

NATIONAL UNIVERSITY OF POLITICAL STUDIES AND PUBLIC
ADMINISTRATION

Doctoral Dissertation Summary

**THE BOOK MARKET IN ROMANIA
UNDER THE INFLUENCE OF
GLOBALIZATION AND TECHNOLOGICAL
CHANGES**

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2022

Doctoral Dissertation Table of Contents

List of figures / 4

List of tables / 7

Introduction / 8

The choice of the topic and the importance of the research / 8

The objectives of the paper / 9

Methodology and analytical design / 12

The structure of the paper / 12

Chapter 1. Globalization and technological progress: The two engines of the book market / 15

1.1. Context / 15

1.2. Sociology of the book in historical context. Theoretical aspects / 16

1.3. Actors in the book market. Theoretical aspects / 20

1.4. The producers. Actors who "learned on the go" / 26

1.5. Market impact on copyright / 27

1.6. British Empire and Colonies. Global book network / 28

1.7. The 20th century and the acceleration of the globalization of the book market / 31

1.8. The oil crisis of the 70's and the rethinking of publishing strategies / 32

1.9. The main actors at present / 34

1.10. Caught between Transediting and McDonaldization. Consumers of the global book market / 40

1.11. New challenges. Creative piracy in the shadow of digital and globalization / 41

1.12. Conclusions. Globalization as the *status quo* of the book market / 42

Chapter 2. Disruptive technologies: audiobook and e-book as contemporary forms of the globalized book / 44

2.1. Context / 44

2.2. Reading and the evolution of new technologies / 44

2.3. The audiobook format / 48

2.4. The e-book format / 51

2.5. The emancipation of the new forms of the book (audio, electronic) / 52

2.6. The streaming digital audiobook – renegotiating the future of the globalized market? / 54

2.7. Digitization – The common disruptive element between globalization and new technologies / 56

2.8. Conclusions / 59

Chapter 3. The Romanian book market: history and portrait / 60

3.1. Context / 60

3.2. The book in the Romanian space throughout history / 60

3.3. The contemporary book market (1990-present) / 64

3.4. Conclusions / 72

Chapter 4. The global, European and local book market. A perspective on dimension – quantitative secondary research / 74

4.1. Context / 74

4.2. Research methodology / 75

4.3. The European book market between globalization and new technologies / 77

4.4. Romania's dimension in the book market / 110

4.5. Global size. Great powers in the ecosystem of the book industry / 120

4.6. Conclusions / 124

Chapter 5. The subject of the book market in Romania according to the specialists / 126

5.1. Context / 126

5.2. Research methodology / 126

5.3. Analysis and interpretation of interviews / 130

5.4. The conclusions of the research / 142

Chapter 6. Index of the book market in Romania. Discussion and proposals / 144

6.1. Argument / 144

6.2. Proposals / 144

The conclusions of the dissertation / 151

Bibliography / 159

Annexes / 172

Introduction

The current paper approaches the book market in Romania and aims to show how it has evolved under the influence of globalization and technological changes. Following the evolution of the book market through the filter of the two subjects, we bring into discussion not only the book-object and the different formats it has acquired in recent decades, but also the evolution of social transformations at an economic, political, educational and cultural level. Thus, book production, distribution and consumption provide us with detailed views of various recent histories and phenomena at the national level.

The doctoral thesis aims to show how the book market in Romania is presented, what are its challenges and how the actors in the analyzed industry can overcome them. We have tried to demonstrate whether the book market is aligned with diverse global trends (promotion, communication, publishing, translation, sales) as well as with the new technologies emerging in consensus with these trends (identified both by format and by audience), what are the challenges that arise in this context and how does the local industry respond to their specific issues.

Argument

The present paper is a thesis in the field of communication sciences due to the analyzed topic, the book being part of the media, both through the paper format (Murray, 2020) and through the new forms of the book's display – such as audiobook streaming – which are considered part of the *new media* itself. (Have & Pedersen, 2015)

In addition, the thesis is built on the role and description of the actors in the book market, starting from the roles identified by Robert Darnton in the circuit of communication (Darnton R., 1990), through which the book circulates from the author, to the publisher, to the printer to the distributor, to the seller to the reader.

