

## The future of the European book sector: a bibliographical review

### General overview

The publishing sector represents one of the biggest strands of the cultural sector in Europe. The book sector is certainly its most representative part and covers all activities related to edition and publishing in all fields (leisure, education, professional, news, academic, etc.). It also covers both ways of publishing, material (on paper or other material) and digital.

Besides its important cultural value and role, the book sector is also an essential economic activity in the EU. In 2021, it was assessed as the second cultural activity, right after watching or listening a program, and represented 12% of the EU average cultural expense. Still in 2021, it had a turnover of more than EUR 23 billion, 18% of it being generated by exportation (a rate relatively stable over the years).

If over the years, the publishing sector demonstrated a rather stable good health, some figures show nevertheless significant evolutions that impact the sector on a long term basis. Digitalisation is one of them, probably the most obvious, but all challenges cannot be reduced to it, even if they are all intertwined - which makes them more difficult to apprehend exhaustively.

- EPRS, At a glance, [Books and book lover in the EU](#), 2021, 1p.
- E. Turrin and al., [European book market statistics 2021-2022](#), Federation of European Publisher, 2022, 21p.
- Mikko Grünlund, [Publishing Market Watch: Final report](#), study for the DG Enterprise, European Commission, 2005, 178p.
- Iain Stevenson: ["The liveliest of corpses": trends and challenges for the future in the book publishing industry](#), in Aslib proceedings, 2000, Vol.52(4), p.133-137.

### a. Digital and digitalisation

E-books are probably the most famous aspect of how digital technologies impacted publishing sector. If several studies analysed how much the development of this new format affected users' experience or consumption pattern as well as publishers' or libraries', its effects have to be considered more broadly. Literature insists indeed on the market evolution, be it considering the increasing rate of online purchases, the diversification of business models and services or the arrival of new actors or new forms of competition.

- Jean Paul Simon and Marc Bogdanowicz, [The Digital Shift in the Media and Content Industries. Policy briefing](#), JRC, 2012, 21p.
- EPRS, Briefing, [E-Books: Evolving markets and new challenges](#), 2016, 12p.
- Chiang-nan Chao and al., [“Electronic Books Impact Global Environment—An Empirical Study Focus on User Perspectives”](#), in *Journal of Management and Strategy*, Vol. 4, No. 2; 2013, 8p.
- N.D. Kho, [E-readers and publishing's bottom line: The opportunities and challenges presented by the explosion of the E-reader market](#), 2010.
- Andrei Maxim and al., [The role of e-books in reshaping the publishing industry](#), Elsevier, 2012, 5p.
- Benhamou, Françoise, et Olivia Guillon. « [Modèles économiques d'un marché naissant : le livre numérique](#) », *Culture prospective*, vol. 2, no. 2, 2010, pp. 1-16.
- Jędrzej Maciejewski, [“Book Markets in Europe: Facing the Challenges of the Digital Single Market”](#), in *Comparative Economic Research. Central and Eastern Europe*, Volume 22, Number 2, 2019, 15p.
- van der Weel, Adriaan. [“From an Ownership to an Access Economy of Publishing”](#). *Logos* 25.2 (2014): 39-46.
- Noorda, R., Inman Berens, K., [“Immersive Media and Books 2020: New Insights About Book Pirates, Libraries and Discovery, Millennials, and Cross-Media Engagement: Before and During COVID.”](#), *Pub Res Q* 37, 227–240 (2021).
- Stavrova, E. (2022). [“Academic Publishing: Research Leadership in the Context of Digitalization and Globalization of the Business Environment”](#). *Business Ethics and Leadership*, 6(4), 92-99.
- Dan Mount, [E-LENDING: CHALLENGES AND OPPORTUNITIES](#), Study at the request of CULT Committee, European Parliament, DGIPOL, 2016, 44p.
- Kim, Kihong. (2019). [Artificial intelligence and publishing](#). *Science Editing*. 6. 89-90.
- Sylvia M. Chan-Olmsted (2019) [“A Review of Artificial Intelligence Adoptions in the Media Industry”](#), *International Journal on Media Management*, 21:3-4, 193-215.
- Yves Gendron, Jane Andrew, Christine Cooper, [“The perils of artificial intelligence in academic publishing”](#), *Critical Perspectives on Accounting*, Volume 87, 2022.
- Raúl Tabarés Gutiérrez, Tecnalia: [Open access, responsibility and the “platformization” of academic publishing](#), February 2022
- George Gamprellis, University of West Attica; Anastasios Politis, University of West Attica; Ioannis Sofias, University of West Attica; Antonios Tsigonias: [Challenges for the printing industry in the modern digital and meta - pandemic era](#), September 2021
- Marta Magadán Díaz, Universidad Internacional de La Rioja; Jesús I. Rivas García, Universidad Internacional de La Rioja: [The Digitization in the Spanish Publishing Industry](#), August 2019

