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.


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.


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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.

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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.


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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.


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,
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.

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**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.

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- Morissa Schwartz, “This is the future of Book Publishing”, entrepreneur.com, 03/08/2021
- Whitefod Publishing, “How the publishing industry change over the next ten years”, wearewhitefox.com, 20/05/2022.
Further information

More information on policy department research for the CULT Committee:

https://research4committees.blog/cult/
www.europarl.europa.eu/supporting-analyses

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