Also, the way we analyze the evolution of the market and the solutions for these problems start from communication: book promotion campaigns, author brands built through communication strategies, national campaigns to encourage reading. As a final argument, the book market index (proposed as part of the solutions) is itself an act of communication as much as its financial implication. Thus, despite the economical and statistical composition, the index or indicators presented in the thesis work by disseminating them to the public – for example the book sales charts.

The importance of the theme lies in the fact that the book market is itself an indicator for all these elements that make up the society. Thus, following its evolution, we can anticipate certain phenomena, managing to find out on this occasion what are the main characteristics, problems and solutions for them.

The objectives of the dissertation

We established two main objectives of the paper, from which the research questions derive.

The general purpose of the present work is to know the ways in which the book market has adapted to global trends, as well as the solutions for the market problems, in the conditions that often a higher impact entity is needed to implement them (such as the state).

The first objective aims to study and present the current behavior of the book market in Romania, under the aspect of globalization and new technologies. Based on it, we presented the historical evolution of the local book market, by analyzing data such as the number of books published, circulation numbers or even the financial revenues of local publishing houses.

From a historical point of view, we analyzed this behavior in the contemporary period, starting from post-communism to present. This gave us the opportunity to observe the impact of globalization on the market through the increase in the number of published titles, as well as their diversity, especially through the dominant aspect of translations.

Along with the evolution of technologies, we also followed the impact of technological tools such as CD ROM or, later, streaming and the new formats such as audiobook and ebook as

part of a subscription service. Obviously, by creating this portrait in detail, we also identified some of the challenges of the book market, which leads us to the second objective.

The second objective was to present the challenges of the local book market in the current context and to provide solutions based on the thesis research. Thus, we tried to present how the national book market is situated in relation to the European one, a comparison that is limited by the obtained information.

In addition, we tried to find out the number of readers, circulations and titles related to the Romanian market and to place it in the geographical space and financial values compared to the states in Europe, as well as the rest of the world. By analyzing data and conducting interviews with a selection of industry specialists, we proposed a series of solutions to improve book consumption in Romania in the hope that there will be certain stakeholders to implement them in the short and medium term.

We started with five research questions regarding the book market in Romania:

RQ1. What is the situation of the book market in Romania in relation to its development potential?

The first research question refers not only to the size of the book market based on its financial evolution, but also to its potential; what has been the evolution of the industry so far, how it can reach its potential and who would be the actors to help it get there.

RQ2. What is the ratio between Romanian authors and foreign authors (translations) on the Romanian book market?

Considering that one of the main themes of the thesis concerns globalization, the number of translated titles is an indicator for this.

RQ3. To what extent does Romania export book titles?

Although there are several Romanian authors who are translated abroad, we wanted to see if this phenomenon is a significant one.

RQ4. How does the Romanian book market relate to global trends?

This time we're talking about recent changes in everything related to technology, in addition to content and format influenced by global book markets.

RQ5. To what extent is the book market in Romania competitive?

We looked to see if the book market is competitive, if it might be a case of monopoly or unfair competition, or if the market's problems come from other sources.

We also formulated four other research questions to find out the opinions of key players in the Romanian book market, to which we had access based on semi-structured interviews:

RQ6. How is the Romanian book market characterized? We followed a description of the market in the opinion of experts and based on data on authors, readers, publishers and distributors.

RQ7. How does globalization influence the book market in Romania? We wanted to understand the general ratio between import and export, more precisely why Romania exports a small number of authors and titles, compared to other countries; correlated with this question, we also followed the communication, promotion or publishing strategies to see if we can refer to a globalized local market when speaking of content.

On the opposite level, but still part of this topic, we researched whether Romania has an impact on the international market, whether we have Romanian authors with international success and how they are present there, as shown more precisely by the export of Romanian books abroad.

RQ8. How are the new technologies influencing the book market in Romania? Here we followed the evolution of the ebook, audiobook and streaming formats, if they can be considered competing or complementary in relation to the classic format, how these forms of the book are expected to evolve currently and in the long term in Romania and if we can speak in advance of a book market with an exclusively digital future, dethroning the printed format.

