

RNIB and the Publishing Industry Working in Partnership

An excerpt from the report produced by Jim Russell, Project Manager

Introduction

There are approximately three million people in the UK with sight problems and dyslexia who cannot read standard print. A massive 96% of books are never made available in large print, audio or Braille. Every day blind and partially sighted adults and children are denied vital information for education, work and daily life, as well as being denied the joy of reading a world of books.

Over the last year, RNIB has been working closely with publishers, publishing trade associations, booksellers, distributors, conversion suppliers and other organisations in a feasibility project in support of the overall mission to bring about a sea-change in the volume and availability of accessible books. The project had two primary objectives:

- 1) To determine the feasibility of using electronic files from publishers in order to save costs and improve efficiency in the production processes for accessible books. This would enable greater volumes of accessible products to be produced.
- 2) To determine the feasibility of selling accessible books through the book trade to extend availability and ease of purchase.

Executive Summary

The feasibility project has proposed a **new model for the production and distribution of accessible books**. This report calls for RNIB and publishing organisations to continue to work in partnership to develop and implement this model and grasp the opportunity to make a real difference to the lives of blind and visually impaired people.

Key Findings & Conclusions

By using electronic source files provided by publishers, external suppliers for conversion of files to XML, and streamlined processes for multiple transformations into Braille, Large Print and Daisy Synthetic Audio master files, RNIB can **halve its production costs** at the same time as making books available in **multiple formats**. This would enable RNIB to double its output with current levels of charitable funding.

Even using this new approach to production, it is estimated that RNIB will still incur conversion and origination costs ranging from £600 for straight forward text trade books to £1,500 and beyond for more complex titles such as textbooks.

Sales of accessible products via the book trade are feasible as long as well-established supply chain mechanisms are followed in the same way as for any other product with an ISBN. RNIB would need to implement changes in processes and systems in order to interface with the book supply chain. This would generate new revenue streams for publishers, authors and booksellers. It would also generate additional funds to support further growth in the quantity of accessible books produced.

With approximately three million people in the UK with sight problems and dyslexia who cannot read standard print, the market could be significant. However, as yet, there is limited evidence to enable accurate projections of future sales and revenue, and the market is largely untapped and unproven. Most potential customers are unaware of the products that are available and how to get them. Growth in sales will not only require more products but also a growth in consumer awareness and changes in consumer behaviour. Market analysis was not included in the scope of this feasibility project.

Given the uncertainty of sales and revenue potential, along with the significant costs of origination and as yet un-estimated infrastructure costs that will be required to implement changes at RNIB, a financial model will work only if there are significant reductions in standard terms for publishers, authors, booksellers, and others in the supply chain. To date, all participating organisations have indicated a willingness to consider reduced terms. Many have indicated that they are content to support this initiative on a cost recovery or cost neutral basis reflecting their sense of corporate social responsibility. Whatever terms are agreed initially could be reviewed in the light of actual sales experience.

The publishers involved in conversion trials experienced varying degrees of difficulty in finding and making electronic files available. Most of the issues could be readily overcome in an operational situation. However, the practise by publishers of selling exclusive rights to other organisations, specifically for large print and audio, presents a significant barrier to making higher profile titles available. Separation of rights for large print paperback and daisy audio formats from these contracts would enable RNIB to produce and make available high profile titles via the book supply chain at more reasonable prices.

Proposed Model

This model applies only where publishers choose not to publish their titles in accessible formats themselves. RNIB supports all organisations who undertake their own accessible product publishing.

Publishers would make electronic files available to RNIB as a not-for-profit, trusted intermediary. RNIB would ramp up its production capacity and would incur the cost of conversion of files into accessible formats. As a co-publisher, RNIB would feed ISBNs and appropriate metadata into the book supply chain to enable trade sales via booksellers. Products would carry joint publisher and RNIB branding. RNIB would then provide a produce on demand service for orders received via booksellers or its own bookshop, with stock only being held for limited titles. Given its limited capacity and experience in large print production and distribution, it is likely that RNIB would outsource this to a print on demand specialist.

