn cyhoeddi llai o lyfrau (gwell) a defnyddio'r gweddill i alluogi cyhoeddwr i gynnig mwy o ostyngiadau a bod mewn gwell sefyllfa i gystadlu yn y farchnad - er mwyn cael mwy o lyfrau i mewn i'r archfarchnadoedd a siopau llyfrau.
- Mae her economaidd gan y gall archfarchnadoedd werthu llyfrau Julia Donaldson, er enghraifft, am brisiau manwerthu sylweddol is - sy'n ei gwneud yn anodd i gwmnïau cyhoeddi gystadlu ac i lyfrau gael eu gwerthu am y pris manwerthu a argymhellir.
- Erbyn hyn ychydig iawn o siopau llyfrau annibynnol sydd yng Nghymru - ac nid oes dim yng nghanol Caerdydd.

Yn dilyn y drafodaeth gyda'r Cyhoeddwr, daeth y Panel i'r casgliadau a ganlyn:

Yr oedd y Panel yn cydnabod y wybodaeth sylweddol a oedd yn amlwg yn y diwydiant cyhoeddi a'r ymrwymiad clir ac angerdd i adeiladu ar yr isadeiledd a'r gweithgareddau cyfredol. Fodd bynnag, teimlai'r Panel fod angen mwy o graffter busnes o fewn y diwydiant. Roedd y Panel yn cydnabod y llwyddiant masnachol a gyflawnwyd gan Accent Press. Roedd angen cwrs hyfforddi yn y diwydiant a fyddai'n cynnwys sgiliau busnes, yn ogystal â hyfforddiant penodol mewn meysydd megis gwerthu hawliau, trefniadau golygyddol a thrafod contractau. Mae cyhoeddwr

yn goroesi ond nid ydynt yn gwneud arian mawr; ac mae cyfyngiadau ariannol yn arwain at osgoi cymryd risg.

Mae marchnata a chysylltiadau cyhoeddus yn feysydd y mae angen eu gwella. Mae angen i gyhoeddwyr fod yn arloesol a dylid mabwysiadu dull mwy strategol gan gynnwys rhagor o fuddsoddi. Teimlai'r Panel fod lefel gyffredinol o foddhad gyda'r Cyngor Llyfrau ymhlith y cyhoeddwyr. Mae lefel y monitro a'r diwydrwydd dyladwy a ddisgwylir gan y Cyngor Llyfrau yn uchel. O'r dystiolaeth a dderbyniwyd, prin oedd y cyswllt rhwng cyhoeddwyr a Llenyddiaeth Cymru ac roedd cyhoeddwyr yn credu mai sefydliad i awduron oedd Llenyddiaeth Cymru ac nad oedd yn uniongyrchol berthnasol i'w gweithgareddau. Awgrymodd y Panel fod angen rhoi strategaethau hirdymor ar waith i gefnogi'r diwydiant, gan na fyddai chwistrelliadau syml o arian o reidrwydd o fudd i'r cwmnïau unigol.

Awgrymodd y Panel y dylid rhoi ystyriaeth i gefnogi mecanweithiau ar gyfer cwmnïau newydd mewn rhannau penodol o'r diwydiant cyhoeddi. Roedd angen adnabod cyfleoedd newydd i werthu. Argymhellodd y Panel y dylai mesurau gael eu rhoi ar waith i annog pob cyhoeddwr yng Nghymru i weithredu'n rhyngwladol yn ogystal ag annog cyhoeddwyr rhyngwladol i ddod i Gymru. Dylai'r Cyngor Llyfrau gefnogi datblygu teithiau i ffeiriau llyfrau rhyngwladol allweddol yn y DU a thramor, er mwyn creu cysylltiadau masnachu a meithrin gallu yn y sector cyhoeddi yng Nghymru. Dylid adolygu costau a manteision y rhain bob blwyddyn ac, yn llawnach, ar ôl tair blynedd.

Dylid diwygio dulliau cymorth megis Cymorth ar gyfer Ymweliadau i Ddatblygu Busnes Tramor, sy'n galluogi busnesau i gynnal ymweliadau datblygu busnes sy'n berthnasol i farchnadoedd tramor, er mwyn ystyried ceisiadau gan gyhoeddwyr i fynychu a chael presenoldeb ffurfiol mewn ffeiriau masnach llyfrau rhyngwladol, yn enwedig ffeiriau yn Llundain (sy'n canolbwyntio ar farchnadoedd tramor er mai yn y DU y cânt eu cynnal) a Frankfurt.

Yn ogystal, dylai Waterstones ystyried datblygu polisi rhanbarthol ar gyfer Cymru, yn yr un modd ag y mae wedi'i wneud ar gyfer yr Alban ac Iwerddon. Yr oedd y Panel yn falch i glywed, yn ystod gwanwyn 2017, wrth i'r adroddiad gael ei gwblhau, fod Waterstones wedi penderfynu cyflwyno polisi rhanbarthol ar gyfer Cymru.

Cylchgronau a Chyfnodolion

Yn ystod cyfarfodydd gyda chynrychiolwyr o wahanol gylchgronau sy'n cael arian gan Lywodraeth Cymru drwy'r Cyngor Llyfrau, gofynnodd y Panel Adolygu iddynt rannu eu barn ar nifer o faterion gan gynnwys yr hyn y maent yn ei weld fel y prif heriau a'r cyfleoedd sy'n wynebu cylchgronau yn ogystal â datblygiadau digidol.

Mae'n bwysig nodi fod y sylwadau isod wedi eu cyflwyno fel tystiolaeth i'r Panel Arolygu – nid ydynt yn sylwadau Aelodau'r Panel

Cododd y themâu a ganlyn o'r drafodaeth gyda'r cylchgronau

Y berthynas rhwng cynnwys print a chynnwys digidol

- Roedd angen gochel rhag rhoi gormod o bwyslais ar ddeunydd digidol yn rhy gyflym. Cyfuniad o ddeunyddiau print a digidol oedd y ffordd ymlaen.
- Roedd rhagdybiaeth y dylai unrhyw un sy'n derbyn arian cyhoeddus gynnig ei wasanaeth am ddim. Ni ddylai hynny fod yn ddisgwyliad ac mae angen datblygu a thyfu busnesau.

Mae symud i gyhoeddi digidol, yn arwain at gynydd yng nghost deunydd wedi'i argraffu ac mae rhagdybiaeth bod modd creu cynnwys digidol am ddim - nid yw hyn yn wir o ran amser pobl a chostau technegol. Mae'n anodd marchnata hyrwyddo a hysbysebu ar y rhyngwyd ac yn y byd sydd ohoni mae llawer o gynnwys ar gael am ddim (e.e. BBC) sy'n ei gwneud yn anodd iawn cystadlu.

- Roedd un o'r cylchgronau wedi darganfod ei bod wedi troi at gyhoeddi digidol yn rhy gyflym ac yn rhoi gormod i fwrdd am ddim; a phwysleisiodd fod y Digital Guardian gyda'i chylchrediad eang hefyd yn brwydro i oroesi.
- Mae cylchgronau bellach yn gyhoeddiadau aml-lwyfan, a dyna sut y dylent fod, ond efallai bod gormod o ddisgwyliad i'r 'genhedlaeth iau' fod yn gwbl ddiigidol ac i'r 'genhedlaeth hŷn' ffafrio deunydd print ac nad yw hyn yn wir bob tro. Bydd lle bob amser i ddeunydd print sy'n cynnig profiad trochi i'r darllenwyd.
- Mae copïau papur yn hanfodol ac o bwysigrwydd diwylliannol ac yn gwasanaethu fel archif mewn ffordd nad yw'n bosibl gyda chynnwys digidol. Mae lle i erthyglau manwl mewn print, gan fod erthyglau digidol hirfaith yn aml yn diflannu dros amser.
- Cyfryngau aml-lwyfan oedd y ffordd orau ymlaen ar gyfer y dyfodol. Mae awydd o hyd ymysg darllenwyr i ddarllen erthyglau manwl wedi'u hargraffu
- Nid yw'r ap digidol (yr ap *Cylchgronau Cymru*) a sefydlwyd gan y Cyngor Llyfrau ar gyfer cylchgronau wedi bod yn llwyddiant mawr.
- Roedd y cylchgronau'n gweithio i ddenu darllenwyr newydd a demograffeg newydd ac mae ganddynt bellach gyfraddau tanysgrifio gwahanol, gan gynnwys tanysgrifiad llawn i gylchgronau print a digidol gyda chyfradd ostyngol i'r rhai sy'n tanysgrifio i fersiynau digidol yn unig.
- Mae'r meysydd digidol yn creu her benodol ac mae angen gweld perthynas rhwng copïau ffisegol a fersiynau digidol. Mae angen datblygu strategaeth i sefydlu'r ffordd ymlaen.

Hysbysebu

- Roedd y cylchgronau'n cytuno ei bod yn anodd i gyhoeddwyr bach godi referniw hysbysebu. Dywedwyd nad yw hysbysebion digidol yn arwain at incwm sylweddol, a bod angen cael manylion darllenwyr a thargedu hysbysebion yn benodol.

Datblygiad gwerthiannau a thanysgrifiadau yn ystod y deng mlynedd diwethaf, ac a oes unrhyw gyfyngiadau (daearyddol a chymdeithasol) yn eu rhwystro rhag cyrraedd eu darllenwyr

- Erbyn hyn, mae llai o siopau ar gael i stocio cyhoeddiadau ac felly mae tanysgrifiadau wedi dod yn elfen fwy o ran maint a phwysigrwydd.
- Mae ardaloedd daearyddol penodol lle ceir nifer fach o siopau.
- Prin yw gallu Canolfan Ddosbarthu'r Cyngor Llyfrau i gyrraedd siopau newydd.
- Byddai presenoldeb mewn digwyddiadau a marchnadoedd wedi'u targedu o fudd i hyrwyddo cylchgronau a chynyddu nifer y darllenwyr.

- Dylai cylchgronau geisio ymgysylltu'n fwy ag ysgolion, colegau addysg bellach a byrddau arholi drwy gynrychiolwyr y Cyngor Llyfrau.
- Nid yw'n ymarferol cynyddu lefelau gwerthiant mewn archfarchnadoedd
- Mae'r cylchgronau'n defnyddio'r cyfryngau cymdeithasol (Twitter a Facebook) i gyrraedd cynulleidfaoedd newydd.
- Mae'r meysydd digidol yn creu her benodol ac mae angen gweld perthynas rhwng copïau ffisegol a fersiynau digidol. Mae angen datblygu strategaeth er mwyn pennu'r ffordd ymlaen
- Roedd pryder ynghylch sut y mae cylchgronau wedi cael eu heffeithio yn ystod y blynyddoedd diwethaf yn dilyn newidiadau i reoliadau cymorth gwladwriaethol.

Cyllid

- Mae codi arian a chyllid drwy hysbysebion yn golygu llawer o oriau gwaith ac mae gallu talu ffioedd awduron yn hanfodol.
- Mae un o'r cylchgronau wedi cael nawdd gan brifysgol a oedd yn gysylltiedig â chynlluniau lleoliadau gwaith ac yn mynd ati i edrych ar gyllid ychwanegol, ond gellid treulio'r amser hwn yn hyrwyddo'r cylchgrawn.
- Nododd un cylchgrawn mai'r unig ffordd o warantu incwm oedd codi pris y cylchgrawn yn rheolaidd ond nad yw hynny'n dueddol o gael effaith ar nifer y darllenwyr.
- Gallai buddsoddwyr preifat beryglu annibyniaeth olygyddol sy'n hanfodol i gyhoeddi cylchgronau, gan greu gwrthdaro o ran buddiannau.
- Mae rhai cylchgronau wedi bod yn llwyddiannus gydag arian preifat ar gyfer gwobrau, ond nid ar gyfer cylchgronau.

Deialog gyda'r Cyngor Llyfrau a sefydliadau eraill?

- Roedd y diwrnod hyfforddi i gyhoeddwyr cylchgronau a drefnwyd gan y Cyngor Llyfrau yn ystod 2016 yn fuddiol i rannu profiadau. Byddai cymorth pellach gyda marchnata yn help mawr i'r cylchgronau. Mae cylchgronau yn rhan fawr o ddiwylliant Cymru, ac yng nghydestun cyffredinol y cyllid a ddyrennir i'r diwydiant cyhoeddi, nid yw cylchgronau yn derbyn swm mawr.
- Roedd cyfle i gael rhagor o ddeialog, ond mae'n bwysig nad oes dim yn cael ei ganoli gan fod cael dau sefydliad ar wahân - y Cyngor Llyfrau a Llenyddiaeth Cymru - yn beth da.
- Nid oedd y Cyngor Llyfrau dda am hyrwyddo ei hun, ond mae Llenyddiaeth Cymru yn roddi cryn bwyslais ar gyhoeddusrwydd.
- Nodwyd bod gan y Cyngor Llyfrau a Llenyddiaeth Cymru stondinau ar wahân yn yr Eisteddfod Genedlaethol a gallai fod yn fwy cost-effeithiol cael un standin.
- Bu oedi gyda hyrwyddo Llyfr y Flwyddyn Cymru gan fod y llyfrau dan embargo.
- Roedd y cylchgronau'n cytuno bod gan bersonel y Cyngor Llyfrau wybodaeth eang am ddiwylliant a llenyddiaeth a bod yr arian yn cael ei ddosbarthu er lles y cyhoedd, ac er bod y Cyngor Llyfrau yn gorff hyd braich mae lefel iach o graffu.
- Prin oedd y rhyngweithio gyda Llenyddiaeth Cymru - roedd un cylchgrawn wedi cysylltu â Llenyddiaeth Cymru i farchnata a hyrwyddo cystadlaethau.

Sut y gellid gwella'r system bresennol?

- Awgrymodd un o'r cylchgronau y dylid edrych ar gyfuno ysgoloriaethau gyda chyhoeddi comisiynau, cefnogi awduron yn hytrach na digwyddiadau a chefnogi cyhoeddwyr i ddylunio a golygu eu cyhoeddiadau eu hunain.

- Gallai'r Cyngor Llyfrau greu cysylltiadau gyda sefydliadau addysgol a byrddau arholi a llyfrgelloedd.
- Mae'r Cyngor Llyfrau yn gwneud ei orau gydag adnoddau prin. Byddai'n fuddiol cael arweiniad a chyngor ar faterion megis hawlfraint ac archifo a chael arbenigedd marchnata i gynnig cyngor ar brisio a gwasanaethau masnachol.

Pwysigrwydd cylchgronau y tu hwnt i Gymru

- Mae hyn yn amrywio ymhlith y cylchgronau ond cytunwyd ei fod yn bwysig a'i fod yn cynnig marchnad fwy, ond mwy o gystadleuaeth hefyd. Roedd targedu siaradwyr Cymraeg dramor yn hanfodol.

Rôl cylchgronau Saesneg yng Nghymru ac a oes angen eu trin yn wahanol i lenyddiaeth Gymraeg

- Mae'r cylchgronau'n hanfodol oherwydd gwendid y cyfryngau print yng Nghymru ac maent yn cyflawni'r rôl papurau newydd.

Crynodeb o faterion eraill yr oedd y cynrychiolwyr cylchgronau eisiau i'r Panel Adolygu eu hystyried

- Pwynt canolog i roi cyngor ar agweddau masnachol gan gynnwys hawlfraint, prisiau a symud-ymlaen yn ddigidol.
- Awgrymodd un cylchgrawn y dylid darparu cymorth yn uniongyrchol i awduron a chyhoeddwr yn hytrach na'i sianelu drwy'r Cyngor Llyfrau.
- Byddai hwyluso perthynas ag ysgolion a llyfrgelloedd o fudd mawr i gynyddu nifer y darllenwyr.
- Mae angen ennyn mwy o falchder mewn ysgrifennu (fel gydag opera) o ystyried faint o bobl a gyrhaeddir drwy ysgrifennu, ac mae angen ysbrydoli gweithgaredd newydd.

Yn dilyn y drafodaeth gyda'r cylchgronau daeth y Panel i'r casgliadau a ganlyn:

Mae'r Panel yn cydnabod yr awydd i newid ymysg cyhoeddwr cylchgronau. Roedd yn amlwg bod gan gyhoeddwr cylchgronau ddealltwriaeth lawer cliriach o rôl y Cyngor Llyfrau o gymharu â rôl Llenyddiaeth Cymru. Trafododd y Panel yr awgrym y dylid rhoi grantiau yn uniongyrchol i awduron a chyhoeddwr, a chytunwyd er y gallai hyn weithio i'r cyhoeddwr mwy profiadol, bod cymorth y Cyngor Llyfrau yn werthfawr i'r cyhoeddwr llai profiadol.

Addysg a Llythrennedd

Gwnaeth y Panel yr arsylwadau a ganlyn yn sgil tystiolaeth gan Gangen Adnoddau y Gymraeg Mewn Addysg Llywodraeth Cymru

Roedd y Panel yn galonogol o weld bod y broses yn cael ei harwain gan y galw a bod ymchwil da yn cael ei wneud i fylchau mewn deunyddiau ac adnoddau. Mae dwy elfen i waith y Gangen, sy'n cynnwys sefydlu a diffinio anghenion ysgolion a rhagweld y gofynion yn y dyfodol.

Roedd y dadansoddiad o'r deunyddiau a'r sawl sy'n eu cynhyrchu yn ddefnyddiol iawn, ac yn dangos bod cynhyrchu a chyhoeddi cynnwys addysgol yn cynorthwyo i gynnal rhai o'r cyhoeddwyr Cymraeg.

Roedd rhai o'r darparwyr yn gwmnïau newydd ac yn cynnwys cwmnïau teledu a digidol, yn hytrach na'r cwmnïau cyhoeddi mwy traddodiadol, ac nid oedd gan y cwmnïau cyhoeddi traddodiadol yr adnoddau i fodloni'r fanyleb ddigidol.

Y Cwricwlwm Newydd i Gymru

Nododd y Panel brinder llyfrau Saesneg am Gymru ac nad yw maes llafur ysgolion CBAC yn cynnwys llawer o lyfrau am ddiwylliant a hanes Cymru drwy gyfrwng y Saesneg. Dylai CBAC sicrhau bod ysgrifennu Saesneg yng Nghymru yn cael ei gynrychioli'n briodol fel pwnc ar y cwricwlwm addysg.

Daeth y Panel i'r casgliad, dros y cyfnod cynllunio pum mlynedd nesaf, bod angen llawer mwy o waith integredig rhwng y blaenoriaethau cyllido a strategol ar gyfer datblygu a gweithredu'r Cwricwlwm newydd a'r cyfleoedd sylweddol i ddatblygu strategaeth addysgol ddigidol gynhwysol ar gyfer Cymru gyfan. Gallai'r Cyngor Llyfrau chwarae rôl gydlynu allweddol yn y cyd-destun hwn. Bydd angen buddsoddi mewn cefnogi athrawon i gyflwyno'r cwricwlwm newydd - gallai hyn gynnwys cynhyrchu deunyddiau newydd i gefnogi'r deilliannau dysgu o fewn y meysydd dysgu a nodwyd. Mae angen rhoi ystyriaeth i'r ffordd orau o gynyddu gwerth llwyfannau aml-gynnwys digidol a sut y gall y diwydiannau cyhoeddi chwarae rhan allweddol mewn datblygiad o'r fath.

Datblygiad Proffesiynol a Datblygu Sgiliau (*gan gynnwys hyfforddiant i Gyhoeddwyr*)

Fel gyda chelfyddydau a sectorau creadigol eraill yng Nghymru, mae cefnogaeth broffesiynol i awduron a chyhoeddwyr yn hollbwysig er mwyn datblygu'r sector ymhellach. Nododd y Panel y gellid gwneud llawer mwy i gefnogi hyfforddiant proffesiynol. Er y cydnabyddir bod nifer o sefydliadau yn cynnig nifer o gyrsgiau hyfforddi, gellid gwasanaethu'r sector cyfan mewn ffordd fwy systematig.

Nododd y Panel y cyrsiau niferus sydd ar gael i gefnogi ysgrifennu creadigol yng Nghymru. Roedd y rhain yn cynnwys ystod o sefydliadau yn amrywio o brifysgolion i ddarparwyr preifat. Gan nodi deinameg gyfnewidiol y sector cyhoeddi, roedd yn amlwg y bydd angen i lawer o gyhoeddwyr bach a chanolig yng Nghymru addasu. Mae hyn yn wir am awduron hefyd. Mae marchnata'r model busnes hunangyhoeddi yn galw am seilwaith cymorth gwahanol iawn. Er mwyn manteisio i'r eithaf ar rwydwaith llawer mwy cymhleth o sianelau dosbarthu i awduron - ar-lein, e-lyfrau, yn ogystal â'r llyfrwerthwyr traddodiadol, awgrymir y dylid rhoi ystyriaeth bellach i ganolfan hyfforddi broffesiynol y gellid cael mynediad iddi ar lein. Gellid gwasanaethu a chydlynu hyn drwy un o'r sefydliadau cenedlaethol allweddol. Yn ogystal â'r meysydd a nodir uchod, cydnabu'r Panel y sylwadau niferus a dderbyniwyd yn mynegi diddordeb yn y meysydd proffesiynol a ganlyn: sgiliau busnes, darlunio, sgiliau golygu, y defnydd o gyfryngau cymdeithasol a dadansoddeg. Gellid cynnig mwy hefyd i bontio rhwng cyrsiau ysgrifennu creadigol ar gyfer cyhoeddi ac addysgu ysgrifennu ar gyfer y sgrin. Gellid annog mwy o waith partneriaeth rhwng ffilm a llenyddiaeth.

Gan nodi pwysigrwydd mynegiant artistig a grym naratif, ystyriodd y Panel hefyd rôl bwysig llenyddiaeth a chyhoeddi o ran cefnogi cynhwysiant a chydardoldeb cymdeithasol yng Nghymru. Mae gwir angen i lenyddiaeth chwarae rhan yn y meysydd iechyd, cyfiawnder ac

addysg. Mae hyn yn galw am hyfforddiant a chymorth proffesiynol i alluogi awduron i ymgysylltu â chynulleidfaedd sy'n agored i niwed ym maes y celfyddydau cyfranogol.

Nododd y Panel briodoldeb adolygu'r holl hyfforddiant proffesiynol cyfredol a chydlynu'r arlwy presennol a datblygu ymhellach raglen integredig i ddatblygu sgiliau sydd wedi'i theilwra i anghenion awduron, cyhoeddwr a rhanddeiliaid artistig allweddol eraill.

Mae'r dirwedd hyfforddiant proffesiynol yn dameidiog yng Nghymru ar hyn o bryd a gellid ei gwella drwy fwy o gyfathrebu, cydlynu a chynyddu'r arlwy presennol ac yna ychwanegu cyfleoedd hyfforddi newydd.

Sefydliadau

Cyngor Llyfrau Cymru (y Cyngor Llyfrau)

Cyfarfu'r Panel gyda swyddogion y Cyngor Llyfrau, gan gynnwys y Cadeirydd a'r Prif Weithredwr ar y pryd. Mae'r wybodaeth gefndir a gyflwynwyd i'r Panel gan y Cyngor Llyfrau eisoes wedi'i chynnwys eisoes.

Mae'n bwysig nodi fod y sylwadau isod wedi eu cyflwyno fel tystiolaeth i'r Panel Arolygu – nid ydynt yn sylwadau Aelodau'r Panel

Cododd y themâu a ganlyn o'r drafodaeth:

Monitro

- Roedd sicrwydd ansawdd yn hanfodol i'r Cyngor Llyfrau ac mae'n monitro'n barhaus y cyhoeddwr sy'n derbyn cyllid i sicrhau amrywiaeth o lyfrau a deunydd llenyddol yn ogystal â deunyddiau marchnata a fydd yn creu incwm.
- Mae nifer o lyfrau sydd wedi ennill gwobrau wedi cael cymorth gan y Cyngor Llyfrau ac wedi codi proffil llenyddiaeth o Gymru ar lwyfan byd-eang.

Deunyddiau Digidol

- Er bod deunyddiau digidol ar gael, roedd y Cyngor Llyfrau yn cydnabod ei bod yn cymryd mwy o amser na'r disgwyl i bobl fanteisio ar e-lyfrau Cymraeg, ond roedd yn cydnabod bod angen i lyfrau Cymraeg a Saesneg fod ar gael yn ddigidol.
- Mae gwerthiant e-lyfrau wedi arafu yn ddiweddar.
- Roedd Gwales, porth gwerthu a marchnata digidol y Cyngor Llyfrau, wedi datblygu'n sylweddol yn ystod y blynyddoedd diwethaf.
- Roedd angen i bapurau bro gynyddu eu presenoldeb digidol heb danseilio'r cynnwys. Cyfeiriodd y Cyngor Llyfrau at uchelgais Golwg 360 i weithio'n agos gyda'r papurau bro er mwyn cynyddu eu presenoldeb digidol.

Y berthynas â rhanddeiliaid allweddol

- Pwysleisiodd y Cyngor Llyfrau, er ei fod yn gweithio gyda Llenyddiaeth Cymru ar brosiectau a digwyddiadau penodol, fod eu swyddogaethau'n wahanol a bod Llenyddiaeth Cymru yn gweithio gydag awduron ond rôl y Cyngor Llyfrau yw datblygu'r diwydiant.
- Mae'r Cyngor Llyfrau yn gweithio'n agos gydag Adran Addysg a Gwasanaethau Cyhoeddus Llywodraeth Cymru ac mae swyddogion ysgol y Cyngor Llyfrau yn cwrdd yn rheolaidd â swyddogion yr Adran.

Rôl y Cyngor Llyfrau o ran creu diwydiant cyhoeddi dynamig yng Nghymru a sicrhau nad yw cyhoeddi â chymhorthdal yn annog pobl i fod yn hunanfodlon

- Mae strwythur grant y Cyngor Llyfrau yn anelu at ddatblygu entrepreneuriaeth ac annog cystadleuaeth a chyfeiriodd at gyhoeddwyr newydd megis Cinnamon Press a Firefly Press, sy'n dangos bywiogrwydd y diwydiant cyhoeddi yng Nghymru. Mae'r system grantiau yn annog datblygiad masnachol a symudiad tuag at fwy o gynaliadwyedd oherwydd ei bwyslais ar gynhyrchu rhestr cyhoeddi sy'n fasnachol gytbwys a thrwy gefnogi mentrau marchnata a chyhoeddusrwydd.

Cylchgronau

- Roedd y Cyngor Llyfrau yn cytuno fod nifer darllenwyr cylchgronau print yn lleihau fel rhan o duedd fyd-eang ehangach ac y dylid rhoi mwy o ystyriaeth i gynnwys digidol. Fodd bynnag, mae'r cylchgronau yn fforwm ar gyfer rhoi sylw i wleidyddiaeth, llenyddiaeth a diwylliant Cymru ac i ysgogi trafodaeth yn enwedig o ystyried gwendid y diwydiant papurau newydd yng Nghymru.
- Dywedodd y Cyngor Llyfrau fod cylchgronau yn awr yn ceisio sicrhau cyllid o fannau eraill i arallgyfeirio, ac mai tanysgrifiadau yw'r brif ffynhonnell ar gyfer gwerthiannau print o hyd, roedd llwyfannau digidol yn rhoi'r potensial i gyrraedd mwy o bobl ac yn cynnwys modelau mynediad agored.

Barn ynghylch a ddylid cael un corff i gynnig darpariaeth hollgynhwysol i'r diwydiant cyhoeddi yng Nghymru

Roedd y Cyngor Llyfrau yn cytuno, er ei fod yn fodlon ei fod eisoes yn gallu darparu gwasanaeth cynhwysfawr i'r diwydiant cyhoeddi sydd ar gynnydd yng Nghymru, byddai'n barod (o gael swm priodol o gyllid ychwanegol) i ystyried chwarae mwy o ran yn y dyfodol mewn meysydd cysylltiedig y tu allan i'w gylch gwaith presennol er mwyn datblygu'r diwydiant cyfan ymhellach.

Yn dilyn cyfarfod gyda'r Cyngor Llyfrau ac ar ôl ystyried y dystiolaeth ysgrifenedig a ddaeth i law, daeth y Panel i'r casgliadau a ganlyn:

Cyffredinol

Wrth ystyried y dystiolaeth a gyflwynwyd gan y Cyngor Llyfrau ac hefyd yn nodi'r dystiolaeth ychwanegol a gyflwynwyd gan rhanddeiliaid eraill, yr oedd y Panel yn teimlo fod y Cyngor Llyfrau yn arddangos lefel-uchel o aeddfedrwydd mewn perthynas â'i swyddogaethau craidd. Yr oedd y Panel yn teimlo fod y Cyngor Llyfrau yn cael ei ystyried ac yn cael ei gydnabod fel sefydliad cenedlaethol allweddol a oedd wedi arddangos dros gyfnod hir ymrwymiad clir i gynhyrchu ac ymestyn cyhoeddi yng Nghymru. Wrth ystyried y dystiolaeth a gyflwynwyd, daeth y Panel i'r casgliad fod yr amser yn iawn i ystyried cyfrifoldebau ychwanegol i'r Cyngor Llyfrau. Gallai hyn gryfhau'r ecosystem gyhoeddi yng Nghymru. Os fyddai dyletswyddau ychwanegol yn cael eu datblygu, byddai rhaid rhoi ystyriaeth ddyledus i nifer o ddatblygiadau strwythurol a llywodraethol i gefnogi'r swyddogaethau ychwanegol.

Cyllid

Mae'r Cyngor Llyfrau yn mynd ati i geisio sicrhau'r gwerth gorau am arian gan gyhoeddwyr llyfrau a chylchgronau. Mae'n ymdrin â cyfres o grantiau cyhoeddi (prosiectau a rhaglenni unigol) ac mae ganddo afael gadarn ar gostau gweinyddu a rhedeg.

Roedd cronfeydd a grantiau yn cael eu microreoli'n dda ond gellid dadlau bod y Cyngor Llyfrau angen mwy o weithwyr proffesiynol y diwydiant o ran rhai agweddau o'i gwaith.

Llywodraethu

Ni nododd y Panel unrhyw faterion o bwys ond gellid gwella rhai agweddau fel gydag unrhyw sefydliad effeithiol. Yn gyffredinol, ystyriwyd y Cyngor Llyfrau yn sefydliad tryloyw a oedd yn sicrhau sefydlogrwydd, tegwch a pharch o fewn y sector ledled Cymru, gan gynnwys ymysg cyhoeddwr, llyfrwerthwyr ac athrawon.

Cymorth i Gyhoeddwr

Roedd trefniadau llywodraethu'r Cyngor Llyfrau o ran y cymorth y mae'n ei ddarparu i gyhoeddwr yn foddhaol. Mae ei wasanaethau dylunio a marchnata wedi helpu i sicrhau bod bron pob cyhoeddwr yng Nghymru yn awr yn gallu creu cynhyrchion masnachol sy'n edrych yn dda - yn sicr, nid oedd hynny'n wir ddegawd yn ôl. Mae'r Cyngor Llyfrau yn rhoi ffocws i lyfrwerthwyr a chyhoeddwr Cymru ond yn naturiol gallai wneud mwy.

Cyhoeddi yn Gymraeg

Yr oedd y Panel wedi ystyried fod y Cyngor Llyfrau yn gwneud cyfraniad allweddol i gyhoeddi yn yr iaith Gymraeg. Yr oeddynt wedi cydnabod cyfraniad holl bwysig y Cyngor Llyfrau ar ran Llywodraeth Cymru i gefnogi a chreu mwy o gyfleoedd o ran cefnogi ac hyrwyddo yr iaith Gymraeg a sicrhau fod gan Gymru ecosystem gyhoeddi ffyniannus yn yr iaith Gymraeg. Fodd bynnag, nododd y Panel fod rhai cyhoeddwr wedi awgrymu bod gormod o deitlau a dim digon o arweiniad clir yn cael ei roi i siopau llyfrau o ran yr hyn y dylent neu na ddylent stocio. Yn hanesyddol, daw'r Cyngor Llyfrau o gefndir cyhoeddi Cymraeg ac efallai nad yw ei ddiwylliant bob amser yn gallu cefnogi cyhoeddwr entrepreneuriaidd.

Cyhoeddi yn Saesneg

Roedd peth o'r dystiolaeth a gafodd y Panel yn dangos mai gwir gryfder a diddordeb y Cyngor Llyfrau yw cyhoeddi deunyddiau Cymraeg. Nododd y Panel y sylwadau a dderbyniwyd o ran cyhoeddi yn yr iaith Saesneg, fod y Cyngor Llyfrau yn cynnig cefnogaeth gymwys ond ddim yr un lefel o arweiniad strategol a gyflwynwyd ar gyfer cyhoeddi yn yr iaith Gymraeg - ac mae ei leoliad yn Aberystwyth yn gwneud iddo deimlo ymhell iawn o ddiwydiant cyhoeddi masnachol bywiog Llundain. Cafwyd peth trafodaeth ymhlith aelodau'r Panel, a derbyniwyd rhywfaint o dystiolaeth, ynghylch ai Aberystwyth oedd y lleoliad gorau i ymdrin â'r gwasanaeth cyhoeddi Saesneg ac a ddylai'r cymorth ar gyfer y ddwy iaith gael ei rannu gan leoli'r cymorth ar gyfer cyhoeddiadau Saesneg mewn man arall. Fodd bynnag, at ei gilydd roedd y Panel cyfan yn teimlo na fyddai rhannu rôl y Cyngor Llyfrau yn cryfhau'r diwydiant cyhoeddi yng Nghymru. Nid yw'r Cyngor Llyfrau yn sefydliad mawr ac mae'r gyllideb ar gyfer cyhoeddiadau Saesneg yn llawer llai na'r un ar gyfer cyhoeddiadau Cymraeg.

Cyhyd ag y bydd Llywodraeth Cymru yn cefnogi cyhoeddi yn y ddwy iaith (ac mae cymorth y Cyngor Llyfrau i gyhoeddiadau Saesneg yn llai na 15 mlwydd oed), mae manteision i'r cysylltiadau rhwng y ddwy ochr. Mae'r farchnad yn gwneud llawer mwy ar gyfer ansawdd cyhoeddiadau Saesneg (ymhlith rhai cynigion llai trawiadol), felly bydd yr ymyriadau o ran arian cyhoeddus yn wahanol. Mae dylunio'n enghraifft dda. Mae ansawdd dylunio llyfrau Cymraeg, yn enwedig ffuglen wedi gwella'n sylweddol yn ystod y blynyddoedd diwethaf, gan leihau'r bwlch rhyngddynt ag enghreifftiau gwell o ddylunio mewn cyhoeddiadau Saesneg.

Yr oedd y Panel yn cynabod fod rhai o'r cyhoeddwr bach a gefnogwyd gan y Cyngor Llyfrau wedi cyhoeddi llyfrau sydd wedi ennill ambell wobr neu wedi cyrraedd ambell restr fer dros y blynyddoedd, ond nid ydynt erioed wedi dangos unrhyw arwydd o ddod yn fusnesau hunangynhaliol. Nid eu bai hwy yw hynny. Cyhyd ag y bydd cyllid ond ar gael i gyhoeddi gwaith newydd o Gymru, ymddengys mai dyna y bydd y cyhoeddwr yn parhau i'w wneud, gan fod grant

yn llawer mwy dibynadwy na dim ond dibynnu ar werthiannau. Pe bai'r cyhoeddwr hyn, neu yn wir unrhyw un sy'n dymuno sefydlu ei hun yn gyhoeddwr llenyddol yng Nghymru, yn awyddus i fod yn hunangynhaliol, mae'n annhebygol iawn y byddent yn adeiladu eu model busnes yn gyfan gwbl ar gyhoeddi gwaith newydd o Gymru.

Un o lwyddiannau mawr y byd cyhoeddi Prydeinig y tu allan i Lundain yw Canongate Books o Gaeredin. Roedd gan Canongate fantais o gael ei brynu gan unigolyn cyfoethog iawn a oedd yn gallu cefnogi'r cwmni drwy rai cyfnodau anodd - ac mae'n bwysig nodi nad yw ei lwyddiannau mawr wedi deillio o'r Alban o reidrwydd - e.e. enillydd ei wobr Booker am 'The Life of Pi' neu, yn wir, cofiant Barack Obama.

Teimlai'r Panel y dylai Llywodraeth Cymru ystyried a yw eisiau parhau i ariannu cyhoeddwr llenyddiaeth Gymreig, fel y gwna yn awr, neu - a byddai hyn yn fwy costus yn y tymor byr, ond o bosibl yn opsiwn tymor byr yn unig - helpu i sefydlu cyhoeddwr yng Nghymru i gyhoeddi'n rhyngwladol, o ran yr awduron y maent yn cyhoeddi eu gwaith a'r marchnadoedd y maent yn ceisio gwerthu iddynt.

Os, fodd bynnag, mai'r nod - fel y bu yn draddodiadol - yw gwneud yn siŵr bod awduron Cymreig yn cael cyfle teg, ac y bydd nofelwyr dawnus o Gymru yn dod o hyd i gyhoeddwr, yna mae angen inni ystyried a oes angen ymyrraeth yn y farchnad er mwyn gwneud hynny. Hynny yw, a yw ysgrifenydd talentog Cymreig yn debygol o gael eu hanwybyddu gan sefydliad cyhoeddi Llundain ai peidio?

Nododd y Panel ei fod yn eithaf arwyddocaol bod y tri llyfr ar y rhestr fer ar gyfer adran Saesneg Llyfr y Flwyddyn 2016 i gyd wedi'u cyhoeddi yn Llundain, gan Faber & Faber. Mae'n bosibl nodi awduron o Gymru y mae eu talent wedi dod i sylw cyhoeddwr Cymreig - e.e. Cynan Jones a Rachel Trezise - ac y mae eu gwaith wedi cael ei gyhoeddi yn Llundain wedyn. A fyddent wedi dod o hyd i gyhoeddwr yn Llundain heb fod wedi cychwyn ar eu taith yng Nghymru? Yn ôl pob tebyg, ond nid o reidrwydd. Yr hyn sy'n amlwg yw na all cyhoeddwr yng Nghymru lwyr gefnogi gyrfa cyhoeddi - nid oes yr un awdur sy'n gobeithio gwneud bywoliaeth o'i waith yn debygol o aros gyda chyhoeddwr Cymreig fel y mae pethau ar hyn o bryd,

Teimlai'r Panel mai'r perygl ar gyfer cyhoeddiadau yng Nghymru sy'n cael arian grant yw ei fod yn dod yn ddiwydiant cartref clyd a hunanfodlon ar raddfa fach sy'n cael dylanwad bach ar ddiwylliant Cymru gyfan. Fodd bynnag, mae'n rhaid dweud - o ystyried y lefel bresennol o gyllid - ac o ystyried cyd-destun ehangach y byd cyhoeddi yn y DU - dyna'r cyfan y gall rhywun ei ddisgwyl yn rhesymol.

Un enghraifft o'r cyfraniad y gellir gwneud yw'r fenter Library of Wales, a olygwyd gan Dai Smith ac a gyhoeddwyd gan Parthian. Mae hyn wedi bod yn ailddarganfyddiad poblogaidd a gwerthfawr o lenyddiaeth Eingl Gymreig y ganrif ddiwethaf a aeth yn angof i raddau helaeth. Ymddengys fod y gyfres hon o lyfrau yn enghraifft o arian grant ar ei orau - yn camu i'r adwy pan na fyddai'r farchnad yn fodlon gwneud hynny gan roi i bobl Cymru heddiw rywbeth mawr ei angen i'w hatgoffa bod mwy i'n hanes na Dylan Thomas.

Dosbarthu

Nododd y Panel fod Canolfan Ddosbarthu'r Cyngor Llyfrau yn gweithredu'n fasnachol, heb gymhorthdal uniongyrchol. At ei gilydd, mae gweithgaredd dosbarthu'r Cyngor Llyfrau yn llwyddiant ac mae ganddo rwydwaith dosbarthu effeithiol. Ymddengys fod y Cyngor Llyfrau yn gwneud gwaith da iawn o ran dosbarthu llyfrau o amgylch Cymru, i ystod eang o siopau sy'n ymestyn ymhell y tu hwnt i siopau llyfrau confensiynol.

Yn amlwg, nid yw'r farchnad lyfrau yng Nghymru yn ddigon mawr i gynhyrchu llwyddiannau masnachol go iawn. Ceir opsiwn o ddefnyddio dosbarthwr sy'n cwmpasu'r DU gyfan hefyd, ond

mae'n ymddangos bod rhai elfennau o wrthdaro buddiannau yma, ac mae'n anodd canfod enghreifftiau o lyfrau gan gyhoeddwr Cymreig sydd wedi gwerthu'n dda iawn ym marchnad y DU.

Unwaith eto mae hyn yn codi'r cwestiwn ynghylch a all cyhoeddwr llenyddol bach Cymreig fyth fod yn fasnachol hyfyw. Ymddengys fod dosbarthu drwy'r Cyngor Llyfrau yn cynhyrchu gwerthiannau gweddol gyson yn y cannoedd uchel fesul teitl - nad yw'n cymharu'n wael pro rata â gwerthu ffuglen lenyddol fel y'i cyhoeddir gan gyhoeddwr y DU - ond mae ymhell o fod yn fasnachol hyfyw. Mae technoleg newydd wedi arwain at orgynhyrchu teitlau gyda'r canlyniad bod y Cyngor Llyfrau o bosibl yn ceisio gwerthu gormod o deitlau mewn marchnad sy'n crebachu.

Y Cyngor Llyfrau - Rhy Amharod i Gymryd Risg Mewn Rhai Meysydd

Ymddengys fod tystiolaeth bod cymorth grant y Cyngor Llyfrau, ar ei ffurf bresennol ac ar y lefelau presennol, ar y naill law, yn galluogi i rai llyfrau gael eu cyhoeddi lle mae galw isel amdanynt gan ddarllenwyr, ac ar y llaw arall ddim yn annog cymryd risg a phrofi'r farchnad.

Roedd teimlad bod y Cyngor Llyfrau yn gyffredinol yn amharod i gymryd risg a'i fod wedi osgoi ar adegau gwneud penderfyniadau cyllido anodd. Er enghraifft, a ddylid diddymu capasiti dylunio mewnol y Cyngor Llyfrau yn gyfan gwbl? A ddylai'r Cyngor Llyfrau o bosibl gefnogi llai o gyfnodolion? Roedd y Panel yn cytuno y byddai parodwydd gan y Cyngor Llyfrau i gymryd risgiau cytbwys yn galluogi cyhoeddwr i symud ymlaen ac i ddatblygu'r diwydiant. Yn ogystal, byddai'n galluogi'r Cyngor Llyfrau a'i randdeiliaid i werthuso'n well yr hyn sy'n llwyddo a'r hyn nad yw'n llwyddo er mwyn sicrhau bod hyd yn oed y risgiau aflwyddiannus yn llywio datblygiad.

Roedd y Panel yn cydnabod bod grant bloc y Cyngor Llyfrau yn symlach na gorfod gwneud cais fesul teitl, ond efallai mai cyrraedd y targedau sy'n gysylltiedig â'r grant bloc (o ran nifer y teitlau) yw un o'r agweddau sy'n ysgogi rhai cyhoeddwr i gyhoeddi teitlau a oedd yn llai masnachol.

Marchnata

Teimlai'r Panel fod angen i'r Cyngor Llyfrau roi mwy o sylw i farchnata yn gyffredinol ond ar yr un pryd roedd yn cydnabod bod hwn yn faes lle y bu'n rhaid i'r Cyngor Llyfrau wneud arbedion effeithlonrwydd yn ystod y blynyddoedd diwethaf.

Gan fod y Cyngor Llyfrau wedi cwblhau ei drafodion busnes ar ôl i lyfr gael ei gyhoeddi, nid oes angen canolbwyntio ar farchnata. Fodd bynnag, mae cyhoeddi digidol yn gofyn am sgiliau marchnata newydd a dadansoddiad sy'n wahanol i weithgaredd marchnata llyfrau traddodiadol. Er mwyn symud gyda'r oes, mae angen datblygiad proffesiynol parhaus ar gyhoeddwr a diweddarau eu gwybodaeth ac mae angen ystyried i ba raddau y mae'r Cyngor Llyfrau yn cyfrannu at hyn ac mae angen adlewyrchu hynny yn y ffordd y mae'n gwasanaethu ei sector.

Panelli a Phwyllgorau'r Cyngor Llyfrau

Roedd y Panel yn cytuno bod amrywiol Baneli a Phwyllgorau'r Cyngor Llyfrau yn llwyddiant. Maent yn cefnogi ac yn helpu i ymgorffori gwerthoedd y Cyngor Llyfrau, a'i gysylltu â rhannau o Gymru ymhell y tu hwnt i Aberystwyth, lle mae bron pob aelod o staff yn gweithio. Maent yn gwneud y Cyngor Llyfrau yn sefydliad nad yw o dan reolaeth ei brif weithredwr neu'r uwch staff yn unig. Roedd y Panel yn cydnabod y diwylliant gwirfoddoli unigryw o fewn y Cyngor Llyfrau ac nad oedd aelodau'r Cyngor a'r Paneli yn cael eu talu. Yn ogystal, mae cyfeillion y Cyngor Llyfrau yn ariannu gwobrau.

Llenyddiaeth Cymru

Cyfarfu'r Panel ar 17 Mehefin 2016 gyda swyddogion Llenyddiaeth Cymru gan gynnwys y Prif Weithredwr ac Aelod o'r Bwrdd - nid oedd Cadeirydd Llenyddiaeth Cymru ar gael. Yn wreiddiol, roedd cynrychiolwyr Llenyddiaeth Cymru i fod i gwrdd â'r Panel ym mis Mai 2016, ond gofynnodd Llenyddiaeth Cymru am ddyddiad arall gan nad oedd modd i'r Cadeirydd fod yn bresennol. Yn ystod y chwe mis dilynol, gwnaed sawl ymgais i drefnu dyddiad i'r Cadeirydd ymddangos gerbron y Panel, ond bu hyn yn aflwyddiannus. Roedd aelodau'r panel yn siomedig iawn nad oedd modd i Gadeirydd Llenyddiaeth Cymru, sy'n sefydliad y mae ei weithgareddau a'i staff yn cael eu hariannu'n bennaf gan y sector cyhoeddus, wneud trefniadau i gyfarfod â'r Panel.

Mae'r wybodaeth gefndir a gyflwynwyd i'r Panel gan Llenyddiaeth Cymru eisoes wedi'i cynnwys.

Mae'n bwysig nodi fod y sylwadau isod wedi eu cyflwyno fel tystiolaeth i'r Panel Arolygu – nid ydynt yn sylwadau Aelodau'r Panel

Daeth y themâu a ganlyn i'r amlwg o'r drafodaeth gyda Llenyddiaeth Cymru:

Perthynas Llenyddiaeth Cymru â'r Cyngor Llyfrau

- Cadarnhaodd Llenyddiaeth Cymru ei bod yn cydweithio ar ddau brosiect penodol, yn cynnwys Llyfr y Flwyddyn a Bardd Plant Cymru. Cadarnhaodd Llenyddiaeth Cymru nad yw'n cwrdd yn ffurfiol â'r Cyngor Llyfrau gan fod gorgyffwrdd rhwng mentrau darllen a chynlluniau llenyddol megis Sialens Ddarllen yr Haf.
- Mae Llenyddiaeth Cymru hefyd yn gweithio gyda chyrrff eraill gan gynnwys yr Eisteddfod Genedlaethol, S4C a Llywodraeth Cymru.

Y gwahaniaeth rhwng ysgoloriaethau Llenyddiaeth Cymru ac ysgoloriaethau'r Cyngor Llyfrau

- Dywedodd Llenyddiaeth Cymru mai dyma'r cyswllt agosaf rhwng y Cyngor Llyfrau a Llenyddiaeth Cymru, a bod ysgoloriaethau Llenyddiaeth Cymru wedi'u hanelu'n bennaf at ganiatáu i awduron neilltuo amser i ganolbwyntio ar ysgrifennu.
- Nid oes angen llyfrau ar Llenyddiaeth Cymru fel tystiolaeth o allbynnau, yn hytrach mae'n anelu at hwyluso cyfleoedd ysgrifennu a chyfleoedd sy'n newid bywydau, ond mae'r Cyngor Llyfrau yn darparu grantiau i gyhoeddi llyfrau.

Rôl Bwrdd a thîm Rheoli Llenyddiaeth Cymru yn dilyn Adolygiad Arad a gyfeiriodd at ddiffyg fframwaith cydlynol a diffyg arweinyddiaeth strategol

- Roedd Llenyddiaeth Cymru wedi'i synnu o ddarllen paragraff olaf yr adroddiad, ac roedd wedi cael nifer o gyfarfodydd dilynol gyda Chyngor y Celfyddydau, ac roedd Cyngor y Celfyddydau wedi cydnabod bod nifer o ddatganiadau yn yr adroddiad a oedd yn gwrthdweud ei gilydd.
- Er nad oedd Llenyddiaeth Cymru yn cytuno â'r casgliad, roedd yn cydnabod bod angen gweithredu ar hyn os dyma yw canfyddiad y cyhoedd. Mae cynllun busnes newydd

Llenyddiaeth Cymru yn ymwneud â bod yn fwy cyfannol a galluogi pethau i symud yn gyflym gan ganiatáu i brosiectau ddatblygu'n strategol, ac roedd yn awyddus i fabwysiadu dull yn seiliedig ar gysylltiad yn hytrach na bod yn arweinydd.

Y berthynas rhwng Llenyddiaeth Cymru ac Academi

- Dywedodd Llenyddiaeth Cymru fod gan y ddau sefydliad berthynas agos, ond bod Llenyddiaeth Cymru yn sefydliad cenedlaethol ac yn credu bod angen i grŵp o awduron megis Academi fod yn annibynnol.
- Dywedodd Llenyddiaeth Cymru nad oedd unrhyw ffens rhwng Llenyddiaeth Cymru a'r Academi - roedd yn fwy o wrych ac mae'r Academi yn allweddol i fwydo i mewn i strategaethau a grwpiau ffocws Llenyddiaeth Cymru.

Materion Llywodraethu

- Nododd cynrychiolwyr Llenyddiaeth Cymru bod Cadeirydd Llenyddiaeth Cymru yn weithgar iawn ac yn cynnal cyfarfodydd effeithiol a chyfrifol. Dywedodd Llenyddiaeth Cymru ei bod wrthi'n recriwtio aelodau o'r bwrdd ac y bydd cefndir corfforaethol yn faen prawf allweddol ar gyfer y sawl a benodir. Dywedodd Llenyddiaeth Cymru fod y bwrdd bellach yn fwrdd o unigolion cydlynol o gefndiroedd gwahanol.

Sylwadau Eraill

- Roedd prisiau cyrsiau Llenyddiaeth Cymru yn gystadleuol
- Roedd Llenyddiaeth Cymru yn cyrraedd targedau ac yn diwallu gofynion Llywodraeth Cymru sy'n cynnwys lefel presenoldeb a chyfleoedd newydd
- Dywedwyd mai pobl oedd prif flaenoriaeth Llenyddiaeth Cymru. Roedd awduron a chynulleidfa oedd yn yr un mor bwysig â'i gilydd. Rhoddwyd pwyslais cyfartal ar gefnogi awduron a datblygu cynulleidfa oedd ac ni ellid gwahaniaethu rhyngddynt.
- Dywedodd Llenyddiaeth Cymru fod grŵp ffocws wedi'i sefydlu i edrych ar strategaethau i gefnogi awduron a'i fod wedi cynnal cyfarfodydd cyhoeddus a dosbarthu holiaduron i fwydo i mewn i hyn. Yn dilyn canlyniadau'r holiadur, mae wedi dod yn amlwg bod mwy o gyfle i gydweithio ac mae wedi bod yn siarad â'r Cyngor Llyfrau er mwyn ymchwilio i hyn.
- Daeth y cyllid ar gyfer digwyddiadau Roald Dahl o Uned Digwyddiadau Mawr Llywodraeth Cymru er mwyn sicrhau bod Llenyddiaeth yn rhan o'r Flwyddyn Antur.
- Trafododd Llenyddiaeth Cymru gyfleoedd yn y maes hunangyhoeddi (e.e., drwy Amazon) a nododd hefyd rai llwyddiannau Cymreig penodol yn y genres llyfrau trosedd a llyfrau i oedolion ifanc

Yn dilyn y cyfarfod gyda Llenyddiaeth Cymru ac ar ôl ystyried y dystiolaeth ysgrifenedig, gan gynnwys ei Chynllun Busnes a'r Gofrestr Risg, daeth y Panel i'r casgliadau a ganlyn:

Ar sail y dystiolaeth a dderbyniwyd gan Llenyddiaeth Cymru a'r sylwadau amrywiol ar y sefydliad, yr oedd y Panel yn cydnabod y gwaith arwyddocaol a gyflawnwyd gan Llenyddiaeth Cymru gan gynnwys y cynllun ysgoloriaethau i awduron; sgwadiau sgwennu; Bardd Cenedlaethol; a Bardd Plant Cymru.

Llywodraethu

Derbyniodd y Panel nifer o ymatebion mewn perthynas â materion yn gysylltiedig â llywodraethu Llenyddiaeth Cymru. Teimlai'r Panel nad oedd unrhyw dystiolaeth yng Nghynllun Busnes Llenyddiaeth Cymru o drefniadau llywodraethu systemig, cryf ac nid oedd unrhyw gyfeiriad at llywodraethu yng Nghofrestr Risg Llenyddiaeth Cymru.

Nid oedd y Panel yn glir pa mor weithgar yw Bwrdd Llenyddiaeth Cymru o ran rhedeg y sefydliad a gwneud penderfyniadau ac nid oedd yn weladwy iawn. Roedd pryder bod Bwrdd Llenyddiaeth Cymru ond yn cyfarfod yn chwarterol. Roedd cyfansoddiad y Bwrdd yn peri peth pryder. Nid yw proffil cyffredinol aelodau o fwrdd Llenyddiaeth Cymru yn ei chwe blynedd cyntaf yn ymddangos wedi cynnwys digon o brofiad a sgiliau mewn llywodraethu corfforaethol, archwilio a rheolaeth ariannol. Gallai hynny newid yn sgil penodiadau newydd, ond nid oedd yn glir i'r Panel pryd a pha mor effeithiol y byddai hynny'n digwydd. Ni chaiff buddiannau awduron a chyhoeddwr masnachol eu cynrychioli ar Fwrdd Llenyddiaeth Cymru ac roedd beirniaid adeiladol ar y Bwrdd hefyd.

Roedd y Panel yn cwestiynu priodoldeb strwythur gweithredu llywodraethu Llenyddiaeth Cymru. Yr oedd hyn wedi arwain at gwestiynu diwylliant cyffredinol y sefydliad. Yr oedd y Panel yn siomedig nad oedd Cadeirydd Llenyddiaeth Cymru yn barod i gyfarfod i drafod gweithgareddau Llenyddiaeth Cymru. Nododd y Panel hefyd sylwadau yr ymatebion i'r arolwg ar-lein a oedd yn cyfeirio at ymdeimlad o hawl a hunanedmygedd gan Llenyddiaeth Cymru. Arweniodd hyn y Panel i gwestiynu a oedd hyn yn briodol yng nghyd-destun cynnig gwasanaeth diwylliannol yn gysylltiedig ag arian cyhoeddus. Roedd y Panel felly yn teimlo nad oedd gan Llenyddiaeth Cymru y cyfansoddiad cywir o sgiliau a phrofiad i redeg corff sy'n gwario arian cyhoeddus.

Tŷ Newydd

Daeth y Panel i'r casgliad fod Tŷ Newydd yn amlwg yn tanberfformio, ond yr oedd Llenyddiaeth Cymru yn dal i gael grant o dros £110,000 y flwyddyn er mwyn sicrhau bod gweithrediadau Tŷ Newydd yn ei rôl bresennol yn gynaliadwy yn ariannol. Ar ôl ystyried y grant hwn mae wedyn yn gweithredu'n gyffredinol gyda gwarged neu ddiffyg cymharol fach. O 2006/7 i 2013/14, roedd y grant gan Gyngor y Celfyddydau ychydig o dan £100,000 y flwyddyn ac mewn rhai blynyddoedd cafwyd grantiau eraill yn ychwanegol at hyn (e.e. dros £48,000 yn 2011/12)

Ymddengys fod Tŷ Newydd wedi'i anelu'n bennaf at bobl sydd wedi ymddeol ac sy'n ysgrifennu fel hobi ond nid oedd yn glir pwy y mae Tŷ Newydd yn darparu ar ei gyfer, ac felly pam mae'n derbyn cymhorthdal cyhoeddus. Nid yw'n glir ychwaith faint o unigolion, sydd wedi bod ar gwrs yn Nhŷ Newydd, sydd wedi mynd ymlaen i gyhoeddi llyfr. Mae'r math hwn o gwrs llenyddol preswyl yn cael ei ystyried gan nifer i fod yn hen ffasiwn yn yr ymchwydd presennol mewn ysgrifennu creadigol yn yr oes ddigidol. Nid oes gan Dŷ Newydd fawr ddim i'w gynnig i awduron proffesiynol nac ardaloedd difreintiedig.[er wedi ei leoli mewn ardal cydgyfeiriant lle mae cynnyrch domestig gros yn isel a ddylai cynnig cyfleoedd i wneud hynny]. Mae hyn yn groes i'r Irish Writers Centre a'r NUJ yng Nghymru, sy'n cysylltu gyda'u haelodau i ddarganfod beth sydd ei angen arnynt. Er gwaethaf hyn, nododd y Panel fod Llenyddiaeth Cymru yn gwrthod cydnabod y pryderon am gyrsiau Tŷ Newydd. Os am sicrhau bod Tŷ Newydd yn goroesi, mae angen arweinyddiaeth newydd ddeinamig a llwybr clir tuag at annibyniaeth ariannol arno yn y tymor byr hytrach na'r tymor hwy.

Crybwyllwyd statws rhestredig a Gradd II* Tŷ Newydd a'i gysylltiadau hanesyddol (hy gyda David Lloyd George) yn ystod y trafodaethau ac yn y dogfennau sy'n ymwneud â'r achos dros gefnogi Tŷ Newydd. Fodd bynnag, nid yw'r rhain yn rhesymau llenyddol dros ariannu colledion Tŷ Newydd. Yn hytrach maent yn ymwneud â phensaernïaeth a chysylltiadau hanesyddol yr eiddo. I'r graddau hynny, os yw'n cael eu hystyried yn achos teilwng dros gael cymhorthdal gan

Llywodraeth Cymru, dylai'r arian hwnnw ddod o gyllid Llywodraeth Cymru a ddyrannwyd i amgylchedd hanesyddol Cymru neu thwristiaeth yn hytrach na llenyddiaeth

Llyfr y Flwyddyn

Roedd y Panel yn cytuno bod gwobr Llyfr y Flwyddyn yn gysyniad da mewn egwyddor ac o fudd i awduron, cyhoeddwr a llyfrwerthwyr. Roedd y penderfyniad diweddar i rannu'r wobwr yn gategoriau ar wahân ar gyfer ffuglen, barddoniaeth a llyfrau ffeithiol yn synhwyrol. Fodd bynnag, mae diffygion sylweddol o ran sut y caiff ei hyrwyddo ac amheuaeth fawr ynghylch ai Llenyddiaeth Cymru yw'r sefydliad priodol i'w chydlynu. Mae ymdeimlad bod y wobwr yn cael ei thanariannu fwyfwy a bod diffyg brwdfrydedd ar ran Llenyddiaeth Cymru ei hun yn amlwg. Prin iawn fu'r sylw yn y wasg i wobrau diweddar a ni fu llawer o ddeunydd hyrwyddo mewn siopau llyfrau. Mae rhain yn gyfleoedd a gollwyd. Yr oedd y Panel yn cwestiynu gwerth y wobwr os nad oedd yn arwain at ragor o hyrwyddo, amlygrwydd, gwerthiant a darllenwyr.

Ar 12 Ionawr 2017 cyhoeddodd Llenyddiaeth Cymru ei bod yn cynnal adolygiad o'r wobwr Llyfr y Flwyddyn a fyddai'n cael ei gwblhau erbyn mis Ebrill 2017. Gwnaed y cyhoeddiad heb hysbysu Llywodraeth Cymru na'r Panel Adolygu hwn o ystyried bod yr adolygiad yn mynd rhagddo. Roedd y Panel Adolygu yn siomedig iawn gydag amseriad yr adolygiad hwn a'r diffyg ymgynghori.

Cymorth i Awduron

Roedd y Panel yn cydnabod bod dwy brif elfen i'r cymorth uniongyrchol i awduron. Yr elfen gyntaf yw ysgoloriaethau i awduron a weinyddir gan Llenyddiaeth Cymru - sy'n cael eu rhoi yn uniongyrchol i awduron er mwyn eu galluogi i weithio ar lyfr - heb orfod ymwneud â chyhoeddwr o reidrwydd. Yna mae'r grantiau a roddir i gyhoeddwr yng Nghymru gan y Cyngor Llyfrau, sy'n cael eu talu i awduron, ac sydd fwy neu lai'n flaendaliadau ar gyfer eu llyfrau. Ymddengys fod y cyntaf o'r cynlluniau hyn yn gweithio'n dda iawn - mae wedi'i hen sefydlu, mae ganddo broses feirniadu agored, ac mae wedi helpu nifer fawr o awduron i symud ymlaen gyda'u gyrfaoedd. Mae'r ail, fodd bynnag, ychydig yn fwy aneglur. Ymddengys nad oes rheswm amlwg dros y ffaith bod ddwy ffrwd ariannu ar wahân - mae'n un o'r enghreifftiau cliraf o ddiffyg cydweithio dybryd rhwng y Cyngor Llyfrau a Llenyddiaeth Cymru.

Ymddengys mai ysgoloriaethau i awduron yw prif elfen gwaith Llenyddiaeth Cymru ond nid ydynt yn cyfrif am brif wariant y sefydliad. Nid oedd yn glir i'r Panel ai prif rôl Llenyddiaeth Cymru oedd cynnig ysgoloriaethau ynteu cynnal digwyddiadau? Nid yw Llenyddiaeth Cymru yn canolbwyntio digon ar ddatblygu awduron. Daeth y Panel i'r casgliad bod diffyg blaengarwch o ran chwilio am dalent newydd ac adnabod talent o'r fath, ac er bod yr ysgoloriaethau yn elfen effeithiol o Llenyddiaeth Cymru, nid oes fawr o waith gweinyddol yn gysylltiedig â hwy a phrin oedd y ddeialog ddilynol ar ôl derbyn yr ysgoloriaeth neu prin oedd yr awduron a gyfeiriwyd at y cyfleoedd cywir.

Mae'r byd ysgrifennu creadigol yn newid yn gyflym ac nid oes tystiolaeth bod Llenyddiaeth Cymru yn ymaddasu i hyn. Ymddengys fod Llenyddiaeth Cymru yn mabwysiadu dull gweithredu corfforaethol ac nad yw'n ymgysylltu ag awduron nad yn cael unrhyw drafodaeth ystyrllon i ddatblygu awduron. Mae marchnadoedd byd-eang ar gyfer cyhoeddi a marchnad ysgrifennu masnachol megis comedi ar y teledu (ITV, Netflix ac ati; mae ITV yn darparu gweithdy comedi yng Nghymru mewn partneriaeth â Boom), sy'n dangos ysgrifennu masnachol ar waith - ond nid yw'n ymddangos bod Llenyddiaeth Cymru yn annog ysgrifennu nac awduron i fod yn fasnachol.

Teimlai'r Panel y dylai Llenyddiaeth Cymru ffocysu ar ddatblygu strategaethau galluogi, hyrwyddo ac annog yn hytrach na mecanweithiau darparu gan osod yr ysgrifennwr a datblygu talent yn sail i'w gweithgareddau. Nid yw ei cyrsiau yn cynnig llawer i ddatblygu ysgrifennwyr i fod

yn barod i fynychu diwydiant masnachol, ac nid yw ei berthynas gyda chyrsgiau ysgrifennu creadigol a gynigir mewn sefydliadau addysg uwch yng Nghymru yn glir.

Digwyddiadau Llenyddol Byw

Yn hanesyddol cyfrifoldeb Llenyddiaeth Cymru (ac Academi cyn hynny) oedd cefnogi digwyddiadau llenyddol byw. Mae'r rhain yn gymysgedd o ddigwyddiadau llenyddol untro, rhaglenni o ddigwyddiadau llenyddol sy'n parhau am ychydig wythnosau neu fisoedd, a gwyliau llenyddol. Mae gwyliau llenyddol yn rhan fwyfwy poblogaidd o'r dirwedd lenyddol. Maent yn amrywio o ddigwyddiadau mawr yn yr awyr agored a gynhelir dros benwythnos i gyfres o ddigwyddiadau bach sy'n cael eu cynnal dros gyfnod o wythnos neu ddwy yn yr un dref.

Mae'n ymddangos bod Llenyddiaeth Cymru yn y blynyddoedd diwethaf wedi symud o ganolbwyntio ar gefnogi hyrwyddwyr allanol i fod yn hyrwyddwr llenyddol ei hun, yn fwyaf nodedig gyda Gŵyl Dinefwr. Yn gyffredinol, mae cyllid ar gyfer gwyliau llenyddol braidd yn ddryslyd - mae rhywfaint ohono'n mynd drwy Llenyddiaeth Cymru a rhywfaint drwy raglen gyllido Gwyliau Cyngor y Celfyddydau, sy'n ariannu, er enghraifft, Gŵyl y Gelli.

Mae Llenyddiaeth Cymru yn cydlynu digwyddiadau a gwyliau. Teimlai'r Panel y byddai'n fwy priodol i Llenyddiaeth Cymru hwyluso'r gwaith o redeg digwyddiadau yn hytrach na'u harwain. Roedd trefniadau blaenorol Llenyddiaeth Cymru mewn perthynas â digwyddiadau llenyddol byw yn yn fwy effeithiol. Ymddengys fod rôl newydd Llenyddiaeth Cymru fel hyrwyddwr yn defnyddio llawer gormod o'i hadnoddau. Mae'n anodd peidio â gweld gwrthdaro mawr o ran buddiannau pan fydd gan Llenyddiaeth Cymru ei diddordeb masnachol ei hun yn y farchnad gwyliau llenyddol.

Dryswch ynglŷn â Rôl - ai Galluogwr yw Llenyddiaeth Cymru ynteu Cyflenwr?

Teimlai'r Panel fod Llenyddiaeth Cymru yn ymddangos fel pe bai'n ansicr ynghylch ei briod ddiiben. A yw'n rhwydwaith cymorth a galluogwr i awduron a hyrwyddwyr llenyddol, ynteu a yw'n gorff cyfatebol i Theatr Genedlaethol Cymru neu National Theatre Wales - cwmni llenyddol cenedlaethol? Ymddengys ei bod yn gogwyddo tuag at yr olaf, ond nid yw hon yn rôl sy'n gwneud synnwyr. Tra gellir perfformio sawl agwedd o lenyddiaeth, nid celfyddyd perfformio ydyw yn bennaf. Mae ymgnawdoliad newydd Llenyddiaeth Cymru fel hyrwyddwr gwyliau i'w weld yn aneffeithiol, yn ddrud ac yn ystumio'r farchnad sy'n gweithredu i raddau helaeth heb gymhorthdal sylweddol gan y sector

Awgrymodd y Panel y dylai Llenyddiaeth Cymru weithredu fel corff galluogi yn hytrach na bod yn fewnblyg a cheisio gwneud popeth ei hun. Awgrymodd ymatebion i waith y Panel mai prin iawn yw'r bobl yn y byd llenyddol yng Nghymru sy'n glir ynghylch beth yw pwrpas y sefydliad ar hyn o bryd a phwy y mae'n ei wasanaethu.

Ariannol

Roedd y Panel yn synnu o ganfod bod 75% o gyllideb Llenyddiaeth Cymru yn cael ei gwario ar gostau cyflogau ei staff ei hun. Ar ôl dadansoddi gwariant Llenyddiaeth Cymru, nid yw'r gwariant ar ysgoloriaethau a digwyddiadau llenyddol yn cynrychioli cyfran fawr o gyfanswm y gwariant. Roedd y Panel yn siomedig gyda record gyffredinol Llenyddiaeth Cymru o ddenu, drwy ei ymdrechion ei hun, arian o ffynonellau eraill (hy heb gynnwys cronfeydd y Loteri a weinyddir ganddo).