RQ9. What would be the possible solutions for the challenges of the book market in Romania? Here we aimed to detect the problems of the local book market and find solutions to solve them; to note that all these questions and discussions take place in the context of the influence of globalization and new technologies; among them are the increase in book consumption, the promotion and export of Romanian authors, the involvement of the state to a large extent as a financial and logistical contribution, as well as the proposal of an indicator of the local book market.

The originality of the research consists in the detailed presentation of the local book market from a multidisciplinary point of view in relation to internal and European challenges, the presentation of the opinions and ideas of specialists regarding the solutions regarding the improvement and increase of book consumption in Romania, as well as the invention and proposal of three indicators or indexes to measure this book consumption at the national level through the evolution and impact of the actors in the industry.

Methodology

The work uses analysis of statistical data provided by various institutions (for example, Romanian Statistic Institute or Eurostat) and qualitative interview-based research.

Thus, we used as sources, in addition to scientific texts from multidisciplinary fields (sociology, culture, communication, economy, history, marketing, even political science), a corpus of official data and statistics from the National Institute of Statistics, the Federation of European Publishers, Eurostat, the National Library of Romania, specialist magazines (such as Publishers' Weekly and Livres Hebdo), articles from economic publications or from the general press (where we have taken statements or interviews of people directly involved in the industry) and financial data of book market actors.

Structure of the doctoral dissertation

The doctoral dissertation comprises six chapters, three of which are for the theoretical approach and three for the research.

The first three chapters represent the collection and presentation of information and establish the theoretical framework of the work; here I defined the concepts of globalization and new technologies in relation to the book market (ebook and audiobook in particular) and also here I presented the history of the book market in Romania, especially the contemporary period, useful for the research in the second half of the thesis.

Chapter 1. Globalization and technological progress: The two engines of the book market

The first chapter provides an overview of the globalization of the book market from its beginnings to the present and introduces both globalization and technological progress (which are interconnected and dependent) as the "engines" of this industry globally. It discusses the actors of the book market and their historical evolution within the perimeter of the colonial empires, as well as their current state.

In this chapter I presented the theoretical aspects, bringing into discussion elements of the sociology of the book and reading, as well as the history of the book, a multidisciplinary field that traces the evolution of the book from its beginnings to the present. However, being a communication thesis, as the main structuring and outlining element of the paper, I adapted the idea (theorized and presented in detail in this chapter) of the communication circuit; in short, it is how the book penetrates society and spreads through its actors (from author, publisher, printer, illustrator to distributor, bookseller and finally reader).

It is interesting to follow the aspect through which all these actors relate and often intertwine according to the roles played. For example, everyone is a reader – even professional readers, a role that authors and editors mainly occupy. There are, of course, situations in which the distributor or even the bookseller may not be readers, or certainly not readers of the same book. By exclusion, an author's book may be read only by the editor, or it may be read by all five. It is important to trace how the book evolved precisely through the communication between these actors and – on a larger scale – in turn influenced society through the spread of culture and ideas.

This relationship requires not only a sociological but also an economic understanding of the phenomena, which prepares the subject for the second part of the chapter in which I presented the book related to the history of its trade (and obviously introduced the idea of the market that we will treat in detail in the rest of the thesis and on which I based my research).

This transformation of the market happened gradually, and the first stage appeared after the advent of printing and its industrialization and reached its peak in the 1970s. This slow process meant changes (economic and technological) of the great powers of the different historical periods and took place running from the beginning of the 19th century and ending roughly in the 1970s.

The main actor used as a model for exemplification was the British Empire, which developed international routes and became the largest producer and trader of books due to the industrial revolution, which it led and from which it acquired technological innovation. At the same time, these routes and the exchange of goods led to the promotion of the English language, which came to be spoken in most of the colonies. Thus, the book developed along the routes created by the British Empire and later led to the development of the empire by increasing its symbolic power, promoting and publishing laws for their interpretation (which were written and transmitted on paper) and obviously led to the expansion and the intercontinental and even

maritime transmission of Christian missionary movements, which benefited from the printing of affordable editions of the Bible and other religious books.

The development of capitalism therefore began with the printing houses, which had multiple roles, so it would have been in a period before the communication circuit, because they also functioned as a publishing house and as a distributor and seller of books.