- Aile Möldre, Tallinn University; Kairi Felt: [E-Book Publishing in Estonia: Publishers' Perceptions and Experiences](#), June 2018
- Klaus Heine, Erasmus University Rotterdam; Martin Senftleben, University of Amsterdam; Miriam Caroline Buiten, Universität Mannheim; Maximilian Kerk: [From Books to Content Platforms – New Business Models in the Dutch Publishing Sector](#), January 2017
- Stig Hjarvard, University of Copenhagen; Rasmus Helles, University of Copenhagen: [Going digital: Changing the game of Danish publishing](#), June 2015
- José-Antonio Cordón-García, Universidad de Salamanca; Daniel Linder, Universidad de Salamanca; Raquel Gómez-Díaz, Universidad de Salamanca; Julio Alonso-Arévalo, Universidad de Salamanca: [E-Book publishing in Spain The paradoxes of a dual model](#), July 2014
- Sara Øiestad; Markus M. Bugge, University of Oslo: [Digitisation of publishing: Exploration based on existing business models](#), March 2014
- B. Martin; Xuemei Tian, Swinburne University of Technology: [Books, bytes and business: The promise of digital publishing](#), January 2012
- Hui-Yi Ho; Luh-Wang Wang; Hsueh-Ju Cheng: [Authors, Publishers, and Readers in Publishing Supply Chain: The Contingency Model of Digital Contents Production, Distribution, and Consumption](#), December 2011
- Erin Carreiro: [Electronic Books: How Digital Devices and Supplementary New Technologies are Changing the Face of the Publishing Industry](#), December 2010
- Xuemei Tian, Swinburne University of Technology; Bill Martin, Swinburne University of Technology: [Digital Technologies for Book Publishing](#), September 2010
- Youngsuk (Y. S.) Chi: [The E-volution of Publishing: Challenges and Opportunities in the Digital Age](#), December 2014
- Siew Poh Phung, Limkokwing University of Creative Technolo: [Utility of Blockchains in Publishing Sector: Focus on Academic Publishing](#), February 2020
- Mark S. Nestor; Daniel Fischer; David Lee Arnold, Center for Clinical and Cosmetic Research; Brian Berman, University of Miami Miller School of Medicine: [Rethinking the Journal Impact Factor and Publishing in the Digital Age](#), January 2020
- Anna Klamet, Edinburgh Napier University: [Publishing in the Shadow of Larger Neighbours: Opportunities and Challenges of Digitisation for Small Publishing Houses in Austria and Scotland](#), December 2020

## **b. Ecological considerations**

Environmental considerations are another important issue for the publishing sector, even more so since the presentation of the EU Green Deal in December 2019. If digitalisation could have appeared in the beginning as a strong solution, this is no longer the case, as we know today that there are numerous environmental issues concerning digital storage as well as the use of rare materials needed for the production of electronic devices. Thus, as a unique global solution seems hard to

find, given our society's current way of life, focus can be put on better understanding of and stronger support to the variety of policy and sector initiatives and actions already in place, taking into account the specificity of the sector.

- Christensen, Kand B Siever. "[Seeing the forest: why publishers and readers need to take a fresh look at print and online publishing to create a sustainable information industry](#)". *Serials: The Journal for the Serials Community*, vol. 23, no. 1, 2010, p. 20-24
- Magadán-Díaz, M., Rivas-García, J.I. "[Environmental Sustainability and Business Models in the Spanish Publishing Industry](#)". *Pub Res Q* 37, 546–557 (2021)
- Thomas, V.M. "[The environmental potential of reuse: an application to used books](#)". *Sustain Sci* 6, 109–116 (2011).
- Manuel Díaz-Madroñero, Universitat Politècnica de València; Josefa Mula, Universitat Politècnica de València; Raul Poler, Universitat Politècnica de València: [Sustainable Supply Chain Management in the Book Publishing Sector](#), January 2012.
- Rachel Done; Rylee Warner; Rachel Noorda: [Publishing Distribution Practices: New Insights About Eco-Friendly Publishing, Sustainable Printing and Returns, and Cost-Effective Delivery in the U.S.](#), June 2022.

### c. Market evolution

The last decades witnessed a strong evolution within the book and publishing markets, due to the development of globalisation, digitalisation and digital technologies that increased considerably communication, autonomy and competition. The market is thus no more conducted only by economic thinking but also by social and ethical concerns that introduce new aspirations and new equilibriums.