Addysgol

Mae Llenyddiaeth Cymru yn cynnal nifer o fentrau addysgol. Fodd bynnag, ymddengys ei fod yn defnyddio nifer fach iawn o awduron rheolaidd.

Cyffredinol

Teimlai'r Panel nad yw Cynllun Busnes Llenyddiaeth Cymru yn cynnwys llawer o fanylion o ran allbwn, a'i fod yn debycach i gynllun gweithgaredd na chynllun busnes. Nid oes dim tystiolaeth o werthuso rhaglenni neu fanylion am fonitro ariannol.

Teimlai'r Panel nad oedd Llenyddiaeth Cymru yn rhan o ddatblygiadau digidol ac roedd angen datblygu cynulleidfaoedd digidol. Nododd y Panel fod rôl Academi a'i pherthynas â Llenyddiaeth Cymru yn aneglur. Nid oedd yn glir i'r Panel pa gamau a gymerwyd gan Llenyddiaeth Cymru yn dilyn Adroddiad Arad. Mae mentrau Llenyddiaeth Cymru sy'n ymddangos i weithio'n dda - yr ysgoloriaethau i awduron yn benodol ac, i ryw raddau, Llyfr y Flwyddyn - yn rhai hirsefydlog ond prin yw'r diddordeb a ddangosir gan Llenyddiaeth Cymru ynddynt bellach. Mae'n ymddangos fel pe ba'n goroesi drwy oddefiad, ac, yn achos yr ysgoloriaethau, yn goroesi diolch i'r arian uniongyrchol a gaiff gan y loteri.

Ar y cyfan teimlai'r Panel fod nodau ac amcanion y sefydliad yn aneglur - mae'r datganiad cenhadaeth i 'wasanaethu pobl/pawb yn afrealistig ac yn amwys. Roedd Llenyddiaeth Cymru yn rhy fewnblyg ac nid oedd yn canolbwyntio'n ddigonol ar ganlyniadau. Nid oedd Llenyddiaeth Cymru yn sefydliad ifanc bellach ond roedd diffyg aeddfedrwydd a chynllunio strategol i'w weld mewn nifer o feysydd.

Cyngor Celfyddydau Cymru

Cyfarfu'r Panel â Chadeirydd a swyddogion Cyngor y Celfyddydau, gan gynnwys y Prif Weithredwr.

Mae'r wybodaeth gefndir a gyflwynwyd i'r Panel gan Lenyddiaeth Cymru eisoes wedi'i chynnwys eisoes.

Mae'n bwysig nodi fod y sylwadau isod wedi eu cyflwyno fel tystiolaeth i'r Panel Arolygu – nid ydynt yn sylwadau Aelodau'r Panel

Deilliodd y themâu a ganlyn o'r drafodaeth gyda Chadeirydd a swyddogion Cyngor y Celfyddydau

Cyffredinol

- Mae llenyddiaeth yn elfen allweddol o'r celfyddydau ac un o'r pryderon mawr yw bod rhai celfyddydau yn elwa'n fwy nag eraill. Mae'r cymorth i lenyddiaeth yn gryf ac yn cael ei ddarparu gan wybod bod methiant yn y farchnad, ond bod llenyddiaeth o werth i ddiwylliant Cymru a bod angen ei gwarchod. Mae angen i lenyddiaeth a chyhoeddi fod yn gydgysylltiedig ac mae Cyngor y Celfyddydau'n croesawu'r Adolygiad, sy'n anelu at wneud y sectorau yn gryfach ac yn fwy strategol.
- Yn 2011/2012, dyrannwyd 3% (£1,247,247) o gyfanswm lefel y grantiau a ddyfarnwyd gan Gyngor y Celfyddydau i lenyddiaeth, ac, er gwaethaf lleihad cyffredinol yng nghyllid Cyngor y Celfyddydau, roedd y grantiau i lenyddiaeth wedi cynyddu i 5% (£2,197,906) yn 2015/2016.
- Un o'r amodau sy'n llywio strategaeth Cyngor y Celfyddydau ar gyfer llenyddiaeth yw bod lefelau gwahanol o bobl a sefydliadau'n ymwneud â'r maes hwn - o lyfrgelloedd i ymgysylltu cymdeithasol - ac mae hynny'n dirwedd gymhleth o ran dull gweithredu strategol. Cymerwyd camau breision ymlaen ac mae cyfranogiad pobl ifanc ar gynydd.
- Nid oes gwariant penodol wedi'i ddyrannu i lenyddiaeth, nac i unrhyw fath arall o gelfyddyd, er mwyn caniatáu dull mwy hyblyg.
- Nid oes datganiad yn nogfennau strategol Cyngor y Celfyddydau sy'n cyfeirio'n benodol at lenyddiaeth neu unrhyw gelfyddyd unigol arall gan fod hyn yn galluogi Cyngor y Celfyddydau i flaenoriaethu ac adnabod prosiectau allweddol.
- Nododd Cyngor y Celfyddydau fod prosesau sefydledig wedi'u rheoli o fewn Cyngor y Celfyddydau ar gyfer monitro sefydliadau a gwneud y gwelliannau angenrheidiol, er mwyn lleihau'r risg ormodol a sicrhau gwerth am arian.
- Pan fydd y risg yn goch mewn sefydliadau, bydd Cyngor y Celfyddydau yn gweithio gyda'r bwrdd a'r Cadeirydd i greu marcwyr a thargedau gyda chanlyniadau penodol ynghlwm wrthynt, a bydd hefyd yn rhoi ffocws manwl ac arweiniad newydd.
- Mae gan Gyngor y Celfyddydau ddulliau ar wahân ar gyfer mesur gwerth economaidd a diwylliannol. Mae'r gyflogaeth a'r arian y mae diwylliant yn eu cyfrannu yn nhermau treth yn sylweddol ac yn fwy o lawer na lefel y cyllid cyhoeddus a roddir i gefnogi sefydliadau celfyddydol.

- Nododd Cyngor y Celfyddydau nad oedd data ar gael ar gyfer llyfrau sy'n cael eu prynu ar gyfer Cymru gyfan(ar-lein a theitlau heblaw'r rhai a gyhoeddwyd drwy'r Cyngor Llyfrau megis archfarchnadoedd).
- Cadarnhaodd Cyngor y Celfyddydau y byddai'n cwrdd â rhanddeiliaid allweddol cyn bo hir i roi argymhellion Adroddiad Arad ar waith.

Barn Cyngor y Celfyddydau ar ei berthynas gyda Llenyddiaeth Cymru

- Roedd Sefydlu Llenyddiaeth Cymru yn her, ond o safbwynt Cyngor y Celfyddydau, roedd angen rhagor o ymgysylltiad gan bob partner.
- Mae Cyngor y Celfyddydau yn gweld Llenyddiaeth Cymru fel galluogwr sy'n creu amgylchedd i eraill ffynnu ynddo yn hytrach na chorff sy'n cyflawni swyddogaethau penodol.
- Nododd Cyngor y Celfyddydau fod gan brif weithredwyr sefydliadau celfyddydol eraill broffiliau uchel mewn meysydd penodol, yn yr un modd â Llenyddiaeth Cymru.
- Roedd Cyngor y Celfyddydau yn cydnabod bod angen i Llenyddiaeth Cymru i fynd i'r afael â datblygiadau digidol ac integreiddio digidol.
- Mae Llenyddiaeth Cymru yn canolbwyntio ar ymgysylltu ar draws ardaloedd sydd dan anfantais gymdeithasol, gan ymestyn ar draws pob math o gelfyddyd, ac yn ddiweddar mae wedi bod yn gweithio gyda beirdd Somali gan ganolbwyntio ar y traddodiad llafar. Mae Llenyddiaeth Cymru hefyd wedi gwneud cryn dipyn o waith mewn ardaloedd Cymunedau yn Gyntaf.
- Roedd Cyngor y Celfyddydau yn anghytuno ag awgrym y Panel bod cyfranogiad cynulleidfaoedd yn fesur allweddol i Llenyddiaeth Cymru ac nad oedd yn amcan penodol a roddir i'r corff gan Gyngor y Celfyddydau.
- Nododd Cyngor y Celfyddydau y gallai fod yn fuddiol cael mwy o gysondeb gan fod Cyngor y Celfyddydau yn derbyn llythyr cylch gwaith a'r Cyngor Llyfrau a Llenyddiaeth Cymru derbyn llythrau dyfarnu.
- Mae Cyngor y Celfyddydau yn annog Llenyddiaeth Cymru i ganfod cyllid o ffynonellau eraill. Yn y blynyddoedd diwethaf, mae Llenyddiaeth Cymru wedi sicrhau cyllid o ffynonellau eraill yn ychwanegol at y cyllid gan Gyngor y Celfyddydau, ac mae wedi dod yn fwy entrepreneuriaidd. Mae cynllun busnes diweddaraf Llenyddiaeth Cymru yn chwa o awyr iach a bellach mae ffocws clir ar yr hyn y mae'n ceisio ei gyflawni.
- Yn y gorffennol, mae Cyngor y Celfyddydau wedi cwestiynu'r prosiectau y mae Llenyddiaeth Cymru wedi eu cefnogi a lefel y staffio, ond mae wedi symud ymlaen ac mae'r blaenoriaethau y maent yn gweithio iddynt yn bositif.
- Mae'r cymorth ar gyfer ceisiadau gan awduron wedi aros yn gyson er gwaethaf y toriadau mewn cyllid

Barn Cyngor Celfyddydau Cymru ar Drefniadau Llywodraethu Llenyddiaeth Cymru

- Yn ôl Cyngor Celfyddydau Cymru, nid yw Llenyddiaeth Cymru o dan unrhyw gamargraff ynghylch atebolrwydd, fel y dangosir gan y ffaith bod Cyngor y Celfyddydau wedi adnabod Llenyddiaeth Cymru fel sefydliad risg coch. Felly mae gan Gyngor y Celfyddydau ddylanwad dros Llenyddiaeth Cymru.
- Cafwyd problemau gyda Llenyddiaeth Cymru yn y gorffennol ond mae'r Cynllun Busnes ar gyfer 2016-2019 bellach wedi esblygu ac mae'n ddogfen llawer cryfach â gweledigaeth glir. Pwysleisiodd Cyngor y Celfyddydau pe bai gan y sefydliad arweinyddiaeth wael ac nad oedd yn cael ei redeg yn iawn y byddai Cyngor y Celfyddydau yn ymateb ac yn gweithredu, ond nid oedd Llenyddiaeth Cymru yn y sefyllfa honno.
- Cadarnhaodd Cyngor y Celfyddydau ei fod wedi ystyried a ddylid rhoi mesurau arbennig ar waith, ond nid oedd Llenyddiaeth Cymru yn y categori hwnnw, ac eglurodd y gallai mesurau arbennig gael eu cymryd os na fydd nodau ac amcanion yn cael eu cyflawni. Nid oedd Cyngor y Celfyddydau yn gyfreithiol gyfrifol am fyrddau y cyrff y mae'n dosbarthu arian iddynt, ond maent yn eu dwyn i gyfrif am y cyllid maent yn derbyn.
- Pwysleisiodd Cyngor y Celfyddydau bod rhai meysydd o bryder yng nghofrestr risg Llenyddiaeth Cymru a bod iaith y gofrestr risg yn ddi-flewyn-ar-dafod gan nad yw am i broblemau gael eu gwyngalchu.
- Mewn ymateb i ymholiad gan y Panel ynghylch y ffaith nad oes neb ar Fwrdd Llenyddiaeth Cymru o gefndir busnes a chyllid digonol, mae Cyngor y Celfyddydau yn cydnabod y gellid cryfhau hynny a bod y trefniadau llywodraethu yn datblygu'n barhaus. Roedd Cyngor y Celfyddydau yn cydnabod nad oedd bwrdd Llenyddiaeth Cymru yn darparu digon o her ac mae'r bwrdd yn ymwybodol bod angen ystod ehangach o sgiliau.

Gofynnodd y Panel pam yr oedd Llenyddiaeth Cymru yn dal i gyfeirio ato'i hun fel sefydliad ifanc er gwaetha'r ffaith iddo gael ei greu chwe blynedd yn ôl. Esboniodd Cyngor y Celfyddydau fod Llenyddiaeth Cymru wedi cael ei ystyried yn sefydliad â risg goch o'r cychwyn gan ei fod wedi gorfod symud o sefydliad a oedd yn gweithredu ar sail aelodaeth i sefydliad cenedlaethol, a bod hyn yn cymryd amser. Roedd Cyngor y Celfyddydau'n cydnabod bod angen gwaith ar hyn.

- Gwendid Llenyddiaeth Cymru oedd llywodraethu ond ei chryfderau oedd ei hymgysylltiad â'r gymuned ar draws gwahanol sectorau a'i hymgysylltiad ag awduron.
- Bu'r broses o drosglwyddo o'r Academi i'r trefniant presennol yn llwyddiant gan ei fod wedi rhoi'r gorau i gefnogi un set o awduron (eu haelodau) i wasanaethu ystod ehangach o randdeiliaid.
- Awgrymodd Cyngor y Celfyddydau y byddai'n gwneud synnwyr i'r Cyngor Llyfrau gael ei lywodraethu gan Gyngor y Celfyddydau. Er y byddai Cyngor y Celfyddydau yn hoffi gweld Llywodraeth Cymru yn rhoi mandad i greu un corff gyda arweiniad strategol ym maes polisi, nid oedd Cyngor y Celfyddydau eisiau dull o orchymyn a rheoli, ac roedd yn parchu cyfrifoldebau annibynnol.
- Nid oedd Cyngor y Celfyddydau yn cytuno y dylai rôl Llenyddiaeth Cymru ymwneud yn unig â datblygu awduron a datblygu talent. Dylai hefyd hyrwyddo drwy wyliau ac y dylid ystyried llenyddiaeth yn gelfyddyd perfformio. Roedd yn bwysig cydnabod y sbectwm

cyfan o lenyddiaeth. Roedd Llenyddiaeth Cymru wedi ymgysylltu â'r rhaglen dysgu creadigol a oedd yn ymwneud â chodi safonau llythrennedd.

- Er bod Llenyddiaeth Cymru ar y trywydd iawn roedd angen i'r corff ymgysylltu'n fwy â phobl ifanc. Mae'r sgwadiau 'sgwennu yn llwyddiant ysgubol ac mae Llenyddiaeth Cymru hefyd yn ymgysylltu ag ysgolion.
- Roedd Llenyddiaeth Cymru wedi bod yn llwyddiannus o ran mesur effeithiau o safbwynt meintiol ond mae'r gwerthusiad ansoddol yn cymryd mwy o amser i'w asesu.
- O safbwynt rhyngwladol, roedd Cyngor y Celfyddydau yn cydnabod bod ffordd bell i fynd wrth ystyried ymgysylltu a chysylltedd strategol Llenyddiaeth Cymru. Fodd bynnag, roedd angen deialog a dadansoddiad o'r farchnad er mwyn symud pethau yn eu blaenau yn y maes penodol hwn.
- Roedd Cyngor y Celfyddydau yn gwbl glir nad oes gan Llenyddiaeth Cymru hawl ddiodyn i arian cyhoeddus ac mae'n ymwybodol mai gan Gyngor y Celfyddydau y mae'r "botwm niwclear" cyllidebol ac y gallai ei ddefnyddio, pe bai angen.

Y berthynas rhwng Llenyddiaeth Cymru a'r Cyngor Llyfrau

- Pwysleisiodd Cyngor y Celfyddydau fod Llenyddiaeth Cymru a'r Cyngor Llyfrau yn sefydliadau ar wahân ac felly nad oedd angen i Gyngor y Celfyddydau fonitro a oedd strategaeth Llenyddiaeth Cymru yn gyson â strategaeth y Cyngor Llyfrau.
- Roedd Cyngor y Celfyddydau yn cytuno bod gorgyffwrdd rhwng y gwahanol sefydliadau a'u bod yn cydweithio ar rai mentrau megis Llyfr y Flwyddyn.
- Fodd bynnag, nid oedd unrhyw berthynas ffurfiol rhwng y ddau sefydliad, ond mae cyfarfodydd yn cael eu cynnal rhwng y ddau. Awgrymodd Cyngor y Celfyddydau y dylai perthynas ffurfiol fodoli rhwng y Cyngor Llyfrau a Llenyddiaeth Cymru ac dylai fod mwy o orgyffwrdd ar lefel weithredol.
- Nid oedd Cyngor y Celfyddydau yn credu y dylid uno Llenyddiaeth Cymru a'r Cyngor Llyfrau. Mae gan y ddau sefydliad feysydd penodol o arbenigedd a gwybodaeth, ond dylent wneud mwy ar y cyd.

Llyfr y Flwyddyn

- Mewn ymateb i pam mai dim ond 10 o adolygiadau ar Amazon a gafodd Llyfr y Flwyddyn, dywedodd Cyngor y Celfyddydau ei fod yn disgwyl i gyhoeddwyr hyrwyddo hynny a chynyddu gwerthiant. Roedd hyrwyddo yn rhywbeth yr oedd angen ei ystyried.

Tŷ Newydd

- Hysbysodd Cyngor y Celfyddydau y Panel fod gan Tŷ Newydd ddiffyg o £110,000 sy'n parhau i'r dyfodol. Mewn ymateb holodd y Panel pam yr oedd Tŷ Newydd yn cael ei ariannu yn amhenodol. Pwysleisiodd Cyngor y Celfyddydau nad oedd erioed yn fater o

gwblhau proses yn daclus, ond mae'n eiddo sydd bellach wedi dod yn lle i ddarparu cyfleoedd penodol i awduron. Roedd Cyngor y Celfyddydau yn cydnabod y dylai ystyried yr opsiwn bod Llenyddiaeth Cymru yn rhoi'r gorau i redeg neu gefnogi Tŷ Newydd

- Nododd Cyngor y Celfyddydau fod Tŷ Newydd bum mlynedd yn ôl yn mynd o un argyfwng i'r llall; erbyn hyn mae ganddo swyddogaeth fwy strategol fel rhan o Llenyddiaeth Cymru a gwell sail ar gyfer y dyfodol. Ffocws strategol Tŷ Newydd oedd cynnig mynediad lefel uchel i diwtoriaid o ansawdd uchel.
- Mae Llenyddiaeth Cymru yn rhyngweithio ag awduron. Mae marchnad ar gyfer y cyrsiau a gynigir yn Nhŷ Newydd er bod angen craffu ar yr ystod o gyrsiau. Roedd yn bwysig ystyried arlwy cyfan Llenyddiaeth Cymru gan gynnwys ymgysylltu ag awduron a phobl ifanc

Yn dilyn y cyfarfod gyda Chyngor y Celfyddydau ac ar ôl ystyried y dystiolaeth ysgrifenedig a ddaeth i law, daeth y Panel i'r casgliadau a ganlyn:

Rôl Cyngor Celfyddydau Cymru mewn perthynas â Llenyddiaeth

O ddarllen Cynllun Gweithredol Cyngor y Celfyddydau, roedd yn ymddangos mai digwyddiadau oedd diddordeb Cyngor y Celfyddydau gyda rhyw 5% o gyllideb Cyngor y Celfyddydau yn cael ei gwario ar wyliau a digwyddiadau. Mae Cyngor y Celfyddydau yn ariannu gwyliau llyfrau a digwyddiadau darllen yn yr un ffordd ag y mae Llenyddiaeth Cymru felly gall fod rhai achosion o gyllido dwbl. Roedd y Panel wedi'i synnu bod Cyngor y Celfyddydau (a Llenyddiaeth Cymru) yn ymddangos fel pe bai'n canolbwyntio ar ddigwyddiadau llenyddol byw - nid dyma'r brif ffordd y mae Llenyddiaeth yn cael ei mwynhau. Mae data Cyngor y Celfyddydau yn ystyried Llenyddiaeth yn gelfyddyd fyw ond, mewn gwirionedd, mae'r rhan fwyaf o lenyddiaeth yn cael ei greu drwy brofiad y darlennydd.

Y berthynas rhwng Cyngor y Celfyddydau a Llenyddiaeth Cymru

Mae Cyngor y Celfyddydau yn ystyried Llenyddiaeth Cymru yn brif ddull cyflawni ar gyfer Llenyddiaeth er mai prin yw'r cyfeiriadau at Llenyddiaeth Cymru yn nogfennau Cyngor y Celfyddydau.

Teimlai'r Panel yn gryf na ddylai Llenyddiaeth Cymru eistedd ochr yn ochr ag Opera Cenedlaethol Cymru, Theatr Genedlaethol Cymru neu National Theatre Wales, o ran y ffordd y cânt eu gweld gan Gyngor y Celfyddydau, gan fod ei swyddogaeth yn wahanol fel cwmnïau cynhyrchu. Nid prif swyddogaeth Llenyddiaeth yw cyrraedd cynulleidfaoedd drwy berfformiad. Llenyddiaeth Cymru yw'r unig sefydliad cenedlaethol a noddir gan Gyngor y Celfyddydau sydd â *risg goch*, ac mae wedi bod felly ers ei sefydlu. Roedd pedwar sefydliad ar hyn o bryd dan *fesurau arbennig* ac nid oedd y Panel yn deall pam nad oedd Llenyddiaeth Cymru yn y categori hwnnw.

Er bod Cyngor y Celfyddydau yn derbyn bod problemau gyda Llenyddiaeth Cymru, fel y dangosir gan y *categori risg coch* a'r ffaith ei fod wedi ystyried mesurau arbennig, roedd y Panel yn pryderu ynghylch yr her annigonol gan Gyngor y Celfyddydau wrth ddelio â Llenyddiaeth Cymru gan fod angen i'r corff fod yn atebol am yr allbynnau a'r canlyniadau sy'n cael eu cyflawni gydag arian cyhoeddus.

Roedd y Panel yn bryderus fod Cyngor y Celfyddydau yn ymddangos yn fodlon bod Llenyddiaeth Cymru tuag 80% o'r ffordd tuag at gyrraedd ei nod gan nodi ei bod wedi cymryd dros chwe mlynedd i gyrraedd y sefyllfa bresennol a fod Llenyddiaeth Cymru dal yn y *catgori risg coch*. Tra bod Cyngor y Celfyddydau wedi cyfeirio at y pŵer a oedd yn ymddangos ar gael iddynt o dynnu cyllid yn ôl, roedd y Panel yn amheus y byddai Cyngor y Celfyddydau yn gwneud hynny ac o dan nawdd Cyngor y Celfyddydau, y byddai cyfradd gwelliant Llenyddiaeth Cymru yn parhau i fod yn araf.

Daeth y Panel i'r casgliad fod Cyngor y Celfyddydau yn cael anhawster i sicrhau bod Llenyddiaeth Cymru yn gwella ei diffygion a'i threfniadau llywodraethu. Dylai Cyngor y Celfyddydau fod yn fwy rhagweithiol, o ran sicrhau bod y Cynllun Busnes a Chofrestr Risg Llenyddiaeth Cymru yn addas at y diben ac yn cyflawni yn erbyn yr allbynnau angenrheidiol. Dylid addasu effaith ystumiol y pwys y mae Cyngor y Celfyddydau yn ei roi ar bresenoldeb mewn digwyddiadau llenyddol wrth oruchwylio Llenyddiaeth Cymru. Nododd y Panel fod angen ystyried beth yw gwerth ychwanegol Llenyddiaeth Cymru, ac a oedd yn gyfrwng i alluogi Cyngor y Celfyddydau i gefnogi llenyddiaeth heb yr angen i ymwneud â hyn yn uniongyrchol.

Mae'r Panel yn awgrymu bod angen i Gyngor y Celfyddydau gyfleu rôl Llenyddiaeth Cymru yn well. Ar sail y dystiolaeth a ddaeth i law, nid oedd Llenyddiaeth Cymru yn cyflawni yn unol â'r disgwyl. Dylai ymyrraeth gan y llywodraeth fod ar gael dim ond i gynorthwyo lle na fyddai gweithgaredd yn gallu digwydd fel arall - ac felly dylid gofyn y cwestiwn ynghylch a yw Llenyddiaeth Cymru a Chyngor Celfyddydau Cymru yn gweithredu fel dim ond asiantaethau cyllido, yn hytrach na chynnig cymhellion i eraill wneud pethau'n well.

Trefniadau yn y Dyfodol

Nid oedd y Panel yn cytuno ag awgrym Cyngor y Celfyddydau y gallai Llenyddiaeth Cymru a'r Cyngor Llyfrau weithio'n fwy cynhyrchiol ochr yn ochr â'i gilydd i gyflawni'r canlyniadau a ddymunir pe bai cyllid y Cyngor Llyfrau yn cael ei drosglwyddo a bod cyllid Cyngor y Celfyddydau yn ariannu'r Cyngor Llyfrau a Llenyddiaeth Cymru. O ystyried barn y Panel ynghylch sut y mae Cyngor y Celfyddydau a Llenyddiaeth Cymru yn ymdrin â'r materion llywodraethu sy'n ymwneud â Llenyddiaeth Cymru, byddai risgiau annerbyniol o uchel yn gysylltiedig â'r opsiwn hwn, a byddai'n annhebygol o arwain at fanteision. Nid nawr yw'r amser i ystyried uno Cyngor y Celfyddydau a'r Cyngor Llyfrau ond dylai'r cysylltiad a'r cydlynu rhwng y sefydliadau fod yn well. Dylid rhoi ystyriaeth i symud rhai o'r gweithgareddau a ariennir gan Llenyddiaeth Cymru ar hyn o bryd i'r Cyngor Llyfrau.

Tŷ Newydd

Yn ystod y deng mlynedd diwethaf a mwy, ni roddwyd ystyriaeth ddifrifol i a yw'n synhwyrol i Gyngor y Celfyddydau (a Llenyddiaeth Cymru ers 2010) barhau i gefnogi'r diffygion refeniw a rhai costau cyfalaf ychwanegol yn Nhŷ Newydd.

Nid yw'r Panel yn teimlo y gall argymell yn bendant y dylai Llenyddiaeth Cymru roi'r gorau i ymwneud â Thŷ Newydd ar hyn o bryd. Fodd bynnag, mae'r dystiolaeth a gafwyd wedi codi rhai pryderon difrifol am ei hyfywedd a'r defnydd ohono.

Gyda hyn mewn golwg, mae'r Panel yn argymell yn gryf y dylai Llenyddiaeth Cymru a Chyngor y Celfyddydau gynnal adolygiad brys o rôl Tŷ Newydd a gwerth parhau i roi swm sylweddol o gymhorthdal i'w gynnal yn yr hirdymor fel rhan o Llenyddiaeth Cymru. A ddylai hyn barhau, ynteu a allai'r cyllid a roddir i Dŷ Newydd ar hyn o bryd gael ei ddefnyddio'n fwy effeithiol i gefnogi

mentrau hyfforddi a sgiliau perthnasol mewn mannau eraill? Dylai'r dystiolaeth a'r casgliadau a fydd yn deillio o'r adolygiad hwn fod yn wybodaeth gyhoeddus.

Datblygiadau digidol o fewn y diwydiant cyhoeddi yng Nghymru.

Deilliodd y themâu a ganlyn o'r dystiolaeth a ddarparwyd i'r Panel gan arbenigwyr digidol amrywiol a restrir yn **Atodiad 2**.

Mae'n bwysig nodi fod y sylwadau isod wedi eu cyflwyno fel tystiolaeth i'r Panel Arolygu – nid ydynt yn sylwadau Aelodau'r Panel

Digidol

- Mae gan Gymru lawer o botensial, ond mae hyn yn cael ei gyfyngu gan ddiffyg mynediad i'r wybodaeth gywir.
- Mae angen i farchnata digidol ar gyfer cynnwys Cymraeg a Chymreig fod yn llawer mwy cydlynol.
- Mae'r Lolfa yn rhagweithiol o ran cyhoeddi llyfrau'n ddigidol a bellach mae modd darllen ei llyfrau ar Kindle ac maent ar gael drwy Amazon.
- Nid oedd Amazon yn ymgysylltu â chyhoeddwr o Gymru ac nid oedd Amazon yn cydnabod y Gymraeg. Datblygwyd ap gyda'r Cyngor Llyfrau er mwyn gallu lawrwlytho llyfrau Cymraeg (yn hytrach na defnyddio Amazon), ond, er gwaetha'r ffaith bod yr ap wedi'i ddatblygu, nid yw'n cael ei gynnal na'i hyrwyddo. Nid oedd yr ap yn cael ei farchnata ar y cyfryngau torfol ac roedd teimlad nad oedd y cyhoeddwr yn ei gefnogi'n gyfan gwbl.
- Mae Amazon yn farchnad fyd-eang ac yn gallu cymryd hyd at 80% ond roedd YouDo yn cynnig dewis arall a fyddai ond yn cymryd 10-20%.
- Mae angen i gyhoeddwr gydweithio mewn ffordd gydlynus a symud ymlaen, gan rannu arferion gorau a thyfu fel diwydiant.
- Er bod llyfrau'r Lolfa ar gael yn ddigidol, nid oes modd darllen llyfrau gwales (a llyfrau cyhoeddwr eraill) ar Kindle.
- Nid yw'r Cyngor Llyfrau yn cymryd risgiau a reolir; ac er nad yw'r drws ar gau o ran yr ap nid oedd yn cael ei farchnata.
- Ar hyn o bryd mae arian cyhoeddus yn cefnogi'r sefyllfa sydd ohoni yn hytrach nag arloesi.
- Nid yw rhai cyhoeddwr yn dymuno cael mynediad i opsiynau digidol rhag ofn y byddant yn peryglu gwerthiannau copïau papur, ond maent yn colli gwerthiannau
- Mae llyfrau llafar wedi cynyddu o ran eu poblogrwydd, ac mae manteision mawr i addasu cynnwys at y diben hwn, gyda mwy a mwy o gyhoeddwr yn awyddus i wneud hyn.
- Mae e-lyfrau'n hygyrch, yn rhatach ac ar gael yn fyd-eang.
- Newidiodd Amazon dirwedd y byd cyhoeddi yn gyfan gwbl ac mae'n galluogi mynediad i bawb cyhoeddi eu gwaith
- Mae mwy o bobl yn awr yn prynu llyfrau o Amazon nag o siopau llyfrau.

Hunangyhoeddi

- Mae nifer o lwyfannau gwahanol i awduron sy'n hunangyhoeddi.
- Mae hunangyhoeddi yn osgoi cyhoeddwr a dosbarthwyr ac yn galluogi'r awdur i gymryd rheolaeth lwyr o'r cynnwys a'r pris.
- Mae Amazon bellach yn sicrhau ansawdd yr holl ddeunydd a hunangyhoeddir ac ni fyddai'n derbyn dim sy'n ansafonol neu'n amhriodol.
- Yr anfantais yw bod mwy o lyfrau i gystadlu â hwy gan fod y farchnad wedi ehangu.

- Os yw llyfr yn dda, boed yn hunangyhoeddedig neu beidio, bydd yn gwerthu, os na fydd yn dda, yna ni fydd hynny'n digwydd.
- Mae dylunio a golygu da yn hanfodol i ddenu darllenwyr
- Bydd sicrhau bod y llyfr ar gael i'w lawrlwytho am ddim yn arwain at fanteision sylweddol o ran gwerthiant ac yn cynorthwyo i farchnata'r llyfr fel 'gwerthwr gorau'.
- Mae gwahanol ddiffiniadau o 'werthwyr gorau' gan gynnwys yn ôl categori penodol.
- Mae siopau llyfrau bellach yn derbyn llyfrau a hunangyhoeddir.
- Mae rhaglen gyfnewid drwy Amazon sy'n hwyluso rhannu sgiliau ymysg cyhoeddwr (e.e. 'cyfnewid' cloriau i'w golygu).
- Ar ôl i lyfr gael ei ysgrifennu, mae angen dod o hyd i gynulleidfa. Gellir gwneud hyn drwy flogio a chysylltu â grwpiau a fforymau darllen.

Sylwadau gan y Panel yn sgil y dystiolaeth lafar ac ysgrifenedig a gafwyd

Yn y cylch gorchwyl penodol ar gyfer yr Adolygiad, gofynnwyd i'r Panel ystyried datblygiadau digidol. Mae cryn dystiolaeth bod y diwydiant cyhoeddi wedi newid yn sylweddol dros y degawd diwethaf gyda newidiadau mawr i'r model busnes cyhoeddi yn sgil digideiddio darllen. Nododd y Panel yr amrywiaeth eang o farn ar y pwnc hwn. Mae datblygiad e-lyfrau a llwyfannau digidol niferus yn galw ar y diwydiant cyhoeddi i adolygu'n sylweddol y cyfleoedd i sicrhau'r twf mwyaf yn y farchnad.

Bydd angen buddsoddi llawer mwy o amser ac egni creadigol yn y byd cyhoeddi yng Nghymru yn y dyfodol er mwyn cysylltu testun, sain, fideo a delweddau i greu cyfleoedd cyhoeddi ystyrion er mwyn crynhoi gwerth stori. Bydd llwyddiant cyhoeddi digidol yn dibynnu ar yr hyn y bydd darllenwyr yn y dyfodol yn ei ddisgwyl o'r profiad darllen a llyfrau ac a ydynt yn dymuno cael rheolaeth dros y profiad o ddarllen neu gael eu tywys gan yr awdur mewn dull mwy traddodiadol. Bydd ymgysylltu rhyngweithiol a hunanreoli naratif wrth wraidd arloesi yn y byd cyhoeddi. Mae cryn gyfleoedd i arloesi yn y maes hwn. Bydd y cwmnïau cyhoeddi hynny a all fanteisio ar dechnoleg ddigidol a data defnyddwyr ar gyfer eu hecosystem gyhoeddi eu hunain yn gweld manteision strategol. Mae hyn hefyd yn wir am ddatblygu mentrau amlasiantaeth yn y meysydd diwylliannol ac ieithyddol.

Mae gwneud y mwyaf o gysylltedd digidol yn caniatáu i sefydliadau megis S4C, Yr Urdd, y Cyngor Llyfrau a darparwyr addysg greu clystyrau digidol creadigol newydd cyffrous a allai wella cyfleoedd ar gyfer cyhoeddi yng Nghymru. Nododd y Panel yn glir mai piler arwyddocaol ar gyfer buddsoddi mewn cyhoeddi yng Nghymru yn y dyfodol yw symud o destun statig i lwyfannau rhyngweithiol. Gall technoleg ddigidol ymgysylltu â darllenwyr drwy ddulliau rhyngweithio cymhellol.

Dros yr ugain mlynedd diwethaf mae technoleg wedi newid popeth yn sylfaenol. Bydd unrhyw beth nad yw wedi newid eisoes yn newid yn fuan. Mae technoleg yn ei gwneud popeth yn haws - o ddosbarthu i gyfieithu - o gymharu â sut yr oedd pethau. Y broblem yw y gall technoleg wneud pethau'n rhy hawdd - mae'n gwneud cyhoeddi'n hawdd, ar draul proses olygu briodol, ac mae statws bod yn awdur yn cael ei ddibrisio. Mae dyfodiad technoleg mewn gwlad fel Cymru, gyda chyfathrebu gwael, yn ymddangos fel pe bai'n ateb i bopeth - ond y tu ôl i hynny oll mae nifer o gymhlethdodau.

Mae Cyngor Llyfrau Cymru, Llenyddiaeth Cymru, a'r rhan fwyaf o gyhoeddwr Cymru wedi bod yn araf i fanteisio ar gyfleoedd digidol - gydag eithriadau nodedig megis Y Lolfa yn dod i gytundeb ag Amazon, ac Accent Books, o ran darganfod talent ar-lein a marchnata'r dalent honno ar lein.

Byddai maint y cyfranogiad ar gyfer y diwylliant Cymraeg, yn seiliedig ar ffigurau'r Eisteddfod ac S4C - rhwng 140,000 a 160,000 - yn gwneud cynulleidfa ddelfrydol i dreialu canolfan amlgyfrwng Gymraeg ar-lein, yn cynnwys llyfrau, ffilmiau, cerddoriaeth, gemau, apiau, cylchgronau a llyfrau llafar.

Ni chanfu'r Panel unrhyw lyfrau llafar yn y byd cyhoeddi Cymreig, er gwaethaf y ffaith bod y farchnad ar gynnydd yn y DU a'i bod yn werth rhwng £75 a £91 miliwn. Fodd bynnag, cafodd y Panel dystiolaeth bod rhai o hunangyhoeddwr llwyddiannus Cymru wedi cysylltu ag Amazon ac yn cael eu hariannu ganddo i greu fersiynau llyfrau llafar o'u gwaith.

Nid yw'r Cyngor Llyfrau na Llenyddiaeth Cymru yn defnyddio meddalwedd cost isel i greu cyfleoedd datblygu proffesiynol ar-lein ar gyfer cyhoeddwr ac awduron, gyda chymunedau a fforymau ar lein er mwyn hwyluso trafodaeth a dysgu rhwng y sefydliadau hyn a'r bobl y maent i fod i'w gefnogi.

Mae cynhyrchu digidol llwyddiannus yn y byd cyhoeddi yn dibynnu ar y chwant i arbrofi, a'r gallu i addasu'n gyflym yn wyneb adborth negyddol, yna rhagor o arbrofi. Mae'n gofyn am ddyfeisgarwch parhaus o ran datrys problemau a dealltwriaeth o sut y mae cyhoeddi traddodiadol a digidol yn asio gyda'i gilydd. Mae dymneg menter o'r fath, sy'n seiliedig ar dimau o arbenigwyr y mae cysylltiad llac rhyngddynt ac sydd wedi'u dosbarthu ar hyd a lled y wlad, ac sy'n aml yn seiliedig ar brosiect lle mae chwaeth yn gyfrifol am eu llwyddiant, yn dangos bod ymateb chwim yn flaenoriaeth. Mae ymateb chwim yn gofyn i sefydliadau cyllido fod yn agored, i beidio â bod yn amddiffynnol ac i fod yn rhagweithiol ynghylch yr hyn nad ydynt yn ei wybod. Unwaith eto, prin yw'r dystiolaeth sydd gan y Panel o hyn, yn enwedig felly yn achos Llenyddiaeth Cymru. Roedd buddsoddi mewn hyfforddiant ar gyfer sgiliau digidol yn y sector cyhoeddi yng Nghymru hefyd yn hanfodol.

Dylai cefnogi datblygiad digidol priodol o fewn y diwydiant fod yn flaenoriaeth gyda llawer mwy o gyfleoedd ar gyfer cynnwys traws-lwyfan - creadigol a dosbarthu. Mae angen mwy o ddatblygiadau digidol - ar gyfer awduron a chyhoeddwr.

Hunangyhoeddi

Bydd grwpiau o hunangyhoeddwr yng Nghymru yn gwneud defnydd mawr o gyfryngau cymdeithasol i drefnu a marchnata eu ffeiriau llyfrau ar lawr gwald sydd wedi'u harwain gan awduron. Eleni, mae'r Rhondda, Dinbych y Pysgod, Llandeilo, Caerfyrddin, Llangwm, y Fenni a Chrucywel wedi cynnal digwyddiadau o'r fath.

Mae'r Panel yn credu y byddai'n fuddiol trefnu gweithdai ar hunangyhoeddi a chyhoeddi digidol. Mae angen i gyhoeddwr ddeall cyhoeddi digidol a'r gwahanol farchnadoedd sydd ar gael iddynt a byddai hyfforddiant yn y meysydd hyn yn cynorthwyo cwmnïau cyhoeddi i dyfu.

Y trefniadau gweinyddol o ran cymorth Llywodraeth Cymru ar gyfer gwasanaeth newyddion ar-lein dyddiol Cymraeg ei iaith, yn ogystal ag ar gyfer papurau bro.

Gwasanaeth newyddion ar-lein dyddiol Cymraeg ei iaith

Gofynnwyd i'r Panel ystyried y trefniadau gweinyddol ar gyfer cefnogi'r gwasanaeth newyddion ar-lein dyddiol Cymraeg ei iaith.

Ar ôl i'r Panel ystyried y mater hwn, dywedodd y Panel wrth Lywodraeth Cymru ym mis Ebrill 2016 y dylai'r trefniadau gweinyddol ar gyfer y gwasanaeth newyddion hwn aros fel y maent ar hyn o bryd gyda chyllid Llywodraeth Cymru yn parhau i gael ei sianelu drwy'r Cyngor Llyfrau.

Cytunodd y Dirprwy Weinidog dros Ddiwylliant, Chwaraeon a Thwristiaeth ar y pryd gyda chyngor y Panel ac wedi hynny cynhaliodd y Cyngor Llyfrau ymarfer tendro i ddarparu'r gwasanaeth newyddion digidol Cymraeg.

Ym mis Hydref 2016 cyhoeddodd y Cyngor Llyfrau mai Golwg Newydd Cyf a oedd wedi ennill y tendr i ddarparu'r gwasanaeth newyddion digidol Cymraeg ar gyfer y tair blynedd nesaf.⁴⁴

Mae Golwg Newydd Cyf wedi rhedeg Golwg 360, ei wasanaeth ar-lein a digidol, ers ei sefydlu yn 2008⁴⁵

Papurau Bro

Gan mai dim ond y trefniadau gweinyddol ar gyfer ariannu papurau bro y gofynnwyd i'r Panel eu hystyried, ni chafodd y Panel dystiolaeth gan bapurau bro. Fodd bynnag, daeth y Panel i'r casgliad fod papurau bro yn llwyddiant ac yn hanfodol o ran darparu cyfleoedd i siaradwyr Cymraeg ddarllen am weithgareddau yn eu cymunedau lleol. Yn wir, cydnabyddir yn eang mai *papurau bro* yw'r unig ddeunydd Cymraeg y mae nifer o siaradwyr Cymraeg yn ei ddarllen. *Ar hyn o bryd caiff Papurau Bro* eu gweinyddu gan Is-adran y Gymraeg Llywodraeth Cymru. Caiff cymorth i gylchgronau yn ogystal â Golwg 360 (sy'n gweithio'n agos gyda'r papurau bro ar nifer o fentrau) eu hariannu drwy'r Cyngor Llyfrau. Gallai'r Cyngor Llyfrau felly weld manteision bod yn gyfrifol am weinyddu'r papurau bro ond dywedodd hefyd nad yw'r sefydliad yn pwysu'n daer i gael y cyfrifoldeb ychwanegol hwn. Trafododd ysgrifenyddiaeth y Panel hefyd y mater hwn gydag Is-adran y Gymraeg Llywodraeth Cymru nad oedd yn pwysu am unrhyw newidiadau.

Er y gallai'r Panel weld manteision trosglwyddo'r cyfrifoldeb dros weinyddu'r papurau bro o Lywodraeth Cymru i'r Cyngor Llyfrau, daeth i'r casgliad fod y trefniadau gweinyddol presennol yn gweithio i bob golwg ac nad oedd unrhyw reswm i newid. Fodd bynnag, dylai Llywodraeth Cymru barhau i adolygu'r mater hwn a dylid datblygu perthnasoedd gwaith agosach rhwng y papurau bro a nifer o sefydliadau. Er enghraifft roedd y *papurau bro* eisoes wedi gweithio'n agos gyda Golwg 360 a dylai hyn gael ei ddatblygu ymhellach.

Y cymorth ar gyfer cyhoeddi a llenyddiaeth mewn ardaloedd difreintiedig ar draws Cymru

Cynhwysiant Cymdeithasol

Gall mynediad i ddiwylliant gael dylanwad mawr ar gynhwysiant cymdeithasol a thegwch. Mae gan sicrhau cyfleoedd a chyfranogiad effeithiol mewn amrywiaeth eang o weithgareddau celfyddydol rôl bwysig i'w chwarae o ran hyrwyddo Cymru fwy cyfiawn a theg. Gall caniatáu i gymunedau greu naratif sy'n mynegi eu straeon a'u gwerthoedd eu hunain gael effaith sylweddol o ran helpu cymunedau i oresgyn allgau cymdeithasol.

⁴⁴ <http://golwg360.cymru/>

⁴⁵ <http://www.cllc.org.uk/newyddion-news/news-detail?diablo.lang=eng&id=13094>

Mae creu, hyrwyddo a chyhoeddi llenyddiaeth sy'n ymwneud â materion cymdeithasol a diwylliannol penodol grwpiau neu gymunedau penodol yn ganolog i gefnogi cynhwysiant. Mae annog cyfranogiad mewn digwyddiadau llenyddol a grwpiau artistig yn meithrin gwynwch a hunanhyder. Mae'n gwella'r cyfleoedd i fagu hyder unigolion a grwpiau ac yn meithrin sgiliau generig allweddol trosglwyddadwy. Mae hyn, wrth gwrs, hefyd yn cwmpasu anghenion hyfforddi unigolion sydd wedi'u dadrithio gan addysg a hyfforddiant ffurfiol ac yn eu galluogi i ystyried nid yn unig gyfleoedd newydd neu hunanddatblygiad, ond cynyddu eu hunanhyder a'u hunan-barch gan arwain at fwy o gyfranogiad mewn cymdeithas. Mae gan hyn botensial i feithrin ymdeimlad llawer mwy cadarnhaol o hunaniaeth ar gyfer grwpiau sydd mewn perygl o gael eu gwahardd.

Dangosodd yr Athro Sandy Pentland o MIT sut y mae patrymau o gysylltiadau cymdeithasol yn rhagfynegi canlyniadau cymdeithasol⁴⁶ a sut y mae ffynonellau iechyd a chyfoeth yn dibynnu ar ymgysylltu ac archwilio. Dywed: 'the propagation of ideas from person to person is a type of collective intelligence we call culture'. Dengys sut y gall rhwydweithiau cymdeithasol sy'n canolbwyntio ar gydgyhmhellion⁴⁷ wella llif syniadau. Gall ef a'i dîm ragfynegi, ar sail patrymau cyfnewid gwybodaeth rhwng pobl mewn rhwydwaith, pa mor gynhyrchiol ac effeithiol y bydd tref neu sefydliad.

Mae gan hyn oblygiadau o ran cynhwysiant polisi a llythrennedd a gall awgrymu y gallai rhwydweithiau presennol fel llyfrgelloedd, cymdeithasau tai ac ysgolion gyfuno eu cryfderau yn effeithiol i adeiladu rhwydweithiau cymunedol cryfach, sy'n canolbwyntio ar ymgysylltu ac archwilio. Mae cymdeithasau tai yng Nghymru eisoes yn hyfforddi tenantiaid i ddod yn gynorthwyr ystafell ddo-barth ac mae Asiantaeth Ffilm Cymru yn cydweithio â chymdeithasau tai mewn ardaloedd o amddifadedd er mwyn cynnwys pobl ifanc leol mewn gwneud ffilmiau.

Nododd y Panel gyfoeth ac amrywiaeth aruthrol y gweithgarwch diwylliannol ar lefel cymunedau lleol ar draws Cymru. Yn wir, dangosodd rhai o'r cyrff cenedlaethol sy'n gysylltiedig â llenyddiaeth a chyhoeddi enghreifftiau o ymarfer arloesol. Fodd bynnag gellir cyflawni mwy drwy sicrhau mwy o integreiddio rhwng cyrff cyhoeddus megis awdurdodau lleol, llyfrgelloedd a grwpiau cymunedol.

Mae angen gwneud gwaith i ddeall y cyfyngiadau o fewn ein cymunedau i gefnogi llythrennedd oedolion a sut y gall hyrwyddo llenyddiaeth chwarae rhan yn hynny o beth. Er bod y Panel wedi derbyn tystiolaeth o sut yr oedd sefydliadau Cymru yn cefnogi llythrennedd oedolion, teimlwyd bod angen dull mwy cydlynol.

Roedd gan y Panel ddiddordeb arbennig yn y posibilrwydd o ddatblygu'r rhwydweithiau llyfrgell helaeth ledled Cymru ymhellach fel canolfannau datblygu allweddol a allai gefnogi mwy o fentrau cynhwysiant a darparu rhagor o gymorth o ran llythrennedd oedolion a llythrennedd digidol. Mae'n amlwg bod synergedd sylweddol rhwng cynlluniau datblygu presennol y gwasanaethau llyfrgell ar draws Cymru a'r sector llenyddiaeth a chyhoeddi. Dylai fod yn bosibl llunio rhaglen ar gyfer Cymru gyfan a fyddai'n ymdrin â meysydd polisi allweddol y Llywodraeth megis: cynhwysiant digidol, llythrennedd, lles cymdeithasol, diwylliant a chreadigrwydd a lles economaidd. Nododd y Panel y cyfle i rannu arferion gorau ar sut i greu canolfannau cymunedol effeithiol a hygyrch a allai gefnogi a gwella ymwybyddiaeth o lenyddiaeth a hefyd hyrwyddo strategaethau cynhwysiant ymhellach. Gallai mwy o bartneriaethau gyda llyfrgelloedd ledled Cymru helpu i ailysgogi ymgysylltiad er mwyn datblygu mwy o ymgysylltu â'r gymuned a chefnogi cynhwysiant.

⁴⁶ <https://www.youtube.com/watch?v=HMBI0ttu-Ow>

⁴⁷ <https://www.amazon.co.uk/Social-Physics-Networks-Make-Smarter/dp/0143126334>

Daeth y Panel i'r casgliadau a ganlyn:

Roedd y Panel yn cydnabod bod y rhan fwyaf o gyhoeddwyr wedi'u lleoli yn yr ardaloedd cydgyfeirio. Roedd sicrhau bod siopau llyfrau o fewn cyrraedd yr holl ysgolion uwchradd yng Nghymru yn hanfodol. Mewn ardaloedd lle nad oes siopau llyfrau ar gael, dylid annog stondinau llyfrau mewn gwyliau, a ffeiriau llyfrau.

Byddai'n ffordd ddoeth o wario arian ac yn rhoi arweiniad a hyfforddiant i gyhoeddwyr cyn cyrraedd y farchnad. Dylai mwy o gefnogaeth fod ar gael i fwy o ddigwyddiadau llenyddol (neu ddigwyddiadau llenyddol yn bennaf) a arweinir yn lleol mewn ardaloedd difreintiedig. Dylai ymyriadau wedi'u targedu fod ar gael hefyd er mwyn datblygu cronfeydd talent yn gysylltiedig â llenyddiaeth.

Awgrymodd y Panel fod lle i roi dull o'r gwaelod i i fyny ar waith ar gyfer llythrennedd, cynhwysiant ac amddifadedd drwy staff cymdeithasau tai yn cydweithio â llyfrgellwyr mewn ardaloedd lleol ac yn gweithio o lyfrgelloedd lleol. Mae cymdeithasau tai fel Tai Taf⁴⁸ eisoes yn cynnal hyfforddiant i denantiaid sydd â diddordeb mewn bod yn gynorthwywyr dosbarth. Mae gan gymdeithasau tai weithwyr cymunedol ym mhob ardal lle mae cynhwysiant ac amddifadedd yn broblem.

⁴⁸ <https://www.taffhousing.co.uk/events/2016/11/04/classroom-assistant/>.

6. Casgliadau ac Argymhellion

Mae'r Cylch gorchwyl ar gyfer yr Adolygiad hwn yn rhoi cyfarwyddyd i'r Panel ystyried y canlynol:

- Prif nodau Llywodraeth Cymru o safbwynt cynorthwyo'r diwydiant cyhoeddi a llenyddiaeth yng Nghymru, yn y ddwy iaith; hy beth rydym yn ceisio ei gyflawni, a hynny ar lefel ddiwylliannol, cymdeithasol ac economaidd? A yw'r nodau hyn yn addas i'w diben o hyd yn yr unfed ganrif ar hugain?

Ar ôl ystyried y dystiolaeth yn ofalus, mae'r Panel Adolygu yn gwneud yr argymhellion a ganlyn. Eu nod yw adeiladu ar y trefniadau cymorth presennol lle bo modd, ond gan wneud newidiadau lle bo angen er mwyn sicrhau bod y cynnig cyffredinol yn addas ar gyfer yr unfed ganrif ar hugain ac yn gwneud y gorau o fanteision diwylliannol, cymdeithasol ac economaidd sector cyhoeddi cryf a diwylliant llenyddol cyfoethog yng Nghymru, yn y Gymraeg a'r Saesneg.

Y prif argymhellion i Weinidogion Cymru

Cyffredinol

- Dylai Llywodraeth Cymru barhau i ddarparu cymorth ariannol i'r diwydiant ar gyfer cyhoeddiadau Cymraeg a Saesneg
- Dylid parhau i ddarparu cymorth ar gyfer deunyddiau print a digidol, ond mae angen gwella'n sylweddol y ddarpariaeth ddigidol a'r strategaeth.
- Dylid cadarnhau pwysigrwydd cyllid priodol gan Lywodraeth Cymru i hyrwyddo ac annog cyfleoedd arloesol ar gyfer datblygu llenyddiaeth a chyhoeddi yng Nghymru.
- Mae'r rhain yn feysydd buddsoddi allweddol sy'n cyd-fynd yn llwyr ag ymrwymiad Llywodraeth Cymru i Ddeddf Llesiant Cenedlaethau'r Dyfodol (Cymru) 2015 ac sy'n cefnogi'n uniongyrchol y blaenoriaethau strategol a nodir yn ei Rhaglen Lywodraethu Symud Cymru Ymlaen 2016-2021:
 - *Bydd gwerthfawrogi ein traddodiad llenyddol dwyieithog enwog, ei alluogi i ffynnu yn yr unfed ganrif ar hugain, sicrhau ei gyrhaeddiad byd-eang a chefnogi mynediad a chyfranogiad ar draws Cymru yn cyfrannu'n sylweddol tuag at y nodau llesiant a ganlyn - Cymru iachach; Cymru sy'n fwy cyfartal; Cymru o gymunedau cydlynol; Cymru â diwylliant bywiog lle mae'r Gymraeg yn ffynnu; Cymru sy'n gyfrifol yn fyd-eang.*
 - *Wrth wneud hynny byddwn yn cefnogi amcanion y Rhaglen Lywodraethu i sicrhau Cymru sy'n - iach ac egniol; sy'n uchelgeisiol ac yn dysgu; sy'n unedig a chysylltiedig.*
 - *Bydd diwydiant cyhoeddi cryf, arloesol sy'n darparu swyddi o ansawdd uchel, sy'n cystadlu'n rhyngwladol ac sy'n caniatáu i awduron proffesiynol o bob cefndir (yn Gymraeg a Saesneg) ddatblygu llwybrau gyrfa yng Nghymru yn cyfrannu'n sylweddol at y nodau llesiant a ganlyn - Cymru lewyrchus, Cymru sy'n fwy cyfartal, Cymru â diwylliant bywiog lle mae'r Gymraeg yn ffynnu, a Chymru sy'n gyfrifol ar lefel fyd-eang.*
 - *Wrth wneud hynny byddwn yn cefnogi amcanion y Rhaglen Lywodraethu i sicrhau Cymru sy'n - iach ac egniol; sy'n uchelgeisiol ac yn dysgu; sy'n unedig a chysylltiedig.*

Newidiadau i'r ffordd y caiff cymorth ei weinyddu

- Dylai Llywodraeth Cymru geisio dod i gytundeb â'r Cyngor Llyfrau Cymru i sicrhau y bydd yn ymgymryd â rhai swyddogaethau presennol Llenyddiaeth Cymru, gan gynnwys:
 - Llyfr y Flwyddyn (gyda'r nod o gynyddu ei effaith fasnachol, gan gynnwys ystyried y dull marchnata sydd ei angen)
 - Ysgoloriaethau
 - Digwyddiadau Llenyddol / Awduron ar Daith
 - Darpariaeth i blant a phobl ifanc
- Byddai hyn yn gofyn am gyllid ychwanegol gan Lywodraeth Cymru, a ddylai gael ei wrthbwysu gan ostyngiad cyfatebol yn y cyllid a ddarperir i Gyngor Celfyddydau Cymru at y dibenion hyn (cyllid y mae'n ei drosglwyddo i Llenyddiaeth Cymru ar hyn o bryd).
- Tra fod y swyddogaethau hyn yn ddibynnol ar gyllid trydydd parti (megis cyllid Loteri Genedlaethol a ddyfarnu'r ar hyn o bryd i weithredu ysgoloriaethau), dylid sicrhau cytundeb gyda Chyngor Celfyddydau Cymru, Llenyddiaeth Cymru a Chyngor Llyfrau Cymru na fydd Cyngor Celfyddydau a Llenyddiaeth Cymru yn ail-ymgeisio ar gyfer y cyllid hwn ar ddiwedd y cyfnod dyfarnu, a bydd yn hytrach yn cefnogi cais gan Gyngor Llyfrau Cymru ar gyfer y cyllid hwn i weithredu'r swyddogaeth hwn yn y dyfodol.
- Os caiff dibenion Cyngor Llyfrau Cymru eu hehangu ar y sail hon, yna byddai angen (i'r Cyngor Llyfrau) ystyried y canlynol:
 - Newid ei deitl i adlewyrchu'r cyfrifoldebau ychwanegol
 - Presenoldeb priodol ar lefel ranbarthol ar draws Cymru
 - Strategaeth ddigidol glir ac iddi ffocws
 - Strategaeth glir i hyrwyddo cynhwysiant ar draws Cymru, gan adeiladu ar ei strategaeth tlodi plant bresennol
 - Strategaeth datblygu talent
- Ar ôl cytuno ar hyn, byddai angen i Lywodraeth Cymru adlewyrchu'r newidiadau uchod mewn llythyr dyfarnu grant diwygiedig i'r Cyngor Llyfrau a llythyr cylch gwaith diwygiedig cyfatebol i Gyngor y Celfyddydau (yn dileu'r dyletswyddau a'r arian sy'n cael eu trosglwyddo i'r Cyngor Llyfrau).
- Yn sgil y newidiadau strwythurol hyn, byddai'r cyfrifoldebau a ganlyn yn aros gyda Chyngor y Celfyddydau / Llenyddiaeth Cymru:
 - Canolfan Ysgrifennu Tŷ Newydd⁴⁹
 - Digwyddiadau a gwyliau diwylliannol eraill a drefnir gan Gyngor y Celfyddydau

Argymhellion ar gyfer sefydliadau rhanddeiliaid:

Y Diwydiant Cyhoeddi yng Nghymru

⁴⁹ <http://www.tynewydd.wales/>

- Mae angen i'r sector cyfan, o ficrofentrau i gwmnïau mwy, ddatblygu ffocws mwy cynhwysfawr ar arloesi, entrepreneuriaeth a chysylltu â chynulleidfaoedd a darllenwyr newydd:
 - *Dylai'r sector yng Nghymru fanteisio'n llawn ar fentrau newydd sy'n hyrwyddo menter ac arloesi mewn technoleg ddigidol, marchnata a chyhoeddi.*
 - *Dylid mynd ati i chwilio am gyfleoedd ar gyfer cydweithio trawsgelfyddydol gydag artistiaid ac entrepreneuriaid mewn sectorau eraill yn y diwydiant creadigol - yn enwedig mewn canolfannau lleol a rhanbarthol, i gefnogi agenda gynhwysol ymhellach.*
 - *Dylai'r diwydiant cyhoeddi yng Nghymru hefyd chwilio am gyfleoedd i gydweithio â busnesau mewn sectorau eraill o'r economi ddigidol yng Nghymru (e.e.; e-fasnach, yswiriant ac ati).*

Cyngor Llyfrau Cymru

- Dylai Cyngor Llyfrau Cymru ddatblygu cenhadaeth newydd, eang i nodi a darparu'r cymorth cywir sydd ei angen ar lyfrau o Gymru yn y ddwy iaith, ym mhob rhan o Gymru - gan gydnabod y bydd yr ymyriadau sydd eu hangen yn aml yn wahanol ar gyfer llyfrau Cymraeg a Saesneg a hefyd ar gyfer gwahanol gyd-destunau (e.e.; daearyddiaeth, demograffeg, rhanddeiliaid, cynulleidfaoedd ac ati).
- Yn sgil hyn daw'r angen i'r Cyngor Llyfrau adolygu natur a chapasiti'r Pwyllgor Gwaith a'r trefniadau llywodraethu, er mwyn sicrhau bod y ddau yn briodol i ganiatáu i'r Cyngor Llyfrau ddatblygu ei genhadaeth newydd, ehangach.
- Mae angen i'r Cyngor Llyfrau ddatblygu lefelau gwahanol o awch am risg ar draws gwahanol swyddogaethau, er mwyn cymryd mwy o risgiau wedi'u rheoli ac arloesi lle y bo'n briodol. Er enghraifft, gallai hyn wella effeithiolrwydd marchnata o fewn Cymru a'r tu allan iddi; byddai hefyd yn caniatáu i'r Cyngor Llyfrau wneud mwy i gymell cyhoeddwr i ddod o hyd i lwyddiannau.
- Datblygu strategaeth ddigidol gadarn a chynyddu ymgysylltiad digidol, gan gynnwys ond nid yn gyfyngedig i'r canlynol:
 - *Cefnogi'r sector cyfan i fanteisio i'r eithaf ar fentrau newydd sy'n hyrwyddo menter ac arloesi ym meysydd technoleg ddigidol, marchnata a chyhoeddi.*
 - *Galluogi'r sector i chwilio am gyfleoedd i gydweithio â busnesau mewn sectorau eraill o'r economi ddigidol yng Nghymru (e.e.; e-fasnach, yswiriant ac ati) a manteisio ar y cyfleoedd hynny.*
 - *Ymgysylltu â chyrrff perthnasol y diwydiant yn y sectorau eraill hyn yng Nghymru, er mwyn ystyried a oes angen datblygu sgiliau ac arbenigedd presennol ymhellach er mwyn hwyluso cydweithredu â'r diwydiant cyhoeddi.*
- Nodi camau i wella marchnata a chynyddu cyrhaeddiad masnachol cyhoeddwr a'u rhoi ar waith.
- Datblygu a gweithredu strategaeth glir i annog a datblygu talent ar draws Cymru, gan gynnwys (ond nid yn gyfyngedig i) nodi llwybrau gyrfa posibl i awduron yng Nghymru a rhoi cyngor

arnynt, chwalu rhwystrau i fynediad lle y maent yn bodoli a sicrhau mynediad priodol ac effeithiol i ddatblygiad proffesiynol.

- Gwella prosesau sicrhau ansawdd ymhellach ac ymgorffori arferion gorau yn y maes hwn ar draws ei ystod newydd, estynedig o weithgareddau.
- Ystyried a gweithredu cynlluniau i gefnogi cyhoeddwr ac awduron mwy arloesol / entrepreneuriaidd.
- Ystyried a oes angen cymorth penodol, wedi'i deilwra i ddiwallu anghenion microfentrau.
- Ystyried cynlluniau i alluogi ac annog cydweithio trawsgelfyddydol gydag artistiaid ac entrepreneuriaid mewn sectorau eraill yn y diwydiant creadigol a rhoi'r cynlluniau hynny ar waith - yn enwedig mewn canolfannau lleol a rhanbarthol, i gefnogi agenda gynhwysol ymhellach.
- Mwy o bresenoldeb ar lefel ranbarthol ar draws Cymru, gan gynnwys yng ngogledd-ddwyrain Cymru a de-ddwyrain Cymru.
- Datblygu a gweithredu strategaeth glir ar gynhwysiant, gan adeiladu ar y strategaeth tlodi plant sydd eisoes yn bodoli; dylai hyn nodi sut y bydd y Cyngor Llyfrau yn cefnogi ac yn galluogi gweithgareddau ar draws Cymru sy'n hyrwyddo cynhwysiant, gan gynnwys gweithio gyda llyfrgelloedd a dulliau cyflawni eraill.
- Ymchwilio i effaith y trefniadau cyfanwerthu yn y sector cyhoeddi yng Nghymru a rhannau eraill o'r DU (yn fwyaf nodedig yn Lloegr) a datblygu cynigion i fynd i'r afael ag effeithiau negyddol hyn.
- Ni ddylai cymorth gan y Cyngor Llyfrau i ffeiriau llyfrau fod yn gyfyngedig i Gymru, er bod y gweithgaredd yng Nghymru yn bwysig ac y dylai barhau.
- Dylai'r Cyngor Llyfrau gefnogi datblygu teithiau i ffeiriau masnach llyfrau rhyngwladol allweddol yn y DU a thramor, er mwyn creu cysylltiadau masnachu a meithrin gallu yn y sector cyhoeddi yng Nghymru. Dylid adolygu costau a manteision y rhain bob blwyddyn ac, yn llawnach, ar ôl 3 blynedd.
- Datblygu a chynyddu'r ddarpariaeth hyfforddiant i gyhoeddwr (mewn meysydd megis rheoli busnes, diogelu a manteisio ar eiddo deallusol, marchnata ac ati).
- Annog cyhoeddwr yng Nghymru i sefydlu sefydliad ymbarél ar gyfer cyhoeddwr Saesneg (yn debyg i Cwlwm Cyhoeddwr Cymru i gyhoeddwr Cymraeg), a/neu ymchwilio i fanteision ymuno ag un o'r sefydliadau cynrychioliadol sy'n bodoli eisoes, ar lefel y DU
- Ceisio gwella cysylltiadau rhwng y sector a'r cyfryngau prif ffrwd yng Nghymru. Dylai'r corff cryfach gael perthynas gryfach â Darlledwr Gwasanaeth Cyhoeddus yn y ddwy iaith.

(Er enghraifft, gellid ystyried cyfleoedd ar gyfer llyfrau sy'n cyd-fynd â chyfresi teledu/adolygiadau etc.; ar hyn o bryd mae gwahaniaeth rhwng y sylw yn y cyfryngau yn Gymraeg a Saesneg - e.e.; mae gan Heno ar S4C eitem reolaidd ar awduron cyfredol o Gymru, ond nid oes rhaglen deledu gyfatebol yn Saesneg ar BBC Cymru Wales).

- Adolygu'r gwasanaethau mewnol i gyhoeddwy'r a ddarperir gan Gyngor Llyfrau Cymru ar hyn o bryd (e.e.; golygu, dylunio). Ystyried ar sail unigol a ddylai'r gwasanaethau hyn barhau - ar y lefel bresennol neu o gwbl?
 - *A ddylid gwneud mwy o ddefnydd o grantiau i gyhoeddwy'r er mwyn eu galluogi i ddefnyddio gwasanaethau o'r fath gan ddarparwyr masnachol?*
 - *Ymchwilio i ddulliau amgen newydd o dyfu gwerth economaidd y sector cyhoeddi yng Nghymru.*

(Nodwn fod ymhell dros hanner costau staff y Cyngor Llyfrau yn ymwneud â'r gwasanaethau hyn a ddarperir i gyhoeddwy'r, yn hytrach na chostau rhedeg craidd.)

- Datblygu a gweithredu cynigion i gynyddu lefel y cyllid o ffynonellau yn y sector preifat a'r trydydd sector (mewn ymgynghoriad / partneriaeth â Llenyddiaeth Cymru neu eraill, lle y bo'n briodol).

(Mae lefel y cyllid a gaiff gan y Cyngor Llyfrau a Llenyddiaeth Cymru o ffynonellau preifat a'r trydydd sector yn ymddangos yn isel. Mae'r ddau gorff yn cael eu hariannu'n helaeth gan grantiau Llywodraeth Cymru, naill ai'n uniongyrchol (y Cyngor Llyfrau - sydd hefyd wedi llwyddo gyda cheisiadau achlysurol i'r Loteri ei hun) neu drwy Gyngor y Celfyddydau (Llenyddiaeth Cymru - y mae Cyngor y Celfyddydau hefyd yn dirprwyo'r gwaith o ddosbarthu swm cyfyngedig o arian y Loteri Genedlaethol iddi). Mae'r ddau wedi gwneud ymdrechion yn y maes hwn ac yn parhau i wneud ymdrechion, ond heb fawr o lwyddiant o ran y symiau cyffredinol (heb gynnwys arian gan y Loteri Genedlaethol, sydd ei hun yn arian cyhoeddus, er nad yw'n grant gan Lywodraeth Cymru). Mae yna, wrth gwrs, rai manteision anariannol hefyd i arian a godir o ffynonellau nad ydynt yn rhan o'r sector cyhoeddus.)