Distributors and booksellers would purchase products on reduced terms. Royalty payments for publishers and authors would be handled via the Copyright Licensing Agency. Pricing would be as near as possible to standard product pricing whilst maintaining sufficient commercial incentives for handling orders.

This model will also require significant changes in processes, systems, resourcing and management at RNIB. Given uncertainties over sales and revenue, it is recommended that a pilot operation is set up to test the market and trial out new partnership arrangements and interfaces. This would be supported by appropriate promotional activity to raise consumer and trade awareness of these products. Such a pilot will help manage the risks, and also provide invaluable knowledge and understanding before making decisions on large scale investment.

The proposed model and pilot operation is primarily focused on trade titles in a set of standardised accessible formats. However, RNIB's *Where's My Book* publication highlighted the need for tailored textbook products to support individual pupil and student needs in education. Publishers are receiving increasing requests for accessible textbooks which they struggle to satisfy. The project team supports the concept of a centralised textbook service through which requests could be channelled, expertise and advice could be provided, and some tailoring of products could be performed in a way complimentary to RNIB's larger production operation. This would include the provision of electronic files under careful controls.

Recommendations

Following this feasibility project, it is recommended that:

1. RNIB, publishers, booksellers, and other suppliers and service providers adopt the proposed new model as the basis for bringing about a step-change in the production of accessible products and distributing them through bookshops
2. RNIB embarks on a change programme to:
 - a. Embed this model into its business strategies and plans, and set new, challenging targets for increased book production and distribution.
 - b. Implement new production processes based around conversion of publisher files to XML and subsequent

transformation into multiple format master files, including third party supplier arrangements.

- c. Establish streamlined produce on demand order fulfilment systems and processes, to enable sales through its own online shop as well as the book trade.
 - d. Develop appropriate mechanisms to capture and feed ISBN and product metadata into the book supply chain.
 - e. Develop appropriate mechanisms to record and process appropriate royalty payments for publishers and authors.
3. Publishing organisations, with the help of designated trade associations and in partnership with RNIB:
- a. Establish new guidelines for contracts relating to the sale of publishing rights.
 - b. Establish a standard agreement for the provision and use of electronic files from publishers.
 - c. Establish new mechanisms for the selection of titles for publication in accessible formats.
 - d. Negotiate trade terms for distribution.
 - e. Incorporate accessible format information into industry standards and distribution e.g. Nielsen, Onix, and booksellers systems.
 - f. Establish a cross-organisation Steering Group to co-ordinate this programme of activity and address investment funding and programme management issues.
 - g. Work towards convergence on XML standards.
 - h. Support pilot operations, including by trade and consumer marketing, with a view to establishing full scale operations as funds, resources and agreements with organisations permit.
 - i. Subject to successful pilot operations, consider establishing a branded scheme that publishers and booksellers can sign up to, and which can be used to assist promotion and to develop consumer awareness.
4. As separate but linked projects, Government and publishers should work with other appropriate stakeholder organisations, including the RNIB, to establish textbook

services for schools, further education and higher education establishments. These should be based around practical trials.

All of these proposals are explained in more depth in the Recommendations section of this report.

Final Comment

It is clear that publishers, authors and booksellers support the overall objectives of extending the reach of books for blind and visually impaired people. Clearly, as commercial organisations, they can, do, and will, exercise the option of entering arrangements with commercial organisations to produce and sell their products. RNIB's prime interest is to extend the availability of accessible books however this might be achieved, and it welcomes any such initiative. It does not want to set up an exclusive operation. If the proposed model is a success, it is unlikely and undesirable that RNIB could ever fulfil all accessible book demands, and therefore parallel initiatives and mechanisms will be essential.

However, the recommended model gives an opportunity to provide a real catalyst to growth in the number of accessible books across the range of formats without risk or significant up front cost for publishers, booksellers and others in the supply chain. This can test the market and give confidence to the publishing industry that there is commercial benefit in bringing the production of accessible products into their mainstream publishing and distribution processes.

Planning work is now in progress at RNIB to determine the likely investment and ongoing operational costs, balancing these with levels of increased volumes of books to be produced, and the overall risk associated with the programme. It would be extremely helpful if Government and publishing industry organisations would contribute to the ongoing funding of this programme.