The only role outside this enterprise would have been that of the author, but gradually in the Western world appeared jobs dedicated to each part of the industry: book publisher, bookseller, distributor and the newly created job of the literary agent, developed in that context of the times; in other words, publishing houses in the British Empire or the United States (at the beginning) that published volumes in English did not end up distributing them in English-speaking territories, even if those were colonies, but chose to sell the copyright through agents to the publishing houses in those territories. Among the reasons for this were the fear of nationalization or of running a company in an unknown territory.

The second period of book market development consistent with globalization is portrayed by multinational economic structures and the speed with which intellectual property (copyright) circulated. The acceleration of the globalization of the book market occurred in the mid-1970s and this period is dominated by the rise in influence of the literary agent.

The chapter concludes by introducing the reader as an actor in today's globalized society, who has access to editions translated and released almost simultaneously in dozens of languages, consuming authors or brand titles, and the fact that the reader can now purchase titles in affordable editions – for example, the pocket book is a good invented at the beginning of the 20th century.

Chapter 2. Disruptive technologies: audiobook and e-book as contemporary forms of the globalized book

The second chapter discusses the technologies that have influenced the book market, from their history to their defining characteristics. Presuppositions of the future of these formats based on scientific works are also discussed.

Here we provide information on new book formats in relation to readers and buyers. The second chapter of the theoretical part of the thesis traces how the main market actors have integrated the new formats into their distribution model in relation to consumers (readers and/or book buyers).

We chose a simultaneous historical and theoretical approach, unlike the first chapter where I introduced the two dimensions of globalization separately. Thus, the electronic book format was presented separately, followed by the audio book format. We followed the presentation of the latter in relation to its technical dimensions, how it evolved historically from books on vinyl and audio cassette to the digital format found today.

We have included details about the reader's relationship with the book, which in this case is different because it involves listening to content and can allow multiple activities to be carried out at once, such as driving a car or cleaning or actually moving around with public transport. In addition, We provided as examples societies from the Nordic countries where audio books are consumed the most for various reasons (long travel time or short days). Starting from here, the audio format went from analog to digital through the emergence of new technologies, and more recently through the streaming platforms that managed to develop recently also in Romania following the pandemic.

Chapter 3. The Romanian book market: history and portrait

After the presentation of the two formats and the new disruptive environment that has appeared in recent years, we moved to the historical approach of the book market in Romania. This chapter provides a conclusion to the theoretical half of the paper and provides the setting for the research in the following chapters.

After an introduction that discusses the appearance of the book in the Romanian space and the evolution of this object in the main historical periods, the detailed history of the contemporary period follows.

Historically, we identify several main moments of it: the chapter begins with a historical passage of the first books in the Romanian space, since the reigns of Matei Basarab in Wallachia and Vasile Lupu in Moldova and reaches the period before 1850: it starts with the first handwritten books and then slightly with the introduction of printing, followed by a moment when one can even speak of a rivalry between the printing institutes of the time (led by Georghe Asachi and Mihail Kogălniceanu) (1850-1880). The *Belle Epoque* period (1880 – 1918) and the interwar period and the Second World War (1918 – 1945) followed, in which the canons of Romanian literature were produced, and continues with the communist period (1945 – 1989), considered in some opinions as being the most professional in terms of editorial quality (editing, printing).

The contemporary period begins with the fall of the old regime, and we have divided it into four stages, each for a decade. Thus, the 1990s are marked by experimentation and lack of stability. It is the period with resounding successes (300,000 copies sold per book by Sandra Brown), or Sven Hassel with *Gestapo* estimated somewhere between 400,000-600,000 copies sold, but also with bankruptcies of publishing houses that were closing down quickly. Some of the state publishing houses are privatized and are successful in the free market.

The 2000s follow, when the market stabilizes and the new technologies (from that time) also arrive in Romania, which opens up the industry's appetite for experimenting with audio and electronic books (on CD). However, these early formats were not successful and did not develop a small market within it.

Next comes the 2010s, which in the first half were characterized by an economic crisis, and later the market started to develop. In the 2020s, there was a sudden drop in the market in the short term, due to the pandemic, but still this period also represented reasons to experiment and invest in digital projects - thus the first audio book streaming platforms appear in Romania as well.