- Dylai Cyngor Llyfrau Cymru barhau i weinyddu'r tendr i ddarparu gwasanaeth newyddion ar-lein dyddiol Cymraeg ei iaith.
- Nodi bylchau yn y data presennol ar y sector cyhoeddi yng Nghymru a chymryd camau i fynd i'r afael â bylchau yn y data, gan ddatblygu data llinell sylfaen cyflawn a gaiff eu diweddarau'n rheolaidd i lywio ystyriaethau polisi yn y dyfodol (e.e.; ar draws Cymru ac yn ôl rhanbarth: cyfanswm nifer y gweithwyr mewn gwaith llawn amser / rhan amser / cyflogaeth lawrydd; cyfanswm y llyfrau a gyhoeddir; cyfanswm y gwerthiannau).

Cyngor Celfyddydau Cymru

- Mae angen ffocws cliriach ar ymgysylltu â Llenyddiaeth (ar ôl rhoi mandad i Llenyddiaeth Cymru ymdrin â hyn, nid yw'n ymddangos bod Cyngor y Celfyddydau ei hun yn ei ystyried yn fanwl neu fel blaenoriaeth).
- Dylai Cyngor y Celfyddydau adolygu cwmpas a maint y cymorth i lenyddiaeth y mae'n ei ariannu a'r ffordd y mae'n cael ei gyflwyno, drwy ymgynghori â Llenyddiaeth Cymru, y Cyngor Llyfrau a rhanddeiliaid eraill. Dylai hyn gynnwys y canlynol:
 - *Diffinio 'cenhadaeth' lenyddol graidd newydd ac iddi fwy o ffocws; un sy'n ystyried trosglwyddo swyddogaethau allweddol o Llenyddiaeth Cymru i'r Cyngor Llyfrau ac sy'n pennu nodau sy'n rhoi llawer mwy o bwyslais ar ganlyniadau.*

- *Ailedrych ar berthynas Llenyddiaeth Cymru ag awduron a llenorion yng Nghymru. Dylai hyn gynnwys materion yn ymwneud â chynrychiolaeth, darparu adnoddau hygyrch a'r ffordd orau o gefnogi datblygiad proffesiynol awduron ac ysgrifenyddwyr, ar sail addasadwy sy'n cael ei 'harwain gan anghenion', mewn amgylchedd lle mae'r byd ysgrifennu creadigol yn newid yn gyflym.*
- *A all Llenyddiaeth Cymru ddod yn sefydliad sy'n 'galluogi', yn ôl y bwriad?*
- *Ailystyried rolau Cyngor y Celfyddydau a Llenyddiaeth Cymru wrth gefnogi gwyliau llenyddol. Bwriedir i Llenyddiaeth Cymru yn enwedig fod yn gorff sy'n galluogi, ond mae hyn yn enghraifft dda o hynny'n gweithredu'n fwy fel corff sy'n cynnal digwyddiadau yn hytrach na galluogi i eraill wneud hynny. Yn rhannol ymddengys fod hyn yn cael ei lywio gan ffocws gormodol yn Llenyddiaeth Cymru ar y niferoedd sy'n bresennol mewn digwyddiadau llenyddol fel meincnod ar gyfer llwyddiant wrth gefnogi llenyddiaeth. Mae hyn yn gyfeiliornus. Mae'r digwyddiadau hyn yn arfau pwysig ar gyfer llenyddiaeth, cynulleidfaoedd ac awduron, ond nid dyma'r prif ddull o fwynhau llenyddiaeth; ni ddylai llwyddiant o ran cynyddu ymgysylltiad â Llenyddiaeth Cymru gael ei fesur yn y modd hwn yn bennaf.*
- *Ailystyried a yw statws 'cwmni cenedlaethol' yn briodol ar gyfer Llenyddiaeth Cymru, yn dilyn trosglwyddo cyfrifoldebau allweddol i'r Cyngor Llyfrau.*

(Mae Llenyddiaeth Cymru yn llawer rhy fewnblyg, heb ddigon o ffocws ar ganlyniadau.)

- Mae angen gwell cyfathrebu rhwng Cyngor Celfyddydau Cymru a'r Cyngor Llyfrau - dylid datblygu Memorandwm Cyd-ddealltwriaeth i helpu i ategu a chyflawni hyn.
- Cryfhau'r oruchwyliaeth o drefniadau llywodraethu ac atebolrwydd Llenyddiaeth Cymru a gwella'r broses o fonitro'r hyn sy'n cael ei gyflawni gyda'r cyllid y mae Cyngor y Celfyddydau yn ei roi i Llenyddiaeth Cymru / Llenyddiaeth.
- Er tryloywder, dylai llythyr dyfarnu grant Cyngor y Celfyddydau i Llenyddiaeth Cymru fod yn wybodaeth gyhoeddus.
- Dylid cyhoeddi Adroddiad 2016 ARAD, 'Ymchwil ar weithio'n rhyngwladol ym maes llenyddiaeth yng Nghymru'⁵⁰ yn llawn (dim ond drwy wneud cais i Gelfyddydau Rhyngwladol Cymru y mae ar gael ar hyn o bryd; dim ond y Crynodeb Gweithredol sydd ar gael fel dogfen gyhoeddus).
- Rydym yn croesawu argymhellion adroddiad ARAD⁵¹, a dylid parhau i'w hadolygu er mwyn sicrhau eu bod yn cael eu cyflawni.
- Rydym yn croesawu ymateb Cyngor y Celfyddydau i adroddiad ARAD, lle mae'n cydnabod ei rôl o ran cyflawni yn erbyn argymhellion yr adroddiad ac yn ymrwmo i gamau gweithredu penodol i sicrhau bod sefydliadau yn dod at ei gilydd yn ôl yr angen i wneud hynny. Dylai'r ymrwymadau hyn hefyd gael eu hadolygu:
 - *Mae Cyngor y Celfyddydau yn cynnig dod â sefydliadau rhanddeiliaid allweddol Cymru ynghyd, er mwyn creu, ar y cyd, strategaeth ymgysylltu ryngwladol newydd ac*

⁵⁰ <http://www.wai.org.uk/news/6883?diablo.lang=cym>

uchelgeisiol, un sydd wedi'i seilio ar fwy o eglurder a chyfatebolrwydd o ran swyddogaethau. Dilyniir hyn gan ddigwyddiad i adeiladu ar ganfyddiadau ac argymhellion yr adroddiad a chychwyn ar y camau nesaf.

- *Parhau â'r gwaith ymgysylltu a ysgogwyd gan yr adroddiad, drwy weithio gyda'r gymuned lenyddol a chyhoeddi ehangach.*

Llenyddiaeth Cymru

- Dylai'r cyllid ar gyfer swyddogaethau a arferai fod yn swyddogaethau craidd gan gynnwys Llyfr y Flwyddyn, Ysgoloriaethau, Digwyddiadau Llenyddol / Awduron ar Daith a darpariaeth ar gyfer plant a phobl ifanc gael eu symud i'r Cyngor Llyfrau (drwy ddarparu cyllid ychwanegol i'r Cyngor Llyfrau gan Lywodraeth Cymru at y diben hwnnw, wedi'i wrthbwysu gan ostyngiad cyfatebol yn y cyllid a ddarperir i Gyngor Celfyddydau Cymru (y mae'n ei drosglwyddo i Llenyddiaeth Cymru ar hyn o bryd at y dibenion hyn).
- Tra fod y swyddogaethau hyn yn ddibynnol ar gyllid trydydd parti (megis cyllid Loteri Genedlaethol a ddyfarnu'r ar hyn o bryd i weithredu ysgoloriaethau), ni ddylai Llenyddiaeth Cymru na Chyngor Celfyddydau Cymru geisio ymestyn y cyllid hwn ar ddiwedd y cyfnod dyfarnu. Dylent yn hytrach ymroi i gefnogi cais gan Gyngor Llyfrau Cymru ar gyfer sicrhau y cyllid fydd angen i weithredu'r swyddogaeth hwn yn y dyfodol.

- Gwella llywodraethu ac atebolrwydd.

(Mae angen clir i unioni'r fantol rhwng y Bwrdd a'r tîm rheoli, sy'n rhy flaenllaw ar hyn o bryd.)

- Mae angen mireinio'r gwaith cynllunio strategol
- Dylid cynnal dadansoddiad manwl o sut y caiff cyllideb Llenyddiaeth Cymru ei dosbarthu ar hyn o bryd

(mae 75% o gyllideb Llenyddiaeth Cymru yn cael ei gwario ar gyflogau ei staff.)

- Ystyried sut i gefnogi awduron mwy arloesol / entrepreneuriaidd.
- Yn ôl yr angen, datblygu a gweithredu cynigion i gynyddu lefel y cyllid o ffynonellau yn y sector preifat a'r trydydd sector (drwy ymgynghori / partneriaeth â'r Cyngor Llyfrau lle y bo'n briodol).

Gan weithio gyda Cyngor y Celfyddydau, ailystyried yn feirniadol rôl Tŷ Newydd - gallai'r cyllid a roddir i Dŷ Newydd ar hyn o bryd gael ei wario ar fentrau hyfforddi a sgiliau perthnasol mewn mannau eraill.

(Mae'n ymddangos nad yw Cyngor y Celfyddydau na Llenyddiaeth Cymru erioed wedi ystyried a yw'r cymhorthdal blyneddol parhaus y mae Cyngor y Celfyddydau yn ei roi i Llenyddiaeth Cymru ar gyfer Tŷ Newydd - sydd ymhell dros £100,000 - yn ddilys o ran y canlyniadau a gyflawnir. Nid ydynt ychwaith wedi ystyried dewisiadau eraill - e.e.; a ddylent gael gwared ar Dŷ Newydd. Mae Llenyddiaeth Cymru a Chyngor y Celfyddydau ill dau yn ymddangos yn amharod i gydnabod pryderon y panel ynghylch perthnasedd a hygyrchedd cyrsiau Tŷ Newydd.)

- Gan weithio gyda Chyngor y Celfyddydau, ailystyried yn feirniadol statws yr Academi Gymreig.

Llywodraeth Cymru – argymhellion eraill

- Dylid diwygio dulliau cymorth megis Cymorth ar gyfer Ymweliadau i Ddatblygu Busnes Tramor, sy'n galluogi busnesau i gynnal ymweliadau datblygu busnes sy'n berthnasol i farchnadoedd tramor, er mwyn caniatáu i geisiadau gan gyhoeddwr i fynychu a chael presenoldeb ffurfiol mewn ffeiriau masnach llyfrau rhyngwladol gael eu hystyried, yn enwedig ffeiriau yn Llundain (sy'n canolbwyntio ar farchnadoedd tramor er mai yn y DU y cânt eu cynnal) a Frankfurt.
- Bydd hyn yn gofyn am ystyriaethau gwerth am arian prïodol ar gyfer y sector (h.y.; is na chanllawiau presennol Llywodraeth Cymru ar gyfer diwydiannau eraill), gan gydnabod y bydd y potensial sy'n deillio o bresenoldeb cychwynnol fel arfer yn talu ei ffordd yn y tymor hwy yn hytrach na'r tymor byr.
- Diwygio'r llythyr dyfarnu grant i'r Cyngor Llyfrau i adlewyrchu'r argymhellion a nodir yn yr adroddiad hwn; yn yr un modd, diwygio'r llythyr cylch gwaith a roddir i Gyngor y Celfyddydau, yn dileu'r dyletswyddau a'r cyllid cysylltiedig sy'n cael ei drosglwyddo i'r Cyngor Llyfrau.
- Mae'n hanfodol bod cyhoeddi a llenyddiaeth yn cael eu hystyried wrth ddatblygu'r cwricwlwm newydd.
- Cryfhau cyfleoedd i gyhoeddwr Cymru ar y fframwaith caffael.
- Ar hyn o bryd dylai Is-adran y Gymraeg Llywodraeth Cymru barhau i weinyddu'r Papurau Bro.
- Gan adeiladu ar argymhellion adroddiad ARAD, mae angen cymorth ar gyfer cyfieithu llenyddiaeth Gymraeg i'r Saesneg - fel iaith bontio yn ogystal ag fel cynulleidfa darged - a hefyd ar gyfer cyfieithu llenyddiaeth o Gymru i ieithoedd eraill, rhyngwladol. Gallai hyn arwain at fanteision diwylliannol yn ogystal â manteision economaidd ac ychwanegu gwerth at ddatblygiad y cwricwlwm newydd. Dylai Llywodraeth Cymru ystyried opsiynau ar gyfer darparu neu hwyluso'r cymorth hwn.
- Ymhen oddeutu pum mlynedd dylai Llywodraeth Cymru gomisiynu ymarfer arall tebyg i hwn i edrych yn eang ar y maes unwaith eto, yng ngoleuni profiad y pum mlynedd nesaf a'r rhagolygon sy'n datblygu'n barhaus ar gyfer y dyfodol.

Atodiad 1 : Tirwedd Gyffredinol Cyhoeddi a Llenyddiaeth

Mae tirwedd llenyddiaeth yn dechrau gyda'r awdur ac yn gorffen gyda'r darlennydd (neu i'r gwrthwyneb). Ceir trosolwg isod o'r broses gyhoeddi gyfan er mwyn deall yn well rôl cyllido yn yr ecosystem benodol hon.

Yr Awdur

Mae'r awdur yn creu nofel neu stori fer neu gerdd a fydd yn y pen draw yn Eiddo Deallusol y mae'r ecosystem gyhoeddi yn seiliedig arno. Mae amryw o gamau o fewn y broses ysgrifennu hon, y mae rhai ohonynt yn cael arian cyhoeddus

a) Ysgrifennu Creadigol

Er mwyn gwella eu crefft gall awduron fanteisio ar addysg ysgrifennu creadigol. Cynigir hyn gan Brifysgolion, addysg oedolion a chan ddarparwyr masnachol. Mae nifer o gyrsiau preswyl ar gael hefyd. Yng Nghymru, ceir Tŷ Newydd, y ganolfan breswyl ar gyfer ysgrifennu creadigol yn Llanystumdwy a ariennir yn sylweddol gan Llenyddiaeth Cymru.

b) Ysgoloriaethau Ysgrifennu

Ar ôl i'r llyfr gael ei ysgrifennu'n rhannol o leiaf - ac os oes gan awduron enw da neu sampl trawiadol o waith - gallant wneud cais am grant i helpu gyda'r broses ysgrifennu. Gallai hyn fod ar ffurf ysgoloriaeth lenyddol gan Llenyddiaeth Cymru neu grant a weinyddir gan Gyngor Llyfrau Cymru (y Cyngor Llyfrau). Mae gan yr ysgoloriaethau llenyddol, yn arbennig, enw da o ran helpu awduron newydd i sicrhau bod eu gwaith yn cael ei argraffu.

c) Beth Nesaf

Ar ôl i'r llyfr gael ei ysgrifennu, yna mae'n rhaid i'r awdur ddod o hyd i gyhoeddwr. Os yw'r awdur eisoes yn sefydledig, efallai y bydd ei lyfr eisoes wedi'i gontractio i gyhoeddwr naill ai yng Nghymru neu y tu allan i Gymru (Llundain fel arfer). Os oes gan yr awduron uchelgais i gyhoeddi eu gwaith y tu allan i Gymru, mae'n debyg y byddant yn anfon eu gwaith at asiant llenyddol yn y lle cyntaf.

Yr Asiant Llenyddol

Bydd asiant llenyddol yn derbyn awdur os bydd yn fasnachol hyfyw yn nhyb yr asiant - fel arfer mae asiantau'n codi 15% o gomisiwn ar ba bynnag drefniant y gallant ei sicrhau i awdur. Fel arfer, bydd yr asiant yn ceisio gwerthu i gyhoeddwr yn Llundain - oherwydd nid yw cyhoeddwr yng Nghymru fel arfer yn talu digon i wneud y trefniant yn un gwerth chweil i'r asiant. Bydd asiantau hefyd yn gyfrifol am drefnu cytundebau sgrinio a chyfieithu ar gyfer eu cleientiaid. Nid oes gan Gymru ei hasiantau llenyddol ei hun: mae hwn yn sector cwbl fasnachol o'r busnes. Mae nifer o asiantau yng Nghymru sy'n gweithio i gwmnïau yn Llundain, a all dalu sylw arbennig i awduron Cymreig, ond dyna'i gyd.

Y Cyhoeddwr

- a) **Cyhoeddwr Llundain.** Mae Llundain yn un o ganolfannau cyhoeddi mawr y byd ac yn cynnig cyfleoedd arbennig i awdur. Fel y mae pethau ar hyn o bryd, bydd unrhyw awdur yng Nghymru sy'n awyddus i wneud bywoliaeth o'i lyfrau yn unig ond yn gallu cyflawni hyn drwy ddewis cyhoeddwr o Llundain. Diwydiant cartref yw'r diwydiant cyhoeddi yng Nghymru o gymharu ac nid oes ganddo ddigon o bŵer marchnata i greu llyfrau a fydd ymysg y gwerthwyr gorau. Mae hefyd, wrth gwrs, yn ddiwydiant cwbl Saesneg. Anaml iawn y mae'r busnes cyhoeddi yn Llundain yn cael cymhorthdal - ond mae rhai gweisg llai, yn enwedig cyhoeddwr barddoniaeth, yn cael arian cyhoeddus.

- b) **Cyhoeddwr Cymru.** Mae dwsin neu fwy o gyhoeddwr Cymreig arwyddocaol. Mae bron pob un ohonynt yn cael cymhorthdal i ryw raddau (eithriad nodedig yw Accent Press sy'n gwmni masnachol, yn ôl ei gyffes ei hun). Yn gyfnewid am eu cymhorthdal mae disgwyl iddynt ganolbwyntio ar gyhoeddi llyfrau sydd o ddiddordeb i Gymru. Felly, bydd rhai awduron Cymreig yn teimlo bod eu gwaith yn fwy addas i gyhoeddwr Cymreig. Bydd hyn yn sicr yn wir os byddant yn ysgrifennu yn Gymraeg. Gall awduron sy'n byw yng Nghymru hefyd deimlo - gyda pheth cyfiawnhad - bod cyhoeddwr yng Nghymru yn fwy tebygol o dalu sylw iddynt.

Mae gan rannau eraill o'r DU y tu allan i Lundain fentrau cyhoeddi arwyddocaol megis Caeredin a Rhydychen - mae'r rhain yn ddinasoedd sy'n debycach o ran maint i Gymru na Llundain. Fel rhan o'i drafodaethau nododd y Panel adroddiad tebyg ar gyfer y sectorau cyhoeddi a llenyddiaeth yn yr Alban a gyhoeddwyd yn 2015.⁵²

- c) **Hunangyhoeddi** Opsiwn arall sydd yn dod yn fwyfwy poblogaidd yw i awduron gyhoeddi eu gwaith eu hunain, naill ai'n ddigidol neu mewn print, neu'r ddau. I rai, mae hyn yn ddewis cadarnhaol: maent yn mwynhau'r rheolaeth a ddaw yn sgil hunangyhoeddi. I eraill, wrth gwrs, dyma'r dewis olaf pan fyddant wedi cael ei gwrthod gan gyhoeddwr confensiynol.

Y Broses Gyhoeddi

- a) **Golygu.** Dyma'r broses lle mae golygydd sy'n cyhoeddi yn gweithio gyda'r awdur i fireinio a gwella ei lawysgrif. Mae safonau golygu yn y byd cyhoeddi yng Nghymru yn amrywiol iawn: ceir rhai golygyddion da iawn a rhai gwael iawn. Gellir dadlau na fu digon o ffocws ar waith golygyddol ym maes cyhoeddi o blaid ffocws ar y meysydd mwy gweladwy megis dylunio.
- b) **Dylunio.** Mae'r Cyngor Llyfrau wedi bod yn gyfrifol am ryw fath o adfywiad mewn gwerthoedd dylunio a chynhyrchu ar gyfer gyhoeddwr Cymru. Drwy gynnig arbenigedd mewnol mae'r Cyngor Llyfrau wedi helpu i godi safonau yn gyffredinol fel bod bron pob cyhoeddwr yng Nghymru yn cynhyrchu llyfrau i safon broffesiynol (yn sicr, nid oedd hynny'n wir ddegawd neu fwy yn ôl).
- c) **Marchnata.** Dyma'r broses o gael llyfrau o'r cyhoeddwr i siopau llyfrau ac ar y rhyngwyd. Un o effeithiau anffodus diwydiant cyhoeddi sy'n derbyn cymhorthdal yw mai ychydig iawn o waith marchnata a wneir. Ni ddisgwylir i lyfrau wneud arian ac o ganlyniad anaml iawn y byddant yn gwneud hynny. O ganlyniad, mae amlygrwydd cyhoeddwr Cymreig yn y siopau ac ar y rhyngwyd yn wael iawn yn gyffredinol. Mae ambell eithriad, ond maent i raddau helaeth yn profi'r rheol.

Cyhoeddusrwydd. Y broses o gael sylw i lyfrau yn y wasg a'r cyfryngau. Unwaith eto, fel gyda marchnata, mae hwn yn faes sy'n dioddef yn yr economi gymorthdaledig. At hynny, ac yn bwysicach efallai, - mae'n dioddef oherwydd diffyg cyfryngau diwylliannol datblygedig yng Nghymru. Nid oes unrhyw fforwm poblogaidd ar gyfer adolygu llyfrau Cymreig. Dylid ystyried mwy o gydweithredu rhwng cyhoeddwr a fforymau megis Wales Arts Review

Dosbarthu

⁵² <http://www.creativescotland.com/resources/our-publications/sector-reviews/literature-and-publishing-sector-review>

Ar ôl i'r llyfrau gael eu golygu, eu dylunio a'u hargraffu, cyfrifoldeb y dosbarthwyr yw sicrhau eu bod yn cyrraedd y siopau a gwefan Amazon ac ati. O ran dosbarthu o fewn Cymru, y prif gorff yw Cyngor Llyfrau Cymru, sydd wedi datblygu busnes llwyddiannus yn dosbarthu gwaith a gynhyrchir gan gyhoeddwr Cymreig ledled Cymru. Mae'r Cyngor Llyfrau yn gwneud gwaith da o ran cyrraedd siopau llyfrau a safleoedd gwerthu eraill - canolfannau celf a chreffft, amgueddfeydd ac ati - nad yw dosbarthwyr eraill yn eu cyrraedd. Nid yw'r Cyngor Llyfrau yn dosbarthu y tu allan i Gymru, felly er mwyn i gyhoeddwr Cymru ledaenu eu gwaith ar draws Prydain byddai angen iddynt ddefnyddio un o'r nifer o ddosbarthwyr masnachol mawr sy'n gwasanaethu'r DU gyfan. Gall fod problemau'n ymwneud â chymalau cyfyngu pan fydd cyhoeddwr eisiau defnyddio Cyngor Llyfrau Cymru yn ogystal â dosbarthwr sy'n cwmpasu'r DU gyfan.

Gwerthiannau

a) Siopau llyfrau. Mae nifer o siopau llyfrau annibynnol, bach, da ar hyd a lled Cymru, sy'n aml yn arbenigo mewn llyfrau cyhoeddedig Cymraeg a Chymreig. Mae llond llaw o siopau cadwyn yn y trefi mwy - Waterstones yn bennaf - sydd yn gyffredinol yn cynnig deunydd cyhoeddedig Cymraeg sy'n ddim mwy nag arwydd symbolaidd yn unig

b) **Y Rhyngrwyd.** Y prif werthwr yma yn amlwg yw Amazon. Mae rhai cyhoeddwr o Gymru wedi cael llwyddiant yn hyrwyddo eu llyfrau drwy Amazon - yn ychwanegiadau ffisegol a rhai digidol - ond gan mwyaf mae adrannau marchnata y cyhoeddwr mawr yn Llundain yn drech na hwy. Yn arwyddocaol ymddengys fod rhai o'r awduron sy'n cyhoeddi eu gwaith eu hunain wedi gwneud yn well drwy werthu e-lyfrau ar Amazon o gymharu â chwmnïau cyhoeddi sefydledig yng Nghymru. Gwnaed cryn ymdrech i sefydlu llwyfan manwerthu ar gyfer llyfrau o Gymru - gwales.com. Er bod y defnydd o'r gwasanaeth ar gynnydd mae cyfyngiadau iddo ac mae lle i wella - er enghraifft, ar hyn o bryd caiff rhifynnau digidol o gwales eu darparu mewn fformat ansafonol a all lesteirio gwerthiant.

c) **Ffeiriau Llyfrau.** Mae'r rhain yn ffenomen sydd ar gynnydd - digwyddiadau rhanbarthol sy'n aml yn arbenigo mewn gweisg bach a gwaith a hunangyhoeddir. Er nad yw'r rhain yn dylanwadu'n fawr ar werthiant, maent yn arwydd o ba mor iach yw'r diwylliant darllen yn gyffredinol. Anaml y byddant yn cael llawer o gyllid.

Digwyddiadau Byw

Ar ôl i lyfr gael ei gyhoeddi, maes arall o'r dirwedd lenyddol i'w harchwilio yw digwyddiadau byw. Mae'r rhain yn amrywio o ddarlleniadau barddoniaeth mewn ystafell gefn tafarn - weithiau gyda chymhorthdal gan raglen awduron ar daith Llennyddiaeth Cymru - i wyliau llenyddol sefydledig fel y Gelli a Phenwythnos Talacharn, y mae'r ddwy ohonynt yn derbyn cymorthdaliadau gan Gyngor Celfyddydau Cymru.

Cyfieithu

Yn olaf, ar ôl i lyfr gael ei gyhoeddi, bydd cyhoeddwr Cymreig, gyda chymorth Cyfnewidfa Lên Cymru o bosibl, sy'n sefydliad sy'n cael arian grant, yn ceisio dod o hyd i gyhoeddwr tramor a fydd yn talu am yr hawliau i gyfieithu a chyhoeddi llyfr. Bydd trefniadau o'r fath yn aml yn cael eu gwneud yn ffeiriau masnach rhyngwladol y byd cyhoeddi - e.e. ffair lyfrau Llundain a ffair lyfrau Frankfurt. Mae cyhoeddwr Cymreig wedi mynychu'r ddwy ffair hyn o bryd i'w gilydd, gyda chefnogaeth arian grant weithiau, a chyda graddau amrywiol o lwyddiant. Yn bennaf y llyfrau mwyaf llwyddiannus yn fasnachol sy'n cael eu cyfieithu ac fel y nodwyd yn gynharach, anaml iawn y bydd gan gyhoeddwr Cymreig deitlau o'r fath, er bod rhai eithriadau nodedig.

Darllenwyr

Gall darllenwyr gael mynediad i lyfrau o lyfrgelloedd, siopau llyfrau a thros y rhyngrwyd. Mae'r rhan fwyaf o ddarllenwyr yng Nghymru yn darllen yr un llyfrau fwy neu lai â phobl ar draws y DU -

yn bennaf, genres poblogaidd fel trosedd, rhamant, coginio, hunangymorth ac ati. Ni ddaw'r rhan fwyaf o ddarllenwyr yng Nghymru i gysylltiad â llawer o lyfrau sydd wedi'u cyhoeddi gan gyhoeddwyr Cymreig. Fel y nodir uchod, ni chânt yr un lefel o gymorth marchnata a chyhoeddusrwydd â'r teitlau poblogaidd a gyhoeddir yn Llundain. Fodd bynnag, mae llyfrgelloedd, ffeiriau llyfrau a gwyliau - heb sôn am y sector addysg - yn gwneud eu gorau i roi rhyw fath o lwyfan o leiaf i ysgrifennu o Gymru. Felly hefyd fentrau fel Llyfr y Flwyddyn. Ac, wrth gwrs, bydd gan y rhai sy'n chwilio am lenyddiaeth Gymraeg, yn anochel, berthynas wahanol â'r farchnad.

Atodiad 2 : Rhestr o unigolion – trafodaethau a gynhaliwyd

Cyngor Llyfrau Cymru

Yr Athro M.Wynn Thomas, Cadeirydd, Cyngor Llyfrau Cymru
Elwyn Jones, Prif Weithredwr, Cyngor Llyfrau Cymru
Lucy Thomas, Pennaeth yr Adran Grantiau Cyhoeddi

Cyngor Celfyddydau Cymru

Phil George, Cadeirydd, Cyngor Celfyddydau Cymru
Nick Capaldi, Prif Weithredwr, Cyngor Celfyddydau Cymru
David Alston - Cyfarwyddwr y Celfyddydau

Llenyddiaeth Cymru

Lleucu Siency, Prif Weithredwr, Llenyddiaeth Cymru
Elinor Robson, Diprwy Brif Weithredwr, Llenyddiaeth Cymru
William Ayot – Cyfarwyddwr y Bwrdd Rheoli, Llenyddiaeth Cymru

Wales Arts International

Nicola Morgan - Co-Head of Wales Arts International

Celfyddydau Rhyngwladol Cymru – Cyd-Bennaeth Celfyddydau Rhyngwladol Cymru

Cyhoeddwr

Garmon Gruffudd – Y Lolfa
Caroline Oakley -Honno
Richard Davies– Parthian
Mike Felton - Seren
Jonathan Lewis - Gwasg Gomer
Gwilym Boore - Gwasg y Dref Wen
Hazel Cushion – Accent Press
Elwyn Williams – Cwlwm Cyhoeddwr
Elena Gruffudd – Cwlwm Cyhoeddwr

Digital

Marc Webber, Digital Entrepreneur, YouDo?
Iain Tweedale – Head of Interactive and Learning, BBC Digital
Nia Davies – Exceutive Producer – Bitesize, BBC Digital
Christoph Fischer – Self Publisher and Festival organiser

Digidol

Marc Webber – Mentrwr Digidol,
Iain Tweedale – Pennaeth Adran Rhyngweithiol a Dysgu, BBC Digidol
Nia Davies– Cynhyrhydd Gweithredol – Bitesize, BBC Digidol
Christoph Fischer – Hunan – gyhoeddwr a threfnydd gwyliau

Swyddogion Llywodraeth Cymru

Ann Evans – Pennaeth Cangen Adnoddau'r Gymraeg mewn Addysg, Yr Adran Addysg a Gwasanaethau Cyhoeddus

Peter Owen, Pennaeth y Gangen Celfyddydau

Iwan Evans, Uwch Swyddog Polisi, Uned y Gymraeg

Eraill (Wedi eu cyfweld gan aelodau Panel unigol, a wnaeth adrodd yn ysgrifenedig ac ar lafar i weddill y Panel)

Jon Gower

Gwyneth Lewis

Peter Finch

Judith Barrow and Thorne Moore – Awduron Honno

Atodiad 3 : Tystiolaeth a Dderbyniwyd

Tystiolaeth Ysgrifenedig gan Rhanddeiliaid

Myrddin ap Dafydd - Gwasg Carreg Gwalch
Garmon Gruffydd – Y Lolfa
Gwilym Boore – Gwasg y Dref Wen
Elwyn Williams - Cwlwm Cyhoeddwyd Cymru
Karl Drinkwater – Cyhoeddwr
Emily Trahair – Planet
Dylan Iorwerth – Golwg

Tystiolaeth ysgrifenedig arall a ddadansoddwyd gan y Panel

Adolygiad annibynnol o drefniadau cyllido addysg uwch a chyllid myfyrwyr (Adolygiad Diamond). Mis Medi 2016

Adroddiad Arad - Ymchwil i weithio yn rhyngwladol yn y sector llenyddiaeth yng Nghymru

Potts a Cunningham – Model Lies

Adroddiad Intel – Llyfrau a E-lyfrau – Crynodeb gweithredol – May 2016 – ‘Concentric Circles’

Cyngor Llyfrau Cymru – Adroddiad Blynyddol 2015

Cyngor Llyfrau Cymru – Cynllun Gweithredol 2016-2017

Cyngor Llyfrau Cymru – Cynllun Strategol

Cyngor Llyfrau Cymru – dadansoddiad manwl o dderbyniadau a lefelau grant 2014/2015 & 2015/2016

Cyngor Llyfrau Cymru - Proses hawlio arian nôl ar daliadau grant

Cyngor Llyfrau Cymru – Ffigyrau Gwerthiant o werthwyr gorau llyfrau plant ag oedolion (Cymraeg a Saesneg) yn ystod y cyfnod 2005/2006 – 2014/2015

Cyngor Celfyddydau Cymru – Adroddiad Blynyddol 2015-2016

Cyngor Celfyddydau Cymru – Llythyr Cylch Gorchwyl 2016-17

Cyngor Celfyddydau Cymru - Cynllun Gweithredol 2016-17

Cyngor Celfyddydau Cymru – Adroddiad Radar a ‘Sgoriau Risg’ Llenyddiaeth Cymru

Cyngor Celfyddydau Cymru – Ystadegau parthed ariannu digwyddiadau a gwyliau llenyddol gan gyllid loteri

Cyngor Celfyddydau Cymru – Adolygiad o gefnogaeth Llywodraeth Cymru tuag at Gyhoeddi a Llenyddiaeth: Cyflwyniad gan Gyngor Celfyddydau Cymru

Llenyddiaeth Cymru – Adroddiad Blynyddol 2014-2015

Llenyddiaeth Cymru – sylwadau diweddglo

Llenyddiaeth Cymru - Cynllun Datblygu Busnes

Tŷ Newydd – Cynllun Datblygu Busnes 2016 – 2019

Llenyddiaeth Cymru – Cynllun Gweithgaredd 2016-2019

Llenyddiaeth Cymru – Cofrestr risg/peryg 2016

Llenyddiaeth Cymru – Trefn Rheoli, strwythur a rheolaeth

Llenyddiaeth Cymru – Stategaeth Codi arian 2016

Llenyddiaeth Cymru – Cynllun Cyfranogaeth Cymunedol

Llenyddiaeth Cymru - Stategaeth arolygu a gwerthuso – 2016

Llenyddiaeth Cymru – Cyllideb 2016-2017 & 2018-2019

Llenyddiaeth Cymru – Rhaglenni Cymunedau yn Gyntaf

Llenyddiaeth Cymru - Cofnodion Bwrdd Rheoli – Gorffennaf 2015 – Ebrill 2016

Llenyddiaeth Cymru – presenoldeb gweithgareddau 2015-2016
 Llenyddiaeth Cymru – Ysgoloriaethau i awduron 2011-2016
 Llenyddiaeth Cymru – Ysgoloriaethau i awduron – arolwg ystadegau
 Llenyddiaeth Cymru – Llenyddiaeth De Cymru Menter Datblygu – tri achos enghreifftiol
 Ystadegau o awduron sydd yn cyfranogi mewn gweithgareddau Llenyddiaeth Cymru
 Llenyddiaeth Cymru – Diweddariad Rhyngwladol
 Ymateb Llenyddiaeth Cymru i adroddiad Arad ar ymchwil i weithio yn rhyngwladol yn y sector
 llenyddiaeth yng Nghymru
 Llenyddiaeth Cymru – Cofiannau Cyfarwyddwyr
 Llenyddiaeth Cymru – Trechi Tlodi trwy brosiectau diwylliannol Ebrill 2015-Hydref 2016
 Llenyddiaeth Cymru - Roald Dahl 100 Cymru - Dyfeisio Digwyddiad – ymrwymiad dros Gymru
 Llenyddiaeth Cymru - Roald Dahl 100 Cymru - Dyfeisio Digwyddiad – ymrwymiad dros Gymru –
 Diweddariad ar dargeddi Llywodraeth Cymru Mis Medi 2016
 Llenyddiaeth Cymru - Her 100 Cerdd 2016 Cyrraedd Cynulleidfa
 Llenyddiaeth Cymru – Dau sefyllfa enghreifftiol ‘culture hive’ ar brosiectau cyfranogaeth
 Llenyddiaeth Cymru – Ymgynghoriad Cymorth awduron – Crynodeb o sylwadau a awgrymiadau
 2016
 Llenyddiaeth Cymru – syniadau ar gyfer ail-drefnu cymorth awduron – Hydref 2016
 Llenyddiaeth Cymru – Datganiad gan y Prif Weithredwr
 Llenyddiaeth Cymru – ymateb i ymholiadau gan y panel – Medi 2016
 Llythyr Personol am Tŷ Newydd gan James Rice
 Llenyddiaeth Cymru –Cymorth i awduron – gwybodaeth cefndirol
 Radio Cymru – ‘Writing the future’ - rhaglen ar waith allanol Llenyddiaeth Cymru
 The Bargoed Miracle (tystiolaeth ategol gan Llenyddiaeth Cymru)

Cyhoeddi a llenyddiaeth yng Nghymru

Amdanoch chi

If you would prefer to complete the survey in English please [visit this page](#).

Mae panel annibynnol wedi cael ei sefydlu i adolygu'r cymorth y mae Llywodraeth Cymru'n ei roi i fyd cyhoeddi a llenyddiaeth yng Nghymru. Bydd y panel yn gwneud mwy na dim ond adolygu'r cyllid. Bydd yr adolygiad yn ystyried nodau diwylliannol, cymdeithasol ac economaidd Llywodraeth Cymru o ran cefnogi'r diwydiant cyhoeddi a llenyddiaeth yng Nghymru ac yn ystyried a ydyn nhw'n cael eu cyflawni. Bydd hefyd yn ystyried y canlynol:

- datblygiadau digidol o fewn y diwydiant cyhoeddi ac a yw'r system sy'n cael ei defnyddio ar hyn o bryd i gefnogi'r diwydiant yn ddigon modern
- y cymorth sydd ar gael ar gyfer cyhoeddi a llenyddiaeth mewn rhannau difreintiedig o Gymru.

Mae rhagor o wybodaeth am yr adolygiad, aelodau'r Panel a'r cylch gorchwyl llawn ar gael yma: [Adolygiad cefnogaeth i gyhoeddi a llenyddiaeth](#)

Lansiwyd yr adolygiad yn gynharach eleni gyda'r bwriad o adrodd yn ôl i'r Gweinidogion yn yr hydref. Mae'r Panel wedi cwrdd â nifer o sefydliadau a rhanddeiliaid, ond mae'n awyddus i glywed gan y rheini sydd â diddordeb ym maes cyhoeddi a llenyddiaeth Cymru. Rydym wedi llunio'r holiadur hwn er mwyn rhoi cyfle i chi ysgrifennu yn uniongyrchol at y panel. Bydd y arolwg ar gael tan 31 Awst 2016. Mae croeso i chi ddweud wrth eich cyfeillion am fodolaeth y wefan hefyd. Wedi'r dyddiad hwn, bydd y Panel yn ystyried yr ymatebion a ddaw i law ac yn eu cynnwys yn yr adroddiad terfynol y byddan nhw'n ei baratoi ar gyfer y Gweinidogion fydd yn cael ei gyhoeddi yn yr hydref.

Mae'n rhaid i chi ateb cwestiynau 1, 2 a 3. Cofiwch ateb cymaint o'r cwestiynau eraill ac y gallwch chi ond byddai'n ddefnyddiol iawn pe gallech chi ddewis atebion ar gyfer cwestiynau 5 i 9. Mae'n bosibl defnyddio hyd at 10,000 o gymeriadau i ateb cwestiynau 11 i 14 ond ceisiwch fod mor gryno â phosibl.

* 1. Ym mhle ydych chi'n byw? (dewiswch o'r rhestr isod):

* 2. Nodwch eich grŵp oedran, ar 31 Awst 2016:

* 3. Pa un o'r canlynol sy'n eich disgrifio chi orau? (Mae'n bosibl y bydd rhai rolau'n gorgyffwrdd.
Rhowch dic wrth BOB UN sy'n berthnasol)

- Darllenwr
- Awdur
- Newyddiadurwr
- Cyhoeddwr
- Dosbarthwr
- Manwerthwr
- Myfyriwr
- Addysgwr
- Rôl arall (nodwch yma)

Sectorau addysgol

* 4. Ym mha sectorau ydych chi'n gweithio yuddyn nhw? (ticiwch BOB UN sy'n berthnasol)

- Cynradd
- Uwchradd
- Addysg Bellach
- Addysg Uwch
- Darparwr hyfforddiant yn y sector preifat
- Arall (nodwch yma)

Iaith a fformat

5. Nodwch ym mha ieithoedd y mae gennych chi ddiddordeb ynddyn nhw (ticiwch BOB UN sy'n berthnasol)

- Llenyddiaeth a chyhoeddi yn Gymraeg
- Llenyddiaeth a chyhoeddi yn Saesneg
- Llenyddiaeth a chyhoeddi mewn ieithoedd eraill (nodwch yma)

6. Pa ffurfiau cyhoeddi sydd gennych chi ddiddordeb ynddyn nhw? (nodwch BOB UN sy'n berthnasol)

- cyhoeddi ffisegol (e.e. llyfrau a chylchgronau wedi'u hargraffu, mewn copi caled)
- cyhoeddiadau digidol (e.e. e-lyfrau a chynnwys ysgrifenedig arall sydd ar gael ar ddyfeisiau electronig ar-lein).
- Arall (nodwch yma)

Mathau

6. Yn gyffredinol, pa fathau o gyhoeddiadau sydd gennych chi ddi-ddordeb ynddyn nhw?

Mae categorïau ar wahân wedi'u rhestru isod ar gyfer deunydd sydd ar gyfer "Plant a phobl ifanc" ac "Oedolion" (ticiwch BOB UN sy'n berthnasol, ar un o'r rhestri neu yn y ddwy ohonyn nhw):

7. Plant a phobl ifanc

- Newyddion a materion cyfoes
- Diddordebau (e.e. chwaraeon, cerddoriaeth, teledu, ffilm, gemau, technoleg)
- Addysgol
- Ffuglen
- Ffeithiol
- Barddoniaeth
- Arall (nodwch yma)

8. Oedolion

- Newyddion a materion cyfoes
- Diddordebau (e.e. chwaraeon, cerddoriaeth, teledu, ffilm, gemau, technoleg)
- Addysgol
- Ffuglen
- Ffeithiol
- Barddoniaeth
- Arall (nodwch yma)

9. Pa mor aml ydych chi'n gwneud y canlynol?

(dewiswch un ateb ar gyfer pob cwestiwn)

| | Byth | Weithiau | Yn rheolaidd |
|--|-----------------------|-----------------------|-----------------------|
| Prynu llyfrau clawr caled neu glawr meddal | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Prynu papurau newydd dyddiol | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Prynu cylchgronau eraill | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Defnyddio gwasanaethau llyfrgelloedd i ddarllen neu fenthyg llyfrau | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Defnyddio gwasanaethau llyfrgelloedd i ddarllen papurau newydd neu gylchgronau | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Prynu llyfrau electronig | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Prynu cylchgronau electronig | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Darllen gwasanaethau newyddion neu faterion cyfoes ar-lein am ddim | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Darllen cynnwys o fath arall ar-lein ar bynciau sydd o ddiddordeb i chi a hynny am ddim (e.e. blogiau) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Tanysgrifio i wasanaethau llyfrau ar-lein | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Tanysgrifio i gylchgronau ar-lein | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Tanysgrifio ac yn talu am wasanaethau newyddion neu faterion cyfoes ar-lein | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Mynd i ddiwyddiadau neu wyliau llenyddiaeth am ddim | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Mynd i ddiwyddiadau neu wyliau llenyddiaeth ac yn talu amdany'n nhw | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Cyhoeddi a llenyddiaeth yng Nghymru

Cefnogaeth i gyhoeddi a llenyddiaeth yng Nghymru

Rydym wedi crynhoi'r prif elfennau sy'n cefnogi'r byd cyhoeddi a llenyddiaeth yng Nghymru yma* (crynodedb o'r cymorth - yn agor mewn ffenestr newydd) ac wedi atodi dolenni at ragor o wybodaeth fanylach.

*** Mae'r cymorth ar gyfer cyhoeddi y mae Cyngor Llyfrau Cymru yn ei ddarparu yn cynnwys gweinyddu cyllid grant ychwanegol sy'n cael ei ddarparu gan Lywodraeth Cymru er mwyn cefnogi'r wasg Gymraeg. Defnyddiwyd y cyllid hwn i sefydlu gwasanaeth newyddion a materion cyfoes ar-lein. Ar hyn o bryd, Golwg Newydd Cyf sy'n rhedeg y gwasanaeth hwn sef Golwg360. Dechreuodd y fasnachfaint gyfredol yn 2014 ac mae'n para tan fis Mawrth 2017.**

Cyn symud ymlaen, cofiwch adolygu'r crynodedb o'r cymorth sydd ar gael.

* 10. Ticiwch yma i gadarnhau eich bod wedi darllen y crynodedb o'r cymorth sydd ar gael:

- Do
- Naddo

Mae'n bosibl defnyddio hyd at 10,000 o gymeriadau i ateb cwestiynau 11 i 14 ond ceisiwch fod mor gryno â phosibl.

11. Yn eich barn chi, beth yw'r prif heriau sy'n wynebu'r diwydiant cyhoeddi a llenyddiaeth yng Nghymru? Gall rhain fod yn heriau diwylliannol, cymdeithasol, economaidd neu fathau eraill o heriau.

Yn y ddau gwestiwn nesaf, rhowch eich sylwadau ar gymaint â phosibl o'r agweddau ar y cymorth a ddarperir (neu sydd ei angen) ar gyfer cyhoeddi neu lenyddiaeth sydd, yn eich barn chi, yn angenrheidiol.

12. Pa agweddau ar y cymorth sydd ar gael ar hyn o bryd ar gyfer cyhoeddi a llenyddiaeth sy'n gweithio'n dda (a pham)?

13. A ddylid gwneud unrhyw beth mewn ffordd wahanol? (Ac oes, dywedwch pam?) Eglurwch beth fyddai canlyniadau'r newidiadau rydych wedi eu disgrifio?

14. A oes yna unrhyw beth arall y byddech chi'n hoffi i'r Panel ei ystyried?

Ar ran y Panel adolygu, diolch ichi am roi o'ch amser i lenwi'r holiadur hwn.

Annex 5 : Quantitative and Qualitative Analyses of responses to Questionnaire [I'w Gyfieithu]

Section 1 : Introduction and Overview

As part of gathering evidence the Panel decided to issue an on-line bilingual survey which ran during July and August 2016. It invited written responses to 14 specific questions, set out in a questionnaire that provided background to the Review and its remit. Respondents were also invited to provide additional supporting information.

Responses to the Call for Evidence have been detailed, informative and thought provoking. They are a valuable addition to the evidence base. As outlined below the questionnaire attracted a remarkable response and was therefore a crucial part of the review process. A copy of the bilingual questionnaire is attached at **Annex 4**.

The statistical analysis includes separate information for the Welsh-language and English language questionnaires. Comments received from respondents are currently presented in the language in which they were provided. *[These will be translated in due course]*

Section 2 : Statistical analysis of responses and responses to call for evidence questions

Overall there were 829 responses received, 498 responses in English and 331 responses in Welsh.

Question 1: Please tell us where you live.

English language responses showed highest response rates from Cardiff (20%), Ceredigion (12.2%) and Outside Wales (11.6%) and Welsh language responses showed highest response rates from Gwynedd (30.5%), Ceredigion (23%) and Cardiff (15.4%). Table 1 and 1a and Figure 1 and 1a provide the statistical breakdown of responses by local authority area. No respondents skipped the question.

Table 1: Statistical analysis of call for evidence responses by local authority area (English Language responses)

| Please tell us where you live: | | |
|--|-------------------------|-----------------------|
| Answer Options | Response Percent | Response Count |
| Blaenau Gwent County Borough Council | 1.2% | 6 |
| Bridgend County Borough Council | 2.4% | 12 |
| Caerphilly County Borough Council | 2.0% | 10 |
| The City of Cardiff Council | 20.7% | 103 |
| Carmarthenshire County Council | 4.4% | 22 |
| Ceredigion County Council | 12.2% | 61 |
| Conwy County Borough Council | 1.6% | 8 |
| Denbighshire County Council | 1.8% | 9 |
| Flintshire County Council | 2.6% | 13 |
| Gwynedd Council | 4.0% | 20 |
| Isle of Anglesey County Council | 1.0% | 5 |
| Merthyr Tydfil County Borough Council | 0.4% | 2 |
| Monmouthshire County Council | 2.0% | 10 |
| Neath Port Talbot County Borough Council | 1.2% | 6 |
| Newport City Council | 2.4% | 12 |
| Pembrokeshire County Council | 4.0% | 20 |
| Powys County Council | 6.2% | 31 |
| Rhondda Cynon Taf County Borough Council | 3.0% | 15 |
| City and County of Swansea | 6.0% | 30 |
| Torfaen County Borough Council | 1.0% | 5 |
| Vale of Glamorgan Council | 7.0% | 35 |
| Wrexham County Borough Council | 1.0% | 5 |
| Outside Wales | 11.6% | 58 |
| <i>answered question</i> | | 498 |
| <i>skipped question</i> | | 0 |

Figure 1 Statistical analysis of call for evidence responses by local authority dddd (English Language responses)

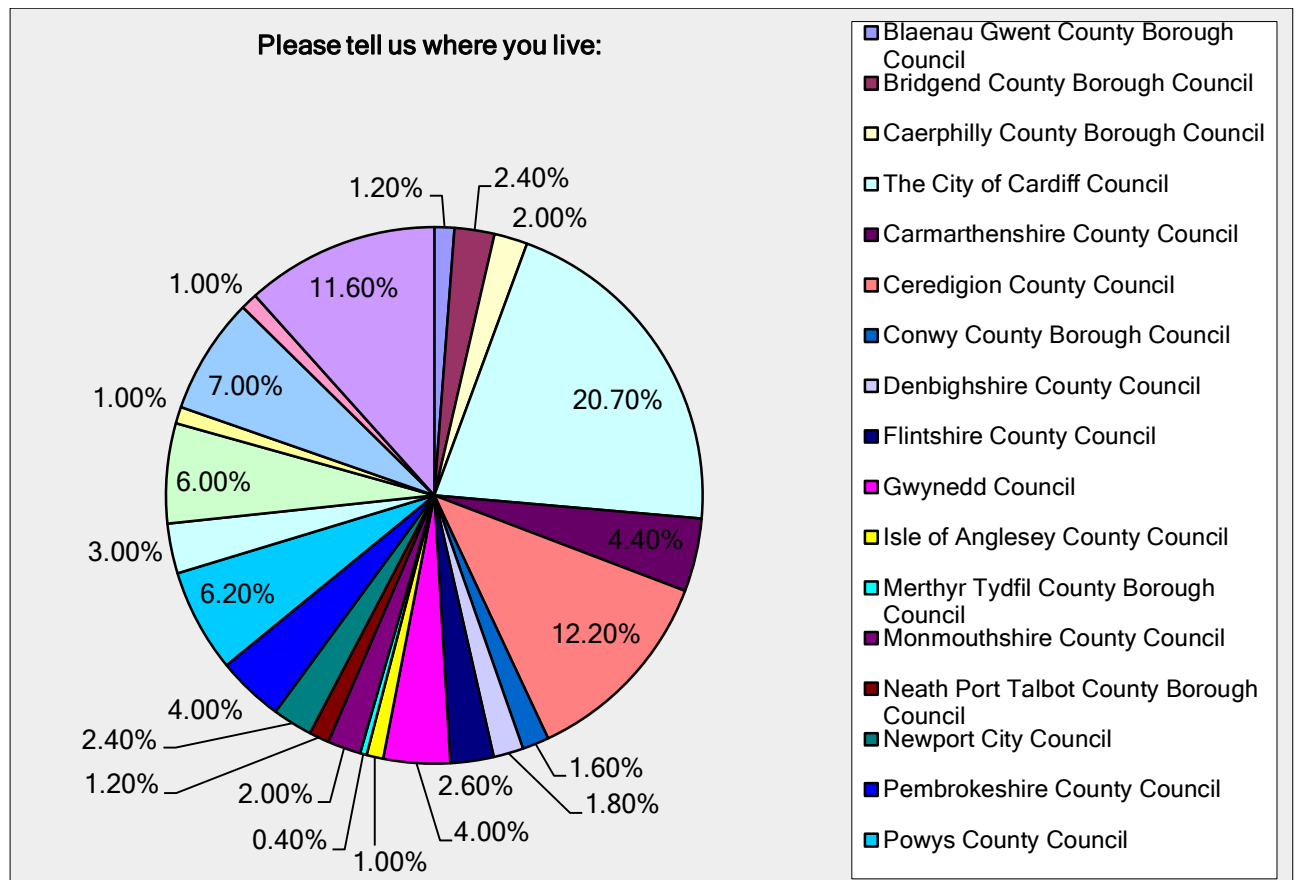
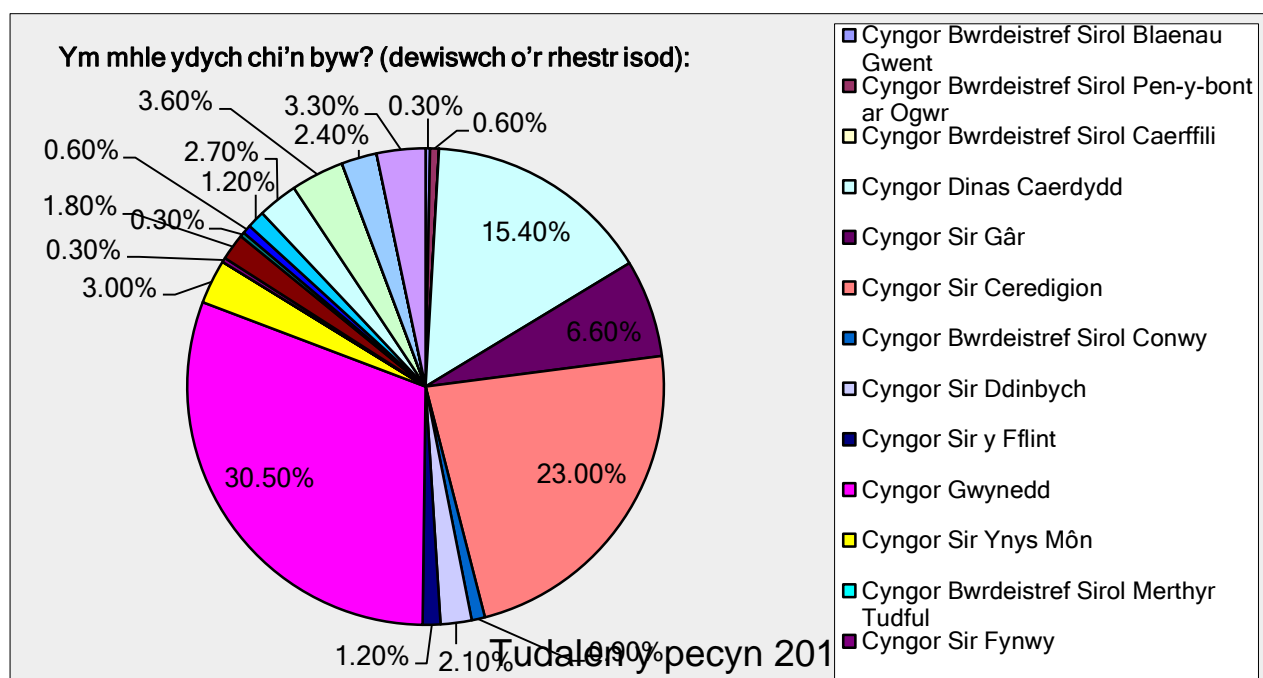


Table 1a : Statistical analysis of call for evidence responses by local authority area (Welsh-language responses)

| Ym mhle ydych chi'n byw? (dewiswch o'r rhestr isod): | | |
|---|-------------------------|-----------------------|
| Answer Options | Response Percent | Response Count |
| Cyngor Bwrdeistref Sirol Blaenau Gwent | 0.3% | 1 |
| Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr | 0.6% | 2 |
| Cyngor Bwrdeistref Sirol Caerffili | 0.0% | 0 |
| Cyngor Dinas Caerdydd | 15.4% | 51 |
| Cyngor Sir Gâr | 6.6% | 22 |
| Cyngor Sir Ceredigion | 23.0% | 76 |
| Cyngor Bwrdeistref Sirol Conwy | 0.9% | 3 |
| Cyngor Sir Ddinbych | 2.1% | 7 |
| Cyngor Sir y Fflint | 1.2% | 4 |
| Cyngor Gwynedd | 30.5% | 101 |
| Cyngor Sir Ynys Môn | 3.0% | 10 |
| Cyngor Bwrdeistref Sirol Merthyr Tudful | 0.0% | 0 |
| Cyngor Sir Fynwy | 0.3% | 1 |
| Cyngor Bwrdeistref Sirol Castell-nedd Port Talbot | 1.8% | 6 |
| Cyngor Dinas Casnewydd | 0.3% | 1 |
| Cyngor Sir Penfro | 0.6% | 2 |
| Cyngor Sir Powys | 1.2% | 4 |
| Cyngor Bwrdeistref Sirol Rhondda Cynon Taf | 2.7% | 9 |
| Cyngor a Dinas Abertawe | 3.6% | 12 |
| Cyngor Bwrdeistref Sirol Torfaen | 0.0% | 0 |
| Cyngor Bro Morgannwg | 2.4% | 8 |
| Cyngor Bwrdeistref Sirol Wrecsam | 0.0% | 0 |
| Y tu allan i Gymru | 3.3% | 11 |
| answered question | | 331 |
| skipped question | | 0 |

Figure 1a : Statistical analysis of call for evidence responses by local authority area (Welsh Language responses)



Question 2: Please indicate your age group, as of 31, August 2016.

The distribution of responses to this question is indicated in Figure 2 and Figure 2a. No respondents skipped the question. Highest response rates in the English language came from the 45-54, 35-44 age groups, closely followed by the 25-34 group. Highest response rates in the Welsh language came from the 45-54, 35-44 age groups, making up more that 50% of all responses. Responses in 25-34 and 55-64 brackets were approximately equivalent.

Figure 2 : Call for evidence responses by age (English Language responses)

NB: Figures have been rounded to the nearest tenth of per cent. The sum of the constituents may not add up to 100%.

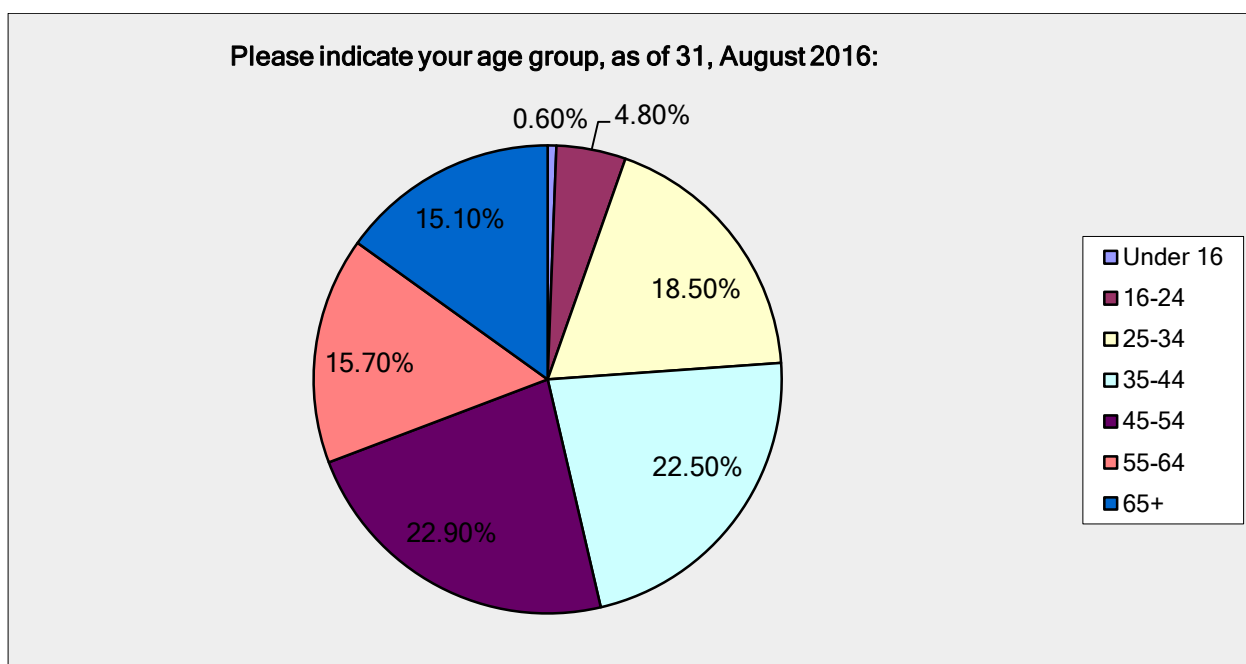
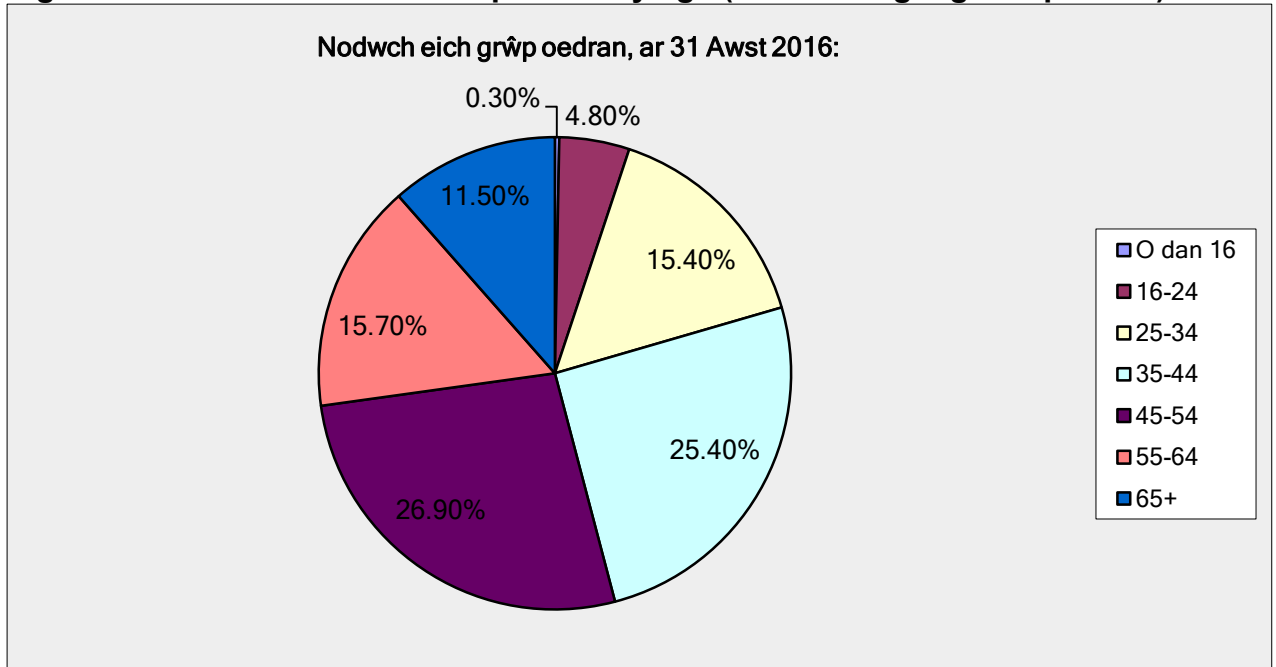


Figure 2a : Call for evidence responses by age (Welsh Language responses)



Question 3: Which of the following describes you? Some roles may overlap; please tick all that apply. Reader, Author, Journalist, Publisher, Distributor, Retailer, Educator (if so please indicate which sectors you work in), Other (please specify).

In both English and Welsh languages responses , the highest responses rate came from the Reader category, the category most likely to overlap with others. Authors make up the next largest group in both languages. See figures 3 and 3a.

Figure 3 : Call for evidence responses by category (English Language responses)

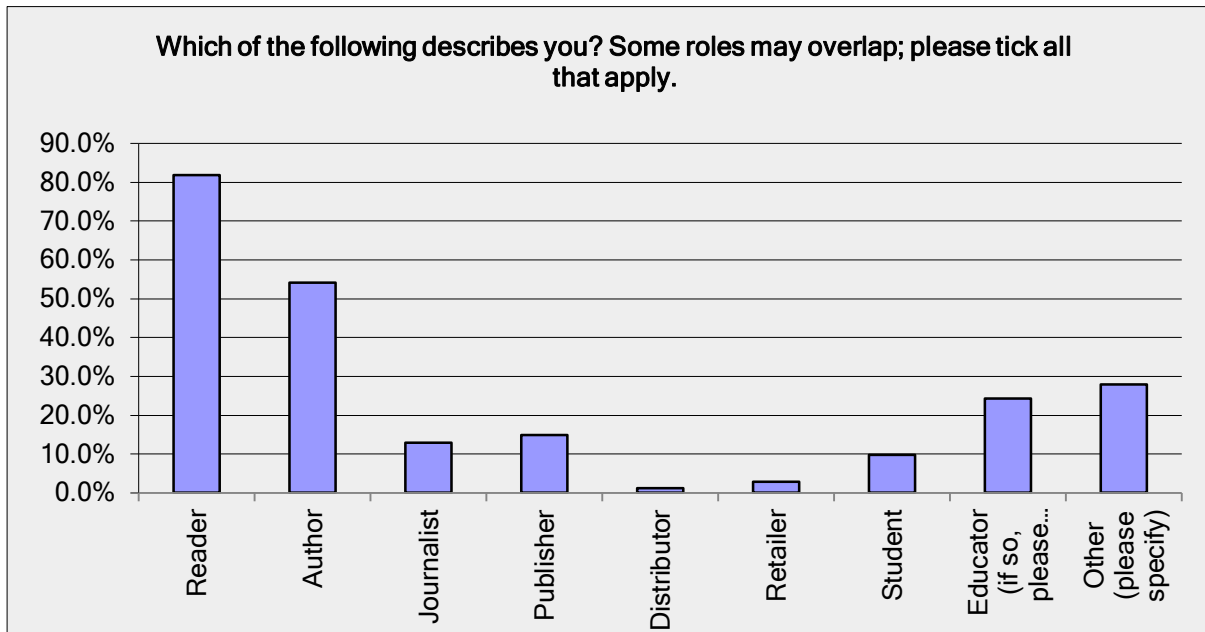
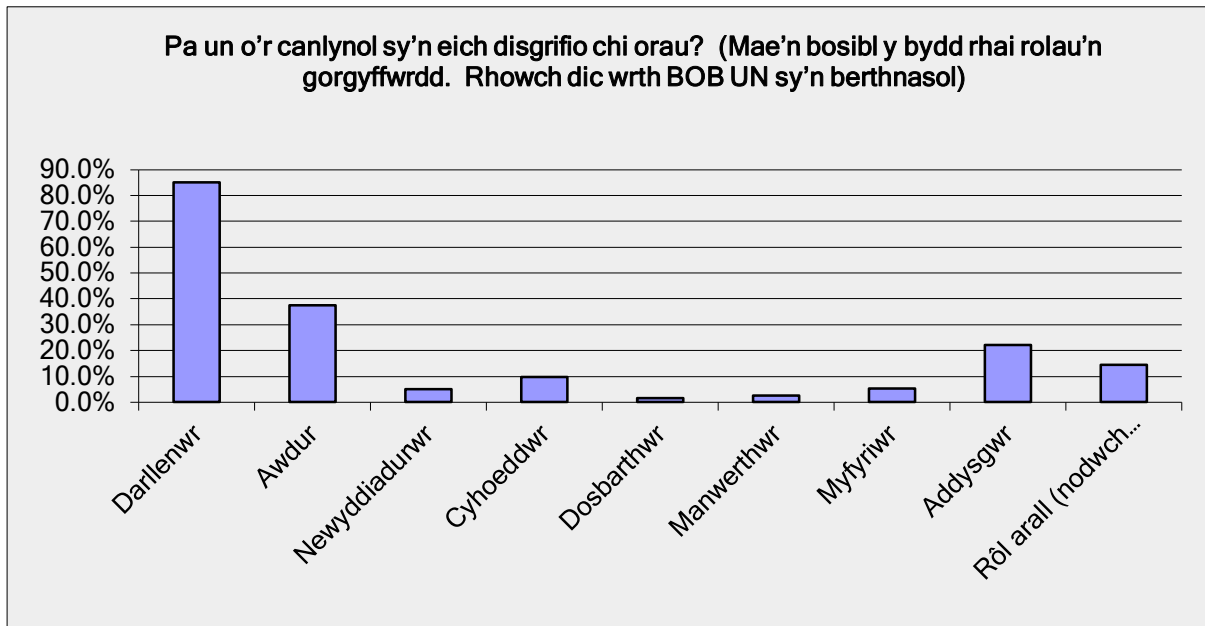


Figure 3a : Call for evidence responses by category (Welsh Language responses)



Question 4: What sectors do you work in? (tick ALL that apply)

Not all respondents chose to answer this question. There were 119 English language responses with a further 23 preferring to give a narrative response. There were 10 direct response in Welsh with one further narrative response. In both languages the highest number of respondents who replied directly to question worked in the Higher Education sector. See Figure 4 and 4a.