- Kolo, C. (2019). "[Strategic challenges of newspaper publishing in an international perspective](#)". *Newspaper Research Journal*, 40(3), 275–298.
- Steiner, A. "[The Global Book: Micropublishing, Conglomerate Production, and Digital Market Structures](#)". *Pub Res Q* 34, 118–132 (2018).
- Klimczak, Mikolaj. (2020). "[The Evolution of the Publishing Industry - the Impact of Vanity Publishing](#)", 11p.
- Robbins, Jill. (2014). "[Globalization, Publishing, and the Marketing of "Hispanic" Identities. Iberoamericana. América Latina, España, Portugal: Ensayos sobre letras, historia y sociedad](#)". *Notas. Reseñas iberoamericanas*, Nº 9, 2003, pp. 89-101.
- Racimo, F. & Galtier, N. & De Herde, V. & Bonn, N. A. & Phillips, B. & Guillemaud, T. & Bourguet, D., (2022) "[Ethical Publishing: How Do We Get There?](#)". *Philosophy, Theory, and Practice in Biology* 14: 15

- Morten Hviid, Sofia Izquierdo-Sanchez & Sabine Jacques (2019) "[From Publishers to Self-Publishing: Disruptive Effects in the Book Industry](#)", *International Journal of the Economics of Business*, 26:3, 355-381.
- Carolan, S., Evain, C. "[Self-Publishing: Opportunities and Threats in a New Age of Mass Culture](#)". *Pub Res Q* 29, 285–300 (2013).
- Dilevko, Juris & Dali, Keren. (2006). "[The self-publishing phenomenon and libraries](#)". *Library & Information Science Research*. 28. 208-234.
- Wang, Y.; Majeed, A.; Hussain, Z.; Popp, J.; Oláh, J. "[Online Second-Hand Bookstores' Strategic Decisions: A Theoretical Perspective. Sustainability](#)", 2022.
- Ghose, A. & Smith, Michael & Telang, Rahul. (2006). "[Internet Exchanges for Used Books: An Empirical Analysis of Welfare Implications](#)". *Information Systems Research*. 17-1, pp. 3-19.
- Vidar Ringstad (2004) "[On the cultural blessings of fixed book prices](#)", *International Journal of Cultural Policy*, 10:3, 351-365
- Perona Mathieu et Pouyet Jérôme. [Le Prix Unique Du Livre à L'heure Du Numérique](#). Éd. Rue d'Ulm, 2010, 92p.
- Ana Gallego-Cuiñas; Esteban Romero-Frías, Wenceslao Arroyo-Machado: [Independent publishers and social networks in the 21st century: the balance of power in the transatlantic Spanish-language book market](#), October 2020
- Jesús I. Rivas García, Universidad Internacional de La Rioja; Marta Magadán Díaz, Universidad Internacional de La Rioja: [Crowdfunding in the Spanish Publishing Industry](#), June 2019
- José Ángel Sanz Lara, Universidad de Valladolid; Ana María Bedate, Mariano Durántez: [Determining Some Factors of the Financial Situation in the European Union Publishing Sector](#), March 2018
- Marie-Astrid Le Theule, Conservatoire National des Arts et Métiers; Ioana Lupu, ESSEC Business School, France: [Publishing without editors or authors? Competing logics, circulation, and cultural creation in a publishing firm](#), November 2015
- Christina Banou: [The Organization of Book-Publishing Houses in a Changing Era](#), January 2013
- Levine, Charles M. "[Joost Kist: New Thinking for 21st-Century Publishers: Emerging patterns and evolving stratagems](#)". *Logos* 19.4 (2008): 212-213.
- Christina Banou, Ionian University; Angus Phillips, Oxford Brookes University: [The Greek Publishing Industry and Professional Development](#), June 2008
- Martin Frank, American Physiological Society: [Open but Not Free - Publishing in the 21st Century](#), February 2013
- Laura J. Miller: [Whither the Professional Book Publisher in an Era of Distribution on Demand](#), December 2012
- Agata Mrva-Montoya, The University of Sydney: [Towards "Born-Accessible" Educational Publishing](#), November 2022

- Janneke Adema; Graham Stone: [The Surge in New University Presses and Academic-Led Publishing: An Overview of a Changing Publishing Ecology in the UK](#), July 2017
- Pr. Allam Ahmed, Queen Mary, University of London: [Open Access Publishing: Opportunities and Challenges for Developing Countries](#), May 2005
- John Feather, [Communicating Knowledge: Publishing in the 21st Century](#), January 2003

#### d. Diversity and accessibility

The questions of diversity and accessibility are central as they are directly linked to the democratic values of the EU. However, these topics and how to efficiently assess them still appear not to be addressed enough. A need is even more urgent as digital technologies, if carrying the hope to grasp wider audiences, show at the same time a tendency to perpetuate and even reinforce existing inequalities.