It is a valid truth that contemporary society is under the influence of globalization - and this does not only influence Romania - which allows and encourages the export and import of books, so that some countries import a greater number of titles and export fewer, and vice versa depending on the historical context, the economic evolution, as well as other factors that impact both the cultural and economic sectors at the national level.

Chapter 4. The global, European and local book market. A dimension perspective – quantitative secondary research

If in the first half we clarified the theoretical and historical aspects of the dissertation, the second part of the thesis includes three research chapters. Chapter four is the longest and can be considered as the first of the second distinct part of the doctoral thesis because it opens the research part.

Starting from everything listed above (the three chapters of theoretical exposition), we aim to find out how the book market in Romania relates to globalization and technological changes, what are the challenges caused by these two factors and how this industry can respond to the problems in the three research chapters that make up the second half of the paper.

Thus, chapter four is essentially a detailed analysis based on a complex corpus of data regarding the European, Romanian and global book market. We aimed to see the size of the book markets, to be able to place Romania geographically and numerically in the European book market and Europe in the global book market.

Here we analyzed the state of the European, global and local book market (from Romania) based on statistical data from various reports. Thus, we tried to outline a clear picture to observe the relationship between the states in the European Union, but also between Europe and the rest of the world. We also tracked the evolution of genre typologies according to sales, as well as the distribution sectors of the book.

Globally we have been able to identify regional and global market forces and a number of characteristics about them and how they have evolved.

Certainly, volumes in the languages with the greatest international circulation (such as English, French and Spanish in particular) end up being distributed as widely as possible, because they directly follow the routes of economic exchange created in the last centuries and preserved until today.

On the other hand, there are also cases of regional powers in the book market which, although not part of these pre-established networks based on historical agent and trade, have strong actors with a large market share, in some cases above that of the actors in the first case.

This second category strikes a discordant note precisely because it represents regional (not global) markets with a strong local footprint and a broad and loyal base of book buyers and readers who come on a historical tradition formed at the community level and passed on at the generational level. Here we give the example of books edited and published in German or Japanese which, although they do not benefit from the export power of publishing houses from the states in the first categories, manage, as I mentioned, to have stronger actors (publishing houses, bookstores) in certain cases.

In addition to geographical distribution, we are also talking about distribution through new formats and technologies, so that the book ends up being distributed in other forms, such as electronic format, audio or streaming. Adaptations also transcend the medium, with books being made into stand-alone products such as movies, music, theater plays, video games, toys and other related products inspired by content issued by publishers.

Fiction is generally the best-selling category in the book market historically, regardless of geographic space. Fiction is also the leading category of the adapted formats mentioned in the previous paragraph.

As far as Romania is concerned, we followed the evolution of print runs compared to that of the number of published titles, together with the evolution over the years of the number of active readers in libraries, among others. This allowed us to analyze the historical evolution of the local book market to compare the different periods stated in the previous chapter.

Chapter 5. The subject of the book market in Romania according to the actors

Chapter five, the second chapter of the research, is characterized by a detailed analysis based on an interview with semi-open questions with specialists in the book industry at the national level, regardless of their role (publishers, editors, communication experts, critics or even authors).

Economic (number of titles sold), social (types of books purchased) and cultural segments (how readers and specialists - here with the role of professional readers - relate to certain books and how they place them on the basis of certain hierarchies) compose the direction of the local book market.

This research chapter consisted of conducting interviews with specialists in the book market on how they characterize the industry starting from the influence of globalization and new technologies on it. We aimed to see the opinion of the specialists regarding the current challenges of the local market, as well as the solutions they propose to combat these problems.

Chapter 6. Index of the book market in Romania. Discussion and proposals

The research section is completed with the sixth and shortest chapter – essentially a proposal of three indicators or indices to reflect the state of the book market. The discussion starts both from the statistical data corpus in chapter four and from the information obtained from the interviews with specialists and involves the proposal of a book market index to help solve some market challenges, i.e., the lack of data and visibility on sales figures.

This is primarily a communication tool, although it has a financial component at its core and has the role of informing about changes in the market, depending on the dimensions it would adopt if it were ever interpreted. Thus, we could follow the trend of the best-selling titles, which

would provide a vision of the consumption of book types in Romania over a well-defined period of time.