Figure 4 : Call for evidence responses by occupation (English Language responses)

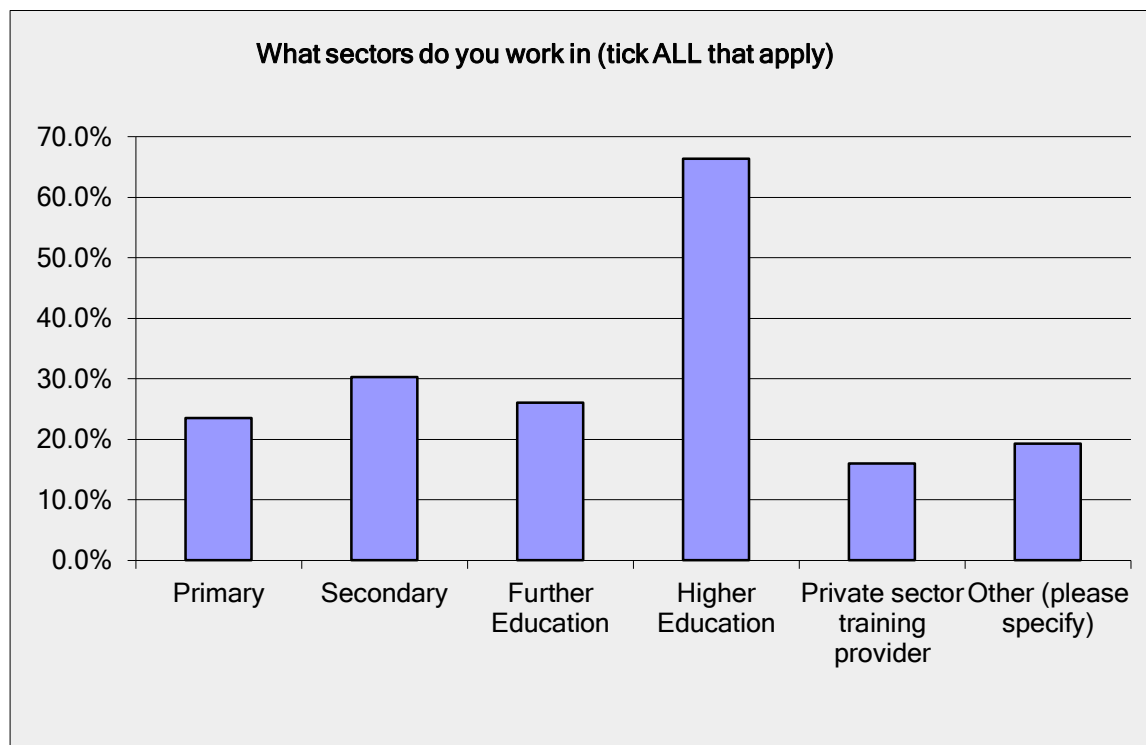
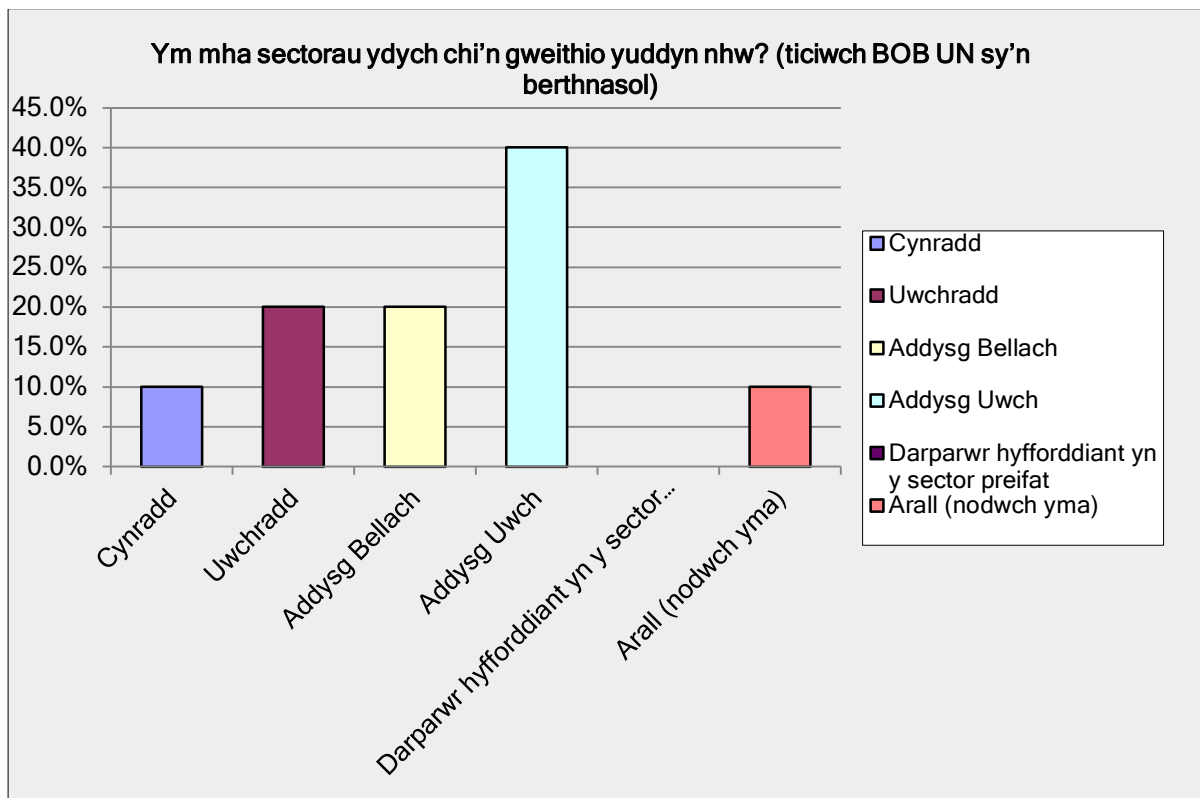


Figure 4a : Call for evidence responses by occupation (Welsh Language responses)



Question 5: Please indicate which languages you are interested in (tick ALL that apply).

Not all respondent answered this question. 488 English language respondents answered using the 'tick box' and 63 provided narrative information indicating an interest in literature in a range of languages including German and other European languages, Turkish, Russian and Chinese.

317 answered the Welsh questionnaire using the 'tick' box with a further 41 providing narrative information. See Figure 5 and 5a

Figure 5 : Call for evidence responses - languages of interest (English Language responses)

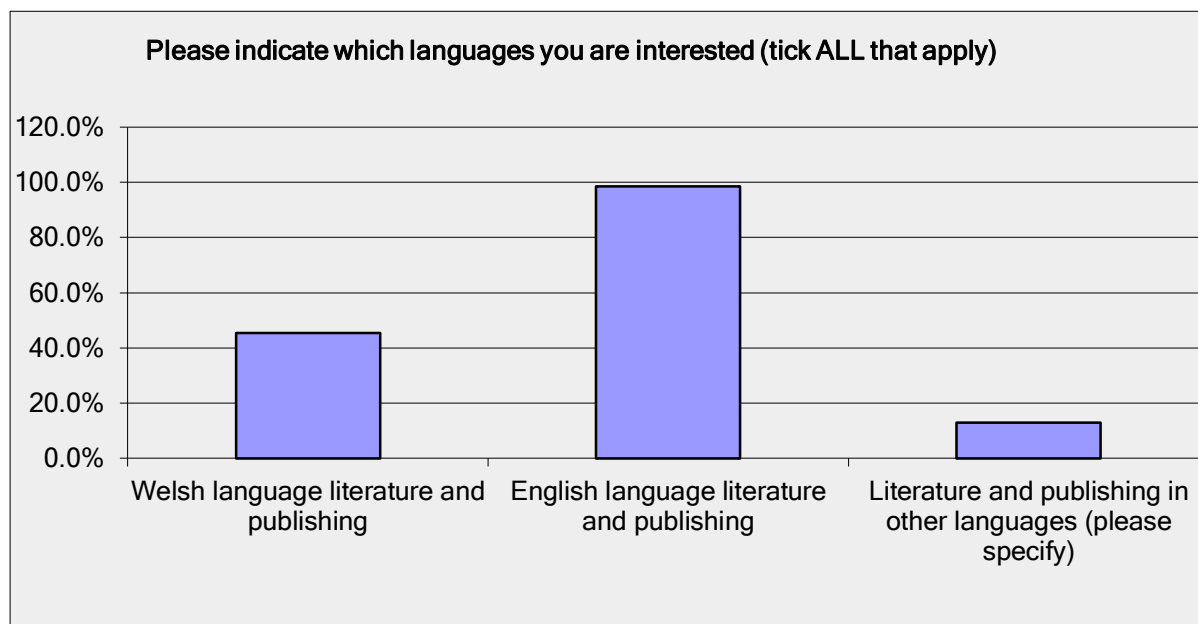
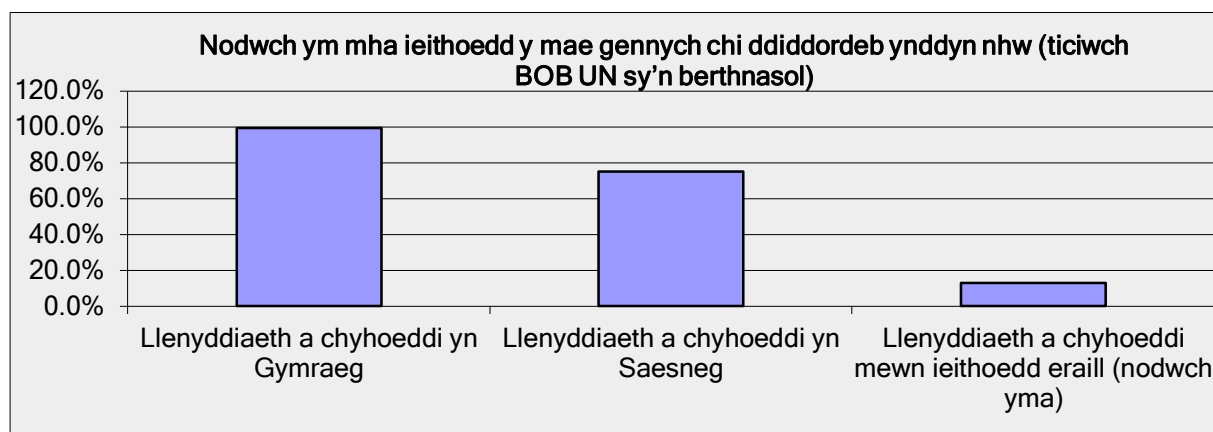


Figure 5a : Call for evidence responses - languages of interest (Welsh Language responses)



Question 6: Which publishing formats are you interested in?

Not all respondent answered this question. 473 English language respondents answered using the 'tick box' and 34 provided additional narrative information. 317 responded to this question in Welsh with 6 providing additional narrative information. See Figures 6 and 6a.

Figure 6 : Call for evidence responses - publishing formats (English Language responses)

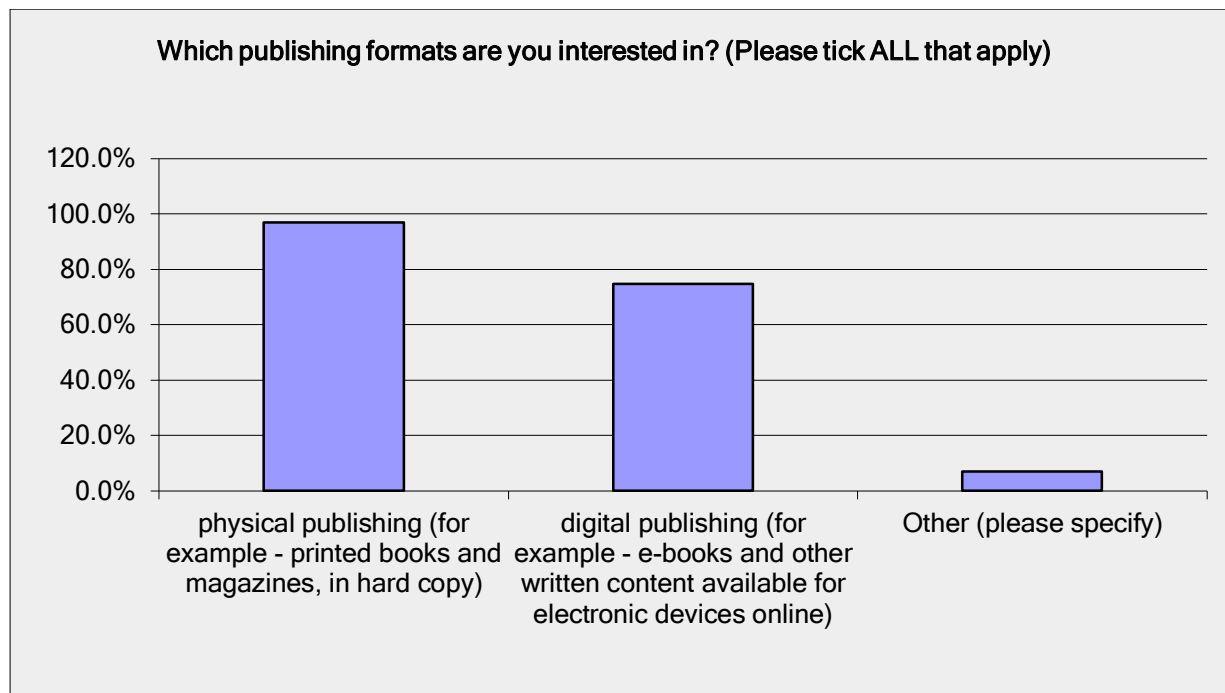
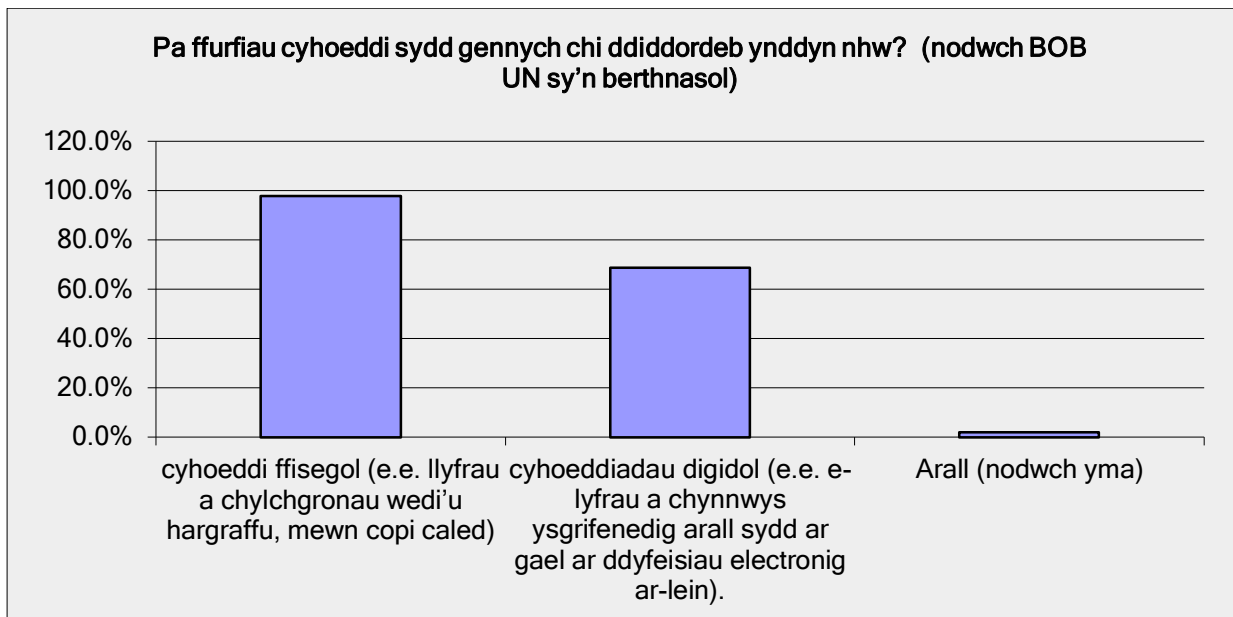


Figure 6a : Call for evidence responses - publishing formats (Welsh Language responses)



Question 7: Genres :Children and Young People

Less than 50% of respondents answered the English version of this question (240) with 6 providing additional narrative information.

Similarly, less than half answered this question in Welsh (146) with 8 providing narrative information. See Figures 7 and 7a.

Figure 7 : Call for evidence responses - children and young people - genres of interest (English Language responses)

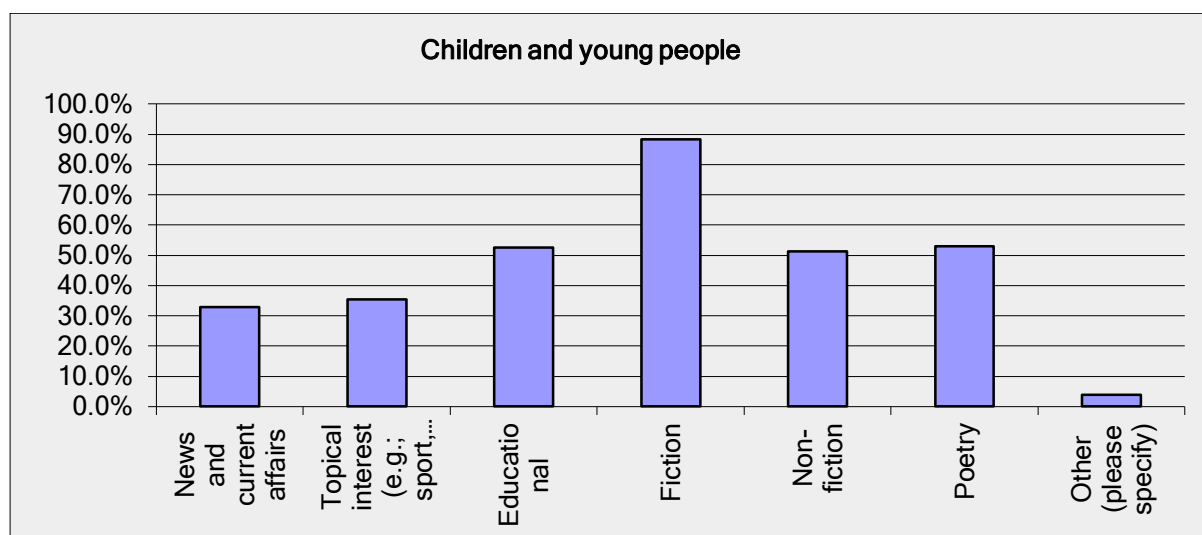
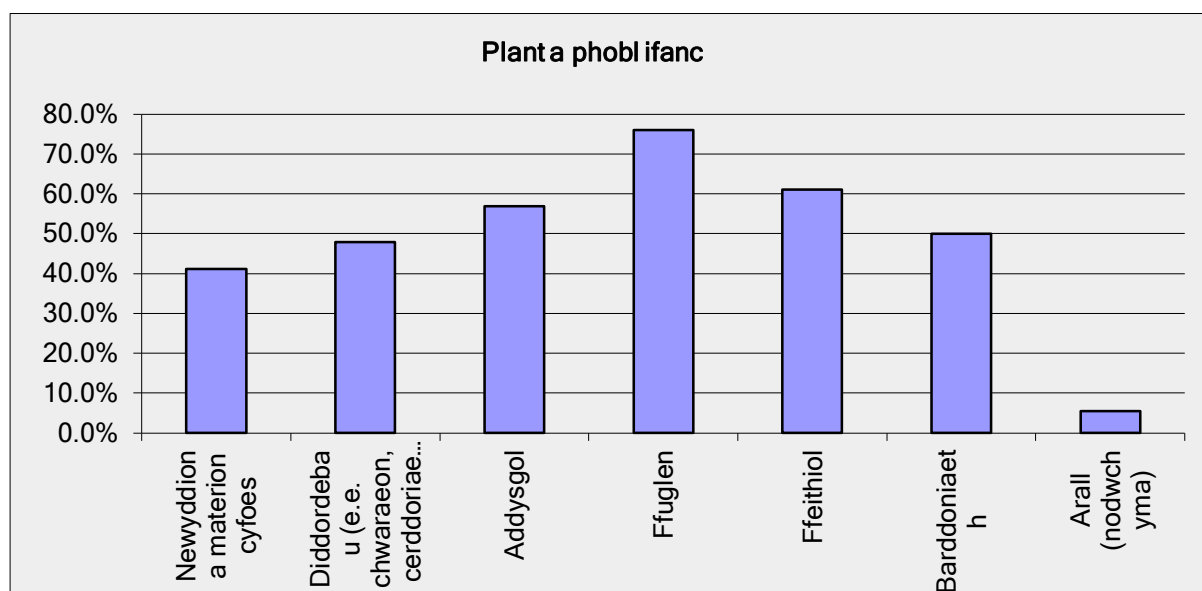


Figure 7a : Call for evidence responses - children and young people - genres of interest (Welsh Language responses)



Question 8: Adults

471 responded to this question in English, 51 providing additional narrative information regarding their reading preferences, outlining in more detail the broad categories provided by the 'tick boxes'.

311 responded in Welsh 26 provided additional information. See Figures 8 and 8a.

Figure 8 : Call for evidence responses - adults - genres of interest (English Language responses)

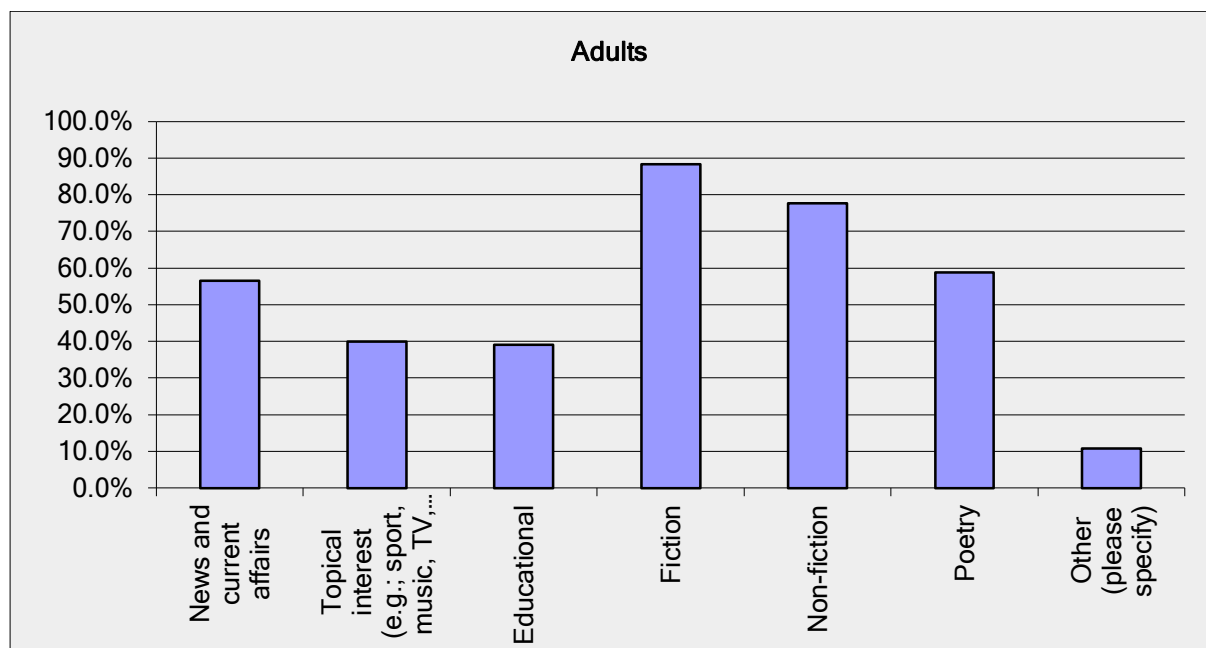
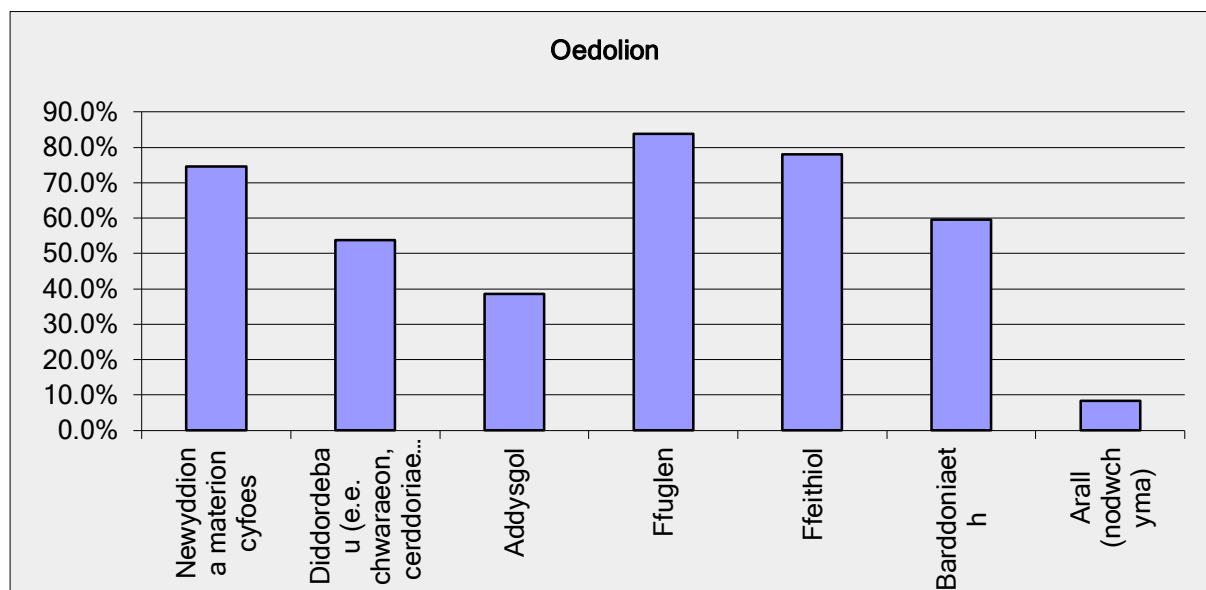


Figure 8a : Call for evidence responses - adults - genres of interest (Welsh Language responses)



Question 9: How often do you do the following? 470 responded to this question in English, 312 in Welsh. Statistical breakdown of responses are in Tables 2 and 2a and Figures 9 and 9a.

Table 2 : Call for evidence responses - reading habits (English Language responses)

| How often do you do the following? (Please pick one option for each) | | | | |
|--|-------|--------------|-----------|----------------|
| Answer Options | Never | Occasionally | Regularly | Response Count |
| Buy hardback or paperback books | 8 | 126 | 331 | 465 |
| Buy daily newspapers | 141 | 192 | 127 | 460 |
| Buy other magazines | 81 | 248 | 126 | 455 |
| Use library services to read or borrow books | 68 | 177 | 208 | 453 |
| Use library services to read newspapers or | 249 | 125 | 68 | 442 |
| Buy electronic books | 171 | 148 | 131 | 450 |
| Buy electronic magazines | 320 | 97 | 20 | 437 |
| Read free online news and current affair services | 6 | 73 | 380 | 459 |
| Read other free online content on subjects of interest | 21 | 99 | 339 | 459 |
| Subscribe to online book services | 287 | 110 | 49 | 446 |
| Subscribe to online magazines | 297 | 99 | 47 | 443 |
| Subscribe to fee based online news and current affairs | 367 | 45 | 34 | 446 |
| Attend a free literary event or festival | 45 | 240 | 177 | 462 |
| Attend a paid for literary event or festival | 79 | 232 | 147 | 458 |
| <i>answered question</i> | | | | 470 |
| <i>skipped question</i> | | | | 28 |
| | | | | |

Figure 9 : Call for evidence responses - reading habits (English Language responses)

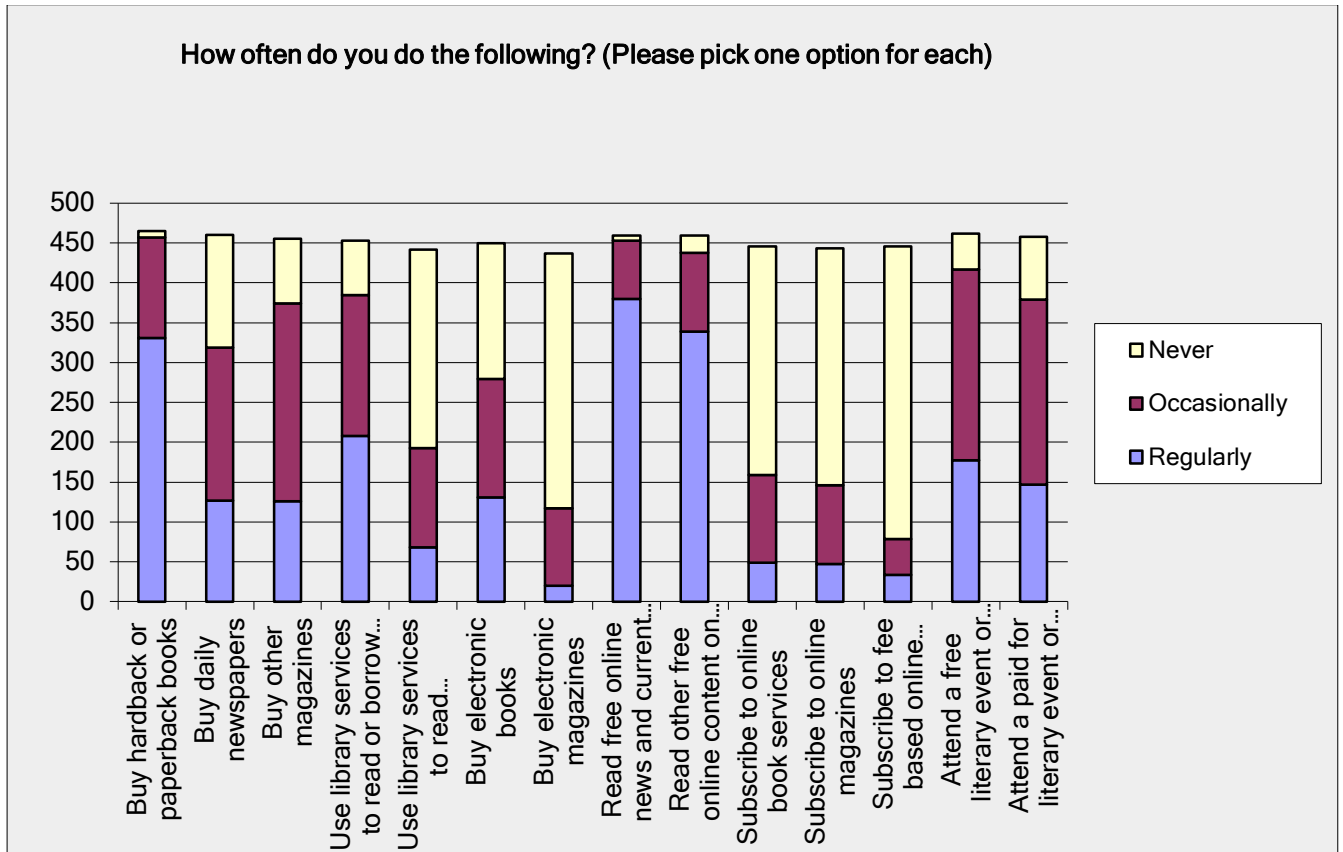
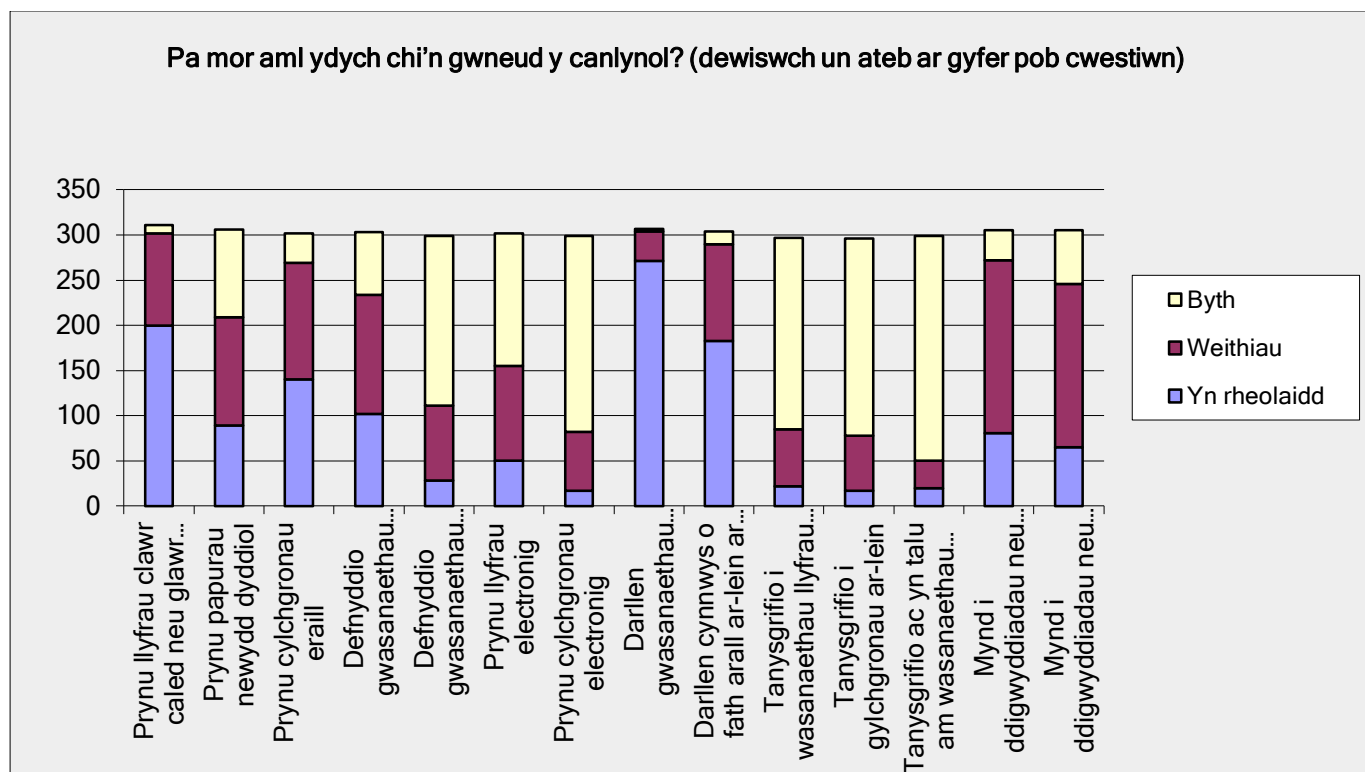


Table 2a : Call for evidence responses - reading habits(Welsh Language responses)

| Pa mor aml ydych chi'n gwneud y canlynol? (dewiswch un ateb ar gyfer pob cwestiwn) | | | | |
|--|------|----------|--------------------------|----------------|
| Answer Options | Byth | Weithiau | Yn rheolaidd | Response Count |
| Prynu llyfrau clawr caled neu glawr meddal | 9 | 102 | 200 | 311 |
| Prynu papurau newydd dyddiol | 97 | 120 | 89 | 306 |
| Prynu cylchgronau eraill | 33 | 129 | 140 | 302 |
| Defnyddio gwasanaethau llyfrgelloedd i ddarllen neu | 69 | 132 | 102 | 303 |
| Defnyddio gwasanaethau llyfrgelloedd i ddarllen | 188 | 83 | 28 | 299 |
| Prynu llyfrau electronig | 147 | 105 | 50 | 302 |
| Prynu cylchgronau electronig | 217 | 65 | 17 | 299 |
| Darllen gwasanaethau newyddion neu faterion cyfhoes | 3 | 33 | 271 | 307 |
| Darllen cynnwys o fath arall ar-lein ar bynciau sydd o | 14 | 107 | 183 | 304 |
| Tanystrifio i wasanaethau llyfrau ar-lein | 212 | 63 | 22 | 297 |
| Tanystrifio i gylchgronau ar-lein | 218 | 61 | 17 | 296 |
| Tanystrifio ac yn talu am wasanaethau newyddion | 249 | 30 | 20 | 299 |
| Mynd i ddigwyddiadau neu wyliau llenyddiaeth am | 33 | 191 | 81 | 305 |
| Mynd i ddigwyddiadau neu wyliau llenyddiaeth ac yn | 59 | 181 | 65 | 305 |
| | | | <i>answered question</i> | 312 |
| | | | <i>skipped question</i> | 19 |

Figure 9a : Call for evidence responses -reading habits (Welsh Language responses)



Question 10: Please tick here to confirm that you have read the summary of current support available.

325 answered the question in English and of those 98.2% (319) said they had read the summary of the support.

207 answered the question in Welsh, 95.2% (197) of those respondents indicating they had read the summary of support. See Figure 10 and 10a.

Figure 10 : Call for evidence responses - confirmation that respondents had read the summary of support (English Language responses)

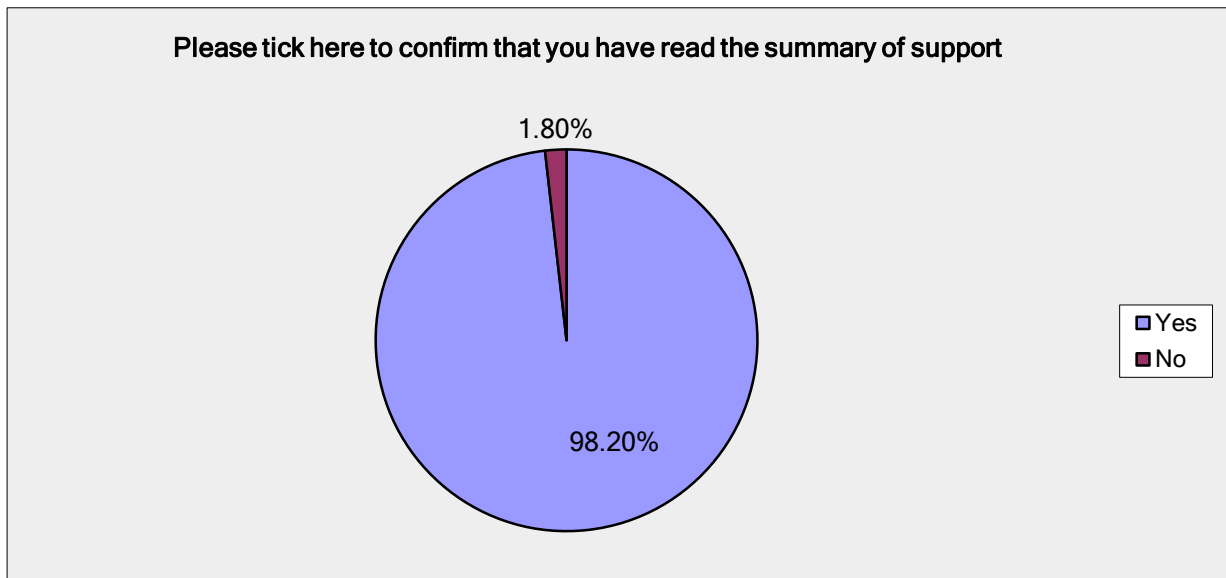
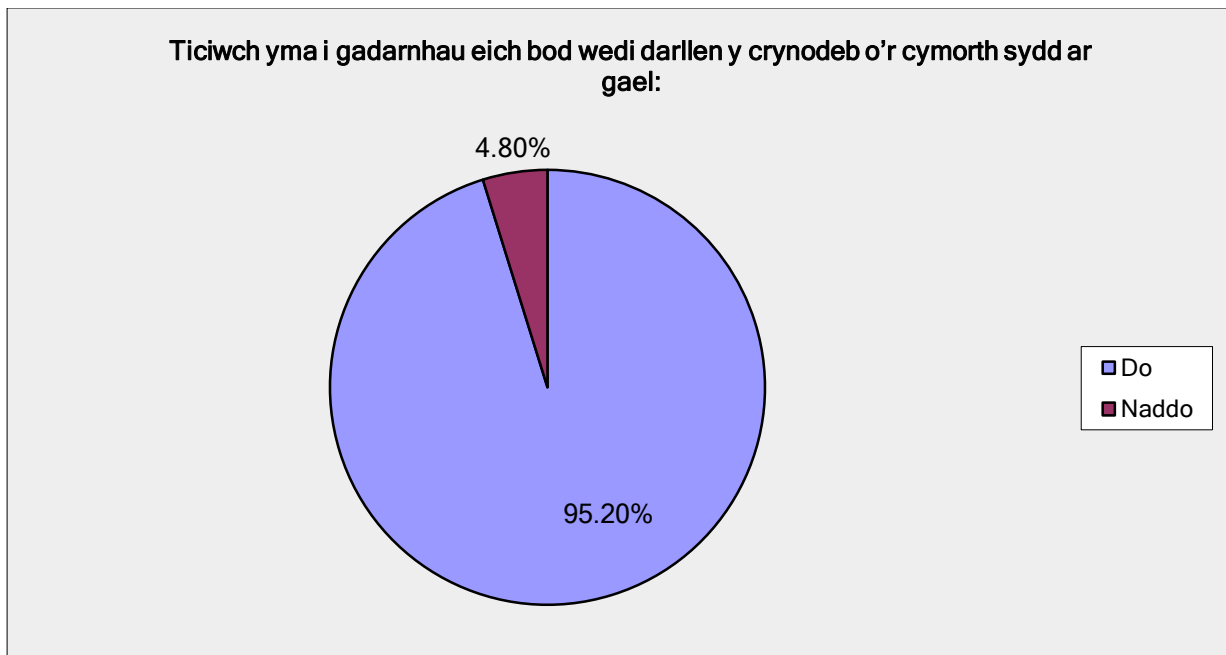


Figure 10a : Call for evidence responses - confirmation that respondents had read the summary of support (Welsh Language responses)



11. In your view, what are the main challenges faced by the publishing industry and literature in Wales? These could be cultural, social, economic or of another kind.

The following comments were received in response to this question and they are grouped under the following categories:

Economic/Funding

- Lack of funding generally in both languages
- Reduction in funding from Welsh Government
- Not enough money to fund development of new writers - may be even less with Brexit.
- External economic uncertainty - leaving EU as EU funding has helped the industry
- Brexit- impact on printing outside of UK such as Poland
- Need additional funding for books especially for teenagers
- Austerity – pressure to create work that is marketable and profitable
- No meaningful private sector publishing industry – more in one London press than whole of Wales
- Small client base
- Digital may overtake print in the long run leading to loss of jobs.
- There should be match-funding for grant aided publishers which would reduce the block grant given to each publisher (to cover overheads and literary titles) but then match fund overall book sales. This would encourage them to operate a commercial strand. It might be possible for them to build up revenue and their operations under their own steam and not have their very survival so reliant on grants.
- Uncertainty of global market
- Lack of funding for more high-brow publications
- Not enough jobs for the profession
- Reducing public spending on schools and libraries
- Higher unemployment leading to lower sales levels
- Funding for a specialised market
- Authors, despite e-books, are earning less than ever.
- Reduction in advertising spend
- Cashflow. Product development and expansion is always hampered by a lack of cashflow. Access to funds, even on a short-term credit basis, would be of immense value if the source of that funding had an in depth knowledge of the industry.
- Reduction in advertising spend which has been the main way of funding publishing.
- Difficulty in getting grants for publishing.
- People have less money to spend on attending events and buying books
- Rising postal costs
- Monopolisation of publishing by Amazon.
- People with no money to spend

- Market for conventional publishing is small, so cover prices high, making it necessary for new business models to develop. In addition, efficiency in supply - reprints take too long when content is required for university courses.
- Production costs
- The high discounts demanded by on-line and physical retailers - currently around 60% have a huge effect on the margins of small publishers such as those in Wales who necessarily do not have the same opportunities for economies of scale as the large multinationals
- Cost of producing books has increased because publishers/printing presses are charging more for publishing. More competition needed between publishers and printing presses to have more competitive prices.
- Need to invest more in the publishers to get them more self-sustaining.
- Deteriorating economic circumstances for many people especially impacting on the elderly and children/young people
- Extremely low wages and low numbers of staff compared to competitors in England (almost always London) sees Welsh publishers always fighting harder to compete, despite still being able to win excellent authors and books.

Digital/Technology

- Opportunities and challenges
- Important to have balance between print and digital
- Not enough emphasis on e-books and digital content in Welsh
- Reluctance of a number of platforms to allow Welsh publications – battle to get Amazon to allow Welsh-language e-books
- Amazon undermines sales through gwales and local bookshops
- Difficult to compete with Amazon
- Market dominance of Amazon in e-books has led to less diversified book consumption
- Developing digital provision is vital
- Digital challenge – vital to include Welsh
- Welsh needs to be on You Tube
- Need to grasp the opportunities provided by e-publishing immediately
- Need to compensate companies to make it viable for them to publish books on the internet for children and young people
- Moving to the digital world has impact on Welsh language. Everything available in English before they are available in Welsh
- Video content in Welsh vital
- Need to invest in Welsh-language reading app which has Vocab and synthetic voice for iPads etc to read Welsh-language e-books etc
- Gap between print and electronic – digital always considered secondary
- Everything now available electronically
- Too slow to embrace technology
- Lack of broadband a factor when considering digital provision
- Growth of vinyl
- Publishing industry competing with You Tube and Vimeo
- Use of electronic media in colleges and universities

- Low price for electronic formats
- E-books are fantastic in that they have enabled many to publish to the public but again the return per book is abysmal. This has also had the knock on effect of reducing demand for physical books, though they will never lose their appeal
- On-line – no promotion like bookshops and libraries
- E-publishing should be supported as an adjunct to, not a replacement of, print publishing.

Press/Newspapers

- Difficult to have discussion on literature and publishing due to the majority of people receiving news from England
- No coverage to books in the popular press
- Too much praising every Welsh content and not enough scrutiny in the press which is critical and fair
- Lack of national press in Wales as well as coverage in UK papers
- Psychological, cultural and economic barriers are obstacles to developing a 'national press'
- Television/Radio – no books on Y Gwyll etc. Need to improve links with S4C and Radio Cymru
- Need daily news service in English similar to Golwg 360
- Golwg 360 vital due to weakness of print media
- In an age when news moves quickly, better use is needed of translation technology to convert AP and Reuters reports to international Welsh-language on-line international stories before that news becomes dated

Welsh Language

- Need to attract Welsh speakers who read English-language books to also read Welsh-language books
- Less people speaking Welsh despite growth of Welsh-medium education
- Young Welsh speakers do not want to read Welsh as they link Welsh with the education sector
- Success of Welsh-language publishing industry dependent on success of Welsh-language education
- Shortage of Welsh-language text-books
- Absence of daily Welsh language newspaper
- Reaching audiences who can speak Welsh but are not used to visiting traditional places which sell books such as bookshops.
- Lack of confidence among Welsh speakers
- Not enough money by some people to regularly buy Welsh-language books and magazines
- Absence of promoting Welsh-speaking books and reviews
- A number of Welsh-language classics such as Daniel Owen out of print
- Not enough appealing novels comparable to adults in English
- So many Welsh-speakers choosing to read in English

- Reduction in the number buying books and reading generally especially in Welsh
- Cost of Welsh language books is too high compared to English language books.
- The resurgence of the Welsh language is growing so quickly that there are not enough resources available
- The lack of investigative journalism in Welsh which is beyond the capacity of present magazines and online services. And the fact that the grants system favours new titles over reprints so that valuable titles that go out of print stay out of print.
- Agree with the priority to publishing in the Welsh Government's Welsh Language Strategy Iaith Fyw: Iaith Byw (Strategic Area I6).
- The industry especially in the Welsh language is effective - "If it ain't broke..."

Different challenges between Welsh and English languages publishing

- Different challenges for both languages
- Impact of Anglo-American culture
- English present everywhere a big challenge
- Parity between both languages is vital
- Huge disparity between the Wales that Welsh speakers experience (a confident, bilingual nation that attempts to cater for all tastes) and those who do not speak Welsh (the odd poetry volume, picture book of landscapes, Welsh history or golden age of rugby books).
- Language divide – English-revenue grant has been frozen – real terms cut of 40 %
- Too much focus on Welsh Language and is waste of resources
- Welsh – small pool of readers available
- English – competing in a large pool mainly due to the lack of feeling of Welsh identity amongst readers
- More of a balance in the Welsh language sector – no representation in Anglo-Welsh publishing celebrating a vibrant, cosmopolitan, modern Wales

Libraries

- Pressure on local authorities – impact on libraries which are under pressure
- Libraries – cut-backs/reduction in opening hours
- Low level of support from libraries. Most libraries do not even have a section dedicated to writing from our own country
- The poor return for library lending is shocking
- Gradual decline of libraries within schools
- School libraries are filled with English-language books even in Welsh-medium schools.

Marketing

- Need more marketing materials

- Lack of promotion and marketing
- Lack of widespread awareness of Welsh writing in English by the public. This leads to impoverishment of sense of identity for English speakers in Wales.
- Publicity is amateurish and ineffective
- No promotion of excellent magazines
- Weak marketing and distribution infrastructure
- Poor marketing and distribution of books especially periodicals
- Exposure. With high street bookshops closing or using their space to display non-book product it is increasingly difficult to bring titles to the attention of a wide audience. It is also difficult to bring 'books from Wales' to an international market when the publishing industry in Wales has no body championing it collectively overseas.
- Importance of promoting Welsh books in the rest of the UK, which is sometimes lacking (due in part to London bias).
- Difficulties of promotion and marketing owing to the decline of bookshops.
- Lack of visibility within Wales to writers.
- Poor marketing support for Welsh publications in English language.
- Lack of visibility. Extra help to promote magazines in libraries, schools and bookshops (such as high street, chain bookshops) would be good.
- Small publishers have no marketing spend
- No attempt to market books outside Wales.
- Small publishers such as those in Wales lack the marketing spend to compete on a level playing field with their multinational competitors, even for Welsh readerships. This can lead to difficulties in visibility/discoverability in the marketplace.
- Lack of promotional opportunities outside Wales and viewed dismissively by the English
- Lack of UK wide representation
- Lack of knowledge and interest outside of Wales and awareness of writers from Wales. Irish and Scottish authors seem to fare much better and have international audiences.
Exposure outside Wales
- Domination by London/Too London centric
- Need to improve reach beyond Wales. Need to keep writers – just like Cannongate has done for Scotland
- Difficulty in getting heard outside of Wales – anti-Welsh prejudice
- Public apathy towards publications in Wales

Educational

- Emphasis on STEM subjects give the impression that there is no value in literature. More needed to spread the message that the publishing industry and its skills it fosters are crucial, valuable and central to our culture and society
- Need to increase literacy to increase the number of readers
- Access to digital educational resources vital

- Precarious state of the University of Wales Press (UWP) – financial support needed
- Concern about cuts to UWP and importance of UWP
- Illiteracy among young people
- Curriculum insufficient
- Lack of Welsh-language textbooks
- Current cuts to the funds made available in Welsh universities (particularly HEFCW) for publications and projects relating to Wales and Welsh culture; a diminution in financial support for scholarly journals relating to Wales and Welsh culture (for instance, the International Journal for Welsh Writing in English), something that threatens to cut off the life-blood of the scholarly communities who currently focus on the study of Wales and Welsh culture; difficulty of raising funds for the publication of non-fiction texts on Wales and Welsh culture in Wales, something that discourages scholars from studying Welsh culture
- Social and educational alienation in Wales's poorest communities, leading to people's disengagement from Welsh culture.
- Illiteracy - half of teenagers leaving schools are functionally illiterate
- Education linked resources need to be curriculum based and more emphasis should be on Welsh publishers being able to publish these resources more quickly and more cohesively
- Provision for children's books in Wales is minimal.
- Schools do not teach the work of English-language authors of Wales
- Reduction in school budgets for books and other related provision

Attracting Young People

- Attracting readers especially young people
- Young people expecting everything for free
- Vital to publish digitally to attract young people. Risk that traditional publishing could be out of reach of young people.
- Provision for teenagers especially boys very patchy
- Need to make reading fun especially for young people
- Need more support for parents for children to read for fun

Size of the Audience and Changing Habits

- Too many books. Need less and of higher standard
- Reduction in number of readers
- Reading competing with other leisure activities
- Need books which attract readers
- Size of the market small
- Problems in reaching people who do not read
- The publishing industry in Wales is very small and therefore the same people tend to work part-time for a number of publishers. The result of this is that a

number of them publish similar styles and genres. They should be more competitive with each other.

- Competition against UK/International publishing – problems of scale
- Publishers and small independent publishers have to compete with large English independents and publishing houses

Translation

- More translation of popular titles needed
- Need to translate more but not just from English
- Too many translations for children
- More translations needed – extend work of Wales Literature Exchange
- Need to have more non-English translations into Welsh

Bookshops

- The reduction in number of physical bookshops
- Lack of bookshops especially in disadvantaged areas

Distribution

- Pitiful book distribution beyond Wales
- Limited distribution of books in UK
- Poor Distribution for print in Wales

Some support structures not transparent//accessible enough

- Too cosy
- Audience too narrow – hear more from Bluemoose based in North of England than Welsh publishers
- Too Welsh – need to be like Scotland and Ireland
- Elitist trends within Welsh culture
- Need to have big ambition – not too niche
- Lack of accountability - old boys'/ womens' network
- Lack of ambition
- Parochialism
- Nepotism

International links

- More emphasis should be placed on making international links too in order to make a name for Welsh writing abroad through translation and author exchanges.

Magazines

- Magazines in Wales – no weight in Wales let alone across border

- Unfortunately the tiny readerships of Planet, New Welsh Review and Poetry Wales mean that they don't carry much weight within Wales, let alone beyond the borders.

Too Subsidised /Need to be more commercial

- Need to develop viable commercial model
- Sector apart from Accent is amateurish
- Too subsidised compared to England/Comfort zone. Need to be more commercial

Other Comments

- More enterprise and energy needed
- The world is changing quickly. Globalisation will likely lead to more people moving especially due to wars and climate change . This will likely lead to more pressure on small cultures.
- Too introvert – need to be more confident internationally and export content and authors
- Support with courses in places such as Tŷ Newydd – tend to be too expensive
- Challenge in English is to foster/nurture audiences within Wales
- Lack of satirical publications in both languages
- Need courses on printing – this would ensure people to stay in their local areas
- Most publishers and agents based outside of Wales
- Too much emphasis on adapting literature for children instead of publishing classics or producing original literature and original illustrations
- Better editing of novels needed
- English-language literature in Wales dependent a great deal on Welsh-speakers
- Political challenge – lack of opportunity to recognise and understand the importance of supporting publishing for minority language readers
- Cultural challenge – effective promotion of relevant contemporary books. Therefore, support of Welsh-language publishing vital.
- Supermarkets and chain-stores need to give due prominence to Welsh-language materials and small publishers.
- Cheap books in supermarkets a problem
- No network of small shops pushing Welsh culture in English
- Papurau Bro vital
- People want everything for free – very reluctant to pay
- Lack of choice and variety
- Better pay for authors for children and teenagers
- Link between history and contemporary vital
- Grow the audience
- Competition from international publishers
- More attractive covers needed – don't put children off reading

- Narrowness of literary organisations – graphics comics and virtual games are also literature
- Appropriate funding to allow authors to remain in Wales
- Apathy
- Low take-up of product
- Lack of excellence
- Book festivals need to be local, central and not large and also affordable
- Insularity v openness to the rest of the world
- Lack of networking among publishing companies. Not enough opportunities for people working in publishing in Wales at access training.
- Scarcity of accessible and affordable support and development initiatives for emerging writers, especially those from disadvantaged backgrounds
- The time and effort of voluntary editors and producers
- The sustainability and expansion of the audience
- Support for new writers
- No national reviews
- There is a lack of targeted book promotion and support for local rather than global
- Too old-fashioned
- Difficulty in attracting Welsh-language staff
- Staff hiring and training. Grant support for staff posts is limited to the ‘favoured few’ publishers who have been successful in the past – the fund is perhaps unduly pressured with the knowledge that any withdrawal of funding may result in the supported post being made redundant. Graffeg would benefit from assistance in this area
- Lack of support for micro-publishers
- Lack of understanding around how to publish in Wales is a massive challenge for individuals who have written some form of literature, who feel that maybe self-publishing could be an option but also if there is success how it can develop into a more official opportunity within the industry e.g. a publishing house picking it up.
- The option of becoming an author is still a relatively grey area for a career choice and while there are plenty of successful authors in the UK, there are only a few stand-out names from Wales who either have the right PR behind them or have the connections to be able to get their work out to the public. There's also not a lot of information about the financial aspect of being an author - what it costs, what you earn etc.
- No appreciation of books by young people
- Publishers in Wales need the freedom to publish experimental/subversive/idiosyncratic books and magazines to ensure that Welsh culture is not washed out, as often happens when Welsh writers take their work to bigger, London-based, publishers.
- Not enough variety
- Advances paid to ‘celebrities’.
- Opportunities for older writers (over the age of 40 years old - there seems to be a huge amount of support for younger writers).

- Lack of ambition, variety and cross-fertilisation which inevitably leads to cultural parochialism. Fundamentally the lack of creative and academic jobs coupled with inadequate public grants (the narrowing of artistic criteria on which these grants are awarded also ultimately renders the projects which receive funding quasi-propaganda) means that writers cannot afford to be writers in Wales.
- Lack of vision - not enough books on modern, universal subjects such as film, tv, food and travel - in both Welsh and English. Too many books geared towards the over 60s market (such as dreary autobiographies in the Welsh language), harking back to a long since past 'golden age', rather than creating space and product for younger audiences - the market of the future as older readers pass on. There should be more of a balance!
- Timing: There is an average wait of over a year to have a three chapter submission read. Sometimes, it's over a year and a half to get a yes or a no to a manuscript. That's way too long.
- Quality mixed – poor quality of fiction
- Need to be more honest and win back customer trust
- Limited readership, not enough variety of publishing particularly in Welsh.
- No critical mass of authors or publishers
- Attention span of people shortening
- Debasement of content due to reduction of editorial monitoring
- variety of books
- Too many publication – jam spread too widely
- Lack of agents in the industry
- Lack of networks – accessing training etc. Need a network for English-language publishers in the same way as *Cwllwm Cyhoeddwyr* for Welsh-language publishers
- Publishing and literature should be considered separately – different challenges
- Challenges in Wales no different to other countries
- Problem – small part of economic portfolio
- Structural and audience building
- Lack of free culture – e.g. in pubs in Ireland
- Lack of support from mainstream booksellers
- The lack of cultural or economic weight to gain orders from the remaining chains, such as Waterstones and supermarkets.
- Extending the commercial reach of the industry
- All the new books are always copies of English books converted into Welsh

12. Which aspects of the support currently provided for publishing and literature are working well (and why)?

The following comments were received in response to this question and they are grouped under the following categories:

Welsh Books Council (WBC) and Support for Publishers

- Golwg 360
- Professionalism of editors
- Gwales
- Magazines
- Bookshops
- WBC Editing Service
- Creative Editors in publishing houses
- Grants to Authors
- Support for publishing houses
- Marketing and Distribution
- Originals important – not just adaptations from English
- Promoting books such as *Gwledd y Nadolig/Llyfrau'r Haf*
- Library of Wales
- World Book Day
- WBC training for editing, design and production
- WBC Distribution Centre
- Block grants to major Welsh publishers - completely necessary economically, and the cultural benefit is immeasurably great.
- Covers improving
- WBC grant system works well in very straitened circumstances.
- Literary magazines
- Children's books – work of Firefly
- Publishing grants - publishers would not exist without these and they are bringing Welsh literature to the attention of mainstream audience.
- The Revenue Grant – although no increase in funding
- The author advance, marketing grants and ILBGs administered by the Welsh Books Council are crucial in allowing small but ambitious publishers in Wales the opportunity to compete with large English publishers for quality authors, and then to market their books effectively to the trade and readers across the UK.
- Success of publishers
- Support for bookshops
- Importance of WBC School officers
- WBC Panels
- WBC grants panels seem to work well. They are transparent and ably supported. It seems important to sustain separate panels for Welsh and English publications.

- The emphasis on the quality of writing, production and on sales targets in the current grant system is one of its strengths to ensure the competitiveness of books from Welsh publishers.
- The standard of design and editing is high. Support from WBC has clearly worked particularly well in these areas.
- WBC grants scheme to booksellers for events
- Good Networks
- WBC's support in terms of sales and marketing is largely restricted to financial support for marketing posts. This is excellent, but WBC could do a lot more with central support and shared marketing services.
- The WBC work very well to publicise the books they distribute
- WBC advice on sales, marketing and design is really helpful for any new authors as it means that you can decide on the best approach to promote your work. The chance to take part in workshops, courses and receive manuscript assessments also means that even if your work isn't ready to publish, there's the opportunity for experts to provide support so that you can get your work finished and hopefully published.
- WBC works well in partnership with Radio Cymru on a number of initiatives such as novel of the week.

Literature Wales (LW)

- Book of the Year
- Writing Squads
- Writers on Tour
- Tŷ Newydd
- LW website easy to navigate and informative.
- Literature Wales events and workshops have helped widen the participation of Welsh people in literary life. Grant support for authors and publishers is invaluable for the sustenance of culture and informed, considered cultural and political debate in this country.
- Support for creative writers, administered by LW, seems to work well.
- Bursaries for young writers
- Social Media such as LW's *Her Barddoniaeth*
- LW - exciting opportunities for young people.
- Gŵyl Dinefwr was very successful – a type of festival promoting Wales' two literatures - a Welsh Hay.

Other Comments

- UWP is doing sterling work, as are the smaller presses.
- Human Resources key
- Festivals thriving
- Bookshops
- Grants.
- Libraries.
- Residencies for writers
- Grants for publication - but to a very small elite.

- Support for publishers
- Reviews and magazines
- Wales Literature Exchange
- Advantage of not having to go through a literary agent
- HEFCW ring-fenced money for books on the study of Wales.
- Grants for authors, training for editors and translators. Programmes such as the Wales Literature Exchange.
- Literature is good for health
- Libraries and the service standards libraries subscribe to in Wales are excellent, providing a key role in supporting communities.
- Papurau Bro

13. Is there anything that should be done differently (and, if so, why)?

The following comments were received in response to this question and they are grouped under the following categories:

WBC and activities funded through the WBC including publishers and magazines

- Change the name of the WBC in a digital age
- Less financial support for WBC and more for the publishers
- More funding for Golwg 360
- Improve WBC marketing especially in English
- Gwales works quite well but it not widely known outside the trade. Gwales needs to be improved and easier to use. There needs to be more ways of buying Welsh books.
- WBC distribution – too much of a monopoly. Shops across Wales do not see reps from the Distribution Centre
- Grants for English-language publishers should be reconsidered although Welsh-language publishing grants should be preserved). An environment that encourages more risk-taking, that raises standards through competition (for example book covers are especially poor in comparison to publishing
- WBC should be far more proactive. The WBC does not actively promote English language publications to their retailers
- Change WBC distribution
- Current WBC periodicals franchise model creates dependency rather than an entrepreneurial business model.
- Apart from Planet other English magazines are not interesting and insular.
- Funding to O'r Pedwar Gwynt – too specialist
- State Aid – problem for English-language magazines
- Increase magazine subsidy to allow larger and better publications - outcome would be a healthier culture of criticism and investigation, crucial to the advancement of culture and public life in Wales.
- The current grant system of WBC disproportionately advantages so called programme publishers who are in receipt of an annual block grant but who also receive more money per title published than publishers who apply for individual grants.
- More central services within WBC e.e editing/design etc
- Review of magazines – lost opportunity
- Fewer books – better quality and Marketing
- The Library of Wales series needs reassessing.
- Importance of Magazines. There is some overlap between *Wales Arts Review*, *New Welsh Review* and *Poetry Wales*
- More financial support for Welsh popular and academic magazines in both languages.
- Some thought should be given to making the distribution centre a business independent of the grant-giving body of the WBC. As presently constituted, there is a clear conflict of interest.

- Several of the publishers in receipt of grant funding are printer-publishers and effectively benefit twice from government support, i.e. for content creation and production and it could be argued that this creates an unfair advantage.
Actual sales figures as recorded by the publisher and excluding returns should be published and available for scrutiny for all grant-aided titles. WBC sales are just a part of the picture.
- There are a small number of Welsh publishers which have a complete monopoly on the book scene in Wales - so many white, middle aged, middle class men dictating what is worth publishing/reading and what isn't.
- The WBC panels seem to make little difference.
- The WBC as a distributor has limited interest in English language titles.
- Not certain of the value of the Books Council design service.
- If there is not any more money the WBC should be more selective in making grants otherwise publishers will just go to the wall and decisions will be made for them.
- A firm and clear emphasis on digital media should be government policy and needs to be at the forefront of WBC policy.
- The WBC distribution service charges a very high percentage of cover price forcing up the cover price to consumers.
- WBC should commit to an annual review with each publisher in Wales (especially independents) to highlight opportunities and grow awareness and sales.
- The publishers in Wales should be encouraged to improve the standard of creative editors to raise standards. Currently editors only concentrate on language accuracy.

Literature Wales and activities funded through the organisation

- More investment in writing squads so that there is one in every Welsh county
- LW need to be fair to Welsh/English writers
- Less emphasis on Roald Dahl and Dylan Thomas and focus more on authors who are alive
- LW bursaries for writers scheme is not responsive to the needs of writers. The length of time between making an application for funding and getting a decision, is too long. A faster scheme for smaller projects - say 1 month - would be much more writer friendly
- Need redistribution of resources within LW
- The Wales Book of Year Awards appears to generate a little publicity but has little real impact on sales of nominated books or on the visibility of literature as a whole.
- The Wales Book of the Year needs to be better supported, with the prize money returned to its previous level
- A writers' organisation is needed that is either separate from LW, or a LW that supports and promotes living, working writers
- Need to reconsider LW bursary for writers and allocation between languages. It is wrong to judge Welsh and English language applications together because a) the issues around the Welsh language are radically different b) the

Welsh language will always come out a poor second against English. Need a strategy which ensures that financially - both languages are treated equally.

- More festivals/events that focus on new work and new to midscale writers - More connections to other small nations in literary events and projects
The writers on tour scheme is too cumbersome and poorly funded to achieve its aims. LW appears to focus on educational (school) initiatives and young writers rather than the writer community as a whole.
- Clarity needed on role of LW
- LW – promoting itself
- Pathway from LW bursaries to the Welsh publishers is not clear
- Remit of LW confusing
- Tŷ Newydd is welcome but not visible. Spectacular literature house in Cardiff is needed similar to the literature house in Oslo to hold events
- Dylan Thomas Prize should be focused more on writers who are Welsh or are from Wales

Marketing

- Funding to support advertising and production of books.
- Find ways to increase the incentives for publishers to promote books ambitiously - outcomes would be that Welsh books achieve greater commercial success.
- A more dynamic marketing Strategy to reach new audiences
- Funding should be targeted at reaching the widest possible readership within and outside Wales, ie by helping put books from Wales into shops, including chains and supermarkets, also into libraries, and reviews into national newspapers and online promotion agencies such as Lovereading or The Reading Agency, or Goodreads (run by Amazon) and by upholding quality standards so that trade and consumers want to stock and buy them.
- More publicity for current initiatives and involve more public events
- More to promote Welsh-writing and publishing outside Wales
- A more impactful presence on social media
- Marketing of Welsh books outside of Wales must be taken seriously. Too many Welsh books drop off the radar immediately after publication. This is largely due to the insular conservative nature of the Welsh publishing houses.
- Increase in marketing support promotes awareness and sales

Educational

- Worry for academic publishing after end of UWP grant
- Importance of UWP
- Increase education materials
- Funding for children's books from Wales should be reassessed and potentially increased in the light of the significantly lower levels of child literacy in Wales as compared to England, Scotland or Northern Ireland in the last available figures. Investment here in publishing books and in bringing authors into schools would reap rewards in terms of literacy and education.
- Important that HEFCW continue to fund academic titles relating to Wales.
- Asking schools and working with exam boards WJEC/CBAC on supporting material for courses would encourage pupils to use the Welsh language more

and more into their late teens and further, thus increasing the demand for resources which in turn would result in larger grants awarded to Welsh publishing.