- Mihelj, Sabina In & Leguina, Adrián & Downey, John. (2018). "[Culture is Digital: Cultural Participation](#)", *Diversity and the Digital Divide*, 34p.
- Isabel Awad Cherit (2008) "[Cultural Diversity in the News Media: A Democratic or a Commercial Need?](#)", *Javnost - The Public*, 15:4, 55-72
- Benhamou, Françoise, and Stéphanie Peltier. "[How Should Cultural Diversity Be Measured? An Application Using the French Publishing Industry.](#)" *Journal of Cultural Economics*, vol. 31, no. 2, 2007, pp. 85–107.
- Moreau, François, et Stéphanie Peltier. « [La diversité culturelle dans l'industrie du livre en France \(2003-2007\)](#) », *Culture études*, vol. 4, no. 4, 2011, pp. 1-16.
- Kovač M., & Gudinaičius A. (2020). "[Publishing in small European countries](#)". *Knygotyra*, 75, 7-16.
- Literature across frontier, "[Publishing translations in Europe. A survey of publishers](#)", 2012, 20p.
- Calabrò, A., Contini, E., Leporini, B. (2009). "[Book4All: A Tool to Make an e-Book More Accessible to Students with Vision/Visual-Impairments](#)". In: Holzinger, A., Miesenberger, K. (eds) *HCI and Usability for e-Inclusion*. USAB 2009. Lecture Notes in Computer Science, vol 5889. Springer, Berlin, Heidelberg.
- Kinnell, M., & Creaser, C. (2001). "[A new outlook: services to visually impaired people in UK public libraries](#)". *Journal of Librarianship and Information Science*, 33(1), 5–14.

#### e. COVID-19

The recent COVID-19 crisis has confirmed the emergence of another type of challenges to be faced in the coming decades. If reading stayed one of the most practiced cultural activity, especially during the lockdown, the period has represented a major threat to book stores that could not all adapt their activity to the new reality of remote online delivery. Beyond a purely economic perspective, from

the point of view of consumers, this situation also directly affects the diversity of the offer, online platforms focusing their effort mainly on transaction and not the selection-counsel expertise that characterise historically the profession. Not to mention also the reduction of the number of new titles for strategic reasons. Nevertheless, stakeholders observed the good resilience of the sector, statistics data being in the end better than expected.

- Federation of European Publishers, [Consequence of the Covid-19 crisis on the book market](#), 2020.
- Federation of European Publishers, [One year after. Consequence of the Covid-19 crisis on the book market. An overview of 2020](#), 2021.
- Brinton J. "[The impact of COVID-19 on the UK publishing industry: Findings and opportunity](#)". Learn Publ. 2021 Jan;34(1):43-48.
- Guren, C., McIlroy, T. & Sieck, S. "[COVID-19 and Book Publishing: Impacts and Insights for 2021](#)". *Pub Res Q* 37, 1–14 (2021).
- Pierangelo Isernia and Alessandro Giovanni Lamonica, DISPOC, University of Siena: [The Assessment of the Impact of COVID-19 on the Cultural and Creative Sectors in the EU's Partner Countries, Policy Responses and their Implications for International Cultural Relations](#), February 2021

### **Stakeholders point of views**

Stakeholders seem to focus their campaigning mainly on economic issues, such as copyright protection, taxation or geo-blocking, though major issues discussed above are also closely followed. With the last COVID-19 crisis, however, a more clear expression rose on the need of public support, especially financial, to help tackle the effects of the pandemic and any other future global crises..

- Oluwatoyin Jegede, "[The future of publishing: how technology is shaping the publishing industry](#)", bookmachine.org, 21/11/2022.
- Morissa Schwartz, "[This is the future of Book Publishing](#)", entrepreneur.com, 03/08/2021
- Whitefox Publishing, "[How the publishing industry change over the next ten years](#)", wearewhitefox.com, 20/05/2022
- Manuel Gils and al., "[The future of the book. Where is the publishing market going?](#)", barcelona.cat, 03/2022.
- Federation of European Publishers, [Report of activities 2020-2021](#), 2021.
- Federation of European Publishers, [Report of activities 2019-2020](#), 2020.

## Further information

More information on policy department research for the CULT Committee:

<https://research4committees.blog/cult/>

[www.europarl.europa.eu/supporting-analyses](http://www.europarl.europa.eu/supporting-analyses)

 Follow @PolicyCULT

**Disclaimer and copyright.** The opinions expressed in this document are the sole responsibility of the authors and do not necessarily represent the official position of the European Parliament. Reproduction and translation for non-commercial purposes are authorised, provided the source is acknowledged and the European Parliament is given prior notice and sent a copy. © European Union, 2023.

Research administrator: Olivier RENARD (trainee); Katarzyna ISKRA, Kinga OSTAŃSKA Editorial assistant: Anna DEMBEK

Contact: [Poldep-cohesion@ep.europa.eu](mailto:Poldep-cohesion@ep.europa.eu)