In another format, the index could provide insights for those interested in investing in this field, establish well-defined hierarchies and encourage competition among players in the book market, which over time could lead to an increase in the size of this industry - gradually, new actors could appear on the market or the current publishing houses could receive investments for launching new projects or promoting the current publishing plans.

Thus, the book market is currently at the level of its potential, and the reason why it cannot exceed it is related to aspects over which publishers have no influence (for example, the level of education at the national level). As for the publishing offer, it is dominated by translations, while Romania exports authors to a very small extent. However, the local book market is connected to Western publishing and communication strategies by publishing titles in tandem with their appearances abroad and by the quality of writing and presentation (print quality, cover, promotional materials). Regarding the state of the actors in the industry, due to the large number of publishing houses and the relatively equal shares they occupy in the market, it cannot be a question of monopoly, but of a competition that translates into productivity, quality and creative placement strategies of the products.

In the research part, we measured the size of the impact of globalization through sales and the adoption of new technologies, and we started a discussion with professionals about the solutions to the industry's problems, proposing indicators that highlight the book market. So through the two parts of similar size, we set the theoretical baggage and answered the research questions.

Analysis of the role of the book as a means of communication, both in print and as new media through audio book and ebook streaming, and how bestsellers and author brands are formed following the impact of the communication strategies deployed by publishers and literary agents give originality to the thesis and answer some research questions in communication sciences.

The conclusions of the doctoral dissertation

Based on the research and discussion chapters of the paper, we reached the following conclusions:

The local book market is aligned with the European one from the point of view of the diversity of titles, as exemplified by the import of volumes, most often encountering titles that appear simultaneously in Romanian with editions from abroad; it is therefore a globalized market through accessible editions and the distribution of global editions, with brand-name authors.

Unfortunately, in terms of export, we cannot speak of recipes from a systemic point of view; although there is a limited number of Romanian authors who have managed to penetrate the European or global market, their success is due rather to their effort and direct involvement, rather than the contribution of certain actors in the industry to place them there based on previous defined strategies.

It is a market in which competition dominates and there are no actors presenting a monopoly, duopoly or oligopoly due to market share segmentation; as we have demonstrated, there are over twenty large publishers, followed by several dozen medium-sized publishers (up to around 100); as for Europe, the continent's regional book market dominates the world (the European Union individually or together with the UK).

Also related to competition, we found that in addition to peer-to-peer competition, there is also competition from outside the publishing sector, such as, in addition to well-known rivals (television) and recent ones (streaming movie and series services, podcasts which in certain cases can be considered books in the opinion of some researchers - here I noted an exemplified mention in the text: Netflix considers sleep a competitor, that is why there are cases where people choose to give up hours of sleep to the detriment of consuming video content).

Technologically, after modest attempts to adopt ebook and audiobook formats in the early decades of the contemporary period (on physical formats such as the CD), there are signs that the new streaming format has a shot at the mainstream.

There are local projects that have developed this segment of the industry and offer both audio and e-books. This sector of the market is in the beginning and growing, although in the local market it still lags behind the European or especially North American market as a percentage of

total book sales. A closeness and connection to the Western model of the market is observed, although on a smaller scale.

The medium strongly influences the access to the book, but the book is becoming more and more accessible, the physical location of the libraries and bookstores gradually reducing its dependence towards the gain of the new formats; However, Romania is only at the beginning of this transition, a transition that was accelerated by the COVID-19 pandemic.

The book market index is necessary to be able to follow the evolution of the industry, but the creation and maintenance of such a tool would be expensive, so its maintenance and promotion in the public space could only be done by large entities, such as a private actor with high incomes or maybe even the state, or a collaboration.

Based on the above, we can consider that the proposals presented can start certain discussions and debates regarding the increase in book consumption in Romania, as well as certain solutions presented can be implemented by certain stakeholders who have the necessary tools to put them in practice, which - in time - can lead to the growth of the book market in Romania and to the improvement of the culture and education sectors at the national level.

In conclusion, the dissertation brings a plus to the research of the subject in Romania through the communication solutions (in relation to other fields, such as the financial or political) proposed to solve those problems and opens the subject of researching the topic in future scientific research.

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