- A more open minded attitude to children's literature would bring Welsh publishing into the modern world.
- Scholarly publishing is a key part of the publishing and literary sector.
- More resources needed for children
- Getting in to schools and championing Welsh books.
- Encourage education authorities to put more emphasis on reading for pleasure and promote contemporary literature
- Support non stem intellectual activity – this leads to thoughtful citizens.

Digital

- Less focus on digital – continue to support but not obsession
- Promote Welsh books on digital platforms
- More on-line publishing
- More self-publishing in Welsh especially electronic
- Moving to online publishing would also allow new digital formats to grow.
- Treat online spaces, literatures, and experiments as just as worthwhile as the printed form.

International

- Need presence abroad at book festivals
- Return to Frankfurt Book Fair

Press/Media

- Increase in coverage in the press/media
- Need English-language news service similar to Golwg 360
- Funding to support national newspaper (either expansion of Western Mail to Wales wide coverage or new publication)
- Literary programme on television
- Critical scrutiny in Welsh language publishing should be encouraged and supported in English language media.
- Ireland and Scotland have strong mainstream press compared with Wales

Funding Generally

- Wales should get rid of state publishing. None of the writers cannot even get an agent
- More grants to publish free on-line material
- More investment in both languages. Including more bursaries for talented authors
- Cancel all subsidy especially Welsh language
- Evidence that subsidising the book sector actually represents value for money.
- Publishers should sink or swim in the commercial world - if they fail then it is easy for writers to publish their own work and/or develop cooperative publishing models without subsidies. This would lead to the production of

some great contemporary work from Wales and the emergence of a true Welsh/literary/bardic voice that will ring through the ages

- More funding for local authorities to arrange more events such as promoting Book of the Year and televising the ceremony and making it a festival of national importance
- Remove funding from all publishers in Wales and possibly distribute all the funds directly to writers based on some criteria to be discussed, designed and developed.

Translation

- Funds to translate both English and Welsh literature into other languages should be increased both to broaden the reach of Welsh culture in the rest of the world and to help Welsh publishers win rights deals which could significantly boost their income and reduce dependence on government support. This would be in line with government funding to other small nations or cultures such as Latvia or the Basque country.
- Translate more popular books
- Wales Literature Exchange has been doing excellent work - more needs to be done to promote translation of literature from and into Welsh
- Of all the bodies funded Wales Literature Exchange is the most invisible

Papurau Bro

- Papurau Bro should not be formalised
- Material prepared centrally on matters of national interest should be available to be included in every papur bro
- Need to link papurau bro with Golwg 360.
- More support for papurau bro— at the local level papurau bro are vital to enable people to read Welsh. Some Welsh speakers only read papurau bro

Other Comments

- More books to be produced and ensure they are known about
- Increasing sales
- None of the small Welsh presses have expanded exponentially in the period since devolution.
- More support for cultural events generally.
- More sharing of ideas and resources. Neoliberalism encourages competition and this doesn't always work for the sector. On the other hand mergers and simplifying eradicates a diversity which is also essential.
- Create a better understanding of this economic order that is holding us back in order to come up with radical solutions. Look abroad for answers. Don't reinvent the wheel.
- Be careful when dealing with the language divide. Involve more monolingual English in Welsh language programmes (and visa versa) in order to aid understanding and lessen divisions. Hire leaders who are great at what they do and if they are not bilingual make sure they understand the needs of the Welsh language and are committed to learning it.
- Eliminate bureaucracy.

- Be open-minded and learn from others.
- Ticking boxes - such as deprived communities
- Less cronyism
- Risk should be taken more often. Without this literature will never progress.
- Raise Standards
- Better editing
- More popular titles
- Value for money
- More events in north-east Wales
- Appeal to young people
- Advertising
- More coverage to good books which please sophisticated readers.
- More emphasis on better drafts of novels/books. Some books appear with mistakes because publishes in too much of a hurry to get books to shops
- Promote discussion on books
- More opportunities to work in partnership
- More awards within the Welsh-Language magazine industry – awards in England lead to publicity and effective marketing to publishers
- Promote less Welsh-language books
- More material free on-line
- Platform for BME writers
- Supporting commercially viable, outward-looking projects to take them UK wide and beyond.
- Too cliquey
- Any possible imbalance in the levels of funding/staffing for literature promotion as compared to literature production should be addressed, as the former cannot exist without the latter.
- Welsh arts, trade and literature promotion agencies could talk to each other and join forces with the Welsh Government to present a cultural case to the Welsh and UK book trade to stock books from Wales across genres. A visionary long-term project to counter the inequality for both readers and writers.
- Welsh writing should also be more popular rather than high-brow
- More reading for pleasure
- Organisations too close
- More funding from Cardiff via ACW for small press publishers in Wales, leading to more opportunities for writers in both languages.
- More literature-related events in north Wales and in both languages, maybe some bilingual to encourage more non-Welsh speakers to both attend and to hopefully develop more of an interest in learning and using Welsh.
- Fewer publishers linked to universities would provide "journeyman" writers with better opportunities for publication and remove the incestuous nature of "creative writing" associated with those universities.
- Move to open access models of publishing, where subsidies are provided to cover the cost of online publication. There would still need to be a selection process - eg peer review of some kind, or publisher intervention - then content is made available using an open access licence free of charge. Removes any

barriers to access, promoting readership by the general public, researchers and students.

- Provide print on demand option for rapid delivery, on a cost recovery basis, or possibly with a small profit margin to act as an incentive for commercial publishers (or to replenish the subsidy fund). This should include back lists from all Welsh publishers. Libraries or other customers who still want print copies could purchase at a reasonable price to make available alongside the free print version.
- A bilingual literature festival in the north perhaps based on the Eisteddfod's Babell Lên or Hay-on-Wye but on a smaller scale
- Disappointment with Hay on Way Festival – need to make better use of Welsh big names based in England
- Facilitate distribution around the world - outcome would be that Welsh cultural impact would be spread more widely.
- Small festivals and targeted distribution of information on Welsh / local literature - covering all genres and publishers - would increase visibility and klout of local authors.
- Mailing lists for genres and all Welsh books.
- A selection service of reputable work from indie authors and books of Welsh interest would put weight behind some of the books published.
- Awards for multiple genres, more winners, not just one book that is high-brow. Broaden the spectrum
- Authors need a genuine voice. Currently they have none.
- Genre writing needs to be recognised in Wales - everything is geared towards worthy works which require financial support. Genre books seem to be seen as suitable to be taken on by mainstream publishers but Welsh writers want to be published in Wales and whilst the odd one or two a year get reviewed and recognised in their homeland most don't.
- Focus on producing commercially viable titles and overall reading schemes to appeal to the general public.
- The support of a new major independent publishing house in Wales that focused entirely on new and exciting voices in Wales, with a focus on global markets and digital experimentation would put Wales on the map.
- Funding for festivals should be more carefully co-ordinated - festivals often have low attendance, or are just attended by those already engaged in literature and publishing in some way, so some strategic thinking on location, theme etc. With better planning we could engage those who are interested but not yet involved. Also, several authors have been organising their own (seemingly successful) book fairs and we should look at why they feel the need to do this and work with them.
- Outreach and information about Welsh literature does not seem to be equally well distributed throughout Wales. Information about funding and initiatives is hard to come by in Mid Wales.
- Streamline funding application processes could be considered as publishers currently spend a long time filling in forms
- A website pathway could be devised, made up of questions that take authors/publishers, etc., to where they need to go for the guidance/support they need. Rather like a medical pathway page. This would enable people to

find the support they need quickly and save time-wasting within the groups trying to point people in the right direction. The same result would be partly achieved by a clear description of each body and what they seek to offer.

- Editorial work on fiction could be better, and the work especially in Welsh could go through another draft or so before publication
- Wales should rejoin the National Poetry Day initiative.
- Better integrated bilingual publications (Welsh and English in same doc for audience of both or either language)

14. Is there anything else you would like the Panel to consider?

- Audio books
- Lack of Welsh-language resources specifically for learners – existing provision is good quality but very limited.
- Website to review books in both languages and also to introduce poetry
- Hold Tŷ Newydd 1 day courses throughout Wales to enable people who live afar to attend.
- Extend mentoring scheme to include advice and leadership
- Encourage original books for children.
- Target new markets such as learners. Provision for them is very disappointing.
- Grants to shops to arrange events
- Work in partnership with festivals such as Gŵyl Arall Caernarfon and local initiatives.
- Use libraries to hold events.
- Better books for teenage boys
- Better novels
- Small number studying Welsh for A Levels – concern for future
- Festival similar to Hay but in the Welsh language
- More resources for children's books and local books.
- Money should be focused on supporting diverse/community focused literary activity
- Need to attend international book fairs
- Training for BME writers.
- Workshops for second language Welsh speakers wishing to get help with writing in Welsh. I have noticed the same names and types of ethnicities more or less appearing on Library shelves
- Open up the prizes and awards to everyone regardless of qualification, publishing record, age, method of publication and who they know. Find different ways of filtering and judging work that doesn't depend on some academic's arbitrary ideas of what constitutes literature
Lottery support – writers should receive the same lottery support as sport
- Using available resources, libraries, local not-for-profit radio, (e.g Radio Bronglais in Aberystwyth) and small events /festivals to promote the available content of Welsh publishing. There is Reinstatement of literature development officers working in the Welsh heartlands, both to promote English language Welsh writers and to promote the joys of the language to English incomers.
- Develop branding add value by enhancing your intellectual property.
- An incubator scheme to bring skilled and experienced literary agents to Wales would be a strong step forward for the industry. This is a key role that is completely missing and an agent will provide a service that a publisher does not.
- Establishing a single website where people can search for the help/organisations that they need. This should cover only those organisations

actually based in Wales, but would include writers groups, agents, publishers, editorial services, proofreading services, etc. Doesn't need to be fancy it just needs to be a list of where people can go for help, the disclaimer being that it is just a list and it is the responsibility of the user to ensure due diligence.

- Raise reimbursement for library lending. Include self published books in competitions/bursaries/festivals. The quality of the book should define its merit, not the way it was published.
- The importance of the role of independent bookshops to the economy and community as meeting places, business sustainability and local identity.
- A big national book fair, in Cardiff, in which Welsh authors can meet their readers and promote their own works.
- Some of the money being paid for writers' foreign trips (via WAI) seems an absolute disgrace - agreed there's a need to promote trips abroad but some of the funded seems v hard to justify.
- A linking of larger publishers with smaller Welsh publishers. A system that would support and develop publishers range.
- Set up an annual, anonymised author feedback survey specifically reporting on publishers. This should be for published authors, feeding back only on their own publishers.
- Have a mechanism for acting on any concerns that result from this survey.
- Set up a sub-panel to establish a safeguarded minimum payments scale to authors publishing with subsidised publishers. This should not limit the negotiating of higher rates where appropriate.
- Diversity in publishing and literature in Wales.
- More publicity and support of Welsh publishers and Welsh authors on a national and international level for children
- The absolute importance of libraries as a community hub and resource for literature and its promotion.
- Spend more money in promoting all Welsh writing not just our high profile writers.
- More poetry books with both English and Welsh translations/originals side by side. More translation workshops and residencies.
- The closure and reduced funding of library services is having a huge impact Arts centres should have bookshops
- There is a lack of clarity in the sector as to which strands of funding should be used to support spoken word and related activities, and as a result it is currently fragmentary and reliant on the efforts of a handful of individuals.

Section 3 : Comments and Information

Provided below is a sample of comments and information, broadly representative of the larger body of evidence collected by the on-line questionnaire.

Comments outlining support for the work of the Welsh Books Council and the funding it distributes to publishers

- Mae'r gwaith a wneir gan y Cyngor Llyfrau yn hanfodol wrth ddarparu grantiau ar gyfer cyhoeddi ond hefyd drwy ddarparu cymorth golygyddol a marchnadol. Mae'n hanfodol fod cyllido'r gwaith hwn yn parhau.
- Mae Cyngor Llyfrau Cymru yn sicrhau bod cyfrolau amrywiol a safonol yn gweld golau dydd yn y ddwy iaith yn gyson drwy'r flwyddyn.
- Un o brif fanteision y drefn bresennol yw fod y Cyngor Llyfrau yn delio â'r byd llyfrau a'r fasnach lyfrau yn ei gyfanrwydd - creu'r deunydd, ei argraffu, y cyhoeddusrwydd a'r gwerthu. Felly mae'n ymwybodol o anghenion pob un sydd yn y gadwyn, o'r awdur i'r darlennydd a'r prynwr. Mae hwn yn gryfder mawr.
- Rwy'n credu bod y Cyngor Llyfrau yn gweithio'n dda ac wedi codi safon olygyddol, dylunio a marchnata llyfrau.
- Mae grantiau'r Cyngor Llyfrau yn bwysig iawn i helpu awduron
- Wedi ymweld â nifer o wledydd - mae Cyngor Llyfrau Cymru yn unigryw ac yn gwir haeddu pob cefnogaeth ariannol.
- Mae defnyddio'r arbenigedd a geir o fewn staff Cyngor Llyfrau Cymru yn greiddiol ac amhrisiadwy i barhad y diwydiant cyhoeddi yng Nghymru. Mae'r strwythur a ddefnyddir i wneud penderfyniadau parthed dosrannu grantiau i wahanol gyhoeddwr yn gwbl dryloyw ac o fudd mawr i'r diwydiant.
- Mae'r gwasanaeth newyddion a gynigir ar hyn o bryd gan Golwg 360 yn arbennig o dda. Mae'r wybodaeth a geir ar Gwales yn arbennig, a'r gwasanaeth a gynigir wrth ddsbarthu llyfrau trwy'r wefan heb ei ail.
- Mae'n wych bod cymorth ar gael i ryddhau awduron profiadol i ganolbwyntio ar ysgrifennu.
- Cryfder mawr yw'r ffaith bod corff fel y Cyngor Llyfrau ar gael i arolygu a hyrwyddo'r holl broses o greu - o'r egin syniad hyd at ddsbarthu'r cynnyrch gorffenedig.

- Mae'r modd y cynhelir y diwydiant cyhoeddi gan CLIC er mwyn sicrhau bod y fath ystod o deitlau'n ymddangos yn flynyddol yn destun diolch a gwerthfawrogiad. Mae'r gefnogaeth hon, yn arbennig i deitlau Cymraeg, yn allweddol os am gyflwyno'r iaith fel un sy'n gallu cynnig amrywiaeth o brofiadau cyfredol a pherthnasol. Cyflwynar CLIC waith ardderchog ar gyllideb gymedrol, a gwelir ei lwyddiant pan yw'n ymgymryd â digwyddiadau ac achlysuron fel Diwrnod T. Llew Jones a Gwobrau Tir na N'Og, e.e. y cydweithio eleni gyda'r Urdd a chwmni teledu Tinopolis.
- The revenue grant, although standstill funding has seen it decline sharply in real terms in the last ten plus years, is still an excellent and viable way to try to help level the playing field a little with the large competitors that Welsh publishers must take on even to publish successfully to a Welsh readership as well as hopefully beyond Wales, and also brings vital stability to forward planning and some absolutely vital support for staff costs.
- The WBC is excellent in supporting journals and book publishing in both languages.
- WBC is an excellent national institution doing invaluable work and should continue to receive high and preferably increased levels of support.
- Grants provided by the WBC offer essential support for publishers and authors whose output has a focus on Wales. The training it has offered to publishers has helped to drive up standards in the areas of editing, design and production. Through its distribution centre it provides a unique service, not only to independent booksellers and chain in Wales and elsewhere, but also to anyone with an interest in Wales via gwales.com The principle arrangement of awarding grant money works well due to the fact that WBC is well established with an experienced staff, robust procedures and a clear focus and deep commitment to the publishing industry in Wales.
- The Welsh Books Council is doing a good job with the small resources it has. But the tight budget means that it cannot function properly so that innovation and change becomes really difficult. This situation is also true for the publishers and project organisers - tight resources, short term project-based funding etc, means that we are limited in what we can do.
- Financial support and advisory services from the Welsh Books Council are fundamental in allowing publishers to maintain a Welsh literary canon, which is an essential component of our national identity.
- The Welsh Books Council manages to do a great deal on little funding. As a result, Welsh publishers stand a fighting chance in the wider world.
- Generally speaking the Welsh Books Council's services work well and have transformed design and editorial standards.

- Hoffwn ganmol y Cyngor Llyfrau: maent yn ardderchog. Noder hefyd fod pob un o dai cyhoeddi Cymraeg Cymru mewn ardal Gymraeg, wledig sy'n ddifreintiedig. Gyda'r holl ganoli i Gaerdydd mewn meysydd eraill, mae'n hollbwysig fod hyn yn parhau.
- The importance of what the Welsh Books Council does should stop being questioned - without its services Welsh culture would be less vibrant.
- Credaf fod Cyngor Llyfrau yn gweithio yn effeithiol iawn. Maent yn rhoi blaenoriaeth i anghenion y cwsmer (awduron / cyhoeddwr / darllenwyr). Mae rhai o sefydliadau llenyddol eraill Cymru yn rhoi mwy o flaenoriaeth (ac arian) i'w delwedd eu hunain. Credaf fod hyn yn broblem.
- Mae'r Cyngor Llyfrau'n gwneud gwaith rhagorol ac yn gwneud i bob ceiniog gyfri. Mae'r systemau trefnus a chlir sydd gan y Cyngor yn annog hyblygrwydd, annibyniaeth gweisg unigol a safonau uchel. Dylid rhoi mwy o arian iddyn nhw! Basai'n llawer gwell gen i weld mwy o arian hyrwyddo a marchnata llyfrau (a darllen)

Magazines

- I think magazines, although they may not have huge circulations, are vital for the creative and cultural life of a country. New Welsh Review, Planet and Taliesin are important centres of discussion, debate and new writing. These grants are administered by the WBC, with their marketing and design support, and I believe they are the reason that literature in Wales is blossoming.
- These magazines provide a critical voice to the cultures and literatures of Wales through diverse and vibrant contributions. The Welsh Government should be proud of its contribution in supporting Planet, NWR, Barn and the like, rather than seeing culture as some sort of encumbrance that needs to be cut.
- The demise of the journal Taliesin was lamentable and has never been fully explained. The new journal, O'r Pedwar Gwynt, seems excellent however. A vibrant and diverse periodical culture is important.

Library of Wales – Support and Criticism

- I do like the Library of Wales series but it has probably reached its peak now.
- What is the real value for money in the Library of Wales project? Since well over £1 million has been expended on this project, resulting in the republication of a long list of old titles, what are the actual sales figures for all the titles published thus far? These sales figures should be published. The titles are professionally produced and well promoted, but do people actually

WANT them?

- The Panel needs to consider whether sufficient cultural breadth has been achieved by the Library of Wales series: there has been a great deal to enjoy here, and the series as a whole is a key cultural achievement of the Welsh Government; however, whether there has been insufficient attention to (for example) writing by women is an area that certainly needs scrutiny.
- The obvious bias in the Library of Wales towards indifferent, male, south-Walian, Labour-friendly literature, which presents Wales as if it were a Celtic fringe dufffest.
- Only 3 female writers are represented amongst 42 titles. This is a shocking missed opportunity to promote historic female writers who received little support in their lifetime and remain undervalued.
- The Library of Wales series was largely a vanity project for the Series Editor and his then political masters. There is no good reason for it to continue
- A lot of money goes into the Library of Wales series. Honno press have been producing a very successful and respected classics series for 30 years, in both English and Welsh, with no formal acknowledgement from the Assembly. I would like to see more support of - in monetary terms would be appreciated, but mostly recognising it as on a par with the Library of Wales, and of great importance to Wales.

WBC Training for Publishers

- The chance to take part in workshops, courses and receive manuscript assessments also means that even if your work isn't ready to publish, there's the opportunity for experts to provide support so that you can get your work finished and hopefully published.

WBC School Officers

- Mae'r swyddogion a gyflogir gan y Cyngor Llyfrau i fynd o gwmpas ysgolion yn chwarae rhan bwysig. Trwyddynt hwy, a'r Catalog Llyfrau Plant a gyhoeddir yn flynyddol, mae'r ysgolion yn gallu cael gwybodaeth reolaidd am lyfrau newydd.

WBC - author advance grants

- These are the best way of encouraging bigger names to publish with Welsh indie presses and so help the publishers to compete in the UK-wide market. WBC - marketing grants. These can make the difference as to whether a title gets anywhere as events are crucial in selling books and helping word of mouth promotion. These grants can also help to pay authors for their travel and time. Too often writers are expected to travel to events and give their time

for free in order to promote the title, for which they will often have been paid very little for. For example the title, *Aubrey and the Terrible Yoot* by Horatio Clare, won the Branford Boase Award 2016 for Wales, against competition from Penguin Random House and Harper Collins amongst others, but this title by a Welsh author would definitely not have gone to a Welsh publisher without a significant author advance grant from WBC. The boost this has given to the reputation of Welsh publishing, not least, within the UK book trade, is considerable. In the last two years, however, it has been noticeable that authors, including talented up and coming Welsh authors have been offered author advance grants by Welsh publishers and have been turning them down in favour of larger advances from UK publishers, so this fund is only just keeping pace with what is needed, or has to be targeted at fewer books.

- Mae'r grantiau awduron yn angenrheidiol. Ond nid yw'n fater o "one size fits all." Efallai y gellid cynnig mwy ar gyfer nofelau hwy, sydd, wrth reswm, yn cymryd llawer mwy o waith ac amser i'w hysgrifennu. Bonws ar gyfer nofelau sydd wedi gwerthu'n arbennig o dda? Hefyd, mae llawer o sylw'n cael ei roi i lyfrau sy'n plesio'r beirniaid 'swyddogol' ond dim digon i'r rhai llai llenyddol - sydd gwir eu hangen yn y Gymraeg.

Changes to WBC funding arrangements

- Block-funded publishers are required to produce too many books into which they cannot put sufficient attention and resources. Fewer books that are more carefully selected, and are more carefully, thoroughly, consistently and persistently promoted over a longer period might be a better model, and would likely generate better returns. Support for publicists to work on getting individual titles broadsheet and broadcast coverage should be increased. So too should support for getting authors into high profile festivals and events (at present this is something that authors largely have to try to do alone). The Author Advance grant and Marketing grant system could use some adjustment. Funding for celebrity and ghost-written works undermines the literary and cultural value argument of support for publishing. It also does not seem to have generated the income in sales that originally justified these kinds of titles.

WBC Distribution of Grants

- The distribution of grants for publishers through the WBC is clearly a robust and helpful process. The grants are distributed intelligently across a range of stake-holder needs, and the WBC administers these grants in a manner that ensures that a wide range of individual publishers benefits from them. Moreover, refereeing processes used by the WBC ensure that quality control is transparent and that quality itself is assured. (I was for a number of years a member of the WBC's English-language grants panel and was impressed by the care, scrutiny and professionalism that the WBC achieved in their important work.)

Performer Related Payments

- I would continue with the grants to publishers for the time being at their present rate, but I would make more funds available that are performance related. For every book that sells more than say a thousand copies, the WBC could pay a 50% incentive fee to the publisher per book to grow their business (until there is greater self-sufficiency). The 'profits' from increased sales for the publishers should be used to publish books for kids and the young that are given away free at readings/events in places like Tesco's in the valleys and other deprived areas. Perhaps also 1-pound novels for the unemployed? Maybe we can create a greater reading culture in Wales beyond the couple of thousand that are presently interested

More in-house WBC Services needed

- Ar hyn o bryd dau olygydd copi canolog sy'n gweithio yn y Cyngor Llyfrau a hoffwn i weld mwy o swyddi canolog o'r natur yma (o safbwynt yr adran olygyddol a'r ddylunfa) er mwyn sicrhau bod y gwasanaeth sy'n cael ei gynnis i gyhoeddwr yn gyflawn - a bod y gwasanaeth hwn ar gael pan mae'r cyhoeddwr ei angen.
- The WBC is already as responsive to trends as it can be, but it (and the publishers) are caught in the straightjacket of funding periods - something the market doesn't respect. The WBC should receive longer term guarantees for funding, so that they can be even more responsive to trends as they already are.

Sufficient funding to the publishing industry is vital

- Mae'r arian ychwanegol a ddaeth i'r diwydiant cyhoeddi yn y ddwy iaith ers 2002 wedi gwneud gwahaniaeth sylweddol. Mae wedi golygu mwy o amrywiaeth o ddeunydd a gwell deunydd. Mae awduron, darlunwyr, ffotograffwyr a dylunwyr wedi cael gwell taliadau am eu gwaith. Dydi'r taliadau ddim yn or-hael, ond y maent yn llawer teilyngach nag oedden nhw cyn 2002.
- Mae angen mwy o gyllid ar y byd cyhoeddi - arian bach yw i'w gymharu â er engraifft y byd teledu. Gyda mwy o fuddsoddiad fe fyddai'r oblygiadau yn bell gyrhaeddiol. Mae arian bach i'r byd cyhoeddi yn mynd ymhell ac yn sicrhau mwy o llywodraeth yn cael gwerth eu harian allan o'r sector yma. Wrth godi proffeil y byd llyfrau fe ellir cyrraedd llawer mwy o bobl.
- One could consider ring-fencing this very modest public investment in literature to allow for confident forward planning among publishers and literary organisations, and to set out a statement of permanent values at government level.
- Welsh publishing and literature in general needs more funding from the Welsh Government. As well as the inherent value of culture for well-being, belonging, health and self-education, literature and culture are an inherent, and age-old part of political expression in Wales, and our 'democratic deficit' is only deepened by the underfunding of the sector.

- Not applying cuts to the Welsh Books Council at all, allowing it to recruit the best talent. Protecting it and championing it, so that they can get back to working on making Welsh literature a focus for excellence the world over - instead of constantly fending off cuts and challenges to their existence. The racism inherent in many of the arguments against funding it, similar to that levelled at S4C. The people who make these arguments know so little about the Welsh language - if we listen to them we would have no language left.
- Support for the Books Council should be maintained or increased, not cut year on year.
- Not enough investment by the Welsh Government, particularly in furnishing the WBC with good marketing budgets to offer publishers. Not enough remuneration for staff of publishing houses.
- With ever limited budgets, the literature organisations in Wales do their very best against quite difficult odds, including large numbers of incomers who don't appreciate the Welsh literary heritage, language and poetry
- The WBC is already as responsive to trends as it can be, but it (and the publishers) are caught in the straightjacket of funding periods - something the market doesn't respect. The WBC should receive longer term guarantees for funding, so that they can be even more responsive to trends as they already are.
- Commercially-led publishing has its place but does not fulfil the deeper cultural need for books and other publications that truly reflect Welsh life, and allow Welsh writers an unrestrained voice and an opportunity to contribute to the cultural dialogue within, and external to, Wales. Financial support and advisory services from the Welsh Books Council are fundamental in allowing publishers to maintain a Welsh literary canon, which is an essential component of our national identity. We need a range of authentic, original voices to be heard and remembered, and threats of funding cuts are threats to our collective voice.
- Welsh publishing has proved it can punch well above its weight in terms of quality - as evidenced by awards and prizes at UK level, with Costa, Booker and many other wins, longlistings and shortlistings. This despite an very low level of staff and wages which is becoming unsustainable. For Welsh publishing to compete profitably and flourish it needs strong, high quality books that are visible in shops to potential readers around the UK and hence to find a niche within the UK book trade that it barely has at present. This is in a time of: shrinking diversity in terms of outlets and what they stock swingeing cuts to margins - thanks largely to the enormous levels of discount demanded by the online trade

Criticism of WBC and the funding distributed to publishers

- Lack of delegation and leadership in the WBC means that they have not been able to flourish in recent years
- Government cuts have been 'absorbed' into people's salaries, rather than taken from operations, meaning that it's hard for them to recruit from the next, younger pool of talent - they can't offer the benefits provided by other jobs. It may have seemed like a good strategy in order to save on cuts to operation but it has damaged the WBC's ability to be a top class employer. There is a demand for the service, there is a huge pool of Welsh talent, the senior management at WBC aren't at all making the most of it.
- Are WBC advice services necessary or effective? Could money be focused more beneficially on grants?
- The panel should provide direction as to the cultural remit for publishing in Wales. Far too much ephemeral tosh (in both languages) is published with Books Council support.
- Mae'r Cyngor Llyfrau yn gorff hynod effeithlon ym mhob agwedd ond mae gweinyddu arian tuag at farchnata wedi bod yn fan gwan dros y blynyddoedd. Pe gallai gefnogi swyddi i swyddogion marchnata yn y gweisg ble nad oes rhai yn bodoli, a darparu hyfforddiant, gallai hynny fod yn fodd i dynnu llyfrau gwreiddiol at sylw darpar-brynwyr.
- Previous budget cuts to WBC have severely impacted its ability to do wider outreach work. Had this question come up a few years ago I would have praised the WBC for its role in projects such as Reading Communities. But sadly, for us this has dried up now.
- I would like to know how many grant-aided titles sell less than 500 copies, and how much waste there is in the system. But at present WBC does not release sales figures, and neither do publishers.
- I definitely don't agree with double-funding. This occurs when, for example, an author gets a grant to write a book, then a Welsh publisher gets a grant to publish it. It should be one or the other. Certainly the public seem to get annoyed when they realised double-funding is taking place in any sphere. Maybe grants for writing or editing services should include the condition that, if used, the book cannot receive a second grant to be traditionally published? Or ringfence figures for titles which aren't published by traditional publishers.
- WBC, though vital, deals only with publishers and distribution. Writers and their remuneration are not independently safeguarded or even properly considered in the present system. WBC have rules that funded publishers must give authors contracts and regular royalty statements, but no one checks independently if this is done. You need a mechanism by which authors

can give feedback to an independent body on publishers' reliability in providing suitable contracts, advances, regular statements and payments, as students can give feedback on lecturers' performance.

- For the author-publisher sector in Wales: the challenge is that there is no support at all. All the support goes to traditional publishing in terms of grants, WBC services and so on, even though in some cases the fact that the books can't be published without grants suggests that they are so unpopular they shouldn't be published at all. A fortune goes to the WBC, even though it only works as part of the traditional/legacy publishing scene. So a vast sector of the writing/literary scene in Wales is totally ignored. Why can't author-publishers apply for grants to publish work, for cover design, for editorial services?
- The WBC has a design department which offers subsidised work which again is really wonderful. However, if this was outsourced to publishers, like the editorial grants are, I believe it would be more cost effective.
- The WBC has always been good value, doing a difficult job but has always been old fashioned in its approach. It compromises when it should take risks.
- The WBC needs to distinguish more clearly between the strategies that are best suited to the Welsh language market, and the strategies that would support English language publications in that much more commercial marketplace. It needs to ask whether these distinct markets require different expertise, even a different mindset.
- Gwales.com may have a nice connection with the Mabinogion, but it is it the best name for an internationally accessible online sales site.
- I end up buying Welsh books from Book Depository because Gwales is a pain to use, do they accept PayPal yet, stupid not to
- Too much reliance on grants. Books Council's reluctance to break new ground. System of readers' reports needs overhauling. Officers need to be shaken out of their complacency. People whose livelihoods depend on the Welsh language hardly ever buy books in Welsh. Ditto for magazines. Old-fashioned image of the publishing industry.
- The inclusion of the Council within the Welsh Government's main economic department may require the Council to make its case with a harder economic edge. In this context its operational plan and sales targets need sharpening.
- Sales targets are expressed for one year only and do not distinguish between the languages. It is not clear, therefore, whether these targets represent a defensive strategy of holding the line or express any confidence in future growth in either language.

- The revenue grant to publishers works well but has not maintained its value.
- Author Advances were a good idea but frankly have not worked. The idea was to encourage Welsh publishers to commission high-profile writers. In practice it has simply been used to 'reward' 'well-known' (in Welsh terms) authors but has failed to attract top-selling authors. The 'well-known' Welsh authors would have written the books anyway, so the Author Advance does not add value.
- The WBC should not be receiving funding to offer services; or all their services should be available to anyone publishing in Wales, regardless of whether it is a small publisher or author-publisher. Or cut some of their funding and use it to support author-publishing in Wales via another body. The last option would be favoured, since the restrictions on working with the WBC (e.g. exclusivity for distribution) are onerous. The fact that any of this has to be spelled out, and seems to leave staff in the established system scratching their heads in confusion, shows how behind-the-times and discriminatory things currently are.
- There are a small number of Welsh publishers which have a complete monopoly on the book scene in Wales - so many white, middle aged, middle class men dictating what is worth publishing/reading and what isn't.
- None of the small Welsh presses have expanded exponentially in the period since devolution. The extra funding in the early 2000s and projects such as the Library of Wales seemed to suggest the potential for breakthrough and the creation of a 'Welsh Cannongate'. The reasons why this did not happen are probably multiple and complex.

Improve marketing including WBC marketing

- Dylai unrhyw nawdd cyhoeddus i wyliau neu ddiwyddiadau diwylliannol fod yn amodol ar hyrwyddo cyhoeddiadau Cymraeg a Saesneg Cymru. Dylai cylchgronau a llyfrau o Gymru fod yn y Maes Awyr yng Nghaerdydd, yng Nghaerdybi ac Abergwaun, ym mhob gorsaf trên ayb. Does yr un llyfr Cymraeg na Chymreig yn cael ei hysbysebu yn eang ac yn amlwg. Mae gwefan Gwales yn hen ffasiwn ei diwyg ac yn anodd i'w defnyddio ac mae angen ei gwella ar frys.
- The WBC is not so effective in promoting Welsh books outside Wales. It needs a more vibrant, outward-facing marketing department.
- My own experience of distribution through the WBC has not been impressive and I now work with London based distributors, who are for more efficient at servicing outlets in Wales (and the UK and internationally). I would suggest reviewing how this distribution model works. I would prefer to use a Wales-based distribution service to get my product around Wales a) to support jobs and b) to reduce the carbon footprint of my publication.

- Marketing of Welsh books outside of Wales must be taken seriously. Too many Welsh books drop off the radar immediately after publication. This is largely due to the insular conservative nature of the Welsh publishing houses.
- Byddai'n well, yn fy marn i, i gyfyngu ar nifer o'r teitlau a gwario mwy ar hyrwyddo. Canlyniad hynny fyddai cael mwy o ddarllenwyr yn y pen draw. Fyddwn i ddim am amharu ar yr amrywiaeth ond yn hytrach cyhoeddi llai o hunangofiannau er enghraifft - bod yn fwy dewisiol a chaboli mwy ar y rheiny yn ogystal a'u marchnata.
- The Welsh Books Council seem content with marketing inwardly, having stands at the National Eisteddfod and the Royal Welsh Show which seem simply to replicate the efforts of shops already attending these events. Wales as a whole needs to become a brand; a location on the map for literature and publishing and a destination for those seeking quality.
- Mae hysbysebu ar hyn o bryd yn tueddu i fod yn ymarfer mewn pregethu i'r cadwedig. Mae angen hysbysebu mwy ar Facebook etc er mwyn cyrraedd cynulleidfa newydd, gan wneud yn siwr bod modd cael at y cynnwys o fewn ychydig o gliciau. Angen galluogi rhagor o rynghysbysebu rhwng ee S4C a Radio Cymru a Golwg 360 a chylchgronau. Angen darparu cynnwys (ee nofel) mewn sawl cyfrwng (ee llyfr, e-lyfr ar gyfer ffôn, e-lyfr yn y porwr, fersiwn llais synthetig). Angen defnyddio mwy ar y lleisiau synthetig Cymraeg i wneud darllen yn haws i'r rhai sy'n cael trafferth darllen.

Criticism of WBC Distribution

- The Distribution Centre is a great service for booksellers, and is allegedly self-financing, but are the reps' salaries allocated to the Centre or to the Council?
- The aim of subsidies to English-language publishers isn't clear. Is it to ensure there are successful Wales-based publishers, or is it to ensure that the output of Wales-based publishers reflects and promotes the culture of Wales? Perhaps it's both, but they're different issues with different answers.

Criticism of Magazines funded through WBC

- There is a question as to whether these are the periodicals we need in contemporary Wales. Planet comes closest to reflecting the connections between literature, politics, economics within the culture, NWR and PW have a literary brief that is relatively narrow. A political / cultural review, appearing every month, in the style of the new Welsh 'O'r Pedwar Gwynt' would be a major contribution to civic debate in Wales. 'Wales Arts Review' may play this role, but its focus is cultural and standard very uneven. Planet seems to

occupy its own valuable space. There is some overlap between Wales Arts Review, NWR and Poetry Wales and this might be worth looking at.

- Ar wahan i Planet, mae'r cylchgronau Saesneg eraill yn go anniddorol ac yn fewnblyg. Byddai cael Poetry Wales i ddilyn patrwm Barddas a NWA i ddilyn Barn er enghraifft, o ran bywiogrwydd, o ran bod â phresenoldeb cenedlaethol a chymunedol, ac o ran bod â naws llai siwdaidd, elft yn gam ymlaen.
- The current periodicals franchise model creates dependency rather than an entrepreneurial business model. A low-level, annual grant is less useful than a more focused injection of support in the early days, followed by tapering support over 3-4 years, on the basis that, at the end of that investment period, if the product is unviable and has no audience, it should be wound up. The outcome is clear: well-resourced businesses should be able to build sales and advertising revenue with sufficient funding up front to develop audience, distribution networks, subscribers, a strong advertising base and new outlets.
- The recent magazine funding review was an opportunity for a bold remodelling of arts media in Wales, one that might have proved Wales the envy of the world in this area. But a conservative decision, where inadequate funding was spread thin, rather than serious thinking applied could in the long run prove the undoing of the Welsh literature. Conflicts of interest and cronyism were demonstrably on display in this process. What little effort is able to be put into the digital sphere is used extremely well, and value for money is easy to evidence.

Importance of Publishers

- Un o nodweddion y byd cyhoeddi yng Nghymru yw fod yr argraffwyr-gyhoeddwyr, rhai fel Gomer, y Lolfa, Gwasg Carreg Gwalch etc yn dal yn bwysig. Ar y cyfan, rwy'n credu fod hwn yn gryfder i'r diwydiant, gan fod y cyhoeddi yn rhan o fusnes mwy, ac am fod y perchnogion yn meddwl fel pobl fusnes. Wrth gwrs, mae'r cyhoeddwyr 'pur' (hy cyhoeddwyr nad ydynt yn argraffwyr hefyd) yn gwneud cyfraniad sylweddol yn ogystal.

Bookshops

- Mae'r cymorth bychan a roddir i siopau annibynnol yn werthfawr, er mai bychan ydyw. Mae'r siopau hyn yn dal yn rhan bwysig o'r fasnach lyfrau, ac yn fannau cyfarfod yn ogystal.
- Diffyg siopau llyfrau sy'n gwerthu llyfrau iaith Gymraeg. . . gwybod bod pethau ar gael ar-lein, ond mae'n well codi copi mewn siop a dod i benderfyniad ar ol darllen cwpl o baragraffau. 10 milltir o leiaf i'r siop agosaf ata i sy'n gwerthu llyfrau Cymraeg ac mae hwnna mewn lle lletchwith iawn i barcio

Support for Welsh Books Council and LW

- The Welsh Books Council and Literature Wales are fantastic organisations!
- Grants from Literature Wales and WBC allow small presses to thrive. Generous bursaries exist for new and established writers. Literature Wales is especially good at organising lively events, and encouraging public interaction with both Wales's literary heritage and its present literary culture - in both languages thrive
- Along with Literature Wales, the Welsh Books Council does an amazing job in enabling, preserving and promoting its vibrant literature community and industry. The threats to that are very much financial. It is essential to maintain existing writers and encourage new writers in both English and Welsh and not drive them away from Wales by restricting funding. We are already seeing cuts to events and the promotion of books. This is a threat. It would be so easy for people to turn elsewhere for books.
- Mae'n bwysig nodi fod y diwydiant at ei gilydd yn effeithiol ar hyn o bryd, yn y Gymraeg o leiaf. "If it ain't broke..."

Advantage of having more than one organisation

- Concentration of literature resources in a single organisation, is unprecedented, unparalleled and is not repeated in other art form sector. For the literature sector to be served effectively, there is an urgent need to distribute resources among several organisations with complementary briefs and relevant expertise. In other words, there is a need for more than one literature portfolio organisation to be working in Wales.
- Mae Llenyddiaeth Cymru hefyd yn rhoi ysgoloriaethau i awduron. Fe allai rhai ddadlau fod yma ddyblygu diangen, ond fyddwn i ddim yn dadlau hynny. Mae pwyslais LIC ar ddeunydd llenyddol yn y ddwy iaith, gyda phwyslais ar lenyddiaeth greadigol a rhoi rhyddid i'r awdur ddatblygu ei weledigaeth. Mae pwyslais y Cyngor Llyfrau yn fwy ar ddarparu deunydd darllen amrywiol ar gyfer darllenwyr o bob math. Dydi hyn ddim yn golygu nad yw awduron yn cael arian awdur CLIC ar gyfer nofelau, ond mae'r pwyslais yn wahanol. Er enghraifft, mae'n annhebyg y byddai CLIC yn rhoi comisiwn sylweddol i fardd i ysgrifennu casgliad o gerddi. Felly mae dadleuon teg yn erbyn canoli'r nawdd i awduron mewn un corff.

Support for Literature Wales and the activities it funds

- Tŷ Newydd is an important organisation but was more engaging and dynamic before being absorbed into Literature Wales

- Tŷ Newydd looks as if it is now in very good hands and has a great new programme on offer.
- Canolfan Tŷ Newydd is a great resource
- Mae cyrsiau Tŷ Newydd yn fendigedig - rwy wedi mynychu sawl un. Buasai rhagor o gyrsiau undydd yn wych, gan fod y gost o fynychu rhai wythnosol yn ormod i nifer o bobl ar incwm isel.
- Literature Wales does a good job, and the subsidies for publication are very valuable.
- I like the aspect of Literature Wales' work which gets out and works with and engages writers from every background. This is essential. I have seen first hand the massively empowering effect this has on people. Literature Wales should be proud of what it does in this field.
- Literature in Wales is thriving and is more than an industry. Literature in Wales supports and enhances industry, culture, health and wellbeing. It needs to be supported for those reasons.
- The revenue to Literature Wales is very well spent. A small and nimble organisation does very much on very little. Their work with the South Wales Literature Development Agency is to be praised. They reach communities in need of literature and who deserve access but rarely gain it.
- Llenyddiaeth Cymru'n gwneud llawer o waith da. Llyfr y Flwyddyn yn denu sylw; Awduron ar Daith yn syniad ardderchog;
- The bursary system is an excellent use public funding to support literary activity and enable the production of literary works analogous to support for other art forms.
- Bursaries - excellent examples of high quality texts produced as a result.
- Funding the development of new writing is seeding our literary culture. Writing takes time and time is a resource. These bursaries foster new talent, and they have a track record of success: Jonathan Edwards and Kate Hamer, for example, have been recognised on a national level for their achievements in huge competitions, and LW money is part of that success.
- Support for young writers and emerging authors, I work with young people who have benefitted enormously from the Young Writing Squads and the writers who work with them are often inspired.
- Support in terms of professional development for authors through Literature Wales – both creative mentorship, bursaries and workshops - is key to nurturing Welsh writing talent. Ty Newydd is also central in this process of

encouraging the best writing, but also puts Wales on the map in the UK and abroad as a nation which takes literature seriously.

- Literature Wales has a social justice and educational plan to get more people from disadvantaged backgrounds reading: this is extremely important for local communities and can only be done through arts funding.
- Grants for publishers and especially magazines also work very well to get the best works of fiction and non-fiction published - many books which have gone on to have great success could not have been published without this financial support.
- There have been some excellent initiatives from Literature Wales taking literature to disadvantaged groups in the Valleys, prisons, etc but the funding of such projects is always vulnerable to the whims of government - this is disappointing and counter-productive.
- Gwaith Llenyddiaeth Cymru gyda sgwadiau sgwennu gan awduron yn effeithiol. Angen ehangu y rhain i bob ardal er mwyn hyrwyddo diddordeb yr ifanc.
- Digwyddiadau proffil-uchel fel Llyfr y Flwyddyn - eto yn rhoi llwyfan i bob mathau o lenyddiaeth, sgil-gynnyrch ar gyfryngau eraill, etc.

Criticism of Literature Wales and activities funded through the organisation

- Literature Wales does a number of very good things but it is too fragmented and too vulnerable to the whims of Welsh Government policy.
- Nid wyf bellach yn gweld llawer o bwrpas i gorff fel Llenyddiaeth Cymru. O'm rhan i mae'n gorff aneffeithiol, araf ei weithgarwch a simsan ei gysylltiad gyda awduron.
- The remit of the organisation is confused and confusing. It does not represent writers' interests, nor does it promote writers. It is not a writers' agency. Indeed many writers object loudly and persistently to its focus on literary tourism, its downgrading of Book of the Year, and its popular projects that have little bearing on current writers and the promotion of their work. The Dylan Thomas and Roald Dahl projects are nothing to do with current Welsh writers or their work. In fact they have served to eclipse Welsh writers, and reinforce internationally narrow and limited view of Welsh literature.
- Big branding projects such as celebrating dead authors connected to Wales are not working in the long term. They look backwards in time, they are top-down, and in the case of Roald Dahl they make Wales look desperate because they seem to want to rub off some of a great international writer's shine onto Wales and looks as if we don't have a contemporary scene. Of

course there are piecemeal efforts to include contemporary writers in these projects but the main aim seems to be about associating Wales with existing older brands. This model could be pretty damaging in the long-run.

- The money Lit Wales spends on activities associated with long-dead writers. Whilst I have no problem whatsoever in celebrating Wales' rich and diverse literary culture, and in bringing its writers to new audience, I do question the value of the Dylan Thomas centenary (and the now annual Dylan Day) and the Dahl centenary. This seems to me thinly disguised tourism, centred almost solely in South Wales, which supports already wealthy literary estates, while the development of new talent and the sustainability of the publishers face cuts after cuts. Lit Wales does some brilliant, important work, but this policy of giving money to the dead is very short-sighted. The impact on further cuts to Welsh publishing as a result of this will have a long-term cost to literary culture in Wales, particularly for the next Dylan Thomases.
- The services (especially Literature Wales) are not joined up and do not seem to work in a grassroots consultative way with the whole scene. This means resources are wasted because they don't take advantage of the talent and connections already working in the field and often it seems LW promote poor quality work because they are not able to reach out to the scene and find what is working and seem competitive rather than collaborative.
- I cannot see the pathways from Literature Wales' bursaries to the Welsh publishers. There could potentially be a more connected partnership, particularly where emerging writers are concerned, that extends beyond the bursary and critical mentoring into support for first publication.
- Literature Wales is not really working as well as it should. It is only really good at promoting itself. It needs a new vision, a different kind of leadership in order to be properly collaborative, responsive and imaginative.
- The Lit Wales website needs revamping, it is old fashioned, it makes it difficult to find out how and when or even if the bursaries are available and it could be a lot more active on social media.
- There are some schemes run by Literature Wales that fund writers directly, and encourage writing from a young age, and these should be the core projects. There are times when a showcase for writers is useful, but it's of limited value if we're not encouraging new writers and readers.
- Dwi meddwl fod angen ystyried beth mae Llenyddiaeth Cymru yn wneud gyda'i harian nhw gan nad yw £900,000 o grant ddim yn cyrraedd awduron a darllenwyr go iawn.
- Literary festivals, and I am thinking particularly of Dinefwr, should have more literature and comparatively less popular music and reliance on 'stars' to bring

in the punters. Careful thought should be given to what literature festivals are actually for.

- There should be far less emphasis on 'competitions'. There is a place for one or two such as the Wales Book of the Year or the John Tripp prize for spoken poetry but the apparently endless proliferation of them devalues the whole art of writing. Writers should be encouraged to engage readers, not strive to win competitions. Selling books is a finer achievement than winning prizes and does more to raise the profile of writers in Wales.
- Literature Wales' bursaries for writers scheme is not responsive to the needs of writers. The length of time between making an application for funding and getting a decision, is too long. A faster scheme for smaller projects - say 1 month - would be much more writer friendly.
- Mae Llenyddiaeth Cymru fel asiantiaeth yn gweinyddu ysgoloriaethau, prosiectau a digwyddiadau megis Llyfr y Flwyddyn yn effeithiol ond nid yw ochr arall ei gweithgaredd, sef bod yn gymdeithas awduron, yn gweithio'n foddhaol. Mae'n rhaid i gymdeithas awduron fod yn ethol ei swyddogion ei hun ac yn pennu ei blaenoriaethau. Mae strwythur o Fwrdd wedi ei benodi yn gweithio ar gyfer Llenyddiaeth Cymru fel asiantiaeth; ond nid yw'n addas ar gyfer cymdeithas awduron, ac nid yw'n ennyn teimlad o berthyn.
- Dyw Llenyddiaeth Cymru, er yn llwyddiannus mewn rhai agweddau o hyrwyddo (mae cyfraniad y Lolfa Len yn yr Eisteddfod Genedlaethol yn wych iawn, er enghraifft) ddim yn rhoi pwyslais ar werthu cynnyrch. Mae hyn yn hanfodol o safbwynt cyhoeddwr. Mae'n ymddangos mai cynrychioli buddiannau'r awdur (a rhai awduron yn unig) y mae Llen Cymru yn bennaf.
- Tŷ Newydd seems to be heading for privatisation under Literature Wales who seem to be looking for ways to make money out of through tourism and corporate events in order to recoup their losses because their courses are not full and the centre is unsustainable if it is not run properly (which it has been in the past). But it was a resource that was bought specifically for the writers of Wales, most of whom do not get its benefits because they cannot afford to visit. Who is now able to enjoy it? It seems mostly Literature Wales staff and well-off would-be writers. Perhaps a more co-operative model could be devised to make sure that the grassroots readers and writers can also benefit from it but also be a part of making it work - e.g. have a stake in its running.
- The Writers on tour scheme is too cumbersome and poorly funded to achieve its aims. Literature Wales appears to focus on educational (school) initiatives and young writers rather than the writer community as a whole.
- Get rid of Literature Wales and probably the whole Arts Council - consult, design and develop a new strategy to support literature in Wales (if necessary) - then consult design and develop some more - get *new*

constituencies of people - especially writers and artists who are outside the core cabals.

- Literature Wales has been made less effective and more bureaucratic by its reorganisation and the role of writers in it has been diminished. The semi-detachment of Academi from it has weakened the position of writers, and the abandoning of AGMs for Academi has deprived writers of an important forum. Cuts in funding for Writers on Tour are a major blow.
- The value of Literature Wales is difficult to evaluate.
- Dydw i ddim yn teimlo fod Llenyddiaeth Cymru'n cynnig yr un gwerth am arian ag y mae'r Cyngor Llyfrau'n ei wneud.
- Buaswn i'n hoffi gweld ailedrych radical ar yr hyn y mae Llenyddiaeth Cymru'n ei wneud
- Rol a swyddogaeth Llenyddiaeth Cymru - pa mor effeithiol ydyw mewn gwirionedd?
- Ad-drefnu Llenyddiaeth Cymru o'r bôn i'r brig: mae wedi crwydro oddi wrth ei amcan gwreiddiol ac wedi tyfu'n ormod o fonolith biwrocraidd. Rhai agweddau da yn perthyn iddo, ond mae'n rhy unffurf erbyn hyn, ac yn gallu dieithrio pobl.
- Rhaid gofyn ai Llenyddiaeth Cymru yw'r corff mwyaf priodol bellach i reoli cymaint o fywyd llenyddol Cymru.
- There is still an awful lot of creativity in the sector and when organisers and curators focus on quality - something that Literature Wales sometimes doesn't seem able to do - some amazing things can happen. But as with anything in the current market economy, development is limited.
- Literature Wales rarely publishes local events of reading series that do not adhere to a certain (unknown) mandate. Several highly interesting and well-known authors that have read in Cardiff received no notice.
- Literature Wales only seems to work in Cardiff, Gwynedd (Ty Newydd) and wherever the Eisteddfod is. I cannot remember the last time I saw a LW event in West or Mid Wales. It is notable that the poetry scene is more connected in a community than the fiction scene (through my observations) - probably because of the distribution of live events.
- We need a writers' organisation that is either separate from Literature Wales, or a Literature Wales that supports and promotes living, working writers. The Writers on Tour support has been cut so much as to make it difficult or impossible for many venues to pay writers for events; writers themselves will

often find themselves out of pocket for events because of the poor fees payable and the poor rates of travel reimbursement. At the very least to show support for writers, the portion paid by Literature Wales should be returned to its previous level. Literature Wales needs to reassess its priorities, and shift funding from the big-scale literary spectacle and literary tourism to instead support sustainable levels of support and promotion of writers.

- A lot of money from what I can see, goes towards promoting books via live events within Wales. Having seen an ad for the Art Tent in the Eisteddfod in The London Review of books recently made me wonder why Welsh books aren't promoted that way - to a very broad spectrum of readers outside Wales? I feel that the live events are often poorly attended and are made up of those people who are all ready in the know.

Book of the Year

- The Book of the Year needs to be better supported, with the prize money returned to its previous level if it is to be taken seriously both inside and outside Wales. At present it's an embarrassment. As a national prize, it should be of greater value than a prize for a single poem. It also needs to be appropriately branded and marketed to maximise the sales potential of all listed titles.
- The Wales Book of Year Awards appears to generate a little publicity but has little real impact on sales of nominated books or on the visibility of literature as a whole.
- Wales Book of the Year has been downgraded in a way that has deeply undermined instead of supported the profile of Welsh literature. The challenge for Literature Wales is to decide if it is for the promotion of Welsh writers, or for tourism.
- Why does a publicly-funded prize (Wales Book Of The Year) arbitrarily exclude many books published in Wales, just because they aren't published by grant-funded traditional small publishers?

Confusion about Current support – WBC and LW

- Too much responsibility given to Literature Wales and Books Council. A new agency is needed. Complaints about both bodies are rife. Their 'readers' reports' are ridiculously inadequate
- Mae'n anffodus bod hollt rhwng y ddarpariaeth grant rhwng 'cyhoeddi' (CLIC) a 'llynyddiaeth' (Llynyddiaeth Cymru) ac addysg (CBAAC a'r hen ACAC - DCELLS). Mae pob un o'r uchod â'u cryfderau a'u gwendidau, ac oll yn gweithio'n galed yn eu his-feysydd. Ond mae'n hen bryd gosod y "diwydiant" cyhoeddi ar sail mwy cadarn a chynladwy. Dyna ddylai'r flaenoriaeth fod - helpu i gynnal gweisg (efallai trwy annog uno neu gyd-weithi rhwng gweisg

neu gwmniau 'cyfryngol', fel ddigwyddodd yn strategol efo chwmniau teledu annibynol oedd yn gweithio i S4C). Ddylai bod strwythur ac arweiniad strategol i ddod â'r asiantaethau at 'i gilydd, i gyd-weithio.

- Er bod nifer o ddigwyddiadau difyr yn cael eu trefnu gan Llenyddiaeth Cymru, a'u bod yn cael eu gwerthfawrogi gan y rhai sy'n eu mynychu, ni ellir osgoi'r teimlad fod dau gorff sydd mor wahanol i'w gilydd o ran syniadaeth yn gadael i rai pethau gwympto rhwng dwy stôl am nad yw'n gyfrifoldeb y naill na'r llall. Mae pwyslais yr un corff ar 'lenyddiaeth' a diffyg adnoddau'r llall i hyrwyddo 'llyfrau' yn ddigonol yn golygu fod ffocws un corff yn llawer rhy gul ar awduron, waeth beth fo'u cynnyrch diweddaraf, a'r corff arall yn rhy brysur yn hyrwyddo creu deunydd o safon a dosbarthu i'r siopau sydd eisoes yn bodoli i wneud unrhyw waith mentrus sy'n torri tir newydd.
- Gellir cwestiynu'r arfer o roi ysgoloriaethau i awduron i ysgrifennu, o'i gymharu â threfn y Cyngor Llyfrau o daliadau comisiwn drwy'r cyhoeddwyr. Mae'r ail yn fwy cost effeithiol ac yn debycach o arwain at gynnyrch sydd ei angen. Er bod y ddau gynllun yn cefnogi awduron, y mae cynlluniau Llenyddiaeth Cymru'n dyblygu gwaith y Cyngor Llyfrau mewn sawl maes.
- Buasai'n llawer gwell gen i weld mwy o arian hyrwyddo a marchnata llyfrau (a darllen) yn cael ei roi i'r Cyngor yn hytrach nag i Lenyddiaeth Cymru ar gyfer ehangu'r farchnad ddarllen yn Gymraeg, gan wneud y diwydiant hyd yn oed yn fwy hyfyw a chynaliadwy.
- Mae Llenyddiaeth Cymru wedi datblygu i lawer o gyfeiriadau yn y cyfnod diweddar gan ddyblygu gwaith a wneir gan y Cyngor Llyfrau. Gan nad yw'r arbenigedd cyhoeddi/ llenyddiaeth bellach yng Nghyngor y Celfyddydau (sy'n ariannu Llenyddiaeth Cymru) nid ydynt o bosibl yn ymwybodol o holl ystod gwaith y Cyngor Llyfrau ac mae perygl fod sefydliadau'n mynd ar draws ei gilydd. Un posibilrwydd o osgoi hyn fyddai gwneud Llenyddiaeth Cymru'n gleient i Gyngor Llyfrau Cymru, neu bod Cyngor Llyfrau Cymru a Llenyddiaeth Cymru'n dod yn uniongyrchol gyfrifol i Lywodraeth Cymru.
- Dylid astudio rôl CLIC a Llenyddiaeth Cymru i weld os oes gwir angen y 2 gorff yn gweithio mewn maes mor gyfyng (yn enwedig o ran y Gymraeg). Yn yr un modd, a oes angen mwy nag un 'noddwr' yn y maes cyhoeddi addysgiadol? Y peth lleia ddylid ei wneud ydi gosod ambarel strategol dros yr holl noddwyr gyrff hyn, gyda'r nod pennaf o greu adeiladwaith cyhoeddi mwy hunan-gynhaliol yng Nghymru a fyddai'n fwy cadarn a chynaliadwy yn yr hirdymor.
- Clarity is needed on the particular roles of Literature Wales and the Welsh Books Council. There seems to be some overlap in relation to marketing and promotion in particular.
- In my experience, there is little interaction and engagement between the several bodies set up to support Welsh literature. I once asked Lit Wales for

guidance and was given a pasted copy of their relevant web page. Only from reading the summary of support today, do I see that they should have pointed me toward the Welsh Books Council.

What could be done differently?

Move LW activities to WBC

- Cyfuno gwaith Llenyddiaeth Cymru a Chyngor Llyfrau Cymru gan sicrhau gwell gwerth am arian i bobl Cymru.
- Dylid cael UN corff a fyddai'n uno cyfrifoldebau'r Cyngor Llyfrau a Llenyddiaeth Cymru (ac arbed arian o ganlyniad?)
- Edrych o ddifri ar y berthynas rhwng Cyngor Llyfrau a Llenyddiaeth Cymru. Dod â holl agweddau gweinyddu grantiau cyhoeddi (hamdden ac addysgol) o dan un corff.
- Rwy o'r farn y dylai y Cyngor Llyfrau lyncu Llenyddiaeth Cymru - i greu un corff - fel one stop shop - mi fyddai arbedion ariannol byddai modd eu dargyfeirio i gynyddu'r gweithgaredd marchnata a'r gynhaliaeth i awduron cynnwys. Hoffwn weld systemau "incentive" ble mae modd i'r gweisg gael cymorthdal i fentrau masnachol lle mae partner yn dod i'r bwrdd gan gyfrannu cyllid - yn yr un modd a sy'n digwydd mewn cynhyrchiadau teledu sy'n gyd-gynhyrchiadau. Os oes gwasg yn medru denu buddsoddwr i brosiect yna mi ddylai bod modd i'r Cyngor fedru cynnig cymorth ychwanegol i hwyluso prosiectau o'r fath.
- Mi fyddwn ni yn ystyried bod potensial da i'r Cyngor Llyfrau sy'n sefydliad gweithgar gweithredol lyncu'r corff "celfyddydol" - llenyddiaeth Cymru. O uno'r ddau sefydliad yna byddai angen ailstrwythuro yn amlwg er mwyn ffocysu ar yr elfen farchnata a denu awduron poblogaidd /hwyliog/heriol i greu cynnwys apelgar fyddai a gwell cyrhaeddiad i ddenu darllenwyr newydd.

Move WBC activities to LW

- Scrap Welsh Books Council and invest in an agency like Literature Wales which, with proper funding, can become more pro-active.
- Efallai dylid rhoi cyfran o gyllid y Cyngor Llyfrau i Llenyddiaeth Cymru er mwyn i'r corff hwnnw ymgymryd a'r gwaith hyrwyddo a marchnata llenyddiaeth a chyhoeddi er mwyn sicrhau mwy o greadigrwydd yn sgil synergedd.
- Dylid trosglwyddo'r gyfrifoldeb am ddsbarthu'r grant cyhoeddi o'r Cyngor Llyfrau i Llenyddiaeth Cymru. Dylai'r Cyngor Llyfrau wedyn ddatblygu ei ochr masnachol.

Move Literature Wales to West Wales

- Byddai'n braf gweld Llên Cymru yn symud ei phencadlys allan o Gaerdydd hefyd. A oes rhaid i bob brif swyddfa yn y sector cyhoeddus a gefnogir gan ddatganoli fod yng Nghaerdydd. Mi fasa Aberystwyth yn hub naturiol i'r diwydiant cyhoeddi. Bod angen rhoi statws arbennig i Geredigion fel conglfaen cynhyrchu llenyddiaeth a llyfrau yng Nghymru. Mae angen dathlu a gwar hod y diwydiant sydd yn y gorllewin.

Organisations too close

- The Welsh Academy & Literature Wales & the Welsh Government are all too close --- a bit of creative friction would produce a better result. The Welsh Literary Establishment appears as a clique ---- the same names featuring again and again with a tendency to endorse celebrity culture. There should be an effort towards democratisation. The outcomes would be more people being and feeling involved.

Impact of Welsh Government financial support and value for money

- The financial support from the Welsh Government to Welsh publishers seems to be working well. It is especially important as most of these publishing companies are based and therefore provide jobs in rural areas of Wales.
- Cymharol fach yw'r hyn a fuddsoddir yn y maes, ond mae'r impact a'r cyrhaeddiad yn fawr o ran cefnogi ystod o deitlau yn nwy iaith Cymru, cefnogi swyddi golygyddol mewn gwesig Cymreig, a chyfrannu at nod Llywodraeth Cymru (un ddiwylliannol, cymdeithasol ac addysgol) o greu Cymru ddwyieithog. Tynnwch yr hyn a gyflawnir o'r pictiwr a dychmygwch yr anialwch ddiwylliannol y byddid yn ei chreu!
- Mae nawdd cyhoeddus i gyhoeddi yn y ddwy iaith yn hollol hanfodol yng Nghymru, a dyna pam y mae'r wasgfa barhaol ar wario cyhoeddus yn gymaint o fygythiad. Mae'r llywodraeth yn sicr yn cael gwerth am arian o'r nawdd a roddir i gyhoeddi yn y ddwy iaith. Fe geir budd diwylliannol o'r nawdd trwy gefnogi awduron o bob math i greu, a hefyd y nawdd i ddarlunwyr, ffotograffwyr a dylunwyr sy'n rhan o greu llyfrau. Yn ogystal, fe geir budd economaidd o'r nawdd - mae'n gymorth i gynnal nifer dda o swyddi, a'r rheini wedi eu gwasgaru trwy Gymru, gan gynnwys nifer dda yng ngogledd-orllewin a de-orllewin Cymru. Heblaw am y nawdd i'r rhai sy'n creu'r deunydd crai, mae'r nawdd a roddir i'r fasnach lyfrau yn gymorth mawr i gwmnïau argraffu a'r holl gadwyn sy'n golygu fod y llyfrau a'r cylchgronau yn cyrraedd y prynwyr a'r darllenwyr - Canolfan Ddosbarthu'r Cyngor Llyfrau, y siopau llyfrau (gan gynnwys y siopau annibynnol a'r siopau cadwyn), a'r llyfrgelloedd cyhoeddus a'r ysgolion.

- Subsidy of books and magazines in Wales should be continued, as it helps provide access to cultural content that would be unavailable elsewhere. News media in Wales is especially weak – the newspapers in Wales offer very little in serious cultural or political discussion, and the online presence of some has declined to essentially being meme-based click-bait. Assistance to magazine publishing in Wales means there are at least some voices discussing issues relating to the Welsh nation and its position internationally.
- Without the grant system that is in place for writers (and cultural magazines), the arts in would suffer immeasurably. The market has never effectively sustained the work of a valuable national literature, and dependence on it will only result in compromised art via dubious sponsorship deals.
- Support for the publishing industry is essential. Without it, the industry will definitely collapse. The future of criticism in Wales is without doubt digital, and at present the WBC model struggles to find space for such ventures that could really put Wales on the map in this area.
- The importance of investing in Wales's culture cannot be underestimated.
- External perception that the sector is over-subsidized is a huge challenge. The cultural value of the industry far outweighs the financial input from e.g. grant funders and WG. It means the industry is always on the back foot, always having to defend itself - this is time and energy that would be better spent innovating, thinking creatively and making a difference to the people of Wales. Instead, they have to constantly fight for their right to exist.

Funding to industry vital due to weakness of print media in Wales

- Gellid dadlau bod y diwydiant cyhoeddi yn bwysicach yng Nghymru nag yng ngweddill Ynysoedd Prydain yn sgil gwendid y wasg a'r cyfryngau torfol yma. Heb fawr o adlewyrchu ac archwilio ein hunaniaeth ar deledu na radio, nac yn y wasg brint ddyddiol, mae angen sicrhau bod y diwydiant cyhoeddi a'n llenorion a'n academwyr yn cael cefnogaeth deg a chyflawn i wneud hynny ar ran y genedl.
- There should be no further cuts to financial support for books and magazines in either language. The Welsh Government should continue to fund English medium cultural magazines in Wales. The publishing industry in Wales punches well above its weight in terms of quality. Publications such as the New Welsh Review and Planet: the Welsh Internationalist provide a much-needed focus on topics that are not adequately covered by other media outlets in Wales and beyond. Attacking these publications with further cuts would leave few, if any places to read in-depth discussion and coverage on topics such as literature, politics, art and culture in general
- On limited finances the small presses are doing remarkable work. They should be supported in the current financial climate.

Changes to funding arrangements – less subsidy needed possibly

- I would do things 100 per cent differently. Do not pander to the subsidy-junkies because they cannot, meaningfully, provide useful large-scale employment to the publishing sector. Target large London publishing houses to set up back office, even front office, operations here. This is exactly the approach that the Welsh government is taking in relation to professional services - and it has borne fruit. These are real, high value, tangible jobs, that are self sustaining. Attract the social media companies to set up publishing hubs in the city - the Buzzfeeds, the Facebooks, the Huffington Posts of this world. This involves selling and marketing to these operations, not simply shovelling cash to established, vested, interests.
- I don't think English language fiction and non-fiction should be subsidised - they should be subjected to market forces. Whilst this would reduce the amount and nature of what is published, overall it should improve quality via proper editing and reduce the number of niche works by the same old names.
- There is a clique of the same writers who receive a disproportionate amount of support/publication subsidy. There should be more attempts to publish and promote emerging writers on a national level.
- The Welsh publishing industry is very heavily subsidised, to the extent that many books are published which would never have seen the light of day in England. That is because across the border publishers do not, by and large, publish books if they do not think they will sell and turn a profit. They have to carry the risks. In Wales, in contrast, many publishers inhabit a comfort zone in which subsidies enable them to publish books which hardly anybody actually wants -- and which will never repay their costs via sales. In other words, they are entirely non-commercial, and are products of a system entirely dependent upon subsidies and grants. It's easy to say: "Ah yes, we need those books anyway, because we need a vibrant publishing industry and because these books help us to define ourselves as a nation." But do we really need (and can we really afford?) a flood of non-commercial titles in Wales?
- Actual sales figures for books in Wales are seldom publicised. That is because it suits everybody to keep as quiet as possible. It is widely known that in Wales a book is counted as a "best seller" if it sells 700 copies. At that level, if the publishers were operating in a real commercial world, a book might just about cover its costs -- there is no way it could be considered as a best-seller.

Need to be more Commercial

- The main challenges faced are those of developing a viable commercial model. The sector (apart from Accent Press) is almost entirely reliant on a grant system which in effect keeps large areas of publishing skill at 'amateur'

level. With poor editors, authors remain poor in terms of skill and ability. With no real free-market testing or accountability, publishing is shielded from being competitive, with publishers instead choosing to chase (often pointless and self-promoted) awards as a success criteria instead of sales. The funding model means most publishers in Wales are actually incentivised NOT to sell lots of copies of a book, as this would leave them with a tougher case to make for winning the next grant. The whole scene is doomed to amateurism and as a result cannot produce a product capable of selling outside of Wales, and often not even capable of selling within Wales. I know no system like it in the world.

- I wonder if a little more exposure to the hard commercial world might actually make the Welsh publishing scene a bit leaner and more efficient, without in any way threatening our civilisation and our great Welsh cultural traditions? For example, just to encourage publishers and writers to think a bit more seriously about what the market actually wants, and to take marketing rather more seriously, it might be rather a good idea to insist that if a book sells fewer than 1,000 copies in its first two years, any grants and subsidies paid must be paid back..... and by that I mean REAL sales, involving real money, and excluding all returns.
- Literature promotion agencies, grant-giving bodies and distributors within Wales need to ensure they understand the realities of the global publishing trade to target resources as effectively as possible at publishers as well as at readers and writers.

Cultural and Economic impact of the industry

- The key challenge is the contradiction between cultural imperative and economic realities. Like any nation, Wales needs a thriving publishing industry that provides a platform for its own specific cultural output; to document its own history, its specific cultural heritage and traditions, in both languages.
- Both the publishing sector and Literature Wales face the challenge of popular and government arguments about accessibility and value for money. Though both involve economic activity, and publishing supports a wide network of jobs, the value of cultural activity needs to be protected. It's indicative that where we once had a Culture Minister, the culture portfolio, which includes literature and publishing, is now a minor part of the Economy portfolio.

Balance between both language

- Looking inwards the balance between the two main languages is always an area of debate. In theory English language literature and culture has the Anglophone world as its potential market while Welsh language authors need support due the limits of the audience. But Anglophone culture has to fight for a space in a crowded field, while the Welsh language community continues to support its authors and writers by buying their books. Parity is, I think, key.

Culture can function as means of uniting the nation across lines of language and background.

Importance of newspaper industry and press to democracy

- In the newspaper industry there is a lack of belief in the product from the people who run it. They are in shock by the rise of the internet and have lost all confidence in print. This is foolish as newspapers remain profitable but there is a demand to squeeze every last penny out of publishing organisations for the profit of shareholders. Local media is incredibly important for small businesses and giving our local communities a sense of identity. More should be done to encourage small scale print newspapers that encourage quality journalism. If we lose our local print media our local democracy will be in a very dangerous territory where there is no oversight to keep it in line.
- As our local newspapers face challenging times it is clear they are incredibly important to fostering a sense of community across Wales. But papers are facing huge falls in readership in the UK, on the continent there are schemes in place to provide public support for local press. Could the panel consider how it could encourage local communities to become more engaged with reading their local press whether it is y papurau bro or large paid for English titles. This could involve engaging publishers to ensure their publications are distributed freely in schools, residential homes and workplaces.

Digital developments and impact on print

- Danger in 'eggs in one basket' as regards electronic publishing. Statistics seem to indicate that printed books are regaining popularity . . . however, a lot of printers are already going out of business, taking their experience with them.
- The publishing industry is an ever changing market since digital books arrived. Anyone can 'publish' a book and the market is awash so directing readers to a book or genre is an increasingly difficult business. Some traditional publishers have been slow to move with the times. Mainstream publishers are even more keen to stick with what has worked before and breaking into the market is difficult for new writers.
- Rising number of books published and market dominance of Amazon in e-books has led to less diversified book consumption. There is a lack of targeted book promotion and support for local rather than global digital advancements.
- There is no doubt that digital presents both opportunity and challenge for publishing, but this is being faced by publishers globally. Customers tend to place a greater value on a product they can hold and keep, and their expectation is to find digital resources for free. Whilst this is shifting with a

greater number of subscription products available across genres, nevertheless, profitability of digital products can often be lower. It is for this reason that digital innovation is key; an e-book can only provide so much value to a customer. A truly interactive experience can take provide so many additional benefits – rather than simply convey content, digital can enhance and check understanding, react to a user, offer a dynamic user experience etc.

- Print copies as physical objects sell and are thus more sustainable than online. People don't really like paying for online content. Also something that would be helpful for Wales would be a new media news and current affairs and cultural blogging platform - perhaps via YouTube.
- I can't stress enough the importance of print. The print editions of magazines also give a substance to the publications.
- I browse the websites occasionally, but I wouldn't subscribe were it not for a print edition. Even established, respected publications, when reduced to online/digital only format recede into the abyss of the internet. Look at the example of the Independent newspaper – it is now online-only and essentially missing from the popular discourse and an alternative voice is missing from national newspapers. I understand it is a different situation to national newspaper, but the principle is the same: an article published online, it is read and is gone. A print magazine becomes part of the culture itself.
- Er gwaethaf llyfrau electronig a'r bygythiad digidol mae llyfrau Cymraeg a Saesneg yn ffynnu ac y mae gwyrth o awduron creadigol a beirdd yn creu pethau sy'n siarad â phobl heddiw. Rwyf wedi cyhoeddi llyfrau a phethau ar y we. Rwy'n derbyn breindal ar lyfrau. Nid wyf wedi derbyn DIM o'r deunydd ar y We. Sut ydym yn mynd i greu deunyddiau digidol nad oes neb yn barod i dalu amdany'n nhw, nad oes modd creu unrhyw incwm ohonynt fel y mae pethau ar hyn o bryd os nad ydynt yn gemau neu feddalwedd. Mae gan Amazon fonopoli bron ar lyfrau. Mae angen os deallaf yn iawn, greu system rheoli testun fyddai'n caniatáu rhyddhau deunydd Cymraeg heb orfod plygu i drefn a chostau Amazon.
- Mae'n bwysig i'r llyfrau bod yn lle mae'r bobl, ac ar y funud dyw hynny ddim yn cael ei gyflawni ar gyfer llyfrau yn ddigidol. Mae sawl siop ddigidol boblogaidd: Kindle; Kobo; iBooks a Google Play. Ar y funud dim ond y lolfa sy'n cyhoeddi i Kindle, a does neb yn cyhoeddi i'r lleill. Wrth gwrs mae Gwales ar gael, ond dyw pobl gyffredin ddim am fynd drwy'r strach o lawrlwytho oddi ar Gwales ac wedyn llwytho oddi ar gyfrifiadur (os oes ganddynt un!) i'w dyfais darllen. Mae'r siopau ar lein yma ar y dyfeisiadau yn barod, llwythwch y llyfrau arnynt, nid yw'n anodd.
- Ers sawl blwyddyn rwan mae recordiau finyl wedi bod yn dod efo cod y tu mewn i lawrlwytho y gerddoriaeth yn ddigidol. Beth am i lyfrau cynnig yr un peth? Prynu copi caled mewn siop llyfrau lleol, a bod y siop wedyn yn rhoi

allan cod i'r copi digidol, unai oddi ar Gwales (sydd yn mynd a ni nol i bwynt 1, ond mae rhywbeth yn well na dim), neu fod ffordd arbennig o allu dewis pa siop ar lein fydd y cod digidol yn gweithio arno?

- Dwi'n siŵr fydd rhai pobl yn gweld hyn fel cael dau beth am bris un. Ond nid cyrraedd y gynulleidfa sy'n bwysig a gallu ehangu sawl person sy'n darllen yn y Gymraeg? Tyfu'r gynulleidfa sy'n bwysig â'i neud yn rhwydd i bawb allu darllen yn y modd maent eisiau.
- The Library of Wales series shows the benefits of "physical" (as opposed to "digital") literature. The current trend seems to be to displace traditional, physical publishing with modern (and, no doubt, less expensive) digital publishing. I think that both have a role to play and that one should not be prioritised over another--at the very least, growth in digital publishing should not be to the detriment of the core, physical publishing on which its content and values are based. For instance, older readers (who I suspect make up a large proportion of the demographic who use the services of the Welsh Books Council) are more likely to appreciate physical books and magazines, so I am sure that they would be grateful for the continued provision of such physical publications.
- Mae cael cylchgronau gweladwy ar silffoedd mewn siopau yn hollbwysig i greu ymwybyddiaeth o fodolaeth cylchgronau Cymraeg. Os gorfodir rhai o'r cylchgronau i fod yn rhai electronig yn unig, byddant yn fwy anweledig ac ni fydd y cyhoedd yn gyffredinol yn ymwybodol o'u bodolaeth. Mae'n bwysig cynhyrch copiau caled.

Self-Publishing

- The WBC grant aid programme for publishers specifically excludes aid to small publishers which are run by writers and which are in effect self-publishing enterprises. In other words, there is no attempt to differentiate between self-publishing and vanity publishing. This is not very sophisticated! I have published an 8-novel saga (set in West Wales) which has racked up sales of over 80,000 copies -- which means that the books are professionally produced and well enough written to have become highly successful. But I received no financial help from WBC. That was rather galling when I see grant aid being dished out to scores of titles that have sold hardly at all..... if I had received grant aid, I would have been able to put much more effort into marketing, design and publicity.
- Self-published books are also barred from competitions, according to the current rules. So my main fiction title, which has sold over 35,000 copies, could not be entered and could not compete on a level playing field with other titles of lower quality and more limited appeal.

Accessibility Issues

- From my personal experience as a poet, I find very little support for anything that is not happening in the main cities (Swansea and Cardiff in the region of Wales that I live) and for the main literary festivals. I cannot recall seeing a single online writing group, either poetry or prose, in a long time, whereas in the last six months I have been able to participate in three poetry classes, at an advanced level, held online but run by Irish organisations with the support of Arts Council Ireland.
- My blindness makes it difficult for me to get to in-person courses and events, but in an increasingly digital world there are many people who would welcome such offerings. The benefits of having a balanced program of in-person and online events is significant. People like myself with accessibility difficulties benefit from having a digital option; people who for other reasons find in-person events a challenge can find an online format more welcoming; the rural nature of many parts of Wales can make groups and events difficult and expensive to access, where an online event, or video and audio coverage presented online can go some way towards making an event accessible; and simply in terms of supporting Welsh writers of all genres the digital opportunities can encourage new writers to put pen to paper as it were, and can make the Welsh population as a whole more aware of the many excellent Welsh writers.
- In terms of cultural, I do feel that here in Wales there ought to be BME workshops to help with progression in writing.
- I feel that there ought to be a platform for BME writers in Wales UK. Also, help for people with disabilities ought to be published regularly (as and when).

Inequality/Deprived Communities

- Too much of the time projects for deprived communities are of poor quality and come in with pre-existing ideas of what will work, e.g. rap for young people that is of bad quality and derivative etc. It has to be grassroots and not top-down. We can look to the socially-engaged arts practices for ideas. This cannot just be one-off support for individual communities but an overarching project that looks across the spectrum of the scene.
- Illiteracy in young people (especially in socially deprived areas/post-industrial villages and towns) is huge problem in Wales, and obviously this has a knock-on impact on publishing and literature in general. I believe the Welsh publishers, authors and readers have a responsibility to tackle this problem as best they (we) can, though it is obviously very difficult.

Comparison with Other Countries

- In some Balkan countries, cash-strapped as they are, there are minimum rates of payment to authors of publicly funded literature which are

safeguarded and publishers etc are obliged to honour them. In Wales when cash is short, publishers, arts admin and bookshops continue to receive living wages (just) while authors' remuneration is reduced frequently to token payments or zero.

- There is no mechanism for authors to complain and it seems no independent check on what payments are made or whether publishers honour contracts.
- Unlike Ireland, Wales does not appear to support its writers and those aspiring to write. Other European countries, especially Norway, possess a unique and respected literary culture due in part to the support of the government.
- Ireland—though the Irish mightn't see it so—genuinely excel at nurturing talent. There's a supportive literary community and established writers generally send the lift back down. The downside is a lot of hype for pretty average but it's probably a small price to pay for the exposure that new Irish writers consistently receive. (An interesting exercise: googling 'new voice in Irish fiction' gives you 36,000 results. Googling 'new voice in Welsh fiction' gives you zero. One could draw lot of conclusions from this...)"
- Ireland has a very strong model for bold and exciting voices coming through Irish independent literature. An investigation into this would be very valuable, and give the industry an idea of how to expand. However, within the Welsh publishing industry there is an identifiable lackadaisical attitude to this need.
- Publishing may be centred in London, but this should not prevent Wales from becoming a publishing hub - after all, in the 21st century, physical distance from London agents and events is less of a barrier. I would like to see Wales follow Scotland and its inspiring presses, like Barrington Stoke and Canongate - institutions which balance an essential Scottishness with a broader remit (e.g. addressing dyslexia, in the case of Barrington Stoke).
- Wales does not pull its cultural weight on the publishing scene. The normal route for a young writer is to be published by a Welsh publisher before being picked up by a larger, London-based publisher. I'm at the very beginning of this process and from what I've heard of the experiences of others I would rather skip being published by a Welsh publisher and jump straight to a London publisher. I would hope to receive better editing and marketing as a result. The people working in the publishing industry in Wales work hard on behalf of their writers but the sector seems to be restricted by the current grant structure. Also, a lack of literary agents in Wales is a problem for writers. If a writer wants to work with an agent they have to look to London.
- Welsh publishers have reasonable impact in 'cultural' Wales, but almost none beyond it. There is a glass border between Wales and England (and by extension the wider world). The Welsh publishers are still too small (and semi-professional) to compete with English operations. Welsh publishers have

pitiful book distribution beyond Wales. Consequently, most of the better Welsh authors (who often begin with Welsh publishers) 'graduate' to bigger English publishers. Nevertheless, the Welsh publishers are still an important breeding ground for authors and serve a national function in Wales (though there is lots of room for improvement in terms of outreach).

- Publishing in Wales is often restricted by the Welshness/Welsh content of the literature - there are good writers and publishers in Wales writing about non-Welsh subjects or from a non-Welsh perspective. Our sense of Welsh identity should be more than just location and should reflect the diverse and interesting cultural landscape that Wales is. Publishing here should be more akin to that of Scotland and Ireland.
- In its London head office, the last remaining physical bookshop chain, Waterstones, has four Scottish buyers, four Irish buyers and no Welsh buyers as we come under 'England and Wales' yet it has recently become extremely difficult to win any significant orders for titles from Wales, even when they are about non Welsh subjects, such as titles set in other European countries.
- Build on the wider culture, including Scandinavian noir - and find a Welsh Poldark!

Overseas – book fairs

- The support from the Welsh Government to attend key book fairs in Europe, eg Bologna, has been instrumental in boosting the profile of Welsh books and Welsh culture, even if it falls short of that provided to Irish and Scottish publishing.
- Wales needs an international champion. There is so much potential in selling rights to home-produced literature in both English and Welsh, yet the cost of attending such high-profile events such as Frankfurt Bookfair, Bologna, Beijing, Guadalajara, in order to promote such business is prohibitive for the individual publisher. Also, to facilitate this, the nation needs to build a profile - San Marino, Iceland, The Vatican, even the Faeroe Islands all have national bookstands at Frankfurt, yet Wales does not.
- It is incomprehensible that Wales is not represented as a nation at the major international book fairs such as Frankfurt, London, Chicago (BEA), Beijing and Tokyo. These fairs have evolved from being merely book exhibition to major market places of content exchange and trading. A nation that is not represented effectively does not exist. It is particularly disheartening that smaller countries like Iceland, the Baltic states and even regions like Flanders and Catalonia, or closer to home Scotland and Ireland do have a country presence whereas Wales does not.
- Consideration should be given at establishing a specific fund for a Wales presence at international content fairs, or at least at Frankfurt Book Fair in

recognition of its importance. Further consideration should be given to the idea of Wales becoming a Guest of Honour at Frankfurt Book Fair, a process that would take at least 5 years in terms of readiness as several Million Euros of funding.

Support for Schools vital

- Providing that schools are provided with sufficient budgets for schools' resources (primary and secondary), my recommendation is to set-up/support the introduction of a Welsh educational publisher.
- Teachers and students will benefit from focussed, targeted resources with the philosophy of the Welsh curriculum at its heart. This will also allow Welsh education and resource provision to be truly integrated from a social, cultural, technological and financial point of view.
- A Welsh educational publisher will ensure that Welsh schools' budgetary spend on resources remains in Wales and contributes to the Welsh economy.
- An educational publisher will provide employment opportunities and contribute to the growth of the Creative Economy.
- The UK education system and accompanying resources are highly regarded across the world with many English educational publishers benefiting from strong positions in global markets. This could be a great opportunity for Wales to export its publishing products.
- With digital demands for schools increasing, we have a strong opportunity to retain and grow our creative digital individuals within Wales.
- Limited initial investment and set up costs as there are plentiful, experienced freelance workers and much of the process able to be outsourced to established organisations.

Relevant resources for schools

- There is no major publisher who produces resources specifically aimed at the needs of Welsh teachers and students, which places Welsh schools at a distinct disadvantage. Welsh schools who wish to purchase trusted, quality resources are forced to buy English curriculum resources which have been tweaked to 'sufficiently' fit the Welsh curriculum, resulting in a diluted approach.
- Resources for Welsh schools are a lower priority for English publishers and usually delivered too late in the year to allow teachers to prepare for a new term. With huge forthcoming changes to English and Welsh curricula resulting in an imminent diversification, this issue will worsen. Welsh schools should

enjoy the same opportunities as their English (and Scottish) counterparts - ring-fenced, sufficient budget to enable purchase of quality, relevant, Wales-focused product available at the right time.

Importance of curriculum – appreciation of literature

- The main challenges faced by the publishing industry is that our young people are not taught an appreciation of books. The way the new curriculum is structured means that a love of anything creative (especially genres such as poetry) are actively educated out of people. Wales needs to continue to pioneer with schemes such as the Lead Creative Schools to encourage creative approaches. Our young people are the future and so we need to be opening their minds creatively so that they will actively choose to engage with Wales' rich and diverse publishing autonomously. This can only be achieved by a drastic overhaul of the education system.

Importance of University of Wales Press (UWP)

- It is the only academic publisher in the world that has at its heart a central mission to disseminate scholarly research in both national languages on the history, politics, culture, literature, law etc. of Wales, and all are published simultaneously in print and various digital formats.
- It is the only publisher in Wales with a comprehensive international distribution network for both print and ebooks, with worldwide distribution partners in North & South America, Europe, India, Asia and Australia/New Zealand thus guaranteeing that Wales is represented internationally as a nation which takes scholarship and learning seriously.
- It is the only publisher in Wales that offers Open Access in all its variations on internationally recognised platforms and its own website (www.uwp.co.uk), is fully bilingual and content rich, providing relevant information to the Academy in Wales.
- Without a thriving UWP, trade publishers in Wales will become the only potential outlet for scholarly works yet these will not meet scholarly expectations, due to the lack of expertise and commitment to academic standards and quality.
- It is the only publisher in Wales that operates a stringent and rigorous system of peer review to ensure the upholding and safeguarding of academic standards. Academic achievement and excellence are intrinsically linked to publication, as monographs and journal articles are central to the Research Excellence Framework.
- Without an internationally respected publisher such as UWP offering publishing opportunities for mandated UK-wide exercises such as REF, scholars will turn their back on the study of Wales, marginalising its relevance and limiting the contribution of Welsh universities to REF. This will lead to a

catastrophic lack of Wales-related research which in its simpler forms is used to inform school curricula, educational programmes by the BBC Wales, ITV Wales and S4C and other media to tell the unique story of Wales.

- The current funding model sees UWP depend on an annual core grant from the University of Wales to cover part of its staff and running costs; it also receives individual book grants from institutions/other funders, and has income from sales and content licensing as is usual in the creative industries; the commissioning process has lead times of several years ahead, which is why a guaranteed core grant is vital for UWP to operate its business and ultimately guarantee its survival.
- A government subsidy, proportionate to what other similar size publishers receive should be considered to secure UWPs future and vital contribution.
- Currently there is no specifically ring-fenced subsidy in place for the structured support of academic writing/books that focus on Wales, in either language and which are almost exclusively published by University of Wales Press (UWP). The discontinuation and subsequent re-routing of the former HEFCW publications fund means that the funding of such titles is left to individual HEIs in Wales. Key publishers in Wales like Gomer, Seren, Parthian, Honno etc benefit from guaranteed annual subsidies as well as being able to apply for additional grants. In contrast most of the publications of UWP are expressly excluded due to their academic nature. Arguably every nation does need at least one rigorous academic publisher, and Wales is fortunate to have such an institution
- Literary and cultural criticism, history and social studies are all integral to a healthy, diverse, informed literary and cultural scene. The continued insecurity and uncertainty of University of Wales Press and funding for the study of Wales cannot be excluded from the interrelated web of publishing in Wales: both need to be secured for the long term, and providing this funding through the Books Council on behalf of all Welsh research universities, rather than through the University of Wales should be considered as one option.
- The existence of a University Press dedicated to Wales is crucial. English and American presses will occasionally publish Welsh-centered material, but there is no sustained commitment to this. The idea that the best academic research will always find an outlet is bogus. Academics work in a highly competitive market in which only certain kinds of works on certain themes get published. The last ten years has seen a flourishing of cultural criticism on Wales, and some of it is making a broader impact (witness the Welsh studies conference that took place at Harvard University this Summer), but without the University of Wales Press and the indigenous Welsh presses much of this work would not have seen the light of day. Sustaining a world class academic publishing culture is a challenge but one that must be faced in any mature nation.

Too parochial?

- Emphasis on maintaining the crachach Welsh language has reduced focus on Welsh as a developing bilingual agile medium..the language police undermine its application and reduce its use
- Writing is turning into a middle class middle brow scene where only the worthy or well heeled survive or receive encouragement.
- Industry too narrow minded on being 'Welsh' and not publishing commercially viable literature by Welsh authors. The industry is an exclusive clique, with the same authors and publishers. It lacks appeal to the general public.
- There is a lack of transparency in Welsh publishing and the literature industry that breeds cronyism and conflicts of interest that may line the pockets of various authors and academics but impoverishes Welsh literature.
- For the most part, the Welsh literary/cultural scene seems dominated by an in-crowd. The amount of money being given to writers who already have significant (largely university) jobs seems bizarre. WG has tried to 'open up the arts to all' but definitely hasn't reached the literary culutre yet (the sector's fault mainly, not WG's). This would make wales's literary scene more representative and more encouraging for those interested in writing (whatever their standard). Publicly funded literary projects should be about writing not just 'good' writing!

Translation/Wales Literature Exchange

- Welsh Books Councils support for publishing in both languages is valuable, but should be complemented by increased support for translation. Wales Literature Exchange's support for foreign publishers translating literature from Wales is an effective model but the size of the translation fund is the smallest in Europe and, crucially, there is no funding available for translation from Welsh into English to facilitate translation into other languages. This is gap in provision which makes it difficult for Welsh-language writing to be effectively promoted abroad. International literary activities are effectively supported both by Arts Council Wales and Wales Arts International), but the level of funding available is inadequate, both in relation to the needs of the sector and in comparison with other European countries.
- Mae'r Gyfnewidfa Lèn wedi llwyddo i ddod â llenyddiaeth Gymraeg i gynulleidfa ryngwladol a rhoi cyfleoedd newydd i awduron
- Mae'r Gyfnewidfa Len wedi cael llwyddiant rhyfeddol yn gwerthu hawliau tramor i lenyddiaeth Cymru.

- Wales Literature Exchange does wonderful work and must continue. Its independence of other literary organisations is an important part of its strength.
- O'r holl gyrff sy'n cael eu cefnogi, Cyfnewidfa Lên Cymru sydd fwyaf anweledig. Does dim sôn yn aml am unrhyw lwyddiannau, arloesi na digwyddiadau sy'n arddangos eu gwaith na'u gweledigaeth. Rwy'n derbyn bod cyfran o'u gwaith yn ymwneud â rhwydweithio dramor, ond byddai'n dda eu gweld yn meithrin presenoldeb mwy amlwg drwy wella eu cyfathrebu y tu hwnt i gylch dethol o awduron. Cyfnewid nid cyfieithu'n unig. Ble mae'r prosiectau a fyddai'n dod a llenorion o dramor i gyswllt a phlant Cymru, neu'r gweithdai sy'n dod a'r technegau rhyngwladol arloesol i sylw ein cyhoeddwr er enghraifft?

Importance of Books – Welsh Language

- Producing Welsh language books is paramount to helping the Welsh language survive. Our identity, history and culture will be quickly lost if we fail to invest and secure funding to support all Welsh Publishers, authors, artist and the wide range of people involved in literature and producing beautiful books in Wales.

Incredible talent in Wales

- I think we have incredible talent here in Wales, in English writing as much as Welsh, and we need to spread our focus out from the universities and into the far edges of our country.
- Wales is a place of incredible talent with a strong heritage. But more should be done to showcase the work of today's authors. Create more author residencies.
- Among all of the dimensions of cultural activity that Wales should be known for world wide, literature (in traditional and innovative forms) is in my opinion paramount. I was aghast at the recent initiative to cut funding that supports literary/scholarly activity in Wales - and extremely grateful that it was stopped. In my opinion Wales has never before had such an energized set of writers, scholars, and publishers in Welsh and in English - and now is the time to capitalize on this energy.
- Our cultural heritage is precious and as we have seen with the Welsh Language at great risk. It is essential these are nurtured and supported in a self confident Wales, proud of its cultural achievements and wanting to build on these.

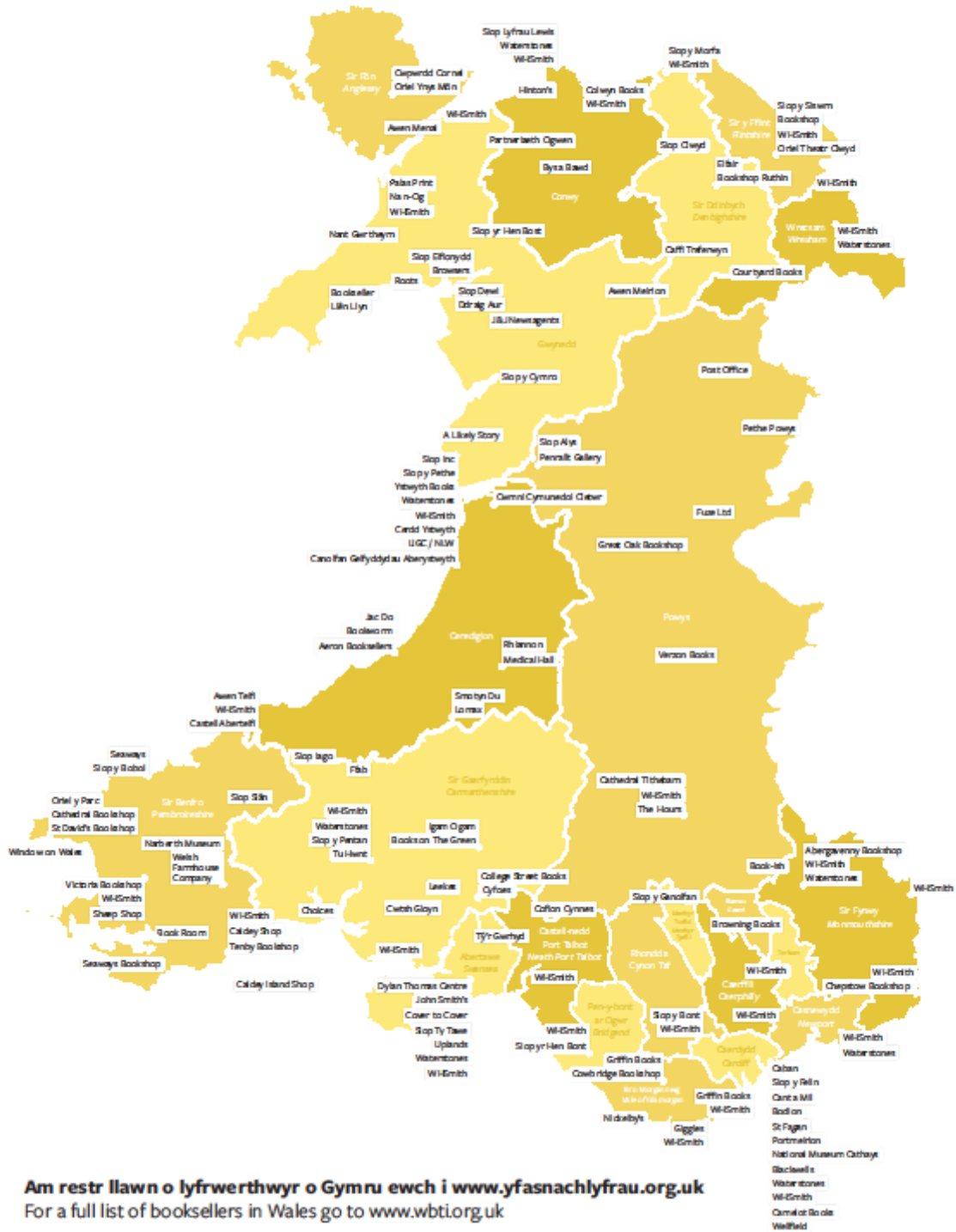
Raise Standards

- Fe fyddwn i'n pwysleisio fod cynnal a chodi safonau yn y byd cyhoeddi yng Nghymru yn bwysig iawn. Rwy'n sôn am ansawdd y deunydd crai ysgrifenedig, safon y deunydd gweledol a'r dylunio, safon y golygu a'r darllen proflenni, a'r argraffu. Gyda chwtogi ariannol mae'n beryg i safonau ostwng. Yn hytrach mae angen eu cynnal, ac mewn rhai achosion mae angen eu codi. Mae hyn yn bwysig, yn enwedig yn achos y deunydd Cymraeg. Mae peryg inni weithiau fodloni ar safonau eilradd gyda llyfrau a chylchgronau Cymraeg; mae'n hollbwysig fod y deunydd Cymraeg yn apelgar ac yn cystadlu o ran safon â deunydd Saesneg.

Working in Partnership is vital

- Mae gwaith cyrff fel Cwlwm Cyhoeddwrwyr Cymru, a'r cyfryngau, yn hollbwysig, ond hefyd rhaid annog cydweithio o ran y gwasanaethau Llyfrgell, ysgolion, colegau a phrifysgolion, addysg barhaus i oedolion, manwerthwyr Prydeinig sy'n gwerthu yng Nghymru (maes y mae'r Cyngor Llyfrau wedi ymdrechu ag ef ers blynnyddoedd, ond heb fawr o lwyddiant) ac unrhyw gyfle arall. Mae angen mwy o strategaeth gyfun, sy'n tynnu asiantaethau ac adrannau gwahanol y Llywodraeth ynghyd er mwyn hyrwyddo llyfrau o Gymru yn yr un modd ag yr hyrwyddir bwyd, treftadaeth, amgylchedd y wlad. Mae'r diwydiant cyhoeddi yn ased bwysig, a dylid ei gwerthu'n llawer ehangach oddi mewn i Gymru ac oddi allan.

Llyfrwerthwyr yng Nghymru Booksellers in Wales



Atodiad 7: International comparisons between Wales and other countries [I'w Gyfieithu]

This section aims to draw some comparisons between the publishing and literature sectors in Wales and those of other European nations – both ‘autonomous regions’ or ‘sub-state legislatures’ and sovereign states.

Comparative data in these sectors is difficult to obtain or compile for several reasons. First of all, home data is not easily available in many countries because it is not collected or published, sometimes due to commercial sensitivity as well as for other reasons. Secondly, in the case of autonomous regions, data is not always collected at the regional or sub-state level and then cannot be disaggregated from larger data sets (e.g. state level data). Thirdly, when data is available, the indicators used do not often correspond across different countries, making like-for-like comparison difficult to establish. In addition, language communities – and hence literary and publishing scenes – operate across regional and state borders, (like English language publishing in Wales, of course) which introduces further complexity to such contexts. Bilingual (or multilingual) contexts can also vary in relation to the literacy levels of speakers and their reading habits in each of their languages, as well as to the size and diversity of the literature and publishing sector in each language. Also, with the exception of children’s books and educational material, translated literature hardly features in the Welsh-language publishing, whereas in languages other than English, translations (of anglophone best sellers in particular) contribute significantly to numbers of titles, sales etc.

Beyond very broad demographic and economic figures, such as GDP, number of speakers etc, PISA results can provide one common indicator to gauge general levels of reading and literacy across the selected states/nations/regions. Frankfurt Book Fair produces information on the Book Markets of participating countries – usually, though not always, sovereign states – but even so, the data presented in these Book Market Analyses is not consistent across each context.

The information presented in this section has been compiled from numerous sources in order to present the Welsh data (sourced from the Welsh Books Council) in comparison, where possible, with that of other European countries. A number of key indicators were selected and applied to Welsh-language and English-language publishing. International comparison may be particularly relevant to Welsh language publishing, so that the actual figures (sales, number of titles etc) can be presented alongside those of similar sized language communities, as well looking at the figures in terms of percentage or per head of population.

The Panel requested additional data from the Welsh Books Council in order to establish some criteria for international comparison, focussing on number of titles, print run and sales (including digital publications).

Welsh Books Council Data

The Welsh Books Council provided data for 2013-2014 and 2014-2015 (the most recent data available, as data is collected in September each year and taking into consideration the request for 18 month sales). The Welsh Books Council data included two separate data sets: (a) grant supported titles and (b) titles distributed by its Distribution Centre, for both Welsh-language and English-language titles.

(a) Grant Supported Titles

| | English-language grant-supported titles | | <i>Increase/Decrease on previous year</i> | Welsh-language grant-supported titles | | <i>Increase/Decrease on previous year</i> |
|---|---|---------|---|---------------------------------------|---------|---|
| | 2014/15 | 2013/14 | | 2014/15 | 2013/14 | |
| 1) New titles per year (not including reprints/revised editions) | | | | | | |
| a. All books | 113 | 93 | 22% | 209 | 202 | 3% |
| b. Educational* | 0 | 0 | | 0 | 0 | |
| c. Children | 25 | 10 | 150% | 107 | 99 | 8% |
| 2) Print run and Average Sales | | | | | | |
| a. i) Literature - average first print run** | 1,557 | 852 | 83% | 1,220 | 1,068 | 14% |
| a. ii) Literature - average 18 month sales | 1,920 | 1,381 | 39% | 885 | 772 | 15% |
| b. i) Poetry - average first print run | 763 | 600 | 27% | 710 | 738 | -4% |
| b. ii) Poetry - average 18 month sales | 415 | 329 | 26% | 445 | 375 | 19% |
| c. i) Literary/Cultural Magazines - average print run | 850 | 850 | 0% | Data unavailable | | |
| c. ii) Literary/Cultural Magazines - average sales | 604 | 567 | 6.5% | 708 | 730 | -3% |
| 3) Best sellers | | | | | | |
| a. Poetry (single poet and/or anthology) | 1,389 | 722 | 92% | 866 | 629 | 38% |
| b. Literature | 25,756 | 7,914 | 225% | 3,147 | 2,539 | 24% |
| | | | | | | |

* The grants support children's leisure books but educational titles are not currently eligible for funding since these are supported via the Education Department of the Welsh Government. Please see the next tab 'All Titles Distributed by WBC'.

** **First** print run is often lower than the sales achieved since further print runs can be produced if titles are successful. Also, e-books are produced and are not included in print run figures.

(b) Titles distributed by the Distribution Centre

| | English-language titles distributed | | Increase/Decrease on previous year | Welsh-language titles distributed | | Increase/Decrease on previous year |
|---|-------------------------------------|--------|------------------------------------|-----------------------------------|--------|------------------------------------|
| | 2014 | 2013 | | 2014 | 2013 | |
| 1) New titles (per calendar year), not including reprints/revised editions | | | | | | |
| a. All books | 761 | 670 | 14% | 646 | 432 | 50% |
| b. Educational* | 94 | 33 | 185% | 279 | 110 | 154% |
| c. Children | 88 | 36 | 144% | 177 | 152 | 16% |
| 2) Total Sales (per Financial Year**) | | | | | | |
| a. Literature - total sales within financial year (units sold) | 18,921 | 11,812 | 60% | 20,087 | 18,105 | 11% |
| b. Poetry - total sales within financial year (units sold) | 5,708 | 4,900 | 16% | 4,830 | 3,845 | 26% |
| 3) Best sellers (distributed) | | | | | | |
| a. Poetry (single poet and/or anthology) | 1,568 | 235 | | 649 | 335 | |
| b. Literature | 2,252 | 2,939 | | 1,593 | 871 | |

* Number of new titles distributed is noted per calendar year.

** Sales are the total number of books sold **within** the financial year (all titles, new and backlist).

Best-sellers: literature

Welsh-language best sellers in literature are usually the prize winners at the National Eisteddfod (Y Fedal Ryddiaeth and Gwobr Goffa Daniel Owen), and can expect to sell 2,500-3,500 during the first 18 months of sales. Figures such as these look extremely small when compared to data on the UK best sellers, where the top 500 – or top 1% – of authors account for 32.8% of the annual £1.49bn in sales⁵³. However, in terms of population, 3000 in Welsh (with just over half a million speakers) is equivalent to sales of 375,000 in French in France's 66.8 million population (not including other French speaking populations, such as Belgium). In 2016, the best seller in France sold 694,840⁵⁴ (translation of JK Rowling *The Cursed Child*). The second best seller, Guillaume Musso's *L'instant présent* sold 565,880 followed by *La fille de Brooklyn* at 458,799 also by Musso, the best-selling French author alive today. In 2016 in France, nine of the top ten books sold 300,000 or more⁵⁵⁶, the list includes non-fiction (such as cookery etc) as well as literature..

Literary best sellers in the Catalan language (which has a speaker community of around 10m), sell 55,000 copies⁵⁷. Catalan speakers are also literate in Spanish or in French, as are Welsh speakers in English. Given the difference in population, it might be expected for Catalan-language sales to be roughly 20 times Welsh-language sales, in which case 55,000 in Catalan would be equivalent to 2,750 in Welsh.

The average first print run for English-language grant supported literary titles - in Wales was 1,557 (2014-15) and 852 (2013-14). The first print run for Welsh - language grant supported literary titles was 1,220 (2014-15) and 1,068 (2013-14). In the Basque Autonomous Community (population just over 2.1million inhabitants; some 700,000 Basque speakers), the first print run for contemporary literature in 2013 was 1,504⁵⁸, up from 1,114 in 2012. There is some translation into Basque of contemporary and classical literature, though readers are also able to (and at least as likely to) access these works in their Spanish translations.

Best sellers in Welsh Language Poetry (single author collections) were 866 (2014-15) and 629 (2013-2014), with average print runs of 738 and 710 for poetry during the same periods. These figures compare favourably with poetry sales and print runs

⁵³ <https://www.theguardian.com/books/2016/jan/15/earnings-soar-for-uks-bestselling-authors-as-wealth-gap-widens-in-books-industry>

⁵⁴ <http://www.lefigaro.fr/livres/2013/01/23/03005-20130123ARTFIG00425-vente-de-livres-musso-devant-cinquante-nuances-de-grey.php>

⁵⁵ <http://www.lefigaro.fr/livres/2013/01/23/03005-20130123ARTFIG00425-vente-de-livres-musso-devant-cinquante-nuances-de-grey.php>

⁵⁶ <http://www.edistat.com/>

⁵⁷ http://www.ara.cat/especials/santjordi2016/lectura-catala-creix-passa-anys_0_1561044010.html

⁵⁸ Gremio de Editores de Euskadi / Euskadiko Editoreen Elkarte (2014) XIX Informe De La Edición En La Comunidad Autónoma Vasca: Comercio Interior 2013

in a number of language communities. In Maltese for example, with a population of approximately 433,000 (slightly lower than Welsh speakers; a different kind of bilingualism with English), the average first print run for poetry is 500 copies⁵⁹. Similarly for Catalan, with twenty times more speakers than Welsh, the average print run for poetry is around 400 copies. In the case of Spanish poetry published in Barcelona – an important global publishing centre in the Spanish speaking world – the average first print run is estimated at 1,000 copies.

The number of **new titles published per year** in Wales (as defined by the number of new titles per year distributed through the Welsh Books Council) was 1102 in 2013 and 1407 in 2014, with 432 and 646 in Welsh and 670 and 761 in English. In Maltese, the figure is just under 900 titles including some 200 educational titles. In Iceland, with a population of 330,000 just over 1/10th the size of Wales or ½ the population of Welsh speakers, the number of new titles per year is 1383 (2014). In actual terms, the Icelandic book market is similar to that of books published in Wales (and distributed through the Welsh Books Council). Also, in actual terms, three times as many books are published annually in Icelandic compared to Welsh, and six times, relative to population size, (though the mechanics of the education market in Wales may skew some of the data to the detriment of the size of the book market in Wales). In terms of translations or original work, 62% of children's titles in Icelandic are translated, and 38% original works. In general fiction, 50% is Icelandic and 50% is translated.⁶⁰ In 2015, 361 of the 1352 books published were translations⁶¹. Of course, Welsh language readers also read (and buy) English language books (including English language translations of books in other languages), though there may be some variation between consumption of fiction and poetry in both languages. In the Basque Autonomous Community (population just over 2.1 million inhabitants; some 700,000 Basque speakers), just over 2800 books (all titles), were published during 2013, 47% of those (or 1,346) in Basque, and most of the others were published in Spanish. Of the 1,346 books published in Basque, some 950 were aimed at children or the school/education market.

Book sales in Iceland in 2014 sales gross reached 28 million Euros which makes an average gross per inhabitant of 83 Euros, the highest in Europe, with every Icelander buying at least eight books per year⁶² (mostly as gifts) and 50% reading at least 8 books per year. Some 48% of the Catalan population (over 14 years old) buys 7 books per year excluding text books, (cf 2011: 46% and 8 books). Comparative data for the Welsh market is not available.

In Flanders (in Belgium), which has a population twice that of Wales and ten times that of Welsh speakers, the **'overall sales for the book industry** in 2014 amounted to around €365 million. Approximately 70% of this amount was earned inside Flanders. Here, the education and science segment occupies a strong position (€172 million), while non-fiction, fiction and children's books together achieved combined

⁵⁹ <http://ktieb.org.mt/wp-content/uploads/2016/01/annual-report-english-digital-v3.pdf>

⁶⁰ <http://2seasagency.com/publishing-iceland-reading-national-sport/> Giulia Trentacosti

⁶¹ <http://utgafuskra.is/statistics.jsp?lang=1>

⁶² http://www.buchmesse.de/images/fbm/dokumente-ua-pdfs/2016/buchmarkt_2016_iceland_58774.pdf

sales of €82 million. The remaining 30% came from sales outside Flanders, with the Netherlands and France as the primary target markets.⁶³ The Belgian publishing industry – and in particular in literature – is overshadowed by the publishing industries of Paris and Amsterdam. Authors who start their publishing careers with Belgian publishers in either language (French or Dutch/Flemish) tend to move towards the bigger publishing centres of Paris or Amsterdam as their careers progress. This situation is not dissimilar to that of English language writers in or from Wales.

In the Basque Autonomous Community, some 445 people are employed in the publishing sector (excluding printing) and there are 107 publishers (excluding the Government and Public Authorities). Some 16% of these publishing houses are part of larger publishing groups; 80% employ no more than 4 people and 50% of the publishers have no more than 1 employee. The total sales generated by the publishing industry in the Basque Country in 2013 was €5m, with sales of Basque language books accounting for €2.5m.

Bilingual populations such as speakers of Welsh, Basque and Catalan are in general either equally literate as adults in both languages or sometimes more literate in the dominant language (English, Spanish/French). Reading patterns reflect this: 26% of the Catalan population reads more regularly in Catalan (up 5% since 2011), while 71% reads more regularly in Spanish (down 6% since 2011)⁶⁴. Some 82% of the population of Catalonia is able to read Catalan⁶⁵ and 97% able to read Spanish. Also, 66% of Catalan population read books for work, study or pleasure (compared to the European average of 68%), which is 4% higher than in 2011. Just over half of the population (52%) reads weekly or more often⁶⁶, and the older generations read less than younger or middle aged groups.

Digital reading in Catalonia: 24% of all Catalans read books in digital form, up from 6% in 2011 and, according to Cambra del Llibre⁶⁷, this is largely due to piracy. Digital sales represent 3-5% of all book sales, with some 25% of new titles also available in digital format. In 2013 in the Basque Autonomous Community, e-books (in all formats) accounted for just 1.5% of the output of all publishers in the region, in Basque, Spanish and other languages. School material accounted for two thirds of this. In Wales, sales of e-books via Gwales.com account for less than 1% of all titles sold through the Welsh Books Council Distribution Centre. No data was found for the total number of e-books bought by the Welsh population through other outlets (e.g. Amazon). The percentage of digital sales in English-language grant supported titles in 2014-15 was 31%, somewhat lower than 39% for 2013-14. In the case of Welsh-language grant supported titles, the equivalent percentage in 2014-15 was 2%, and just 7% of titles were offered as e-books. Digital sales are extremely marginal to the

⁶³ http://www.buchmesse.de/images/fbm/dokumente-ua-pdfs/2016/flandern_webseite_2016_en_57470.pdf

⁶⁴ http://www.ara.cat/especials/santjordi2016/lectura-catala-creix-passa-anys_0_1561044010.html

⁶⁵ http://llengua.gencat.cat/web/.content/documents/publicacions/altres/arxiu/EULP2013_angles.pdf

⁶⁶ http://premsa.gencat.cat/pres_fs/vp/docs/2016/04/18/13/53/0faf43c0-2ae0-495b-b7ab-a3b2a003b7c2.pdf

⁶⁷ http://www.ara.cat/especials/santjordi2016/lectura-catala-creix-passa-anys_0_1561044010.html

general Welsh language book market at present, and are much more impactful in the sales of English-language titles. There is some evidence to suggest that this may be more compounded in small book markets. In 2014, Icelandic e-books accounted for less than 1% of the total market share⁶⁸.

Although comparative data is patchy, it is still possible to make some limited comparisons between Wales and other countries. As has been noted elsewhere in this report, there are some significant data gaps in Wales – such as the size of the Welsh Book Market, the number of printed books bought in Wales and the number of e-books bought by the Welsh population etc. In the case of both English-language and Welsh-language publications, the Welsh Books Council data points to increases from the 2013-14 figures to the 2014-15 figures across most categories, though it cannot be assumed that this growth will continue. The figures for Welsh language publishing in general compare reasonably well with other languages of similar population sizes, and, when per capita adjustments are made to Welsh language literature – and to poetry in particular – the figures compare very favourably with more widely spoken languages.

⁶⁸ <http://www.islit.is/en/news/nr/3965>

Atodiad 8 : Adroddiad Diamond

DYFYNIADAU O ADRODDIAD INTERIM DIAMOND (Rhagfyr 2015)

Paragraffau perthnasol, cyfeiriadau at Gwasg Prifysgol Cymru tud 13 a 95-96

Daeth set o themâu i'r amlwg yn ymwneud â'r iaith Gymraeg a darpariaeth cyfrwng Cymraeg:

xxiv) Pwysigrwydd darpariaeth cyfrwng Cymraeg; barn gymysg ynglŷn ag i ba raddau y mae'r trefniadau presennol yn cefnogi mesurau i ehangu mynediad i AU drwy gyfrwng y Gymraeg; a chydabyddiaeth o rôl y Coleg Cymraeg Cenedlaethol.

xxv) Cyfraniad allweddol darparwyr addysg uwch at ddatblygu gweithlu dwyieithog medrus iawn ac at baratoi ar gyfer cenedl ddwyieithog.

xxvi) Cymorth i addysgu diwylliant a hanes Cymru; Gwasg Prifysgol Cymru a Geiriadur Prifysgol Cymru.

xxvi) Cymorth ar gyfer addysgu diwylliant a hanes Cymru, Gwasg Prifysgol Cymru a'r Geiriadur Cymraeg.

DYFYNIADAU O ADRODDIAD TERFYNOL DIAMOND (Medi 2016)

Crynodeb Gweithredol

“19. Mae'r Panel Adolygu'n cefnogi'r egwyddor o fuddsoddiad cyhoeddus, ochr yn ochr â dulliau masnachol, ar gyfer gwasg gyhoeddi academiaidd yng Nghymru. Credwn y dylai amseriad yr adolygiad annibynnol o gymorth Llywodraeth Cymru ar gyfer cyhoeddi a llenyddiaeth yng Nghymru ganiatáu i'r holl randdeiliaid ddatblygu cynllun busnes cynaliadwy ar gyfer Gwasg Prifysgol Cymru. “

Adroddiad Terfynol

9.11 Gwasg Prifysgol Cymru (GPC)

9.11.1 Derbyniodd y Panel Adolygu safbwyntiau cryf am bwysigrwydd Gwasg Prifysgol Cymru o ran cefnogi'r Gymraeg ac astudiaethau Cymraeg yn ehangach; ac mae'r Panel Adolygu wedi'i argyhoeddi ynghylch y rôl bwysig hon. Felly mae'n llwyr gefnogi penderfyniad y Dirprwy Weinidog Diwylliant, Chwaraeon a Thwristiaeth ar y pryd, ar 15 Mawrth 2016, i gyhoeddi adolygiad annibynnol o gefnogaeth Llywodraeth Cymru ar gyfer cyhoeddi a llenyddiaeth yng Nghymru.

9.11.2 Mae'r Panel yn llwyr gefnogi cylch gwaith yr adolygiad, a fydd yn edrych ar: a) nodau diwylliannol, cymdeithasol ac economaidd Llywodraeth Cymru ar hyn o bryd wrth gefnogi'r diwydiant cyhoeddi a llenyddiaeth yng Nghymru ac a yw'r nodau hyn

yn cael eu cyflawni; b) datblygiadau digidol yn y diwydiant cyhoeddi ac a yw'r system gyfredol o gymorth yn addas ar gyfer y diwydiant modern;

ac c) cymorth ar gyfer cyhoeddi a llenyddiaeth mewn ardaloedd dan anfantais ledled Cymru. Mae'r Panel yn cefnogi egwyddor buddsoddi cyhoeddus, ochr yn ochr â dulliau masnachol, ar gyfer tŷ cyhoeddi academaidd yng Nghymru ac mae o'r farn y dylai amseru'r adolygiad ganiatáu i'r holl randdeiliaid ddatblygu cynllun busnes cynaliadwy ar gyfer GPC.

Atodiad 9 Welsh Government's Major Events Unit : Support for Literature and Festivals [I'w Gyfieithu]

| 2016 | Event | Type | Funded body | Level of funding | Location |
|-----------------|---|-----------------------|---------------------------------------|------------------|--------------------|
| 14 May | International Dylan Thomas Day: 2016 Events/activities across Wales - http://www.literaturewales.org/our-projects/international-dylan-thomas-day/ | Cultural literature / | Literature Wales | £15k | Pan-Wales activity |
| 26 May – 5 June | Hay Festival: To support a project to improve digital connectivity at the site of the Events to support live social media interactivity, and to establish a new production unit to capture, edit and distribute audio and video content to a global audience | Cultural / Literature | Hay Festival of Literature & the Arts | £17.5k | Hay-on-Wye |
| 18-21 Aug | Youth Arts Festival: The Funding will support the development of the newly established (2016), Youth Arts Festival for Wales. Creation of new employment and training opportunities in the area and development of opportunities for young Welsh artists and | Cultural Literature / | Youth Arts Festival for Wales | £35k | Newport |

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| | performers. | | | | |
| 17-18 Sept | Roald Dahl 100: 'Roald Dahl's City of the Unexpected' co-production by Wales Millennium Centre / National Theatre Wales | Cultural / Literature | Wales Millennium Centre & Literature Wales | £400k £100k | Pan- Wales |
| Throughout 2016 | Pan-Wales outreach funding scheme delivered by Literature Wales, http://www.literaturewales.org/roalddahl100/ and the | | | | |

Atodiad 10: Arts Council of Wales Funding 2012/13 to 2015/2016 [I'w Gyfieithu]

Funding through lottery and grant in aid to projects with 50% or more literature activity

| Organisation | Type | Title | Project Description | Grant | Fund | Year |
|---|--------------------------------|--|--|---------|--------------------|---------|
| Theatr Bara Caws | Annual Revenue | Annual Revenue 2012-2013 | Annual Revenue 2012-2013 | 287,556 | General Activities | 2012/13 |
| Literature Wales | Annual Revenue | Annual Revenue 2012-2013 | Annual Revenue 2012-2013 | 851,915 | General Activities | 2012/13 |
| University of Wales Trinity Saint David | International Opportunity Fund | Research and development visit, Sweden | For Dominic Williams from Coracle and Elena Schmitz from Literature Wales to undertake a research and development to Sweden to develop ideas with partners in Sweden and Ireland for a EU Culture bid. | 900 | General Activities | 2012/13 |
| Trezise, Rachel | International Opportunity Fund | Kikinda 2, Serbia | For Rachel Trezise to participate in the Kikinda Literature Festival in Kikinda and Sarajevo in Serbia. | 1,059 | General Activities | 2012/13 |
| Atkinson, Tiffany | International Opportunity Fund | Rosario International Poetry Festival, Argentina | For poet Tiffany Atkinson to take part in bilingual readings of her work with Jorge Fondebrider in Buenos Aires, and take part in the Rosario International Poetry Festival. | 1,762 | General Activities | 2012/13 |
| Bangor University | Strategic Awards | Pontio Stepping Stones Project | Pontio Stepping Stones Project 2012/13 | 105,000 | General Activities | 2012/13 |

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|---------------------------|-------------------------|---|---|--------|----------------------|---------|
| Literature Wales | Dylan Thomas 100 | A Dylan Odyssey/ Odyssey Dylan - a series of DT literary tourism public tours | 15 literary tours inspired by Dylan Thomas words and worlds taking place across Wales, Oxford, London and New York. | 30,000 | General Activities | 2012/13 |
| Cooper, Christine | Creative Prof: Training | Learning Welsh | For Christine Cooper to further develop Welsh language in her work as storyteller and musician. | 590 | Lottery Distribution | 2012/13 |
| Hudis, Rosalind | Creative Prof: Training | Training via mentoring scheme | For Rosalind Hudis to participate in a new mentoring scheme offered by Cinnamon Press. | 600 | Lottery Distribution | 2012/13 |
| Gibbard, Gwenan | Creative Professionals | Agweddau hen a newydd ar Gerdd Dant | For Gwenan Gibbard to research the traditional art form of Cerdd Dant, and develop, following a period of experimentation, the beginning of new work. | 3,000 | Lottery Distribution | 2012/13 |
| Flintshire County Council | Organisations: Large | Dan Ganas / Under Canvas | A collaborative project, led by Flintshire County Council, working in partnership with Denbighshire County Council, aiming to offer high quality Welsh Language participatory arts opportunities within various settings - schools, community and health, across two counties encompassing the timeframe of the National Eisteddfod in Denbigh in 2013. | 9,900 | Lottery Distribution | 2012/13 |

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|--|-------------------------|--|--|--------|----------------------|---------|
| Laugharne Literary Festival | Organisations: Large | The Laugharne Weekend 2013 | Support for The Laugharne Weekend 2013, an annual festival which champions new writing and music and blends the experimental with the mainstream. | 20,000 | Lottery Distribution | 2012/13 |
| Beyond the Border Storytelling Festival | Organisations: Large | Audiences, Audiences, Audiences | The development of three new initiatives aimed at developing audience for Storytelling across Wales, as well as building the audience in Wales for the Beyond the Border Festival itself. | 28,990 | Lottery Distribution | 2012/13 |
| DS Cymru Tudalen | Organisations: Small | DS8 | A proposal for DS Cymru to present its annual digital storytelling one day festival at Chapter Arts Centre. | 2,616 | Lottery Distribution | 2012/13 |
| Literature Across Frontiers Pecyn 292 | Organisations: Small | Literature Across Frontiers - policy development research and online international literature and translation resource | For Literature Across Frontiers to enhance for a Wales based audience for two areas of work: the development of a comprehensive online resource and specific research into literature in translation within the UK | 4,980 | Lottery Distribution | 2012/13 |
| Cardiff University | Organisations: Small | Fiction Fiesta 2013 | A proposal to develop a series of literary events in Cardiff over one weekend to raise awareness of and to celebrate literature in translation. | 5,000 | Lottery Distribution | 2012/13 |

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|---------------------------|----------------------------|---|---|---------|----------------------|---------|
| National Library of Wales | Dylan Thomas 100 | Promoting NLW as premier venue to visit/study Dylan Thomas - enhancing their programme of DT-related activity | A series of artist commissions by NLW to create work that for a multimedia exhibition inspired by Dylan Thomas and the NLW archives. | 37,000 | Lottery Distribution | 2012/13 |
| National Theatre Wales | Dylan Thomas 100 | Under Milk Wood | National Theatre Wales working with BBC Cymru Wales to create a hyper connected live broadcast of Under Milk Wood. | 100,000 | Lottery Distribution | 2012/13 |
| Theatr Bara Caws | Annual Revenue | Annual Revenue 2013-14 | Annual Revenue 2013-14 | 287,556 | General Activities | 2013/14 |
| Literature Wales | Annual Revenue | Annual Revenue 2013-14 | Annual Revenue 2013-14 | 851,915 | General Activities | 2013/14 |
| Daws, Martin | Creative Wales Ambassadors | USA 2014 | A project between Martin Daws, performance poet and current Young People's Laureate for Wales, and partners Literature Wales and Urban Word New York. | 25,000 | General Activities | 2013/14 |

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|---------------|----------------------------|--------------------|--|--------|--------------------|---------|
| Gwyn, Richard | Creative Wales Ambassadors | Unfinished Journey | Cardiff based writer and translator, Richard Gwyn, researching and writing a non-fiction account of the process of travel, with visits to writers, translators and festivals in Latin America. | 25,000 | General Activities | 2013/14 |
|---------------|----------------------------|--------------------|--|--------|--------------------|---------|

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|--------------------------------|--------------------------------|--|---|-------|--------------------|---------|
| Curtis, Tony | International Opportunity Fund | Poetry reading and interview in Paris, France | For Tony Curtis to deliver a poetry readings in Paris and to meet with translators for his work. | 449 | General Activities | 2013/14 |
| Poetry Wales Press Limited | International Opportunity Fund | Sha'ar Festival, Israel | Poetry Wales editor, Zoe Skoulding, to participate in the Sha'ar International Poetry Festival in Israel. | 550 | General Activities | 2013/14 |
| Wales Arts Review | International Opportunity Fund | Cerith Mathias - Tennessee Williams Festival, USA | Wales Arts Review for Cerith Mathias to travel to New Orleans to attend the 2014 Tennessee Williams Festival to develop further relationships with the festival. | 620 | General Activities | 2013/14 |
| Elfyn, Menna | International Opportunity Fund | Bremen International Poetry On the Road Festival, Germany | For Menna Elfyn to participate in the Bremen On The Road International Poetry Festival, Germany. | 800 | General Activities | 2013/14 |
| Cynewidfa Lên Cyffru 295 | International Opportunity Fund | Festival of the European Short Story, Zagreb and Varazdin, Croatia | Four writers from Wales - Jon Gower, Owen Martell, Deborah Kay Davies and Rachel Tresize - to participate in the European Short Story Festival in Croatia, with Wales as guest of honour in 2013. | 1,380 | General Activities | 2013/14 |
| Rhydderch, Francesca | International Opportunity Fund | Beijing Bookworm International Festival 2014, China | For Francesca Rhydderch to participate in the Beijing Bookworm International Literature Festival. | 1,570 | General Activities | 2013/14 |

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|--------------------------|--------------------------------|---|---|-------|--------------------|---------|
| The Original Print Place | International Opportunity Fund | Welsh and Amsterdam Storytelling Collaboration, Netherlands | For storytellers Guto Dafis and Lauren to attend Welsh and Amsterdam Storytelling Collaboration during a Welsh Printmaking Exhibition, Amsterdam. | 1,640 | General Activities | 2013/14 |
| Owen, Karen | International Opportunity Fund | Writers' Chain Wales-Latin America | For Karen Owen to participate in the Wales-Latin America Writers Chain across Patagonia. | 2,100 | General Activities | 2013/14 |
| Hopwood, Elin Mererid | International Opportunity Fund | Writers' Chain Wales-Latin America | For Mererid Hopewood to participate in the Wales- Latin America Writers Chain across Patagonia. | 2,100 | General Activities | 2013/14 |
| Gwyn, Richard | International Opportunity Fund | Writers' Chain Wales-Latin America | For Richard Gwyn to participate in the Wales Latin America Writers Chain across Patagonia | 2,100 | General Activities | 2013/14 |
| Atkinson, Tiffany | International Opportunity Fund | Writers' Chain Wales-Latin America | For Tiffany Atkinson to participate in the Wales - Latin American Writers Chain across Patagonia | 2,100 | General Activities | 2013/14 |
| Literature Wales | International Opportunity Fund | New York and Chicago partnership building for Literature Wales, USA | For Chief Executive of Literature Wales, to undertake a research and development visit to New York and to Chicago. | 2,500 | General Activities | 2013/14 |
| Literature Wales | International Opportunity Fund | Bardd Plant Cymru and Young People's Laureate visit to New York, | For Bardd Plant Cymru Aneirin Karadog and Young Peoples Laureate Martin Daws to visit New York to participate in the Free Word conference and The Bronx Writers | 2,500 | General Activities | 2013/14 |

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| | | USA | Centre and to perform at the Bowery Club. | | | |
| Gwyn, Richard | International Opportunity Fund | 23rd International Poetry Festival of Medellín, Colombia | For Richard Gwyn to participate in the Poetry Festival of Medellín in Colombia and to work with Colombian poets in Bogata. | 2,581 | General Activities | 2013/14 |
| Cyfnewidfa Lên Cymru | International Opportunity Fund | Writers' Chain Wales-Latin America | For Wales Literature Exchange to lead a series of translation workshops and readings between Welsh, Chilean and Argentinian writers across Patagonia, in partnership with the Club de Traductores Buenos Aires and local partners. WLE will be joined by film maker Gideon Koppel. | 5,000 | General Activities | 2013/14 |
| Bangor University | Strategic Awards | Pontio Stepping Stones 2013-14 | Pontio Stepping Stones 2013-14 | 105,000 | General Activities | 2013/14 |
| Oriel Myrddin Trust | Dylan Thomas 100 | Laugharne Residency and commissions | A residency in Laugharne for artist Craig Wood and the selection of 5 artists to undertake commissions for new work inspired by Dylan Thomas. | 22,500 | General Activities | 2013/14 |
| Bangor University | Dylan Thomas 100 | A mini-festival, part of the Dylan Thomas 100 celebrations | A mini-festival of five different concert events entitled My Friend Dylan Thomas, | 23,105 | General Activities | 2013/14 |

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|---|------------------------|--|--|---------|----------------------|---------|
| Chapter Cardiff Ltd. | Dylan Thomas 100 | Lleisiau/Voices | A collaboration between Chapter and Good Cop Bad Cop, celebrating Dylan Thomas' legacy and other voices. | 27,000 | General Activities | 2013/14 |
| Locws International | Thomas 100 | DT100 Abertawe Mega Poem (working title) | A new commission as part of a new strand of Dylan Thomas related programming as part of the inaugural International Contemporary Art Biennial for Wales in 2014. | 30,000 | General Activities | 2013/14 |
| Caerarthenshire County Council | Dylan Thomas 100 | Caerarthenshire DT100 - Laugharne, Boat House and Writing Shed activities. | A year long programme of activity centred on this iconic venue, bringing to the attention of the nation the collections, assets and interpretations of the Boathouse and Writing Shed. | 37,500 | General Activities | 2013/14 |
| City and County of Swansea | Dylan Thomas 100 | Dylan Thomas Festival | A year-long cultural festival comprising of large-scale arts activities encompassing a variety of artforms, to take place in and around the city of Swansea. | 100,000 | General Activities | 2013/14 |
| Hay Festival of Literature and the Arts Ltd | Capital Lottery | Box Office Infrastructure | Purchase of new box office equipment. | 9,515 | Lottery Distribution | 2013/14 |
| James, Keith | Creative Professionals | Time let me play. From the poetry of Dylan Thomas | For Keith James to present a collection of Dylan Thomas poem set into songform across small venues in Wales. | 3,550 | Lottery Distribution | 2013/14 |

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|---|------------------------|---|---|---------|----------------------|---------|
| Cooper, Christine | Creative Professionals | Cad Goddeu / The Battle of the Trees | Working with theatre director Emma Kilbey and musician Ceri Rhys Matthews to further develop the piece Cad Goddeu / The Battle of the Trees. | 3,831 | Lottery Distribution | 2013/14 |
| North Wales International Poetry Festival | Organisations: Large | North Wales International Poetry Festival 2 | Support for North Wales International Poetry Festival. | 17,216 | Lottery Distribution | 2013/14 |
| Laugharne Literary Festival | Organisations: Large | The Laugharne Weekend 2014 | Support for The Laugharne Weekend 2014. | 30,000 | Lottery Distribution | 2013/14 |
| Literature Wales | Organisations: Large | Dinefwr Literature Festival 2014 | To develop and deliver the second Dinefwr Literature Festival in partnership with the National Trust and Cadw. | 100,000 | Lottery Distribution | 2013/14 |
| Hay Festival of Literature and the Arts Ltd | Organisations: Large | Hay Festival Wales (Including Scribblers Tour) 2014 | Support for Hay Festival of Literature and the Arts. | 100,000 | Lottery Distribution | 2013/14 |
| xx Women's Writing Festival | Organisations: Small | 2014 XX Festival of Women's Writing | For support towards xx Festival 2014, an annual festival of women's writing held at Chapter Arts Centre. | 5,000 | Lottery Distribution | 2013/14 |
| Literature Wales | Organisations: Small | Owen Sheers, Calon and the WRU on Tour | A tour co-ordinated by Literature Wales taking Owen Sheers reading from and discussing Calon, his prose book resulting from his residency with the RFU. | 5,000 | Lottery Distribution | 2013/14 |

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| Stephens and George Charitable Trust | Organisations: Training | kids rule rock and do newsletter | Support for a part time officer to co-ordinate a Young Person's Newsletter Project and deliver weekly workshop sessions with young people from Merthyr. | 5,000 | Lottery Distribution | 2013/14 |
| Venue Cymru | Organisations: Training | Writing Conference (Comedy) / Welsh Language Training | A training package of two strands - A Craft of Comedy Writing Training Conference aimed as aspiring young writers who wish to develop a career in this field, along with the enhancement of Welsh Language skills for Venue Cymru customer focused staff. | 11,313 | Lottery Distribution | 2013/14 |
| Theatr Bara Caws | Annual Revenue | Annual Revenue 2014-15 | Annual Revenue 2014-15 | 284,680 | General Activities | 2014/15 |
| Bangor University | Annual Revenue | Annual Revenue 2014-15 | Annual Revenue 2014-15 | 285,000 | General Activities | 2014/15 |
| Literature Wales | Annual Revenue | Annual Revenue 2014-15 | Annual Revenue 2014-15 | 830,617 | General Activities | 2014/15 |
| Literature Wales | Direct Funding | Independent Review of the Young People's Writing Squads | Literature Wales to commission a consultant to undertake an independent review of the Young People's Writing Squads in Wales. | 5,000 | General Activities | 2014/15 |
| Literature Wales | Capital Lottery | Ty Newydd Refocus Project | Project to develop Ty Newydd. | 30,000 | Lottery Distribution | 2014/15 |
| Shaw, Eleanor | Creative Prof: Training | Speaking to the stars, Autobiographical | Eleanor Shaw to attend Speaking to the stars, Autobiographical storytelling course in Amari, Crete. | 599 | Lottery Distribution | 2014/15 |

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| | | storytelling | | | | |
| Donahaye, Jasmine | Creative Wales Awards | Slaughter | For Jasmine Donahaye to spend a period of four seasons observing, investigating and trying to capture in writing the changing processes of slaughter through the year, as well as narrating the relationship between the place and its environment. | 20,000 | Lottery Distribution | 2014/15 |
| Jones, Mab | Creative Wales Awards | Rakugo, Storytelling & Performance Poetry Studies | For Cardiff based poet, Mab Jones, to focus on areas of writing and performing beyond her usual practice as 'stand up poet', exploring new modes, methods and techniques. She plans to experiment with the Japanese storytelling tradition of Rakugo and to receive mentoring from acclaimed performance poet, John Hegley. | 20,000 | Lottery Distribution | 2014/15 |
| Stockford, Caroline | International Opportunity Fund | Eskisehir Poetry Festival 2014, Turkey | For translator and poet, Caroline Stockford, to participate in the Eskisehir Poetry Festival, Turkey. | 284 | Lottery Distribution | 2014/15 |
| Skoulding, Zoe | International Opportunity Fund | IV Festival Internacional Centroamericano de Poesía, Guatemala. | Support for Zoe Skoulding to participate in the Festival Internacional Centroamericano de Poesía in Guatemala. | 1,000 | Lottery Distribution | 2014/15 |
| Williams, Dominic | International Opportunity Fund | Sweden and the Language Arts | For Dominic Williams to undertake a visit to Sweden to meet with potential future collaborators and to perform and present his work. | 1,010 | Lottery Distribution | 2014/15 |

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| Wales PEN Cymru | International Opportunity Fund | PEN Pregunta - Mexico | For Dylan Moore to represent PEN Cymru at the PEN International Pregunta Conference in Mexico. The visit will link to PEN Cymru's participation in the UK Mexico Year of Culture 2015. | 1,185 | Lottery Distribution | 2014/15 |
| Karadog, Aneirin | International Opportunity Fund | International Laureates' Summit, Bologna, Italy | Support for Bardd Plant Cymru, Aneirin Karadog, and National Young People's Laureate, Martin Daws, to participate in the inaugural Laureates Summit in Bologna. | 1,200 | Lottery Distribution | 2014/15 |
| Wales PEN Cymru | International Opportunity Fund | PEN International Congress in Kyrgyzstan | For Sally Baker of PEN Cymru to attend the PEN International Annual Congress in Kyrgyzstan. | 1,464 | Lottery Distribution | 2014/15 |
| Gwyn, Richard | International Opportunity Fund | Book launch and public lectures in Buenos Aires and Santiago de Chile | For Richard Gwyn to launch the Spanish translation of A Vagabond's Breakfast at the Santiago Book Festival, Chile, and to participate in a series of public events and workshops in Argentina. | 1,914 | Lottery Distribution | 2014/15 |
| Literature Wales | International Opportunity Fund | Brave New Voices Festival, Philadelphia, and Urban Word, New York, USA | For Louise Richards, Outreach Manager at Literature Wales, to attend the Brave New Voices Youth Slam Festival in Philadelphia and to hold meetings with Urban Word in New York. | 2,020 | Lottery Distribution | 2014/15 |
| Cyfnewidfa Lên Cymru | International Opportunity Fund | Ffair Lyfrau Guadalajara | For Cynan Jones to attend Guadalajara Book Festival 2014 | 2,250 | Lottery Distribution | 2014/15 |

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| Literature Across Frontiers | International Opportunity Fund | Translating Poetry in Georgia and Kurdish Turkey | For Literature Across Frontiers to organise two translation workshops - one in Georgia and the second in Turkey - in collaboration with local partners and involving Welsh poet Ifor ap Glyn. | 5,000 | Lottery Distribution | 2014/15 |
| Laugharne Literary Festival | Organisations: Large | The Laugharne Weekend 2015 | Support for The Laugharne Weekend 2015. | 13,324 | Lottery Distribution | 2014/15 |
| Poetry Wales Press Limited | Organisations: Large | Gelynion - Enemies Cymru | Bilingual project from Poetry Wales with the Enemies Project with events in Newport, Swansea, Cardiff, Hay on Wye, Bangor and Aberystwyth. | 15,610 | Lottery Distribution | 2014/15 |
| Literature Across Frontiers | Organisations: Large | International Literary Exchange for Wales | For Literature Across Frontiers to develop a programme of activity ahead of, and feeding into, their Creative Europe application. | 27,376 | Lottery Distribution | 2014/15 |
| Literature Wales | Organisations: Large | South Wales Literature Development Initiative | Support to continue the South Wales Literature Initiative previously supported through ACW's Local Authority Initiative programme, with activity with local communities across four local authorities: Caerphilly, Neath Port Talbot, Newport and Torfaen. Additional activity to be delivered in Bridgend, Merthyr Tydfil, RCT and Vale of Glamorgan. | 30,000 | Lottery Distribution | 2014/15 |
| Hay Festival of Literature and the Arts Ltd | Organisations: Large | Hay Festival and Scribblers Tour 2015 | Support for the Hay Festival Wales 2015, including for their festival programmes for children and young people - Hay Fever and HF2 - and their initiatives for schools - Hay Schools Programme and Scribblers Tour. | 69,000 | Lottery Distribution | 2014/15 |

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| Gladstone's Library | Organisations: Small | Young People's Gladfest Programme | Literary events for young people at Gladfest 2015. | 2,000 | Lottery Distribution | 2014/15 |
| Wales Arts Review | Organisations: Small | WAR Digital media and audience development project | Project to redesign and upgrade functionality of the website, to improve audience/ readership accesses and interaction with Wales Arts Review content. | 4,480 | Lottery Distribution | 2014/15 |
| Menter Y Felin Uchaf Cyfeirddalen Y pecyrr 304 | Organisations: Small | Fourth Branch Mabinogi Research and Development | Research and Development project to look into co-commissioning a new performance and forge a stronger network of Welsh venue partner relationships to develop and tour the work. | 4,750 | Lottery Distribution | 2014/15 |
| The Escape Artists North Wales CIC | Organisations: Small | Altered Images | Escape Artists N Wales CIC to deliver Altered Images a project engaging residents at Ty Newydd Approved Premises Bangor, who are newly released from prison. | 4,950 | Lottery Distribution | 2014/15 |
| North Wales International Poetry Festival | Organisations: Small | Bangor Poetry Festival | Support for 3rd North Wales International Poetry Festival. | 5,000 | Lottery Distribution | 2014/15 |
| Literature Wales | Organisations: Small | Lolfa Lên - Eisteddfod Genedlaethol Maldwyn a'r Gororau 2015 | Support for the Lolfa Len/Literature Tent at the National Eisteddfod 2015. | 5,000 | Lottery Distribution | 2014/15 |

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| Stephens and George Charitable Trust | Organisations: Small | Spread the Word Literature Festival | Support for Spread the Word Literature Festival 2015 | 5,000 | Lottery Distribution | 2014/15 |
| Theatr Bara Caws | Annual Revenue | Annual Revenue 2015-16 | Annual Revenue 2015-16 | 278,702 | General Activities | 2015/16 |
| Bangor University | Annual Revenue | Annual Revenue 2015-16 | Annual Revenue 2015-16 | 279,015 | General Activities | 2015/16 |
| Literature Wales | Annual Revenue | Annual Revenue 2015-16 | Annual Revenue 2015-16 | 743,174 | General Activities | 2015/16 |
| MOSTYN | Strategic Awards | MOSTudno | Our Space award, including development of audience for Literature events | 23,980 | General Activities | 2015/16 |
| Potter, Clare | Creative Professionals | Sucking on Sugar Cane | A collaboration between poet Clare E. Potter and Jazz musician Gareth Roberts. | 3,000 | Lottery Distribution | 2015/16 |
| Stammers, Ben | Creative Professionals | rAdda | A collaboration between visual artist and photographer Ben Stammers and accomplished poet and Bangor University Senior Lecturer Zoë Skoulding, based around and inspired by the subterranean river that flows underneath the heart of Bangor. | 3,000 | Lottery Distribution | 2015/16 |
| Reynolds, Anthony | Creative Professionals | Abse and Co | Setting of five poems of Dannie Abse, and five original poems by the applicant, to create a suite of ten pieces consisting of | 5,000 | Lottery Distribution | 2015/16 |

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| | | | music, sound, poetry and spoken word. | | | |
| Henry, Paul | Creative Wales Awards | The Glass Aisle | Creating work in response to a particular stretch of the Monmouthshire & Brecon Canal. | 17,570 | Lottery Distribution | 2015/16 |
| Dafydd, Sian Melangell | International Opportunity Fund | Kikinda Short Festival 2015, Serbia | Support for Sian Melangell Dafydd to participate in the tenth anniversary edition of the Kikinda Short Festival, Serbia. | 440 | Lottery Distribution | 2015/16 |
| Lewis, Llyr | International Opportunity Fund | European Festival of the First Novel, Kiel, Germany | For novelist Llyr Lewis and his publisher to attend the European Festival of the First Novel in Kiel, Germany. | 900 | Lottery Distribution | 2015/16 |
| Jones, Anthony | International Opportunity Fund | Poetry Translation Residency, Sweden | Support to Anthony Jones to undertake a poetry translation residency in Tranas, Sweden | 980 | Lottery Distribution | 2015/16 |
| Wales PEN Cymru | International Opportunity Fund | PEN International Conferences, Slovenia and Netherlands | For PEN Cymru to participate in 2 PEN International Conferences: Simon Mundy at the Writers for Peace in Slovenia and Caroline Stockford at the Writers in Prison in Amsterdam. | 1,499 | Lottery Distribution | 2015/16 |
| Dooley, Freya | International Opportunity Fund | Enter Text, Finland | For Freya Dooley to participate in the Enter Text residency at Arteles Creative Centre in Finland. | 1,899 | Lottery Distribution | 2015/16 |
| Wales PEN Cymru | International Opportunity Fund | PEN International 81st Congress, Quebec | For delegates from Wales PEN Cymru to participate in the PEN International Congress in Quebec. | 2,781 | Lottery Distribution | 2015/16 |

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| Rhydderch, Francesca | International Opportunity Fund | Shanghai International Literary Week, China | For Francesca Rhydderch to launch the Chinese translation of her novel, The Rice Paper Diaries at the Shanghai International Literary Week 2015 accompanied by the book translator, Dr Yan Ying. | 3,008 | Lottery Distribution | 2015/16 |
| Laugharne Literary Festival | Organisations: Large | The Laugharne Weekend 2016 | Support for The Laugharne Weekend 2016, an annual festival which champions new writing and music, taking place April 2016. | 28,000 | Lottery Distribution | 2015/16 |
| Literature Wales | Organisations: Large | South Wales Literature Development Initiative | Support for the South Wales Literature Development Initiative 2015-2016, which operates across the local authorities of Caerphilly, Newport, Torfaen, Neath Port Talbot and the Vale of Glamorgan | 30,000 | Lottery Distribution | 2015/16 |
| Learning Links International | Organisations: Small | JamRy - Barddoniaeth Cymru Jamaica Poetry | Exploring the links between Jamaican poetry and Welsh poetry. | 5,000 | Lottery Distribution | 2015/16 |
| Pop Up Projects CIC | Organisations: Small | Pop Up in Wrexham (pilot) | A pilot project to test a small-scale version of Pop Up Education in 9 Wrexham schools during Autumn term 2015. | 5,000 | Lottery Distribution | 2015/16 |
| Literature Across Frontiers | Organisations: Small | North Wales International Poetry Festival | Support for the 4 th North Wales International Poetry Festival October 2015 | 5,000 | Lottery Distribution | 2015/16 |
| Literature Across Frontiers | Organisations: Training | Developing the international literature sector in Wales | Project to develop an international programme of audience and writer focussed activity in Wales. | 30,000 | Lottery Distribution | 2015/16 |

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| Hay Festival of Literature and the Arts Ltd | Strategic Awards | Creative Wales Hay International Fellowships | Support for Creative Wales Hay International Fellowship 2015-16 | 25,000 | Lottery Distribution | 2015/16 |
| Hay Festival of Literature and the Arts Ltd | Strategic Awards | Creative Wales Hay Festival International Fellow | Support for Hay Creative Wales Hay International Fellowship 2016-17 | 25,000 | Lottery Distribution | 2015/16 |
| Cyfnewidfa Lên Cymru | Strategic Awards | Wales Literature Exchange programme of work 2015-16 | Wales Literature Exchange programme of work 2015-16 | 47,916 | Lottery Distribution | 2015/16 |

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Atodiad 11: Wales Arts International Strategic Funding for International Literature Activity 12/13 -15/16

| Organisation | Title | Project Description | Amount | Fund | Year |
|-----------------------------|------------------------------------|--|--------|---------------|-------|
| Wales Literature Exchange | India Wales Writers Chain | Programme of translation workshops and public literary events in India and Wales | 5,000 | WAI strategic | 12/13 |
| Hay Festival | Hay International Fellowship 12-13 | Support for Hay International Fellowship 12-13 | 25,000 | WAI strategic | 12/13 |
| Wales Literature Exchange | HALMA | Participation in HALMA international network and associated activity | 5,000 | WAI strategic | 12/13 |
| Literature Across Frontiers | Culture Forum | Bursary to participate in EU Culture Forum | 530 | WAI strategic | 13/14 |
| WAI project | Ghazalaw workshop | Translation workshop for Ghazalaw project | 2,500 | WAI strategic | 13/14 |
| WAI project | DT100 New York | Poetry performance programme, NY, for DT100 | 3,000 | WAI strategic | 13/14 |
| In Chapters | In Chapters Australia | In Chapters performances, Australia for DT100 | 3,000 | WAI strategic | 13/14 |
| Literature Across Frontiers | India Wales | Translation workshops and festival performances, India and Wales | 9,000 | WAI strategic | 14/15 |

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| Beyond the Border | India R&D | R&D visit to Jodpur RIFF and storytelling workshops | 3,000 | WAI strategic | 14/15 |
| Literature Across Frontiers | Kathreptis International | Participation in Kathreptis International | 408 | WAI strategic | 15/16 |
| PEN Cymru | Culture Forum | Participation in EU Culture Forum | 450 | WAI strategic | 15/16 |
| WAI direct project | Walking Cities | Partnership project with British Council, with writer collaboration, skills exchange and festival performances | 25,000 | WAI strategic | 15/16 |
| Literature Across Frontiers | China visit | Support for visit to Shanghai and Beijing Book and Literature Festivals | 1,106 | WAI strategic | 15/16 |

Tudalen 310



Eich cyf/Your ref
Ein cyf/Our ref

Phil George, Chair, Arts Council of Wales
Nick Capaldi, Chief Executive, Arts Council of Wales
Professor Damian Walford Davies, Chair, Literature Wales
Lleucu Siencyn, Chief Executive, Literature Wales
Professor M. Wynn Thomas, Chair, Welsh Books Council
Helgard Krause, Chief Executive, Welsh Books Council

14 July 2017

Dear colleagues,

Thank you for the detailed responses to the Independent Review of Support for Publishing and Literature in Wales which I have now received from the Arts Council of Wales, Literature Wales and the Welsh Books Council.

I appreciate the range of views provided for my consideration. I note the points of concern some of you have raised about certain aspects of the report, as well as your statements of agreement and constructive engagement with the report in other areas.

As agreed, these have now been shared with the Chair and other members of the independent review panel. They have agreed to consider your submissions and will respond to me directly in due course. This process will largely focus on matters of accuracy, scope, impartiality and strategic effectiveness, as these are the areas you have primarily focused on in your submissions. This will take some time, especially given the academic commitments of both the Chair and Vice-Chair of the panel over the next few weeks. I expect to receive the panel's written response towards the end of the summer break.

I will consider the panel's views on the matters you have raised and provide you with an update in due course. I am open to the possibility, as some of you have suggested, of a meeting between ourselves and the panel Chair at that point. I will consider this further once I have seen the panel's response.

I am pleased that you have all also committed to participating in a separate strand of work, running in parallel with the first, where we will collectively consider the practicalities of taking forward the report's recommendations. I appreciate that some of you have serious concerns about certain aspects of these recommendations.

Bae Caerdydd • Cardiff Bay
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Correspondence.Ken.Skates@gov.wales

Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

I am absolutely clear that your participation in this work on the practicalities of implementation does not imply support for, or acceptance of, specific recommendations. Neither should you assume that this work implies I have already made any final decisions. I stand by my statement in the Assembly Chamber on 13 June, but I will of course give the outcomes of both pieces of work full consideration before reaching a firm conclusion. In the meantime, your concerns are being looked at and I expect us all to engage fully and constructively in this work over the summer, whilst the programmes of activity you deliver for the people of Wales should continue as normal.

Space must be allowed for these pieces of work to be completed, so they can properly inform the Welsh Government's formal response to the independent review which I will look to publish during the autumn.

Some of you clearly perceive serious issues with the report. You have raised these with me and have agreed with me that the review panel should consider your concerns and respond to them. I have therefore been surprised in recent days to see personal statements appear online which could be seen as seeking to undermine the process we have all committed to, without awaiting the panel's response.

This is not helpful. I hope and expect that we will move forward in a way that allows this work to be completed in good faith and in doing so maintain productive and positive working relationships, both now and in the future.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Ken', with a long, sweeping flourish above the name.

Ken Skates AC/AM

Ysgrifennydd y Cabinet dros yr Economi a'r Seilwaith
Cabinet Secretary for Economy and Infrastructure

Llenyddiaeth Cymru – Cyflwyniad i'r Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu Medi 2017

1. Cyflwyniad

Dylai adolygiad annibynnol o'r cymorth y mae Llywodraeth Cymru yn ei roi i'r sector cyhoeddi a llenyddiaeth wedi bod yn gyfle amserol i werthuso ffyniant y sector amlochrog hwn sydd o bwys diwylliannol. Ers iddo gael ei sefydlu yn 2011, mae Llenyddiaeth Cymru wedi creu agenda democrateiddio llenyddiaeth a bu'n galw am sector mwy cysylltiedig ers tro. Felly, roedd yn edrych ymlaen at ddarllen canfyddiadau'r adolygiad hwn. Mae'n drueni bod y cyfle hwn wedi'i golli oherwydd diffygion sylweddol adroddiad yr Athro Medwin Hughes.

Mae Llenyddiaeth Cymru wedi cyflwyno ymateb llawn i Ysgrifennydd y Cabinet, sydd hefyd wedi cael ei rannu â'r Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu. Mae Ysgrifennydd y Cabinet wedi gofyn i'r Athro Hughes a'r panel ymateb yn fanwl iddo – yn ogystal ag ymateb i gyflwyniad gan Gyngor Celfyddydau Cymru, sy'n dod i gasgliadau tebyg. Mae Llenyddiaeth Cymru yn disgwyl eglurhad ar nifer fawr o faterion, a chywiriadau i lawer o bethau oedd yn ffeithiol anghywir.

Mae pryderon Llenyddiaeth Cymru am yr adolygiad yn ymwneud â'r meysydd canlynol:

- i. Cadernid y sylfaen dystiolaeth
- ii. Diffyg cysylltiad rhwng y dystiolaeth a'r argymhellion
- iii. Y sylwadau partisan ac anghywir am Llenyddiaeth Cymru
- iv. Diffyg gwybodaeth a diffyg ymchwil y panel wrth lunio barn am y dirwedd lenyddol
- v. Gwrthdaro buddiannau aelodau o'r panel
- vi. Y ffaith nad ymdriniwyd â Chylch Gorchwyl yr adroddiad

Yn sgil y ddadl gyhoeddus ers cyhoeddi'r adolygiad, mae'n hollol briodol bod y Pwyllgor yn cynnal ymchwiliad i'r broses a wnaeth arwain at yr adroddiad diffygiol a rhannol hwn ac edrych ar ffyrdd y gall cymorth Llywodraeth Cymru ar gyfer y sectorau llenyddiaeth a chyhoeddi ddiogelu'r arbenigedd a'r profiad sy'n bodoli ar hyn o bryd a hefyd wella cysylltedd y sector.

Yn y cyflwyniad cyfredol hwn, mae Llenyddiaeth Cymru yn egluro ei safbwynt ac yn cynnig dadansoddiad o'r effeithiau posibl os bydd Ysgrifennydd y Cabinet yn derbyn argymhellion yr adroddiad.

2. Cylch Gwaith, Cenhadaeth a Meysydd Strategol Llenyddiaeth Cymru

2.1 Cylch Gwaith a Chenhadaeth

Llenyddiaeth Cymru yw'r cwmni cenedlaethol ar gyfer datblygu llenyddiaeth yng Nghymru ac mae'n aelod o Bortffolio Celfyddydau Cymru Cyngor Celfyddydau Cymru. Fel y cyfryw, cylch gwaith Llenyddiaeth Cymru yw datblygu llenyddiaeth fel ffurf ar gelfyddyd drwy gefnogi awduron ac annog mwy o bobl i ymgysylltu'n greadigol â geiriau o bob math ar amrywiaeth o lwyfannau.

Fel y nodwyd yn ein Cynllun Busnes¹, mae cenhadaeth Llenyddiaeth Cymru yn seiliedig ar y gred bod llenyddiaeth yn perthyn i bawb ac ar gael ymhobman a, drwy weithio gydag eraill mewn ystod eang o gymunedau, gall Llenyddiaeth Cymru wneud llenyddiaeth yn llais i bawb. Gan weithio mewn pum maes strategol (Cymryd Rhan, Cefnogi Awduron, Plant a Phobl Ifanc, Rhyngwladol a Chreadigrwydd Digidol), mae Llenyddiaeth Cymru yn meithrin cydberthnasau o fewn y sector diwylliant a'r tu hwnt iddo er mwyn galluogi pobl i ddatblygu rhaglenni llenyddiaeth lleol cynaliadwy, gwella sgiliau, mynd i'r afael â materion anfantais gymdeithasol a hyrwyddo awduron o Gymru yma a thu hwnt.

Gan anelu at ddangos rhaglenni ategol Llenyddiaeth Cymru a Chyngor Llyfrau Cymru, mae'n ddefnyddiol nodi yma sut mae cylch gwaith ac arbenigedd sefydledig Llenyddiaeth Cymru yn wahanol i'r hyn a geir o fewn Cyngor Llyfrau Cymru. Yn ei Gynllun Strategaeth (Mehefin 2016), mae Cyngor Llyfrau Cymru yn nodi mai ei genhadaeth yw 'hyrwyddo a datblygu'r diwydiant cyhoeddi yng Nghymru' drwy gefnogi cyhoeddwr a llyfrwerthwr yng Nghymru. Ffocws Cyngor Llyfrau Cymru felly yw *cefnogi cyhoeddi fel diwydiant masnachol*. Dyma le mae ganddynt brofiad. Mae arbenigedd Llenyddiaeth Cymru yn wahanol iawn. Dros y blynyddoedd, mae Llenyddiaeth Cymru wedi arloesi ym maes datblygu awduron, ymgysylltu creadigol a chymryd rhan yn llenyddol, gan annog arbrofi a chefnogi arallgyfeirio llenyddiaeth fel ffurf ar gelfyddyd.

2.2 Strategaeth Cymryd Rhan

Bob blwyddyn, mae staff arbenigol Llenyddiaeth Cymru yn datblygu prosiectau a mentrau gyda dros 200 o bartneriaid o sectorau gwahanol ac yn cyrraedd tua 160,000 o gyfranogwyr. Nod y prosiectau hyn yw mynd i'r afael â rhwystrau i gymryd rhan a thargedu grwpiau na fyddent yn cael mwynhau'r celfyddydau fawr ddim fel arall. Drwy rwydwaith o bartneriaethau, mae Llenyddiaeth Cymru yn hwyluso gweithdai mewn carchardai, prosiectau gyda'r gymuned Teithwyr Sipsiwn Roma, gweithdai creu llyfrau comic gyda phobl ifanc NEET ac ysgrifennu gyda phobl â dementia. Enillodd partneriaeth hirsefydledig Llenyddiaeth Cymru â Charchar a Sefydliad Troseddwr Ifanc y Parc **wobr Celfyddydau, Busnes a'r Gymuned yng Ngwobrau Celfyddydau a Busnes Cymru² ym mis Mehefin 2017**.

Mae wedi cymryd blynyddoedd i feithrin ymddiriedaeth a chydberthynas waith â'n partneriaid a'n cynulleidfaoedd. Mae llawer o'n cynulleidfaoedd yn cynrychioli'r aelodau mwyaf agored i niwed mewn cymdeithas. Os byddai Ysgrifennydd y Cabinet yn symud cyllid o Llenyddiaeth Cymru i Gyngor Llyfrau Cymru, gallai'r gwaith cymhleth a thringar hwn ddiflannu.

Mae prosiectau proffil uchel megis Roald Dahl 100 Cymru,³ Ffrindiau Darllen⁴ a mentrau datblygu llenyddiaeth rhanbarthol⁵ yn dangos y gwerth y mae asiantaethau eraill yn amlwg yn ei weld yn Llenyddiaeth Cymru. Mae rhai o'r sefydliadau hyn yn Lloegr yn gweld Cymru fel meincnod rhagoriaeth yn y DU wrth ymgysylltu cynulleidfaoedd â Llenyddiaeth. Mae'r ffaith bod Llenyddiaeth Cymru dros y blynyddoedd wedi datblygu a chynnal y gwaith o ddatblygu awduron mewn meysydd arbenigol – e.e. gweithio gydag oedolion ifanc sy'n agored i niwed – yn golygu bod gennym

¹https://issuu.com/lencymru-litwales/docs/llenyddiaeth_cymru_-_cynllun_busnes

²<http://cymraeg.aandbcymru.org.uk/celfyddydau-busnes-ar-gymuned-2017/?force=2>

³<http://www.roalddahl100.cymru/dyfeisio-digwyddiad/>

⁴<http://www.llenyddiaethcymru.org/our-projects/ffrindiau-darllen-cymru/>

⁵<http://www.llenyddiaethcymru.org/our-projects/south-wales-literature-development-initiative/>

gonsortiw m cryf o awduron o bob cefndir yn y ddwy iaith sy'n gallu gweithio yn y meysydd hyn. Nod Llenyddiaeth Cymru dros y 2-3 blynedd nesaf yw gwella'r cyfleoedd hyfforddi datblygu arbenigol hyn ymhellach.

Y drafodaeth am y maes hwn o waith yw un o'r rhannau mwyaf diffygiol yn Adroddiad Hughes. Nid yw'n cynnig unrhyw ddadansoddiad o effaith gymdeithasol gwaith Llenyddiaeth Cymru na'i lwyddiant wrth gyrraedd targedau Llywodraeth Cymru a nodwyd drwy raglen Cyfuno a Deddf Llesiant Cenedlaethau'r Dyfodol. Nid yw'r Adroddiad yn nodi unrhyw uchelgeisiau ar gyfer y dyfodol chwaith. Mae hyn yn arwain at ddiffygion yn yr argymhellion a fyddai'n peryglu'r camau breision a gymerwyd yn y maes hwn ac yn cael effaith andwyol ar sefyllfa Cymru fel arweinydd ledled y DU yn y maes hwn.

2.3. Strategaeth Plant a Phobl Ifanc

Mae'n frawychus ym maes Plant a Phobl Ifanc nad yw Adroddiad Hughes unwaith eto yn cyflwyno unrhyw ddadansoddiad o weithgarwch strategol cyfredol cyn mynd ymlaen i argymhell newidiadau a allai gael effaith andwyol. Fel y gwelwyd yn ein Strategaeth Cymryd Rhan, arbenigedd Llenyddiaeth Cymru o ran gweithio gyda phlant a phobl ifanc yw creu partneriaethau newydd a galluogi sefydliadau ac unigolion o gefndiroedd y tu allan i'r celfyddydau traddodiadol i ymgysylltu â gweithgarwch llenyddol ar sawl ffurf.

Bob blwyddyn, mae Llenyddiaeth Cymru yn cydweithio â phartneriaid i ymgysylltu tua **60,000 o blant a phobl ifanc** mewn gweithgareddau llenyddiaeth. Gwneir hyn drwy raglenni a ddarperir yn uniongyrchol megis Awdur Ieuencid Cymru⁶ a Bardd Plant Cymru⁷ a drwy helpu ysgolion, clybiau ieuencid, grwpiau gofalwyr ifanc, sefydliadau troseddwy'r ifanc ac eraill i ddod o hyd i ffyrdd creadigol o weithio gydag awduron ac artistiaid i ennyn diddordeb pobl ifanc.

Mae Llenyddiaeth Cymru hefyd yn arwain y ffordd o ran datblygu cyfleoedd perfformio i blant a phobl ifanc, sy'n gallu gwella hyder, hunanfyneiant a sgiliau cyfathrebu. Yn 2015 daeth Llenyddiaeth Cymru â'r gystadleuaeth hynod boblogaidd Slam Barddoniaeth i Gymru. Ffocws Barddoniaeth Slam yw annog trafodaeth wleidyddol ac actiffaeth gymdeithasol ymhlith pobl ifanc. Uchelgais Llenyddiaeth Cymru yw galluogi tîm dwyieithog o Gymru i gystadlu ym mhencampwriaeth Slam y byd yn UDA.

Nid yw'r gwaith strategol, datblygiadol hwn yn rhywbeth y gellir ei drosglwyddo'n hawdd. Mae'n strwythur cymhleth, cydweithredol, wedi'i adeiladu ar bartneriaethau cryf a gaiff eu creu a'u hwyluso gan Llenyddiaeth Cymru.

2.4. Strategaeth Cefnogi Awduron a'r diffiniad o lenyddiaeth

Yr anhawster cyntaf yma yw diffiniad Adroddiad Hughes o lenyddiaeth. Mae'r adroddiad yn cyflwyno cysyniad darfodedig sy'n canolbwyntio ar waith *cyhoeddedig*, nad yw'n cyfleu'r hyn sy'n digwydd bellach – safbwynt mor gyfyngedig na all yr adroddiad ddadansoddi'r cyfraniad y mae Llenyddiaeth Cymru yn ei wneud i lenyddiaeth yn ddigonol.

⁶<http://www.lenyddiaethcymru.org/our-projects/young-peoples-laureate-wales/>

⁷<http://www.lenyddiaethcymru.org/our-projects/bardd-plant-cymru/>

Tra bod adroddiad Hughes yn diffinio llenyddiaeth fel yr hyn sy'n rhagflaenu cyhoeddi yn unig, mae llenyddiaeth yng Nghymru yn yr unfed ganrif ar hugain yn rhywbeth llawer mwy dynamig, creadigol a diddorol. Yr hyn y mae'r adroddiad yn eu diystyru yw'r gair llafar, rap, arfer ar draws ffurfiau ar gelfyddyd, digidol, y nofel graffeg, ysgrifennu geiriau caneuon a sylwebaeth gemau – y mae pob un ohonynt yn rhan o'r ffordd rydym yn cysylltu â geiriau o bob math bob dydd. Gall amrywiaeth eang gweithgarwch Llenyddiaeth Cymru gefnogi llenyddiaeth ar bob ffurf: ariannu rhaglenni gwyliau; comisiynu prosiectau digidol; ysgoloriaethau ar gyfer crewyr nofelau graffeg; a phrosiectau llenyddiaeth a thechnoleg. Gellid colli'r sbectwm pellgyrhaeddol hwn o weithgarwch a'r arbenigedd sylfaenol sy'n ei lywio os byddai argymhellion Adroddiad Hughes yn cael eu derbyn.

Mae dechrau o safbwynt mor gyfyngedig o lenyddiaeth yn golygu na all Adroddiad Hughes werthfawrogi'r amrywiaeth o awduron y mae Llenyddiaeth Cymru yn gweithio gyda nhw i ddatblygu nifer o sgiliau. Mae perfformwyr ac artistiaid sy'n datblygu eu gwaith mewn lleoliadau eraill, llai traddodiadol – boed hynny drwy greu 'Instapoetry', allbwn gair llafar, neu drwy ddarparu gweithdai sydd wedi newid bywydau mewn cymunedau ledled Cymru.

Mae awduron wrth wraidd gweithlu Llenyddiaeth Cymru. Bob blwyddyn, mae Llenyddiaeth Cymru yn cydweithio â dros 500 o awduron ac yn buddsoddi 25% o'i gyllideb mewn awduron unigol, sy'n golygu bod dros £300,000 yn mynd yn uniongyrchol i awduron sy'n byw ac yn gweithio yng Nghymru.

Nod Llenyddiaeth Cymru yw cefnogi pob agwedd ar ddatblygiad awdur, drwy roi'r hwb cyntaf hwnnw i awdur newydd drwy Ysgoloriaeth Awduron i ysgrifennu ei nofel gyntaf, neu drwy ei hyfforddi i arwain gweithdai ysgrifennu creadigol gyda gofalwyr ifanc neu droseddwy'r ifanc.

Mae llawer o'r rheini sy'n derbyn Ysgoloriaethau Awduron yn mynd ymlaen i gyhoeddi eu gwaith, ac mae llawer yn llwyddo i gael cytundeb llyfr gyda chyhoeddwy'r y tu allan i Gymru – a all arwain at werthu swm sylweddol o lyfrau. Ni allai Adroddiad Hughes ddadansoddi gwerthiannau llyfrau a gyhoeddwyd yng Nghymru yn ddigonol oherwydd diffyg data. Fodd bynnag, mae Llenyddiaeth Cymru yn falch o fod wedi cefnogi llawer o awduron sydd wedi mynd ymlaen i ennill canmoliaeth feirniadol a bod yn llwyddiant. Un enghraifft yw Kate Hamer a gafodd Ysgoloriaeth Awduron o £5,000. Mae ei nofel *The Girl in the Red Coat* bellach wedi gwerthu 75,911 o gopïau, gan gynhyrchu £400,252 (Nielsen BookData ar werthiannau'r DU).

Mae Llenyddiaeth Cymru yn cefnogi awduron o Gymru, p'un a ydynt am gyhoeddi ai peidio, p'un a ydynt yn cyhoeddi yng Nghymru neu'r tu hwnt. Cenhadaeth Cyngor Llyfrau Cymru yw cefnogi'r diwydiant cyhoeddi *o fewn* Cymru, a phrin yw ei gyberthnasau sefydledig a'i arbenigedd yng nghyd-destun y diwydiant ledled y DU. Os bydd Ysgrifennydd y Cabinet yn derbyn argymhellion yr Adroddiad, mae perygl y gallai awduron sy'n cyhoeddi y tu allan i Gymru golli allan.

3. Llywodraethu, Rheoli a Strwythurau

Mae beirniadaeth nas seiliwyd ar dystiolaeth Adroddiad Hughes o strwythurau llywodraethu Llenyddiaeth Cymru yn gwbl groes i safbwyntiau ein cyllidwyr a'n rheoleiddwyr. Caiff strwythurau a systemau adrodd ariannol Llenyddiaeth Cymru eu monitro'n agos gan ei Fwrdd ei hun, yn ogystal â Chyngor Celfyddydau Cymru, archwilwyr annibynnol, y Comisiwn Elusennau a Thŷ'r Cwmnïau. Mae gan Llenyddiaeth Cymru yr arbenigedd, y profiad a'r strwythurau rheoli i gyflawni a monitro ei gylch

gwaith gweithgarwch llawn yn llwyddiannus. Mae Llenyddiaeth Cymru wedi herio awduron yr Adroddiad i brofi fel arall.

Mae dull gweithredu cynhwysol Llenyddiaeth Cymru yn rhan o'i ethos craidd, sef hyrwyddo cyfle a mynediad cyfartal, ynghyd â ffordd ddynamig a meddwl agored o weithio. I gyflawni newid yng Nghymru, mae Llenyddiaeth Cymru o'r farn y dylai hyn ddechrau gyda'r sefydliad ei hun. Mae Llenyddiaeth Cymru yn falch y caiff y gwerthoedd hyn eu hadlewyrchu yng nghyfansoddiad ei Fwrdd Rheoli a'i staff. Mae'r cyfarwyddwyr⁸ yn cynrychioli amrywiaeth o gefndiroedd ieithyddol ac ethnig ac mae'r rhan fwyaf yn fenywod. Fodd bynnag, mae mwy o waith i'w wneud o hyd er mwyn sicrhau bod y celfyddydau yn hygyrch i bawb.

Mae Llenyddiaeth Cymru hefyd yn cydweithio â Chwarae Teg ar ei Rhaglen Cyflogwyr ar Strategaeth Cydraddoldeb ac Amrywiaeth, gan hyrwyddo ei Gynllun Cydraddoldeb Strategol ymhellach. Mae hefyd wedi helpu llawer o aelodau o staff i gynnal hyfforddiant rheoli fel rhan o'r rhaglen Cenedl Hyblyg 2.

4. Effaith economaidd

Mae'r cyllid mae Llenyddiaeth Cymru yn ei gael gan Gyngor Celfyddydau Cymru yn ei alluogi i ddarparu rhaglen graidd o weithgarwch a hefyd greu swm sylweddol o incwm ychwanegol.

Ers 2011/12, mae'r incwm y mae Llenyddiaeth Cymru yn ei godi o ffynonellau eraill wedi cynyddu'n sylweddol. Yn 2011/12 roedd grant refeniw Cyngor Celfyddydau Cymru yn cynrychioli 74% o incwm Llenyddiaeth Cymru. Erbyn 2015/16, roedd wedi gostwng i 61%. Yn y cyfnod hwn, mae'r incwm a'r cyllid ychwanegol y mae Llenyddiaeth Cymru yn eu cael y tu hwnt i'w grant craidd wedi cynyddu 122%.

Hefyd, yn dilyn gwaith atgyweirio a chadwraeth diweddar yng Nghanolfan Ysgrifennu Tŷ Newydd, mae incwm o logi'r safle wedi cynyddu o £815 yn 14/15 i £8,085 yn 2015/16, a disgwylir £23,097 yn 2017/18.

Yn ogystal â gwariant uniongyrchol drwy'r gyllideb flynyddol, mae gweithgarwch Llenyddiaeth Cymru yn cynhyrchu buddsoddiad ychwanegol a gwerth ychwanegol sylweddol. Am bob £1 sy'n cael ei buddsoddi yn Llenyddiaeth Cymru gan Gyngor Celfyddydau Cymru, caiff £2.50 ychwanegol ei gynhyrchu. Mae hyn yn cyfateb i £1.8m y flwyddyn, yn seiliedig ar ffigurau 2015-17, ac mae'n cynnwys £114,000 ychwanegol a grëwyd drwy bartneriaethau Awduron ar Daith a £326,000 ychwanegol a grëwyd drwy Ganolfan Ysgrifennu Tŷ Newydd mewn incwm masnachol yn ogystal â gwariant cyfranogwyr yn yr ardal leol. Ceir manylion pellach yn atodiad ii.

Fel sefydliad cenedlaethol, mae gan Llenyddiaeth Cymru staff yng Nghanolfan Ysgrifennu Tŷ Newydd yn Llanystumdwy, Gwynedd ac yng Nghanolfan Mileniwm Cymru, Caerdydd. Caiff mentrau Llenyddiaeth Cymru eu cyflwyno ledled Cymru, ac mae rhai swyddi yn gweithio ar draws ardaloedd Awdurdod Lleol – er enghraifft ein swyddogion datblygu Llenyddiaeth rhanbarthol.

5. Ffyrdd Strategol ymlaen

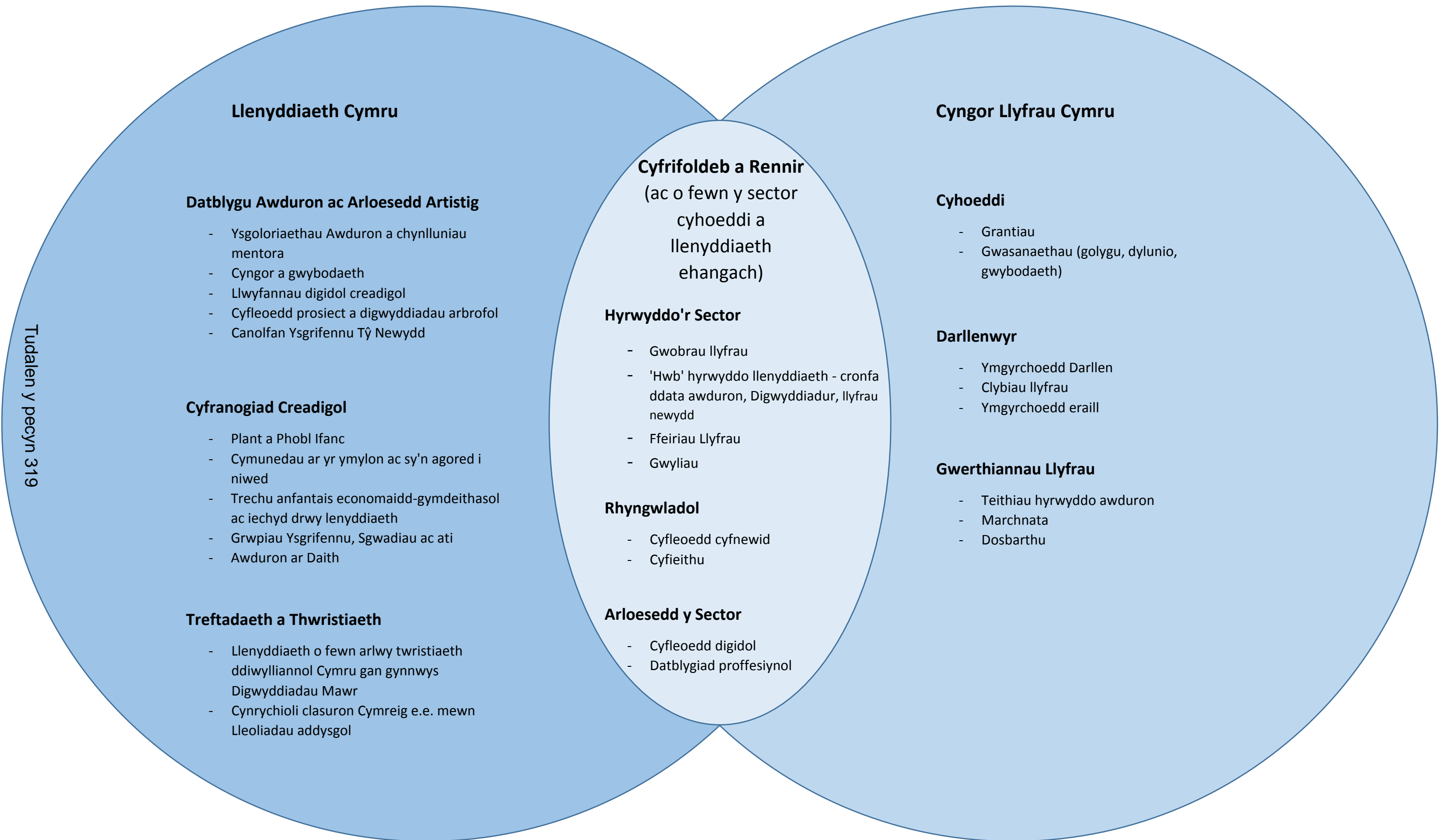
⁸<http://www.lenyddiaethcymru.org/about/bwrdd-rheoli-2/>

Mae Adroddiad Hughes yn syml ac yn swta yn awgrymu “dympio” gweithgareddau, heb feddwl am ymarferoldeb, terfynau amser, risgiau amlwg na goblygiadau ariannol trosglwyddiad o'r fath. Fel y nodwyd uchod, mae Llenyddiaeth Cymru o'r farn y byddai sector sydd wedi'i gysylltu'n fwy dynamig, lle y caiff arbenigedd cyfredol ei gadw a'i wella, yn gwasanaethu pobl Cymru yn well. Byddai canoli yn bygwth yr egwyddor hyd braich – egwyddor y dylai pob un ohonom ei harddel mewn cenedl ddemocrataidd aeddfed. Byddai Llenyddiaeth Cymru yn croesawu'r cyfle i gydweithio'n strategol â'r holl randdeiliaid allweddol er mwyn datblygu blaengynllun sy'n defnyddio arbenigedd sefydledig mewn ffordd fwy cytûn. Mae'r diagram yn atodiad i yn dangos rolau presennol Llenyddiaeth Cymru a Chyngor Llyfrau Cymru, ac yn cynnig meysydd cadarnhaol ac ymarferol ar gyfer mwy o gydweithredu.

Bydd hyn yn adeiladu ar y weledigaeth bod Llenyddiaeth yn perthyn i bawb, ac yn sicrhau ffyniant ein diwylliant unigryw o eiriau ar gyfer y dyfodol.

Llenyddiaeth Cymru, Medi 2017

Llenyddiaeth Cymru a Chyngor Llyfrau Cymru – cylchoedd gwaith a meysydd posibl ar gyfer cydweithredu

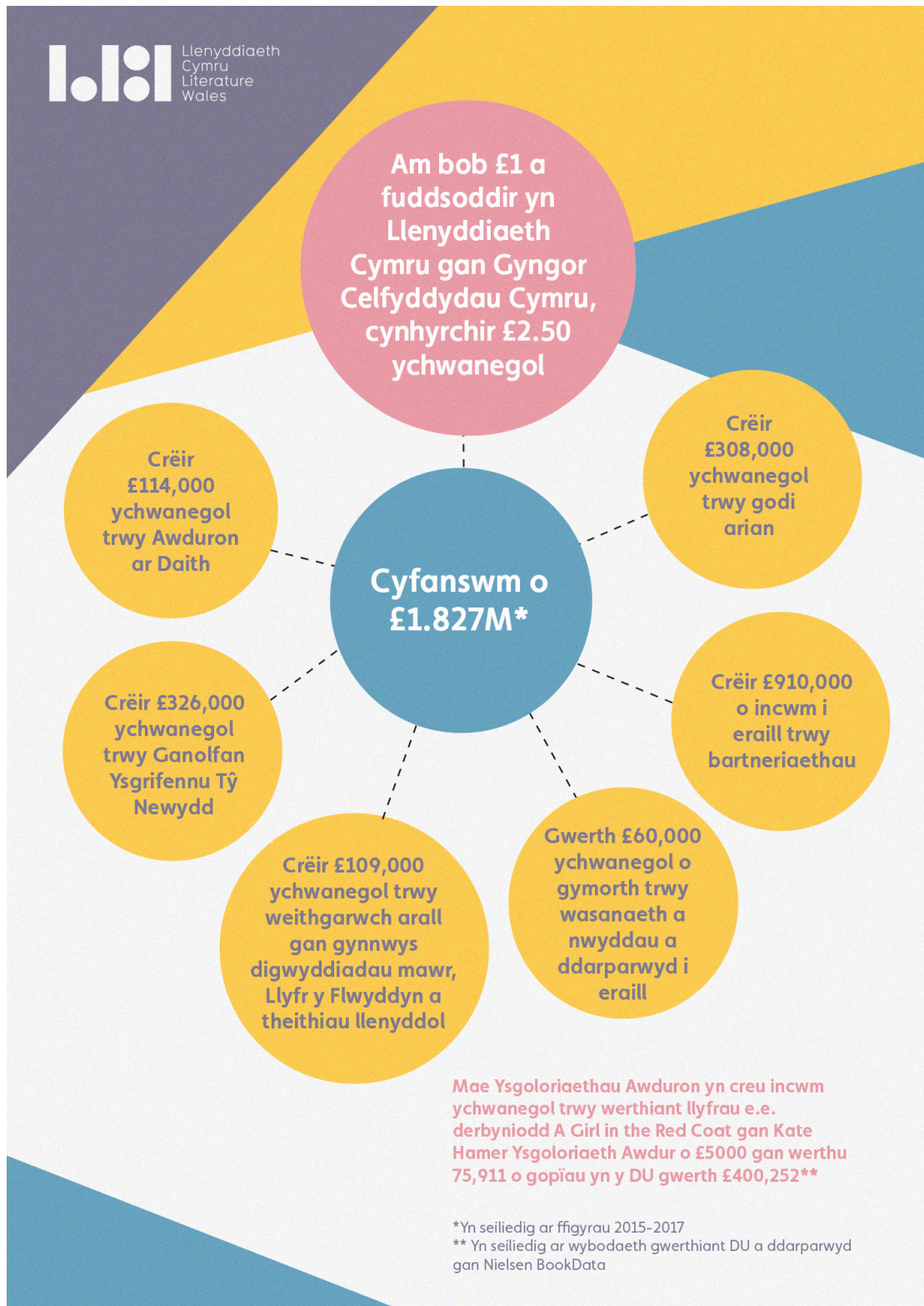


Tudalen y pecyn 319

Yn bennaf ar gyfer Awduron, y Gelfyddyd a Chyfranogwyr

Ar gyfer Diwylliant

Yn bennaf ar gyfer Cyhoeddwyr, Masnach a Darllenwyr





14 Medi / September 2017

**AT Y PWYLLGOR DIWYLLIANT, Y GYMRAEG A CHYFATHREBU
TO MEMBERS OF THE CULTURE, WELSH LANGUAGE AND COMMUNICATIONS COMMITTEE**

Annwyl Glerc,

**Cais am dystiolaeth: Adolygiad
Annibynnol o Gymorth ar gyfer Cyhoeddi
a Llenyddiaeth yng Nghymru**

Mae'n bleser gennyf amgáu ymateb Cyngor Llyfrau Cymru (*The Way Forward*, Gorffennaf 2017) i Ysgrifennydd y Cabinet dros yr Economi a'r Seilwaith yn dilyn prif argymhellion yr Athro Hughes yn ei *Adolygiad o Gymorth ar gyfer Cyhoeddi a Llenyddiaeth yng Nghymru*.

Hefyd yn gynwysedig ceir cyflwyniad byr i'n gwaith, ystadegau allweddol o flwyddyn ariannol 2016/17 a samplau o'n deunyddiau marchnata diweddaraf.

Mae'r Athro M. Wynn Thomas, Cadeirydd y Cyngor Llyfrau a minnau'n edrych ymlaen at gyfarfod â'r Pwyllgor Diwylliant yr wythnos nesaf.

Dear Clerk

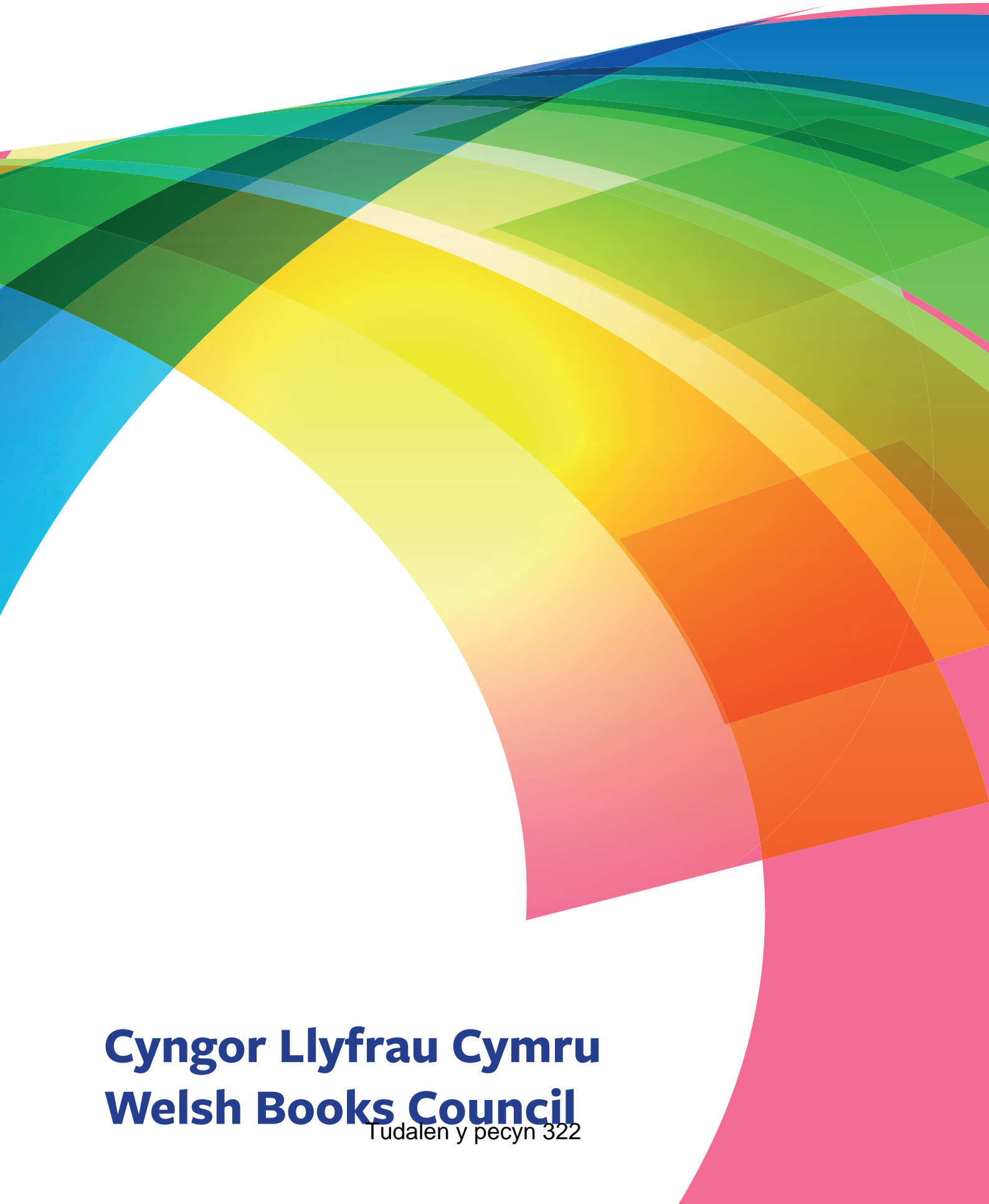
***Evidence to Committee: Independent
Review of Support for Publishing and
Literature Wales***

I am pleased to enclose the Welsh Books Council's response (The Way Forward, July 2017) to the Cabinet Secretary for Economy and Infrastructure following the main recommendations of Professor Hughes's Review of Support for Publishing and Literature in Wales.

Also included is a brief introduction to our work, key statistics from the financial year 2016/17 and samples of the most recent marketing materials.

Professor M Wynn Thomas, Chairman of the Welsh Books Council, and I look forward to meeting with the Culture Committee next week.

HELGARD KRAUSE
Prif Weithredwr / Chief Executive



Cyngor Llyfrau Cymru
Welsh Books Council

Tudalen y pecyn 322

The Welsh Books Council is the major national body enabled by government funding to underpin the entire publishing industry in Wales, in both languages.

The **Welsh Books Council** was founded in 1961 and is a registered charity funded by Welsh Government. Our established aim and purpose is to serve the publishing sector in Wales in all its different aspects, thereby nurturing Welsh writing talent to allow it to maximise its potential in all its different forms.

Grants and Services

We distribute grants to publishers, run training courses and offer a range of services such as editing, design, distribution, sales, marketing, and bibliographic data management services. We work in close partnership with schools, libraries, booksellers and other third sector organisations with the aim of stimulating interest in books, reading and literature in general. We deliver successful schemes such as the Tir na n-Og Children's Book Awards, World Book Day, Quick Reads, author tours, book quizzes and competitions, often in partnership with the Book Trust, The Reading Agency, CILIP and SCL, and pride ourselves in being an open and collaborative partner.

Personnel

We employ 45 people in our administrative offices and distribution centre, all of whom are fully bilingual. We are proud to count teachers, publishing specialists, academics, published authors, editors, designers, library professionals, booksellers as well as highly skilled administrators, finance and distribution specialists amongst our staff. We frequently benefit from the wide experience and skills of our trustees as well as those of members of our independent panels, Executive Committee and Council; they also ensure robust and effective governance.

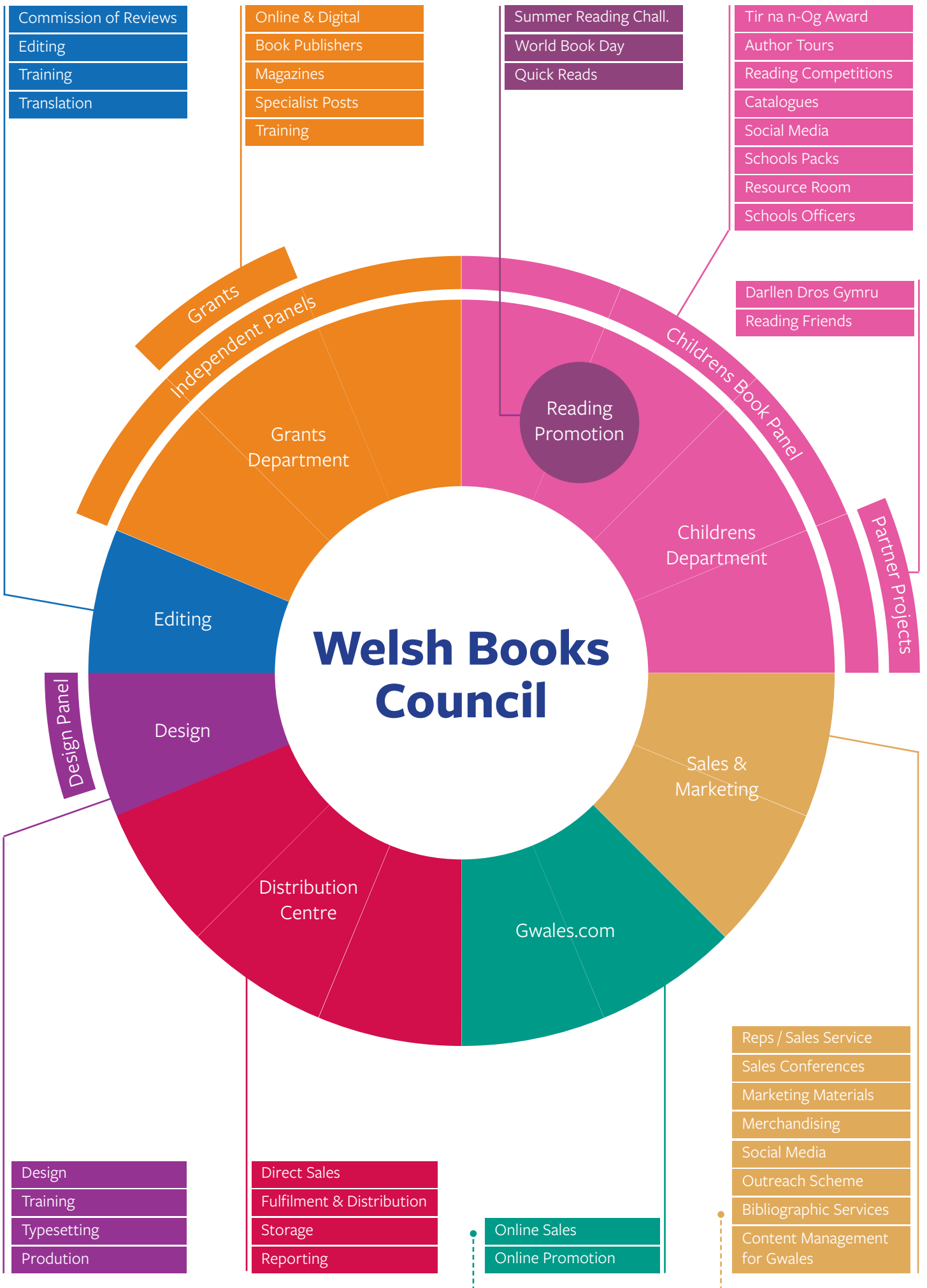
As a national organisation, truly meaningful engagement with our stakeholders lies at the core of our work, and it is this principle which has resulted in a proven track record for over 50 years and which was affirmed most recently

in 2015 by the 'Review of Support for Books from Wales', a report by Martin Rolph for the Culture and Sport Department, 2015.

Response to Professor Medwin Hughes's report
Our work is inextricably linked to all aspects of literary endeavour in Wales, and unsurprisingly our Executive Committee and ruling Council warmly endorsed the recommendations of Professor Hughes's review. It is the unanimous view of our Council and Executive Committee that the recommendations

- recognize that the services to be transferred dovetail perfectly with our current programme of provision
- significantly strengthen current provision but also allow several of its present schemes to be adapted to meet constantly developing needs
- will enable us to significantly reinforce the publishing sector we exist to serve
- are supported by many representatives of the sector who have already voiced their very strong support for the recommendations
- indicate that sufficient additional funding will be made available to us to ensure effective implementation of the recommendations
- if fully implemented, would better enable us both to deliver our own strategic plan (Looking Forward) and to fulfil the strategic priorities of Welsh Government (as outlined in Taking Wales Forward 2016–2021; Well-being of Future Generations (Wales) Act 2015).

We believe that we are uniquely placed not only to develop a clear and focused strategy for the promotion of publishing and literature in Wales but also, crucially, to implement it successfully. Our role as enabler and dispenser will be applied to all new functions, ensuring maximum impact not only culturally and socially, but also commercially. And our positive response to the recommendations has been echoed throughout the publishing sector in Wales.



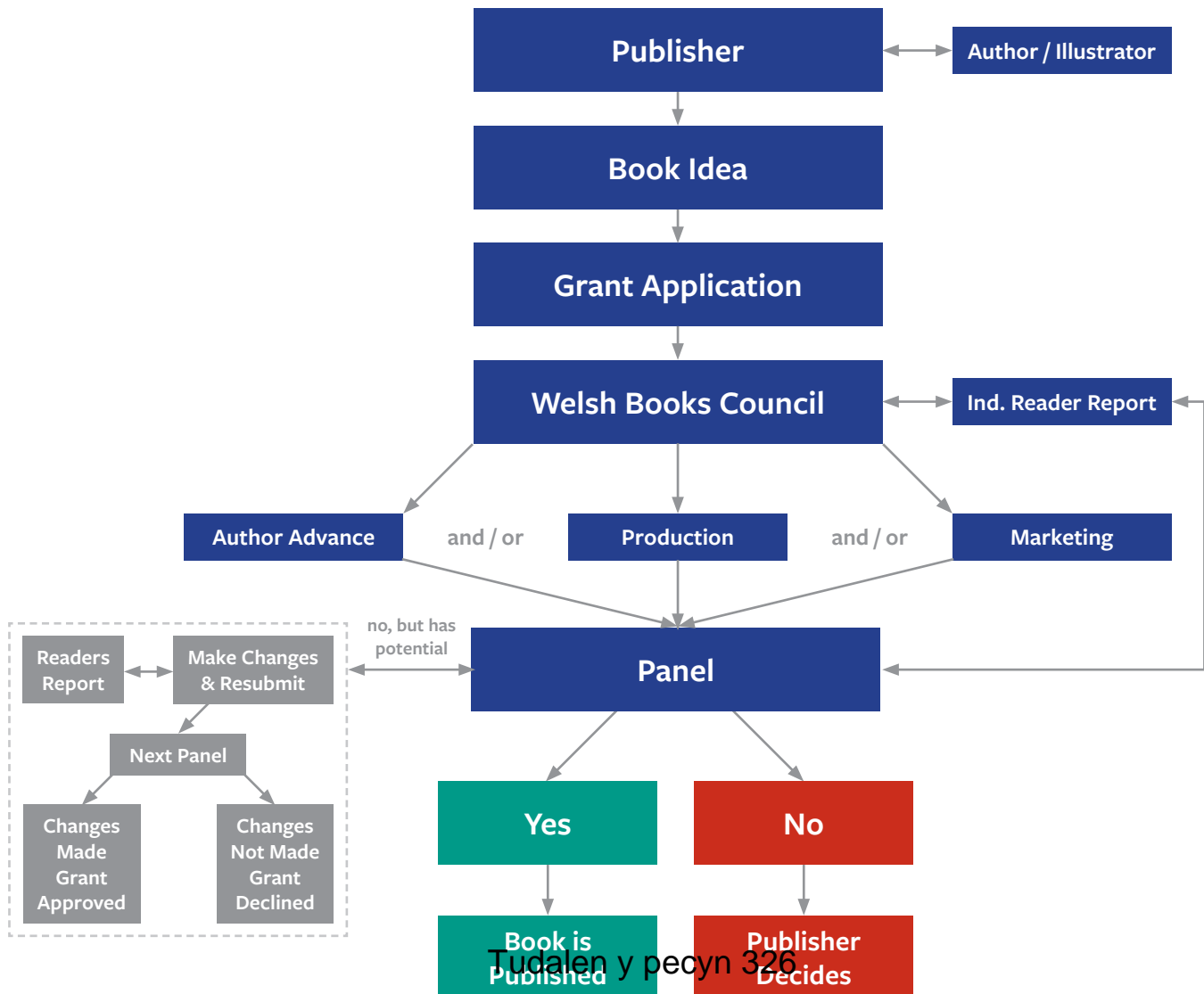
Grants Distributed

£2,299,000

| | |
|------------------|----------------|
| Welsh | English |
| £1,632,550 (71%) | £666,450 (29%) |

| | Welsh | English |
|--|-----------|---------|
| Publishers Supported | 17 | 14 |
| Posts (Editorial and Marketing) | 20 | 10 |
| Children's Books | 123 | 10 |
| Books for Adults | 109 | 66 |
| Magazines (Printed and Digital) | 15 | 5 |
| Marketing Events | 66 | 22 |
| Digital Journalism | Golwg 360 | - |

Individual Grants



Design Department

| Publishers Supported |
|---|
| 11 |
| Number of titles supported |
| 105 |
| Internal Publications & Marketing Items |
| 50+ |

Editorial Department

| Publishers Supported |
|----------------------------|
| 13 |
| Number of titles supported |
| 147 |
| Reviews |
| 183 |

Children's Department

World Book Day

Biggest Bookshow author event – 800 pupils
Bilingual materials to schools, libraries and colleges

Summer Reading Challenge

Participation – 39,222 / Completed challenge – 22,953
New members – 1,977 / New Reading Hack volunteers – 135

Author Tour

Participation – 1,464 pupils / Sales £3,256

Reading Competitions

Participation – Primary school pupils - 2,570

Childrens' Books catalogues

Welsh titles – 3,316 / English titles – 1,123

Schools officers

3 schools officers / 790 consultations / Orders - £380,000

Schools pack

Produced biannually / Primary – 1,358 / Secondary – 222

Resource Room

4,885 titles in Welsh and English
Tudalen y pecyn 327

Gwales.com (Information Services)

| |
|---|
| 30,000 titles on gwales.com 22,000 titles available to order |
| 25,000+ users from 170 countries |
| 172,269 order lines through gwales.com during 2016/17 |
| 39 Independent Bookshops benefited from the Bookshop Support Scheme on gwales.com 2016/17 |
| Increase of 18.4% of social media followers since January 2017 |
| 1,631 e-books available, 353 in Welsh |

Sales & Marketing

| |
|---|
| Grants of £25,976 were distributed to 16 bookshops |
| Offers exclusive sales and distribution service |
| 3 sales representatives approx 2,300 visits to customers in 2016/ 2017 |
| Approx. 335 events organised – total sales value of £140,383 |
| 18 titles featured in the television adverts on S4C broadcast in November and December 2016 – seen by over 2 million viewers |
| 2,140 shops, schools, libraries received marketing materials such as Llyfrau'r Haf, Summer Reads, Gwledd Nadolig, Festive Reads, Chwedlau Myths and Legends, Hedd Wyn, bespoke Christmas catalogue for Waterstones |

Distribution

| |
|---|
| Total 2016/17 £2,613,611 |
| 18,000 parcels per year |
| Pick Pack Distribute over 650,000 books per year |
| created 35,000 invoices |
| 98.65% of all orders received dispatched same day |
| 289 staff years industry experience |
| Over £2m net stock holding |
| New weekly stock reporting to main publishers |
| Same day order processing for orders placed by midday and next day fulfilment on trade orders |



Position Paper

The Way Forward

July 2017



WELSH BOOKS COUNCIL POSITION PAPER

THE WAY FORWARD

Executive Summary

- The WBC enthusiastically welcomes this thoroughgoing report's recommendations and such of its findings as relate to its work.
- In doing so, it assumes that sufficient additional funding will be made available to ensure effective implementation of them.
- It recognizes that the services to be transferred to its care dovetail perfectly with its current programme of provision.
- Not only will they significantly strengthen current provision but also allow several of its present schemes to be adapted to meet constantly developing needs.
- They will thereby enable the Council significantly to reinforce the publishing sector it exists to serve.
- In anticipation of this, many representatives of that sector have already expressed their very strong support for the recommendations.
- Full implementation of the report would also better enable the Council both to deliver its own strategic plan (*Looking Forward*) and to fulfil the strategic priorities of Welsh Government (as outlined in *Taking Wales Forward 2016-2021*; *Well-Being of Future Generations (Wales) Act 2015*).
- The core response of the WBC to the Report has already been very warmly endorsed by both its Executive Committee and ruling Council.
- The WBC now looks forward to working with its partners to ensure an efficient and speedy transition of responsibilities

Overview

The Welsh Books Council welcomes in the very warmest terms the findings of the recent Independent Review of Support for Publishing and Literature in Wales and accepts its recommendations in their totality. In doing so, it assumes that sufficient additional funding will be made available to ensure effective implementation of them. It looks forward to working with others to effect the transfer of responsibilities as speedily and efficiently as possible.

The established sole aim and purpose of the WBC is to serve the publishing sector in Wales in all its different aspects so as to enable it to nurture Welsh writing talent and to allow it to maximise its market potential. Particularly significant, in the present context, has been an acceptance by a succession of past Ministers, most notably Jenny Randerson and Alun Pugh, of the WBC's core argument that grants/bursaries to writers are most productive when tied directly to an assessment of the likely market impact and performance of the work that is being financially supported and when combined with mentoring and training opportunities.

For more than two decades the work of the WBC for the publishing industry in Wales has repeatedly been commended in the warmest of possible of terms by a whole series of independent reviews and reports:

- ‘Evaluation of the efficiency and effectiveness of the Grant Support Scheme for Welsh Language Publishers’, D.R. Thomas and D.N. Martin (Cardiff Business School on behalf of the Welsh Office), 1995.
- ‘Review of the Publishing Grant administered by the Welsh Books Council’ (Grant Thornton on behalf of the Welsh Language Board), 1999.
- ‘Report of the Task and Finish Group on Publishing for [Jenny Randerson AM] The Minister for Culture, Sport and the Welsh Language’, chaired by Delyth Evans AM, 2002
- ‘Welsh Writing in English’ Report for the Culture Welsh Language and Sport Committee, Rosemary Butler AM (Chair), 2004.
- ‘Review of Support for Books from Wales’, Report by Martin Rolph for the Culture and Sport Department, 2015.

It is extremely doubtful whether any other Welsh body active in the fields of writing, literature and publishing has undergone such sustained scrutiny and emerged with such flying colours. And it is further worth noting that the recommendations in this report are completely consistent with the findings of these previous assessments.

As was to be expected, the examination of the WBC by the panel of this latest review was appropriately testing and rigorous, with a number of challenging issues being raised by panel members in accordance with their particular expertise. However, the Chair and Chief Executive of the Welsh Books Council welcomed the opportunity to respond, believing the occasion provided an excellent opportunity for it to showcase its work and to reflect on how the Books Council’s services could be adapted and extended to meet future anticipated needs.

The recommendations of the review have met with enthusiastic support from the Welsh Books Council as not only are they a clear recognition of its distinguished record of service to the publishing industry but also represent an exciting new opportunity for that service to be significantly augmented and strengthened in a number of important respects. They have been equally warmly welcomed by key players right across the publishing sector in Wales excited by the possibilities for development, growth and enhanced performance that they represent.

The recommendations focus on activities that lie at the very core of literary endeavour. These would benefit from WBCs exclusive focus on books and publishing since within the WBC framework they would not face internal competition either from other more cost-intensive if more glamorous art forms or from high-profile performance events with the advantage of being prominently public-facing.

The proposed transfer of functions would also clearly align with the strategic priorities of Welsh Government (as outlined in *Taking Wales Forward 2016-2021*) and its commitment to the *Well-being of Future Generations (Wales) Act 2015* and it would also reflect key aspects of WBCs own strategic plan *Looking Forward*. In this context WBC would wholeheartedly embrace a name change which would not only more accurately reflect its present status but also clearly signal the widening of its current remit; the change would also be reflected in a changed mission statement to signal a clear intent to embrace and embed the new responsibilities fully, especially with regards to authors and talent development.

Writers' Bursaries: Developing & promoting talent

The publishing industry is underpinned by the creative output of writers; the careful nurturing of emerging talent and professional development opportunities for more experienced authors are central to ensuring a diverse and engaging content; content suitable for publication in book or magazine form is currently supported through our grants system. However, writing manifests itself in many more diverse forms, such as games, scripts, spoken word and live performance, apps, web content, networks and social media. We believe that Writers' Bursaries play a vital role in developing talent, but that the current bursary system is short of ambition and lacks structure.

Using tried and tested principles currently deployed by the Welsh Books Council we envisage a new bursary function that:

- Is established through consultation with writers and their representative bodies
- Attracts high profile panel members with deep expertise and from diverse backgrounds
- Facilitates and encourages risk-taking by authors and at times publishers which is rarely possible within the present confines of the WBC grant system
- Operates two separate panels to ensure equity in opportunity for both languages
- Has a transparent application process designed not only to facilitate the creative process but also to provide real focus with regard to the aims and outcomes desired by the writer
- Embeds mentoring and training as well as follow up and assessment with access to publishers, editors, agents, marketing and digital experts facilitated
- Enables a suitable partner to re-establish the much missed writers' database
- Is national in outlook, working proactively to attract applications from disadvantaged areas
- Is located in North-East Wales, allowing for a wider geographical presence of WBC

Writers on Tour

Events where authors can engage with readers, other writers and particularly disadvantaged communities or young people are central to widening reach and encouraging participation. The inspiration, especially for young people, gained by meeting an admired author should not be underestimated, nor should the marketing opportunity for books. The WBC grant system is very targeted and specific in the support it currently gives for events; a more culturally focussed activity in the shape of Writers on Tour is a natural extension of our current work and also offers new marketing opportunities for all kinds of content and formats.

We therefore envisage a more joined up and holistic approach to Writers on Tour by:

- Acknowledging that very few writers actually earn a living from their writing and that participation at events needs to be supported at an appropriate level
- Ensuring that books are on sale, through a local bookseller where possible, by encouraging applications to WBC's outreach grant scheme
- Considering Author tours in context and ensuring they form part of a structured development of community engagement by reaching out to existing local organisers

- Considering the diverse demands and interests of different communities and proactively encouraging publishers to collaborate
- Making appropriate provisions for young and emergent writers
- Maximising the international potential through joining up with initiatives from British Council Wales and Wales Arts International

For the potential and ambition of the Writers' Bursaries and Writers on Tour schemes to be fully realised careful consideration will need to be given to the current level of funding, which has decreased over the last few years.

Promoting and awarding the best of Welsh writing

Literary awards are an important recognition of excellence; they provide career development prospects for authors and promotional/commercial opportunities for publishers. Whilst the Wales Book of the Year award has a long and distinguished history, the reduction in prize money, and lack of sense of occasion and resultant visibility, has diminished its importance in the eyes of many in recent years. Whilst literary awards are not central to our core services and in themselves do not offer the same structured intervention possibilities of the grants system we appreciate their relevance in the publishing landscape and not least their national symbolism in showcasing the best of Wales. We envisage a revived Wales Book of the Year by:

- Establishing a working group that includes representatives from publishers, authors booksellers, media, broadcasters, libraries, education sector, and sponsors
- Seeking to establish commercial sponsorship or patronage similar to other prizes (this may not be immediately possible in the first and second year of the prize, so appropriate funding would need to be forthcoming initially)
- Seeking to involve the broadcast media from its inception to ensure coverage and maximum exposure within the English-language media in Wales
- Establishing a robust and transparent selection and judging process with high profile expert judges, ensuring quality and independence
- Considering the current genre categories, formats permitted and how to align with the Tir na n-Og awards, particularly with regard to the category 'Young Adult Fiction'
- Consider the introduction of an award category to recognise achievement for design and illustration in children's publishing, possibly in collaboration with HE institutions
- Developing a cohesive marketing strategy, including international opportunities, by collaborating with other organisations such as Welsh Literature Exchange, Literature Across Frontiers, British Council Wales, Wales Arts International
- Establishing a new "Author of the Year" scheme which will be joined up to Authors on Tour and the activities of the marketing and sales department
- Locating its administration in South-East Wales, allowing for a wider geographical presence of WBC

Provision for children and young people

This particular recommendation is very broad in its reach and would greatly benefit from further discussion with the aim of developing a coherent strategy through collaboration with a number of different stakeholders. We are keen to build on the already existing activities of our dedicated Children's and Reading Promotion department (World Book Day, World Biggest Book Show, Great Summer Reading Challenge, Quick Reads, BookSlam) to further our "Reading for Pleasure" agenda, with a particular focus on disadvantaged regions. Reaching reluctant or non readers especially in the 10-18 age group is a key concern and we envisage increased collaboration with schools, libraries, Urdd Gobaith Cymru, S4C and BBC Cymru/Wales to develop innovative ways to engage young people, akin to already existing partnerships such as Bardd Plant Cymru. The strategic interventions available through the current grants systems with regards to content creation would form part of the strategy as would a complete re-think of the way in which we reach young people through our digital and social media presence.

Conclusion

The Council is confident that the transfer of the functions outlined above would serve to strengthen the sector as a whole and that it is uniquely placed not only to develop a clear and focused strategy for the promotion of publishing and literature in Wales but also, crucially, to implement it successfully. The recommendations for an augmentation of the WBC's programmes and services will be considered in the context of a number of other observations and suggestions in the Review as to possible improvements of our work

Within our senior management team, staff, trustees and panel members we possess a deep and comprehensive understanding of the sector both within Wales and internationally. We have a robust governance structure and our decision making processes are transparent and stand up to scrutiny. We also enjoy an excellent reputation as an open and collaborative partner, experienced at giving equal consideration to the varied priorities of its stakeholders.

We firmly believe in our role as enabler and dispenser and therefore more than two thirds of our funding is awarded to grant recipients, thus cementing our reputation as providing "good value for money" and this is a principle we would wish to adhere to going forward.

Those skills and principles underpinning our current work will be applied to all new functions, ensuring maximum impact not only culturally, but also commercially and socially. The WBC's reading of the Review has been strongly and widely endorsed and supported throughout Wales and is reflected in the numerous public comments and testimonials. They underline the WBC's own recognition that these recommendations dovetail perfectly with its own strategic plan and Welsh Government's strategic priorities.

Eitem 5.1

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and Communications Committee
Independent Review of Support for Publishing and Literature in Wales
Ymateb gan Gillian Clarke / Evidence from Gillian Clarke

As one of four, including my husband, David, who set up Ty Newydd as our Welsh Writing Centre 27 years ago, I was shocked by the Medwin Hughes report. It is shallow and inaccurate. No member of the panel visited Ty Newydd, or spoke to the staff, or contacted me, its inaugurator and President, and National Poet of Wales for the previous eight years.

As you know, Ty Newydd is our Welsh version of the Arvon Foundation in England, established by Ted Hughes, and of Moniack Mhor in Scotland. Before setting up our Welsh Writers Centre, I had tutored 50 courses for the Arvon Foundation. Ted Hughes wrote to the Welsh Arts Council in support of my bid for a centre in Wales, and his wife, Carol, came in person to speak to them. David and I found a suitable house to rent, and, through writers' donations, I raised £25,000. The Welsh Arts Council matched it. We worked with two others to restore, clean, decorate and furnish the building. Laura Ashley donated bed linen. Other companies gave furniture. Ty Newydd held its first poetry course in April 1990.

Ty Newydd's purpose is to encourage reading and raise standards of writing by enabling people to work with the best writers. Courses in poetry, prose, fiction, drama, film, and other specialist areas are run throughout the year. I tutor two poetry masterclasses, one with the Poet Laureate, Carol Ann Duffy (who tutors nowhere else but Moniack Mhor), and one with another poet-tutor. The report's panel members visited no course, spoke to no tutor, and no participant, and did not contact me.

TN was independent of the WAC until Dai Smith, Chairman of WAC, instructed us to unite with Literature Wales. It was difficult for Director Sally Baker to work under the new regime, so she retired. Tragic events hit the staff. One retired, one died, the newly appointed head fell ill, and after a period with no-one actively in charge, he was forced to retire. We lost customers. After much repair work we now have an excellent team, and have recovered lost ground.

FACTS THE PANEL DID NOT CONSIDER OR GOT WRONG:

1. Ty Newydd courses do have a strong record of helping writers to develop writing careers and to get published. Below is a small sample list of published poets/writers whom I first met as unpublished unknowns, either in my work as Poet-in-School, or at Ty Newydd:

Alice Oswald, Horatio Clare, Adam Horovitz, Will Owen Roberts. Bethan Gwanas, Paul Henry, Owen Sheers, Samantha Wynne Rhydderch, Liz Lefroy, Jane Clarke (Bloodaxe) Lizzie Fincham. (Cinnamon)

2. TN's equally important purpose is to get people reading, and to widen and deepen their reading. We need readers as well as writers. It is not our function to make everyone a published author, but to spread literature and literacy to all.

3. Those who come to Ty Newydd from other parts of Wales, other parts of Britain, Ireland, Europe and the USA, experience Wales and hear Welsh spoken. Many become admirers and supporters of our language and our literatures. The diplomatic power of TN is incalculable.

4. The report is incorrect in several details: there is no Writers House like Ty Newydd in Ireland, which is why so many Irish people come to Ty Newydd. A recent Irish star is Jane Clarke, who attended several Masterclasses, and whose collection, 'The River,' she worked on at TN. Published by Bloodaxe, it has won several literary prizes.

5. One of TN's most ardent supporters, who co-tutors a Masterclass with me every year, is Carol Ann Duffy, the Poet Laureate.

6. There are open courses for all to apply for (as there should be) but for the two annual Masterclasses we select the most promising applicants. Thus the remark in the report about 'retired hobbyists' is insulting and false. In fact, as well as masterclassers, Ty Newydd welcomes the young, the elderly, the disabled, the lonely, those suffering from dementia and those who help them. Language for such people, and those who work with them, has an enabling, curative power. The tutors*, all published writers, are appropriately chosen for each group of participants.

(*It should be noted that the tutor's fee gives a writer, often on a very low income, a useful small return for their creative work.

Writers-on-Tour

My own encounter with many of the writers listed above was first made in their primary or secondary school under Writers-on-Tour. Evidence from teachers could be gathered to support the success of poet visits. Why were they not asked? On a visit to read to patients in a Mental Hospital in Abergavenny, I witnessed an old

man, an elected mute who had not spoken a word for ten years, stand and recite Wordsworth's 'Daffodils'. My poem 'Miracle on St David's Day' tells this story.

National Poet of Wales

This is my other area of experience, and I wish to add detail to the bare mention made by the report: the NPW has a powerful ambassadorial role. Wales used to be invisible in the British literary scene. In my eight years tenure I was invited to represent Wales at festivals in England, Ireland, Scotland, France, Italy, Spain, Luxembourg, the USA, Bangladesh and Mexico. During the centenary years of Dylan Thomas, Alun Lewis, and others, organised by Literature Wales, I re-read every word of the writer celebrated, and was commissioned to write poems, stories, articles and to give readings and lectures in London, Sheffield, Hay-on-Wye, Dublin, St Andrews, Edinburgh, to name but a few. I judged a young Muslim poetry competition. I met the Irish President in Swansea, (Dylan Thomas year) and was invited to the Yeats 150 year centenary in Sligo, where I read in pubs, a graveyard, and on a boat to Inisfree with the Irish Ambassador to London. These encounters made friendships across borders and cultures, and the doors are open for our current National poet, Ifor ap Glyn, to continue LitWales' good work.



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11 September, 2017.

Re: Welsh Literature and the Poetry of Loss.
For the attention of Culture Committee Chair.

Dear Bethan Jenkins AS

I am writing to you following the report on the publishing and literature industry in Wales which was commissioned by the *Welsh Government* and published during the summer. One gap in the report was the lack of commentary on the involvement of *Literature Wales* in the *Wales Remembers* programme which, as you know, marks the centenary of the First World War from 2014 onwards. As part of the programme, *Literature Wales* is delivering a project entitled *The Poetry of Loss*, a programme commemorating the First World War and Hedd Wyn, the poet who was killed (along with the Irish poet, Francis Ledwidge) at Passchendaele in 1917. This is a collaborative project with the Flemish Government. I was pleased to hear in Spring 2017 that I had been successful in a keen competition to spend three weeks taking part in a literary residential project in *Passa Porta*, the International House of Literature in Brussels. Full details of this project can be accessed here:

<https://www.llenyddiaethcymru.org/lw-news/nerys-williams-gyflawni-preswyliad-lenyddol-ym-mrwsel/>

I have little interest in analysing political views on how Wales should fund resources for the arts. But I feel *strongly* that it is important for the report to be balanced and fair – especially when there is such an obvious gap. I am not a ‘stakeholder’ and have been living and working in Ireland since 2002. Although I keep a keen eye on developments in Wales, I am not a part of any distinct Welsh faction – whether bureaucratic, academic or political.

In brief, I am writing to the Committee as an author, to describe my experience of working with *Literature Wales*, and the importance of the three weeks to the development of my creative project. Without doubt, the experience – and the connections I made – demonstrate the international objectives of *Literature Wales* and its desire to widen and develop strong artistic links between Wales and Ireland. shows

I am aware that time is short – therefore I shall outline the work produced as a result of the project:



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During the residency (Monday 8th – Sunday 28th May 2017).

1. Composed a long poem entitled *Alphabet on Fire* (a series of ten poems) depicting an imagined meeting between Hedd Wyn and the Irish poet Francis Ledwidge. The poem poses relevant questions regarding: nationalism, Europeanism, linguistic inventiveness, as well as the challenge of modernity upon traditional verse forms. The poem asks whether a culture of militarism has grown in post devolutionary Wales and how do I, as a female, bilingual, non-combatant poet, engage with a history of warfare?
2. An evening of poetry, prose, music and discussion on Hedd Wyn and the First World War poets in Passa Porta, the International House of Literature in Brussels on 23rd May, 2017.
<http://www.passaporta.be/en/agenda/poetry-of-loss-barddoniaeth-collod>
3. A lecture on 'Poets of the Black Chair: Francis Ledwidge and Hedd Wyn 1887-1917' in the Irish Embassy. Reading Hedd Wyn's poetry in the context of the experience of Francis Ledwidge, the Irish poet, 22nd May, 2017.
4. Reading of the draft of *Calendar on Fire* in *Passa Porta* to staff, authors and other involved in the works of the International House of Literature. 17th May 2017.
5. 3 blogs
 - 'Brussels Week One' <https://www.llenyddiaethcymru.org/lw-blog/6969/>
 - 'Poetry and Document: Suturing Wales, Ireland and Belgium'
<http://www.literaturewales.org/lw-blog/poetry-loss-literary-residency-brussels-2-nerys-williams/>
 - 'Border Zones, Bitumen and Boezinghe' <http://www.literaturewales.org/lw-blog/poetry-loss-literary-residency-brussels-3-nerys-williams/>

Since the residency

1. Lecture at the *Hinterland Festival* (Kells Co Meath) on Hedd Wyn and War Poetry 23rd June, 2017.



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2. A poem, 'Taxing the Bachelors,' from the *Calendar on Fire* series composed in Brussels was broadcast on RTE Radio– *Sunday Miscellany* to commemorate the centenary of the death of Hedd Wyn and Ledwidge, 30th July, 2017.
3. An article/short radio script 'Meeting Hedd Wyn in *Le Cirio*, Rue de la Bourse (A Letter)' written in *Passa Porta*, and broadcast on *Sunday Miscellany* on 30th July, 2017.
<http://www.rte.ie/radio1/sunday-miscellany/podcasts/>
4. An article for *Barddas* was published to commemorate the centenary on 31 July 2017. It arose from pieces I wrote in Brussels in response to the 'Empty' Chair created by Mechelen students and given to Wales as a memorial chair.
5. Contribution to a BBC radio programme, *Yr Arwr*, produced by Irfon Jones, 3rd August 2017
<http://www.bbc.co.uk/programmes/b08zfgcb>
6. Contribution to *O Dan yr Wyneb*, a programme presented by Dylan Iorwerth on Radio Cymru, 1st August 2017.
7. New volume of poetry completed entitled *Cabaret* (New Dublin Press) September 2017.
<http://www.newdublinpress.org/store/cabaret>

Commemorative events

1. An opportunity to take part in Ifor ap Glyn's touring performance, *Y Gadair Wag*, in The Irish Writers' Centre, Dublin (reading original poetry), 13th September, 2017.
<https://irishwriterscentre.ie/products/y-gadair-wag-the-empty-chair-an-chathaoir-fholamh>
2. Represented the 'Welsh' perspective at the national centenary celebrations in Slane (a piece about Ledwidge and Hedd Wyn). *Francis Ledwidge – Poetry and the First World War 1917-2017*, 14th October, 2017.

I must note that *Literature Wales* were extremely supportive and professional during the residency, and the experience, without doubt, helped me to develop a useful profile which linked the artistic connections between Ireland and Wales. And, of course, I am very happy to develop anything which could be positive for Wales (during a turbulent political period).



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Literature Wales is obviously keen to continue to foster their artistic links with Irish institutions and develop a strong network. During every public broadcast, I have mentioned the importance of the residency and the support of *Literature Wales* and the *Welsh Government*. During the coming years, I am certain that Wales will be looking increasingly towards the strong Welsh diaspora within Europe, and around the world. Of course, being a poet (from Carmarthenshire originally) is not an excuse to be a 'Captain of Industry'. But the development of artistic connections is important to the continued positive image of that which represents Welshness (in my opinion). This is the first Welsh literary bursary for which I have been able to apply – as most of them depend on being a permanent resident. I was very grateful to be given the opportunity.

Finally, I feel that *Literature Wales* are eager to develop the profile and value of the Welsh arts beyond Wales.

I hope this commentary will help fill some of the 'gaps' in the original report in relation to the international objectives of *Literature Wales*.

Yours very sincerely,

Dr Nerys Williams

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Copi hefyd wedi ei ddanfôn drwy e bost at sylw Prif Weinidog Cymru Carwyn Jones

Mae cyfyngiadau ar y ddogfen hon



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12th September, 2017

Dear Sir

I would like to take this opportunity to draw to your attention the support and positive engagement Literature Wales has given to HMP & YOI Parc over many years of collaboration.

The Creative Arts at Parc, is a thriving and successful department offering prisoners the opportunity to engage in the various education classes and through the additional projects and workshops that take place on a regular basis in all areas of the establishment. Since the prison opened twenty years ago there has been a successful collaboration with Literature Wales to help provide funding, advice and support to offer a wide variety of workshops and projects for the prisoners.

The projects and workshops that have been supported by Literature Wales have given a large number of individuals an experience of and exposure to creative writing in many formats, that they would not have had the opportunity to have experienced without that support. This type of experience is of great benefit to the prisoners as they generally don't have the opportunity to access such events.

One of the main opportunities for Literature Wales to support the creative arts in Parc has been by organising and providing suitable authors to conduct workshops during the annual Hay in the Parc festival. This event, now coming up to its tenth year, runs in conjunction with the Hay Literary Festival and is formally a part of the event. Over the years many well known and local authors have attended the prison to discuss their work and conduct workshops, all of which have been very well received by the prisoners.

Another very successful collaboration has been the projects undertaken with the prisoners and their families to write and illustrate story books have been particularly successful. Literature Wales have provided funding for two projects to date with a writer and illustrator attending for two full days to produce a fully illustrated, original children's book. The workshops for these projects give the prisoners time to work and interact with their children in a very focused way and allows them greater family time together. The outcomes in terms of the quality of writing and illustration are also of an excellent quality which is an indication of the enthusiasm and enjoyment the families feel.

Over the many years working with Literature Wales, HMP Parc has had the opportunity to organise creative writing workshops with a wide variety of authors and other literary figures to give the prisoners an insight into and an experience of many different aspects of literature. The majority of these have been made possible with Literature Wales providing match funding to arrange for the writers registered with them to visit the prison.

The creative arts has a very high profile in HMP Parc and creative writing is one of the most popular and successful activities within the many arts disciplines offered. This was recently recognised (2017) when HMP Parc won the Arts in the Community Award from Arts and Business Cymru in partnership with Literature Wales. The prisoners gain many benefits from having the opportunity to access all forms of writing and, along with the Writers in Residence employed in the prison, the support Literature Wales gives to the establishment and individual prisoners is invaluable. We have, over the years, found the staff who visit Parc and those in administration, to be very professional, supportive and enthusiastic in pursuit of the aims to provide greater access to literature for as many individuals as possible.

Yours sincerely
Laurence Bater and Phil Forder

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10th September 2017

Bethan Jenkins AM,
Chair of the Culture Committee.

<mailto:SeneddCWLC@assembly.wales>

Dear Bethan Jenkins,

I write with regard to the recent Independent Review of Support for Publishing and Literature in Wales. I am very pleased to hear that the Culture Committee is looking into this report. I sent a similar letter to this one to the Cabinet Secretary, Ken Skates, and I would be very grateful if you are also able to consider my points below.

As a teacher and emerging writer in Wales, I simply wish to outline here how important and wonderful the work that Literature Wales does is, in the hope that this can help balance the misrepresentations in the report. The organisation is about the best thing about being a writer in Wales, the writer's best friend, and any erosion of the funding or responsibility of Literature Wales would be an erosion of the ability of current and future writers in Wales to flourish. My experience of Literature Wales has been in connection with their Writers on Tour funding, their Dylan's Big Poem project, the Writing Squads, the writing centre at Tŷ Newydd, their writers' bursaries and Wales Book of the Year. I hope to give some idea here of just how amazing these aspects of their work are.

Firstly, as a teacher, I have found the Writers on Tour funding invaluable. Because of it, we have been able to give our pupils access to inspirational workshops and events with wonderful Welsh writers including Mike Jenkins and Rhian Edwards. English as a school subject has to be about so much more than the daily routine of the classroom and exams, and opportunities like this are crucial in terms of pupils developing a passion for English and seeing writing as a potential career. Equally, I have been very lucky because of this funding to visit a number of schools and writing groups in various parts of Wales to deliver workshops, so this funding creates an incredible development opportunity for teachers and writers as well as for pupils. Though I always loved writing, until the age of about twenty I thought that real writers were sort of winged, vaguely mythical beings, and that it was no more possible to become one than it was to fly to the moon. Because of the work of Literature Wales and the increased access to writers that young people have because of it, this is not the case for young people now, and this is an absolutely wonderful thing.

In connection with this, I would like to mention the Dylan's Big Poem project. This involved pupils writing a few lines of poetry on a given theme and submitting them, following which high-profile writers in Wales, including Owen Sheers, compiled a large community poem using the lines. This was a great thing to do in the classroom, as it allowed even pupils who can struggle

with English to produce something they were proud of and had enjoyed working on. The reward of seeing their work included in the final poem was a brilliant thing for them, and it is experiences like these which help develop a passion for English.

As well as delivering workshops in schools, I have worked on a number of occasions with a couple of the Literature Wales Writing Squads. These groups, which meet a couple of times each school term and give pupils access to writing workshops, are a wonderful thing. Those at the Dylan Thomas Centre in Swansea are a particular success story, as attendance is constantly expanding and creating the demand for more workshops. Pupils who attend these sessions throughout their school career have gone on to study Creative Writing at university and to be successful entrants in the Terry Hetherington Award for Young Writers, so the development opportunity these groups provide is incredible. I would urge anyone who wants to fairly understand the importance of what Literature Wales do to attend one of these workshops and to see pupils engaging with the magic and fun of literature. It is impossible not to attend these sessions and to grin and grin at the joy of what students produce, and for the opportunity the students are given I applaud Literature Wales.

In terms of Tŷ Newydd, I have delivered workshops there for both adults and school groups. Tŷ Newydd is a magical place, which allows people to make real breakthroughs in their writing. I know that there are a number of published writers in Wales who have honed their work through repeated Tŷ Newydd courses, and the impact of Tŷ Newydd stays with people for years. Focusing intensely on writing in those beautiful surroundings allows writers to achieve something they would not otherwise be able to. It is particularly rewarding to see how school groups respond to the experience, as they discover something about writing, about themselves, for the first time, in a way they will never forget.

If Literature Wales has given me amazing opportunities to develop as a teacher, what it has given me as a writer is of course even more invaluable. I have benefited hugely from their bursaries programme. This funding, and the way that it is managed by them, offers life-changing opportunities for writers. This is true not just in a practical sense in terms of the time it gives writers to work, but also the way that it makes writers feel that their work has value. Developing an audience, a reputation and a sense that what you are doing has worth, in my own field of poetry, is enormously difficult, so to receive a bursary like this is an extraordinary thing for writers to hold up against the voices which are telling them their writing will go nowhere. For me, the time was invaluable not just in terms of the poems I wrote during this period but also for the stylistic breakthroughs which continue to be crucial in my work years later. Very simply, I would not have been able to write what I have without the great gift of this time.

Finally, I would like to mention the Wales Book of the Year. My book was very lucky to be shortlisted for this award in 2015, and to receive the Wales Arts Review People's Choice Award, and everything about this process was wonderful. The attention given to a shortlisted book means of course an expanded audience, which is crucial for a poet, the enhanced opportunities for future publication, the sense of being part of a literary community. The awards evening in Caernarfon was a wonderful experience – an amazingly professional and special event in a beautiful location – and given the difficulties of any sort of writing career it is crucial that writers have such glorious opportunities and memories if we are to keep working.

Overall, I very much hope it is clear that Literature Wales make Wales a significantly more fantastic, joyous place in which to write. Indeed, it is unimaginable that our vibrant and exciting literary culture can continue to grow with any erosion to their role. While I am only able to give you my own experience, I know that I am among an enormous number of writers and teachers who feel exactly the same about how lucky we are to have such an energetic, ambitious, friendly and passionate organisation in Wales. I very much hope that these experiences can be taken into account as part of any reflections on the report.

Yours sincerely,

Jonathan Edwards

As a writer who grew up in Wales and who retains a close interest in literary matters in that nation, and as a Patron of Literature Wales, I read the Medwin Hughes report with great interest and, I'm afraid to say, growing misgivings. I could not see the logic behind the recommendation to downgrade the support given to Literature Wales, and to reduce its involvement in literary activities so greatly, given the clear evidence of plentiful and valuable activity on the part of that organisation, and the satisfaction expressed by many people who have been involved. There seems to me a clear need for the various bodies including Literature Wales to be supported strongly and with conviction by the Welsh Government, and their differing purposes clearly understood. To reduce the activities currently undertaken by Literature Wales (and which are praised very highly by many respondents quoted in the report) effectively to running Ty Newydd, and to hand over more or less everything else to the Welsh Books Council, seems little short of perverse.

I hope you will consider very seriously the strong dissatisfaction with this report that has been expressed by many people in Wales who have benefited from, and who approve of, the excellent work of Literature Wales, and that the organisation will continue to flourish and encourage the art form that above all others is at the heart of Welsh culture.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and
Communications Committee
Independent Review of Support for Publishing and Literature in Wales
Ymateb gan Clare Potter / Evidence from Clare Potter

I would like to express real concern at the Independent Review for Support of Publishing and Literature in Wales that was made public earlier this year—I believe it was published before being shown to Literature Wales, thus denying them their right to respond and correct inaccuracies; this meant that even though errors in the report have since been proven, much damage has been done not only to the reputation of Literature Wales, but I imagine to the staff too who have been unfairly misrepresented.

Having been supported consistently by Literature Wales for many years, and published in Wales, I feel able to comment, although my opinion was never sought for the review. None of the many professional writers I know who work in a multitude of LW projects, fostering literacy and expression, were asked either. Furthermore, I don't believe staff at Ty Newydd were invited to comment. I'm struggling to understand how this report was 'independent.'

Putting aside the poor presentation of the report, misspellings of names, grammatical errors and so on, I feel strongly that the document and its accusations should be seriously scrutinised.

I met Ken Skates last year during the Literature Wales South Wales Valleys Showcase at the Senedd. I remember him commenting how impressed and moved he was by the work of the refugee women, the elderly people with dementia, and the vulnerable women who had produced and published children's books.

He quoted Baroness Andrews in his *Light Springs through the Dark: A Vision of Culture in Wales*, as saying 'culture can empower disenfranchised and alienated people, and give them a voice;' it was clear from his reaction that he witnessed such empowerment and the raising of voices at the Senedd. Literature Wales has evidenced this empowerment of the disenfranchised. Staff have worked to dismantle barriers to literature and have made significant relationships in the process with countless schools, charities, councils and other professional and grass-roots collectives in Wales, the wider UK and overseas. This was missing from the report. A few casual remarks about the good work were undermining, and I felt, insulting. I fail to see how after years of building these crucial partnerships, that taking away Literature Wales' ability to do its work will be of benefit to anyone. It would be a huge undertaking for the Welsh Books Council to take up this role

and a great loss to the people who have benefited (and will benefit) from Literature Wales' outreach initiatives.

For almost a decade, I have been fortunate to work on remarkable projects through Literature Wales, which have been enriching for the participants and myself in equal measure. This is why I am writing to you; the report did not adequately reflect the incredibly important work done by Literature Wales and the writers and organisations that have collaborated to reach typically excluded people, as well as nurture the promising talent of more able youngsters through writing squads.

There seemed little mention of the South Wales Literature Development Initiative, headed by Louise Richards for the past eight years. Many of the projects she has implemented have won awards which include an Arts and Business Award for the Captured Memories Project; the young mothers who made the children's books won a NIACE Inspired Award for Family Engagement; and Silver Hoodies (an inter-generational film project in the Gurnos) won a TPAS Award; another project reaching isolated people won a Library Service Users Award. I'm sure you have heard about the successful collaboration with Parc Prison which was showcased at the Hay Festival this year? This project has been engaging prisoners and their families in writing, sharing stories, elevating literacy and self-worth (this project recently won an award too). The SWLDI has engaged over 37,000 people in the last ten years with over 200 projects aimed at ensuring that all people in Wales have access to expressing themselves, working with professional writers to help them shape those stories in film, theatre, the written and spoken word, audio, and in community installations.

Ken Skates' 'Light Springs' document defines culture as 'all creative activities that give people purpose, and a sense of belief and identity.' The projects through Literature Wales do not seek to merely enable people to tell stories, to make a mark with the intention of ticking a box, these projects are aimed at making literature accessible to all, about increasing social cohesion, enabling people to make serious changes in their lives both politically and personally. Literature Wales understands that to advance that, people must believe their voices are worthwhile, and in today's political climate where many people feel disenfranchised and unheard, their many projects provide a platform for Voice and well-being.

I left academia in order to pursue more work in community art-engagement because, due to working on projects with LW, I have experienced how life-affirming and essential this outreach is in our constantly fracturing society. This

kind of work has also made me a better writer. I have been supported in my profession by Literature Wales in many ways, having been sent to America to represent Welsh culture at the Smithsonian Folk–Life Festival; as one of the Hay Festival’s Writers at Work; through various professional development projects (such as training to work with vulnerable, socially excluded children); I have been afforded the opportunity to collaborate with artists in other genres in various projects; I was awarded a writing bursary which helped me to write a second poetry collection; I have had help with forms for funding applications, and because of being encouraged to develop my Welsh language skills by Lleucu Siencyn at Literature Wales, I now work bilingually and have been on several television and radio programmes speaking about various projects and have been translating for the National Poet of Wales. Therefore Literature Wales not only works to improve the lives of workshop recipients, but is an organisation able to assist writers to develop their own talent and employment. This has been essential to me.

I feel an opportunity for productive discussion has been lost. There are probably elements of Literature Wales that could have benefited from some fair and constructive feedback; I’m sure the staff would have welcomed that. However some of the harsh criticisms levelled at this body, were already part of forward planning. For instance, I believe that LW was in the process of redeveloping bursaries and mentoring and a new funding scheme at the time of the review.

Despite what must have been an uncertain time, LW have continued to do what they do best, to give access to literature for all, to promote a love of reading and writing, particularly with our little ones—the readers and writers of the future. Bursaries have been applied for, as have other awards, along with many other opportunities for established writers since the report was published. I’d say Literature Wales and its staff are doing a most excellent job. I look forward to an investigation into the report.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and
Communications Committee
Independent Review of Support for Publishing and Literature in Wales
Ymateb gan Dr Dimitra Fimi, / Evidence from Dr Dimitra Fimi

I am a Senior Lecturer in English at Cardiff Metropolitan University. I wish to express my support for Literature Wales.

I have been involved in various projects run by Literature Wales for the last nine years, including talks, conferences, and other similar events. I am currently serving as a judge for the Wales Book of the Year Award.

I am sincerely impressed with the professionalism of the Literature Wales staff and the highly organised, effective, and very popular events they run.

I believe that Literature Wales has played an important role in promoting literature in Wales and I hope to see it continue its excellent work in the future.

I've written in similar terms to the Cabinet Secretary for Economy and Infrastructure.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and Communications Committee
Independent Review of Support for Publishing and Literature in Wales
Ymateb gan Kate Strudwick / Evidence from Kate Strudwick, Creative Project Manager Head4Arts

For the past twenty years I have been working in the context of community arts, developing projects in some of Wales' poorest communities in the Heads of the Valleys, East. This focuses on using participation in the arts as the catalyst for effecting change, driven by the strategic priorities of Wales – helping people build the skills they need for employment, to get the qualifications they need and to improve their health and well-being. A major challenge for us all has been in improving levels of literacy and in encouraging parental support for children's learning.

Central to this approach has been the need for cultural organisations to work in partnership with other agencies in order to have a more effective – and more engaging – approach. We work with a huge variety of partners but one of the most stalwart, reliable and creative partners is Literature Wales, via their Community Participation projects.

This support is not always in the form of a financial contribution – more frequently it is about creative input, encouragement, expertise and connecting with other initiatives. However, the results of such collaboration have always been tangible and useful and this needs to be acknowledged. This partnership approach has meant that we have been able to add value to many of our projects by integrating elements that nurture literacy and learning skills that might not otherwise have been possible.

In 2007, in my capacity as Senior Arts Development of Caerphilly CBC, I worked with Literature Wales (then, Academi) to set up the South Wales Valleys Literature Development Initiative. Since then this has reached over 37,000 in communities across the Valleys, running over 250 projects and over 900 workshops – an impressive achievement.

In my present job, I encounter many young people who have benefitted from the Young Writers Squad scheme who then go on to other and tell me about the hugely significant difference that membership of the Squad has made to them. This is only one of so many programmes that Literature Wales has championed that make a huge impact for relatively little outlay.

We are currently working together to introduce an exciting new method of engaging young people with reading, developing and adapting an Italian innovation so that it can benefit children in our bilingual nation.

I very much hope to be able continue this vibrant working relationship with Literature Wales, knowing how effectively this organisation reaches our most disadvantaged communities. It appears that many people are unaware of this crucial aspect of their work – and how much we would miss their help and support if this function were devolved to another organisation that didn't have their considerable experience and expertise.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and Communications Committee
Independent Review of Support for Publishing and Literature in Wales
Ymateb gan Sarah Goodey / Evidence from Sarah Goodey, Arts Development Manager, Gwent Arts in Health.

I am writing in support of the upcoming plans for Literature Wales Community Participation projects. Gwent Arts in Health have benefited greatly from the partnership work that we have undertaken in the past together and I am encouraged by the directions that Literature Wales are considering.

Previously, Literature Wales South Wales Literature Development Initiative has provided valuable support in terms of funding and expertise in identifying poets and writers who are best equipped to work on our partner project Healing Words. In 2016, the project delivered tailor-made creative writing and visual arts sessions for the Torfean-based group Wednesday Warriors. The young men who have severe learning disabilities and other challenges thoroughly enjoyed the outdoor experience and there were many positive outcomes from this project which featured in a joint presentation at the Storytelling for Health Conference, Swansea, June 2017.

Literature Wales continue to deliver a high standard of outreach and active participation in their projects ensuring a quality experience for their participants. I would strongly support the development of this project and its associated activities. There is a need and a demand for this initiative especially as it aims to address mental health and employment in communities in Wales where there is a growing need for support in these areas, and by using and supporting the written and spoken word, participants in such projects can hope to gain in confidence and self esteem.

Gwent Arts in Health would like to continue to work with LW and would be able to contribute in kind support of expertise in the art, health and wellbeing field, and in the administration of shared projects. Gwent Arts in Health have previously worked in partnership with LW raising funds locally to deliver the Healing Words project in Newport and Torfaen and would wish to continue and expand to other LAs if possible.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and
Communications Committee
Independent Review of Support for Publishing and Literature in Wales
Ymateb gan Simon Stephens / Evidence from Simon Stephens, Cardiff City FC
Community Foundation & Literature Wales Partnership Work.

I am writing to you regarding the recently published Medwin Hughes Report and to highlight the strength of Cardiff City FC Community Foundation's partnership with Literature Wales.

The Cardiff City FC Community Foundation is the official charity of Cardiff City FC. We use the unique appeal of Cardiff City FC as an engagement tool for social change. Our goal is to support children, young people and families in South Wales to achieve their full potential by creating education and employment opportunities, improving health and well being and reducing offending and reoffending.

We want a future where our communities are more prosperous, healthier, more resilient, and more cohesive. We recognise that achieving this future will require a multi-agency approach and have set out to develop innovative partnerships. We have collaborated with Literature Wales for a number of years, co-designing and delivering projects that engage children in literacy related activities. This approach is not simply about reading books, but about developing reading skills, confidence and a passion for literacy.

We have found this a particularly powerful approach in engaging members of our community that otherwise would not engage in literacy related tasks, and by using the hook of Cardiff City Football Club, and once engaged, the skilled and passionate workforce of Literature Wales to provide the expertise to drive the change. We hope that in the longer term this work can contribute towards breaking cycles of poor literacy within households and amongst specific groups within our community.

I hope that this provides you with a flavour of our existing partnership with Literature Wales and how this is something that as a Foundation we value highly. We believe we have found a means of using the appeal of the professional Football Club brand and the expertise of Literature Wales to make a positive difference within some of the most disadvantaged Welsh Communities in an area that some would not engage with through traditional means.



Department for
Digital, Culture
Media & Sport

Secretary of State for Digital, Culture,
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Our ref: MC2017/02104
MC2017/03054

9 August 2017

Bethan Jenkins AM
Chair of Culture, Welsh Language and Communications
Committee
National Assembly for Wales
Cardiff Bay
Cardiff
CF99 1NA
SeneddCWLC@assembly.wales

Dear Bethan,

Thank you for your correspondence of 17 July and 2 August. Thank you also for sending the Inquiry report into the future of S4C.

The Government is committed to the future of Welsh language broadcasting and of S4C. S4C was created by the Conservative Government in 1982, and this UK Government remains committed to supporting the valuable service S4C provides to Welsh speaking audiences. We want to see the channel thrive and flourish in the 21st century and embrace the opportunities of a digital age.

As such, I am very pleased that Euryng Ogwen Williams has agreed to chair an independent review of S4C on behalf of the Government. Mr Williams' in-depth understanding of the broadcasting sector, the Welsh language, and Welsh culture and society make him ideally suited to lead this review.

The review will look at S4C's remit, funding methods and governance and accountability structures. A copy of the full Terms of Reference are attached to this letter.

Your Committee's inquiry addresses many of the same issues and will provide a valuable source of evidence to Mr Williams as he carries out the independent review. Given the independent status of the review, it would not be appropriate for me to meet you to discuss your committee's findings whilst Mr Williams' review is ongoing. I have therefore asked Mr Williams to meet with you in September to

Tudalen y pecyn 357



discuss your findings and recommendations, as part of his evidence gathering process.

A handwritten signature in blue ink that reads "Karen Bradley". The signature is written in a cursive style with a light blue background behind the text.

The Rt Hon Karen Bradley
Secretary of State for Digital, Culture, Media and Sport

ANNEX A

TERMS OF REFERENCE, S4C REVIEW

S4C was created by the Conservative Government in 1982, and this UK Government remains committed to supporting the valuable service S4C provides to Welsh speaking audiences. We want to see the channel thrive and flourish in the 21st century and embrace the opportunities of a digital age.

Background

S4C is a Welsh language broadcaster, mainly funded by the TV licence fee, but also supported by Grant in Aid from the UK Government. S4C also generates some additional income through commercial activities, providing around 2% of the channel's funding.

The government has committed to undertaking an independent review of S4C's remit, governance and funding.

1. Objectives

- a. To conduct a review to:
 - i. examine S4C's remit, including with respect to online services, and consider whether changes are required in light of changing viewing habits and technological developments;
 - ii. examine S4C's current governance structure and accountability models;
 - iii. examine S4C's partnership with the BBC and its current funding methods;
- b. To make recommendations to the Government within 3 months.

2. Key considerations

In assessing the objectives above (1a –b), the review will consider the following factors:

- a. S4C's role in promoting, and its impact on the Welsh language and its wider place in Welsh culture and society;
- b. S4C's contribution to the Welsh economy;
- c. S4C's relationship with the independent production sector and other broadcasters and cultural institutions, including whether its partnerships are working effectively and to maximum effect;
- d. Audience opinions, satisfaction and viewing figures of both Welsh speaking viewers, learners and the non-Welsh speaking population, both in Wales and across the UK;
- e. S4C's editorial independence, and appropriate transparency and accountability arrangements;
- f. The way in which S4C is governed and held accountable, including how the S4C Authority is operating and whether alternative models of governance should be considered;

- g. The way in which S4C is regulated and the role of Ofcom;
- h. Value for money, efficiency and the role of the National Audit Office;
- i. The way S4C is currently funded, including the licence fee, grant-in-aid and commercial sources, and its financial relationship with the BBC from 2022/23; and
- j. The extent of S4C's commercial freedoms.

3. Process

The review should seek evidence from a wide range of stakeholders, including the Welsh public, key industry and Welsh language stakeholders, other broadcasters, the UK and Welsh Governments, as well as other interested parties in Wales and across the UK.

4. Output

A report setting out an assessment of the current remit, governance and accountability structures and funding methods, as well as proposals for the most appropriate remit, regulatory, governance and funding models for the future of S4C, including key findings, conclusions and any other supporting information. The report must be submitted to the Secretary of State for Digital, Culture, Media and Sport within 3 months, prior to publication.

ANNEX B



Eurn Ogwen Williams, Biography

Eurn has extensive experience of the Welsh broadcasting sector (both Welsh and English language). He served as Deputy CEO of S4C from 1988 to 1991, and knows the broadcaster well.

Eurn is a Welsh speaker and was special adviser to the National Assembly of Wales Culture Committee's Review of the Welsh Language between 2001 and 2002. He has also worked for minority language broadcasters in Scotland (the Gaelic language BBC Alba channel) and Ireland.

Eurn has worked as a consultant and academic specialising in digital media development in the Welsh language. He was made an Honorary President of the National Eisteddfod of Wales in the Vale of Glamorgan in 2012, a big celebration of all things Welsh.

Between 2008 and 2016, Eurn advised a number of independent producers - Acen, Fflic Boomerang and recently Boom Cymru - on various aspects of their development as programme suppliers to both S4C and other UK broadcasters.



Llywodraeth Cymru
Welsh Government

Eich cyf/Your ref
Ein cyf/Our ref

Bethan Jenkins AM
Cadeirydd; Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu
Cynulliad Cenedlaethol Cymru
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7 Medi 2017

Annwyl Bethan

Er gwybodaeth, atodaf gopi o'r datganiad i'r wasg a chrynodeb o'r adroddiad terfynol gan Dr Simon Thurley, a'i cyhoeddir heddiw. Rwyf wedi gofyn i Dr Thurley edrych ar lwyddiant, cydnheredd a chynladwyedd Amgueddfa Cymru.

Yn gywir,

Ken Skates AC/AM

Ysgrifennydd y Cabinet dros yr Economi a'r Seilwaith
Cabinet Secretary for Economy and Infrastructure

Bae Caerdydd • Cardiff Bay
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Correspondence.Ken.Skates@gov.wales

Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.



Llywodraeth Cymru
Welsh Government

Adolygiad o Amgueddfa Cymru

Crynodeb Gweithredol

gan Dr Simon Thurley CBE ar gyfer Llywodraeth Cymru

Mehefin 2017

Tudalen y pecyn 363

Crynodeb Gweithredol

- 1.1** Mae Amgueddfa Cymru yn un o amgueddfeydd mawr y Deyrnas Unedig. Yn ei chasgliadau, yn arbenigedd a gwybodaeth ei staff, yn ei chefnogaeth i ddatblygiad cymdeithasol a chymunedol ac yn ei chyfraniad i wybodaeth am hanes a diwylliant Cymru, mae wedi cyflawni'n eithriadol. Am ganrif bu'r Amgueddfa Genedlaethol yn dirprwyo bron â bod dros y Cynulliad Cenedlaethol wrth hyrwyddo achos Cymru, ei hanes a'i thraddodiadau. Ers 1999 mae wedi cymryd ei lle yn stabl y sefydliadau cenedlaethol eiconig a ariennir gan Lywodraeth Cymru.
- 1.2** Mae Llywodraeth Cymru, o dan weinidogion olynol, wedi cydnabod pwysigrwydd yr amgueddfa a diwylliant yn ei ystyr ehangaf i Gymru. Roedd Deddf Llesiant Cenedlaethau'r Dyfodol (Cymru) 2015 wedi rhoi diwylliant wrth wraidd gwneud penderfyniadau ynghylch dyfodol y genedl. Yn fwyaf diweddar yn ei datganiad diwylliant 'Golau yn y Gwyll' mae'r Llywodraeth wedi ailadrodd y manteision y mae Cymru yn eu cael drwy fuddsoddiad cyhoeddus a phreifat mewn diwylliant. Ystyrir bod amgueddfeydd yn chwarae rhan bwysig yn hyn o beth. Cymru oedd y wlad gyntaf yn y Deyrnas Unedig i gyhoeddi strategaeth amgueddfeydd yn 2010 a dwy flynedd yn ôl cynhaliwyd adolygiad ar ddarpariaeth amgueddfeydd lleol. Yn fwy diweddar, mae cyfres o adolygiadau wedi edrych ar bosibiliadau'r cyrff diwylliannol a ariennir gan Lywodraeth Cymru yn gweithio'n agosach gyda'i gilydd. Dylid ystyried fy adolygiad o Amgueddfa Cymru yn y cyd-destun hwn.
- 1.3** Mae'n ddyddiau anodd ar y sector cyhoeddus. Mae llymder, ac erbyn hyn yr ansicrwydd yn sgil y bleidlais i adael yr UE, yn heriol yn ariannol ac yn strategol. Mae teimladau yn corddi'n gryf ac mae tensiynau wedi codi. Gorfodir gwleidyddion i wneud penderfyniadau y byddai'n well ganddynt beidio â'u gwneud o bosibl. Mae cyrff hyd braich sydd wedi eu hariannu'n uniongyrchol, megis Amgueddfa Cymru, wedi gorfod ymateb i newidiadau y tu hwnt i'w rheolaeth ac weithiau y tu hwnt i'r hyn y maent yn gysurus ag ef.
- 1.4** Ar adegau fel y rhain, mae'n hollbwysig bod cyllidwyr a derbynwyr cyllid ill dau yn cydweithio'n agos at amcanion sydd wedi'u diffinio'n dda ac wedi'u mynegi yn gyhoeddus. Mae'n bwysig bod ymraniad priodol rhwng polisi a chyflawni; bod eglurder ynghylch y fframwaith technegol y cyflawnir yr amcanion ynddo; bod sicrwydd bod y gallu i gyflawni yn gadarn; bod system rheoli perfformiad gref, ond nad yw'n mygu, ar waith; bod yr adborth gan ddefnyddwyr a chyflogeion yn dryloyw ac y gweithredir yn briodol arno.
- 1.5** Dyma rai o'r sylfeini y mae angen i Amgueddfa Cymru adeiladu arnynt yn y dyfodol.
- 1.6** Mae'r adolygiad hwn wedi canfod sefydliad llwyddiannus a ffyniannus y dylai Cymru ymfalchïo ynddo. Bu i frwdfrydedd ac ymrwymiad y staff wneud cryn argraff arnaf dro ar ôl tro, felly hefyd ansawdd yr amgueddfeydd. Drwy ymgymryd â rôl yr ymwelydd yn ystod y misoedd diwethaf, rwyf wedi cael fy nhrwytho â gwybodaeth, wedi cael fy ysbrydoli a fy synnu gan arddangosfeydd rhagorol a gwrthrychau gwych. Mae wedi gweddnwied fy nealltwriaeth am Gymru a diwylliant Cymru.
- 1.7** Ond nid teithiau plaserus i amgueddfeydd diddorol yn unig oedd hyn. Roedd gennyf y gorchwyl anodd o edrych yn feirniadol ar agweddau ar fusnes Amgueddfa Cymru. Yn hyn o beth, mae gennyf nifer fechan o arsylwadau ar lefel uchel a nifer fwy o argymhellion ar lefel is.

1. Dylai Amgueddfa Cymru ystyried bod yn fwy uchelgeisiol yn ei dehongli ac adrodd stori nad yw'n gul Gymreig, ond yn ymwneud yn fwy â rhan Cymru yn y chwyldro diwydiannol byd-eang.
2. Dylai Amgueddfa Genedlaethol Caerdydd weithio'n llawer agosach â Croeso Cymru, Cyngor Dinas Caerdydd a Llywodraeth Cymru i leoli ei hun fel rhan allweddol o'r cynnig i dwristiaid i Ranbarth Dinas Caerdydd.
3. Amgueddfa Cymru i roi blaenoriaeth i gefnogi rheolwr yr Amgueddfa Lechi ac anelu at rôl fwy uchelgeisiol i'r amgueddfa yn nhwristiaeth Eryri gan ehangu ar ei gwaith yn hytrach na'i leihau, a dechrau partneriaethau â chyrff yn y sectorau cyhoeddus a phreifat i gyflawni hyn.
4. Dylai Llywodraeth Cymru ad-drefnu'r rheolaeth dameidiog ar ei safleoedd eithriadol yng Nghaerllion dan reolaeth Amgueddfa Cymru ac annog partneriaeth leol ehangach i ddatblygu'r dref yn bot mêl i dwristiaid ar y cyd â Chronfa Dreftadaeth y Loteri.
5. Llywodraeth Cymru ac Amgueddfa Cymru i fynd ati i gydnabod a deall achosion y rhwystredigaeth bresennol ar y ddwy ochr.
6. Yna Llywodraeth Cymru ac Amgueddfa Cymru i ddatblygu cyd-weledigaeth 10 mlynedd ar gyfer Amgueddfa Cymru gan fod â ffocws pum mlynedd iddi a chytundeb ariannu tair blynedd.
7. Yr amgueddfa i gymryd camau, gan gynnwys y rhai a argymhellir yn yr adroddiad hwn, i roi hyder i Lywodraeth Cymru yn ei gallu i gyflawni'r strategaeth.
8. Llywodraeth Cymru i gymryd camau i greu amgylchedd llywodraethu a pholisi a fydd yn galluogi Amgueddfa Cymru i gyflawni'r strategaeth newydd.
9. Argymhellaf, gan ystyried yr argymhellion yn yr adolygiad hwn a barn Llywodraeth Cymru, fod y Cyfarwyddwr Cyffredinol, ynghyd â Llywydd ac Ymddiriedolwyr yr Amgueddfa, yn adolygu'r sgiliau angenrheidiol ar yr uwch dîm rheoli er mwyn cryfhau ei allu i fynd i'r afael â'r heriau y mae'n eu hwynebu yn y blynyddoedd i ddod.
10. Y Llywydd a'r Bwrdd gyda Llywodraeth Cymru i fynd ati ar frys i gefnogi'r uwch dîm rheoli â rhaglen i ailfeithrin ymddiriedaeth y staff a'r undebau.
11. Llywodraeth Cymru i ystyried symud i bolisi yn seiliedig ar y terfyn (ends based policy) ar gyfer mynediad i Amgueddfa Cymru yn hytrach na pholisi ar sail modd. Byddai hyn yn golygu y gallai'r amgueddfa gadw ei llygad ar y polisi mynediad yr hoffent ei gael, ar yr un pryd â phennu drosti ei hun y cydbwysedd rhwng gwasanaethau y codir amdanynt a gwasanaethau sy'n rhad ac am ddim yn ogystal â'r lefelau tâl priodol.
12. Rwy'n argymhell bod Amgueddfa Cymru yn y dyfodol yn codi tâl am arddangosfeydd arbennig, ac yn sefydlu system Rheoli Cysylltiadau Cwsmeriaid (CRM) briodol a chynllun aelodaeth cyn gynted ag y bo modd.
13. Amgueddfa Cymru i gytuno â Llywodraeth Cymru ynghylch y paramedrau sydd ar gael i'w datblygiad masnachol, gan gynnwys polisiau ar godi tâl, oriau agor a thelerau ac amodau staff masnachol.

14. Gan gymryd y byddai Llywodraeth Cymru yn cytuno ar ryddid masnachol hyblyg i Amgueddfa Cymru, yr amgueddfa i benodi cyfarwyddwr masnachol ar lefel Bwrdd Gweithredol ac ar gyflog a fydd yn denu person o ansawdd uchel sydd â phrofiad helaeth o atyniadau ymwelwyr.
15. Y cyfarwyddwr masnachol newydd i gyflwyno cyfundrefnau codi tâl priodol, systemau Rheoli Cysylltiadau Cwsmeriaid a chynlluniau aelodaeth a gwella'r rheoli ar arlwy a manwerthu i hwyluso a datblygu arlwy masnachol yr amgueddfa.
16. Amgueddfa Cymru i adolygu ei strategaeth rhoddion, gwella seilwaith corfforol bocsys rhodd, ac ymchwilio i ffyrdd priodol o ofyn wyneb-yn-wyneb ym mhob un o'i safleoedd.
17. Llywodraeth Cymru i ganfod ffordd o ddarparu rhywfaint o gyllid trosiannol i Amgueddfa Cymru fel rhan o becyn dan gydberchnogaeth i adeiladu model busnes gwydn a chadarn ar gyfer y dyfodol.

Adolygiad Thurley o Amgueddfa Cymru

Heddiw, bydd Llywodraeth Cymru yn cyhoeddi'r argymhellion a wnaethpwyd gan Dr Simon Thurley mewn adolygiad a gomisiynwyd gan Ysgrifennydd y Cabinet dros yr Economi a'r Seilwaith, Ken Skates, i edrych ar lwyddiant, cadernid a chynaliadwyedd Amgueddfa Cymru.

Gwnaeth Dr Thurley nifer o arsylwadau ac argymhellion defnyddiol y bydd Ysgrifennydd y Cabinet a Llywodraeth Cymru, ac Amgueddfa Cymru bellach yn eu hystyried yn fanwl.

Dywedodd Ysgrifennydd y Cabinet, Ken Skates: "Hoffwn ddiolch i Dr Thurley am ei adroddiad cytbwys, ystyrion a di-duedd. Mae'r adolygiad yn gam allweddol i helpu Llywodraeth Cymru i nodi'r ffyrdd mwyaf priodol o helpu i sicrhau bod Amgueddfa Cymru yn parhau i ffynnu yn y dyfodol, mewn cyfnod sy'n parhau i fod yn gyfnod heriol iawn yn ariannol.

"Fel yr amlinellwyd yn yr adroddiad ar Cymru Hanesyddol, rwy'n parhau i fod wedi ymrwymo'n gyfan-gwbl i alluogi ein sefydliadau treftadaeth i sicrhau'r manteision economaidd a ddaw i bobl Cymru yn eu sgîl.

"Byddwn bellach yn cydweithio'n agos â Bwrdd Ymddiriedolwyr Amgueddfa Cymru a'r Uwch-dîm Rheoli i benderfynu ar y ffordd orau o ddatblygu'r adolygiad a'r argymhellion."

Yn ei adolygiad, mae Dr Thurley yn cydnabod safon casgliadau cenedlaethol Amgueddfa Cymru, arbenigedd a gwybodaeth y staff, ei chefnogaeth i ddatblygiadau cymdeithasol a chymunedol a'i chyfraniad o ddarparu gwybodaeth am hanes a diwylliant Cymru, gan ddisgrifio ei llwyddiannau yn y meysydd hyn fel rhai neilltuol. Edrychodd ei argymhellion hefyd ar y berthynas rhwng Amgueddfa Cymru a Llywodraeth Cymru; cyfleoedd am ddatblygiad masnachol yn ogystal â pholisïau a llywodraethiant, a gweledigaeth ar gyfer y dyfodol.

Meddai Dr Thurley: "Rwy'n gobeithio y bydd fy adolygiad a'i argymhellion yn sylfaen gref i'r amgueddfa, yn ogystal â Llywodraeth Cymru, i fodloni'r heriau a symud ymlaen yn llwyddiannus i gam nesaf ei hanes."

Dywedodd David Anderson, Cyfarwyddwr Cyffredinol, Amgueddfa Cymru:

"Rydym yn falch bod y cyfraniad positif sydd wedi'i wneud gan Amgueddfa Cymru - trwy ei staff, ei hamgueddfeydd a'i chasgliadau - yn cael ei gydnabod gan Dr Thurley yn ei adolygiad.

"Mae'n disgrifio Amgueddfa Cymru fel 'un o amgueddfeydd gwych y DU' ac yn 'sefydliad llwyddiannus sy'n ffynnu', yr ydym yn hynod falch ohoni.

"Rydym yn cydnabod yr angen i wneud gwelliannau mewn meysydd penodol o'n gwaith gan gynnwys creu incwm a chysylltiadau diwydiannol, ac mae sylwadau ac argymhellion Dr Thurley yn cynnig fframwaith defnyddiol i helpu inni fynd i'r afael â hyn.

Meddai Elisabeth Elias, Llywydd Amgueddfa Cymru – National Museum Wales:

"Hoffwn ddiolch i Ysgrifennydd y Cabinet am gomisiynu'r Adolygiad hwn, sydd wedi manylu ar llwyddiannau'r sefydliad cenedlaethol eiconig hwn yn ogystal â rhai o'r heriau y mae'n eu hwynebu.

"Fel Bwrdd Ymddiriedolwyr byddwn yn ystyried yr argymhellion yn fanwl ac yn cefnogi'r Uwch-dîm Rheoli wrth gydweithio â staff, yr Undebau llafur cydnabyddedig a Swyddogion y Llywodraeth wrth eu rhoi ar waith."

Crynodeb Gweithredol ac Argymhellion:

<http://gov.wales/topics/culture-tourism-sport/museums-archives-libraries/national-museum/?skip=1&lang=cy>

Additional evidence following oral evidence

1) What assessment have you made of the health of Welsh-language news journalism (Bangor University's Ifan Morgan Jones has said that "because of public funding, Welsh-language journalism is enjoying something of a golden age").

This tallies with other comments I've heard that public subsidies are insulating Welsh-language journalism from many of the challenges facing the media at large. Clearly, it is critical that appropriate safeguards are put in place to guarantee independence in any situation that involves public funding for the media, but there is no indication at all that the Welsh-language media's integrity has been compromised in any way by this funding.

2) Does Welsh language news journalism require any different support to English-language news journalism in Wales?

Speaking personally, I believe it is very important that Wales has a strong Welsh-language media, but the relatively small scale of the Welsh-language sector suggests that it would be more vulnerable to market fluctuations, were it not for some level of public support. While I am not saying the current funding strategy needs changing, I believe it would be healthy for this to be under regular review, looking at questions such as whether it would be more beneficial for a wider group of recipients to be given a smaller amount each, or whether a smaller number of larger grants is more productive.

3) Do you publish any Welsh-language content in your publications?

- If not, how could you be encouraged to do so?

The constituent parts of what is now Media Wales have traditionally been English-language publishers, and as such, the company is set up to publish predominantly in the English language. While there are pockets of Welsh-language editorial in our titles, these are generally submitted. We would potentially be interested in

significantly enlarging our Welsh-language online content, but establishing a sustainable means of providing a meaningful Welsh-language would be expensive, and difficult to achieve in the face of the market pressures that the whole industry is currently facing. However, we do believe that the significant reach that WalesOnline possesses could be an asset in terms of connecting high quality Welsh-language journalism with a wider audience.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language
and Communications Committee
Newyddiaduraeth Newyddion yng Nghymru / News Journalism in Wales
CWLC(5) NJW17
Ymateb gan Andrew Campbell, Daily Post / Evidence from Andrew Campbell,
Daily Post

1) The Daily Post is reaching a growing number of people.

The Daily Post has shown substantial digital audience growth while remaining one of the UK's best performing print titles in terms of year-on-year sale. According to the latest ABC figures, the Daily Post's daily digital users stood at almost 109,000 in May 2017 – an increase of 31% year-on-year. At the same time the unaudited print sale stood at just under 20,000 – representing a year-on-year decline of –7.87%. That figure is significantly better than the industry average decline of more than 12%.

This would suggest the growth in digital audience is more than offsetting the loss of print readership and that the Daily Post is reaching new readers. Analysis also points to a large increase in the Daily Post's local digital audience.

2. The Daily Post focuses on local news and things that matter to North Wales people

The Daily Post remains committed to local news and sport in print and online. Add to that content about Welsh culture and regional identity, we have what is, and always has been, the Daily Post's lifeblood. However, the Daily Post continues to publish selected national and international content on all channels which is of interest to its local audience. This is nothing new. Indeed, coverage of the big north west football clubs (Manchester United, Liverpool FC and Everton FC in particular) has always been an integral part of the Daily Post content mix – along with extensive coverage of lower league football and grassroots sport particularly through Trinity Mirror's weekly titles in North Wales.

3) We can see in detail, what people are reading and what they want to read

Our local content decisions are now aided by web analytics which offer real-time insight into how many people are looking at individual stories and where they are from. This allows us to truly identify content that engages our readers. In reality, the 'best' stories perform well in print and online – with analytics adding the statistical confirmation that backs up editorial choices.

4) The Daily Post has invested in its North Wales future

The Daily Post's creation of a North Wales office in 2000 and split from the Liverpool Daily Post in 2003 emphasised an increased commitment to the region. That investment continues and was highlighted by the Daily Post's relocation to a more modern office in Colwyn Bay in May this year. We are committed to retaining a Welsh HQ. However, we have shut smaller offices to save costs. We would always rather close offices than shed jobs.

5) The Daily Post is determined to forge a digital future

In keeping with Trinity Mirror's strategy, The Daily Post produces content aimed at developing and increasing its digital audience while extending the life of print for as long as possible. Print circulation has been declining for decades across all regional newspapers – long before the advent of the internet. We must ensure we have our content on the platforms where people wish to consume it. We are proud of the extensive digital training we are providing for our journalists. We believe we lead the regional media sector in this area.

6) The goal is to be a company in growth

Trinity Mirror's strategy is to build digital audience – and digital revenues – to a level that outstrips the loss of print revenue. The Daily Post is part of this strategy which offers the prospect of a long-term sustainable business. Our digital audience is growing – and we know how to grow it – while the long-term newspaper sales trajectory is downward. The Daily Post and Trinity Mirror as a whole are working hard to develop an array of commercial options that increasingly suit the multi-channel needs of advertisers, however the dominance of Facebook and Google present serious challenges in an already challenging digital advertising market.

7) Politics is local, national and multi-national

The Daily Post has withdrawn journalists from Westminster and more recently Cardiff to avoid duplication of Trinity Mirror resource. These are challenging times for the industry and copy sharing is vital. The Daily Post has access to Trinity Mirror and Press Association content from both seats of Government. By withdrawing from the Assembly, the Daily Post is able to employ a politics reporter based in North Wales with responsibility for covering a more 'local' level of government while adequately covering Westminster and Cardiff. Resource is not infinite.

8) Political decision-making and holding politicians and public servants to account

This remains vitally important. We cover these stories because we have a duty to inform, even though on occasions this means expending resource on stories that are unlikely to drive print sales or substantial audience online. We remain committed to finding new ways of engaging our audience with stories of this nature. The BBC democracy reporting scheme, ultimately funded by the public, presents a major step forward by offering us a means of reporting day-to-day democracy in action while mitigating our need to monetise the content. Within Trinity Mirror we have invested heavily in data journalism which enables us to use central resource in Cardiff and Manchester, and best practice, to support our role as scrutineers.

9) We need support

Continued commitment by public bodies to advertise within trusted local media would help to fund proper journalism and keep titles in business.

Eitem 7

Yn rhinwedd paragraff(au) vi o Reol Sefydlog 17.42

Mae cyfyngiadau ar y ddogfen hon

Mae cyfyngiadau ar y ddogfen hon