



ONE YEAR AFTER

**Consequences of the COVID-19 crisis on
the book market - An overview of 2020**

March 2021

FOREWORD BY SABINE VERHEYEN, CHAIRWOMAN OF THE CULTURE AND EDUCATION COMMITTEE OF THE EUROPEAN PARLIAMENT



The culture and creative sector in the EU, especially individual creators and SMEs are being decimated by the crisis. Among them, the book sector had suffered severely and remains affected- including on how to deal with the long-term consequences. The sector is facing today the combination of uncertainty whether fairs and other literary events can be planned and whether bookshops can remain open together with a considerable reduction or postponement of titles, including translations.

We in the CULT Committee want to make sure that financial support reaches these fragilised sectors. We are in constant contact with Commissioners Thierry Breton and Mariya Gabriel as well as with the Council Presidencies, underlining that the EU must do more to help cultural actors to get back on their feet.

The cultural and creative sector consists of many individual creators and SMEs, and their status often makes it harder for them to qualify for national or EU support schemes.

Last year, to make sure EU fundings reach the sector, we asked the Commission to consider increasing the Cultural and Creative Sectors Guarantee Facility (by topping it up from the 2021 budget or transferring funds from the European Fund for Strategic Investments).

The changes to the Structural Funds rules agreed by the European Parliament before the summer then also helped to unlock additional financing. Projects dealing with the impact of the COVID-19 pandemic qualified for 100% financing and thematic concentration rules have been loosened, so funds can be more easily channelled to where they are needed most.

The Parliament now has adopted several Resolutions and positions on the Recovery of European culture, trying to help the sector by adopting specific policies and recommendations and, maybe in the short term most important, asking the Member States to allocate and dedicate money from the recovery fund towards cultural and creative sectors and industries: In September 2020 the Parliament adopted a Resolution on the Cultural Recovery of Europe led by the CULT Committee, calling on the Member States that from the Recovery Fund, at least 2% should be exclusively dedicated to the cultural and creative sectors.

The safe opening and quick and full recovery of the cultural and creative sectors as well as when it comes to books, the situation of writers, translators, publishers, booksellers remain the focus of our work in CULT. We have developed many studies and consulted experts and those concerned and are currently preparing a report on “The situation of artists and the cultural recovery in the EU”, which will be presented in May. I very much hope for your active involvement and support.

Here in Brussels, we will certainly continue to work on Europe’s cultural and creative recovery. But we need to join forces. With the help of the sector, we must continue to advocate for the importance of culture to our society, not only at the European level, but also at the national and regional levels.

Also, we will need to keep the needs and specificities of the sector in mind when we discuss about the developments in the online world. Copyright is key and strengthening the general role of right holders online is our ongoing task as European legislators.

Culture is of systematic importance. Literature, theatre, art, music, dance, poetry - all these helped people in Europe to survive the past year of the pandemic, when social contacts were strictly limited. Throughout the lockdowns, art and literature helped us resist the dire period.

Culture cannot be taken for granted, quite the opposite. Our governments and our fellow citizens must unite to make culture the centre of our lives. I am firmly convinced that the efforts will be worth it.

Sabine Verheyen
Chairwoman of the Culture and Education Committee of the European Parliament

FOREWORD BY PETER KRAUS VOM CLEFF, FEP PRESIDENT



Dear Reader:

FEP is pleased to present to you our new report on the state of the European book publishing industry in times of the Covid pandemic. A very heterogeneous, but all in all confident overall picture emerges. Publishers as well as booksellers have displayed an amazing entrepreneurial willingness to adapt to the circumstances, finding new and innovative solutions whenever required.

During lockdowns, many people re-discovered books. Reading as a fundamental cultural technique can, on the one hand, open the door to education and the reader's own bright future, and, on the other hand, it allows us to escape to new worlds of our imagination.

A key lesson we can draw from our study is that political support for our uniquely diverse and varied cultural sector is crucial. The evidence shows that countries which classified books and book shops as essential and specifically promoted and supported the cultural sector suffered significantly fewer losses in this core sector, which is so important for Europe culturally and economically, than those in which there was a complete shutdown of the brick-and-mortar book shops and a lack of state support.

Politicians with a high regard for the cultural sector are indispensable if we are to secure a legislative framework that supports creativity. Even if it is tempting, one should resist the myth of gratuity. It is in publishers' DNA to support libraries and education, however, it is essential that we maintain the economic balance of the book ecosystem. Many solutions developed during the pandemic were exceptional and cannot be considered a "new normal". If our sector is to remain a beacon of cultural diversity in this difficult period, national governments must play their role.

Dear Reader, let us look ahead with optimism and confidence! The European book sector, unique in the world in its cultural diversity, will retain its importance if the copyright framework remains fair, the power of Internet platforms is contained, and the governmental support necessary in extraordinary times of crisis is assured.

Thank you for your interest in this FEP report - and carry on reading!

Peter Kraus vom Cleff
FEP President

Introduction

Halfway through 2020, the Federation of European Publishers took stock of the impact of the COVID-19 crisis on the book sector in Europe. Back then, many countries had just experienced lockdowns, resulting in the unprecedented situation of having bookstores closed almost everywhere for weeks, and the consequences for book sales had been dreadful. While the coming of the summer had shown timid signs of recovery, the overall outlook was still gloomy, and most of all the year's prospects were marked by extreme uncertainty. The present document updates the information from the previous survey

with a first approximation of the impact of the pandemic on the book sector in 2020. Uncertainty remains the keyword also for the beginning of 2021, the second year of the COVID-19 crisis; nonetheless, the book sector has revealed a greater resilience than the situation half a year ago may have led to expect. As for the [report we published in July](#), the information mostly comes from the surveys and estimates made by the members of FEP.

2020 at a glance: difficult and divergent, not always and everywhere as bad as feared

If we were to sum up the year 2020 for the book sector, we could say “difficult and divergent, not always and everywhere as bad as feared”. If our previous estimate in July 2020 pointed at an expected loss for the sector for the whole year that would be certainly in the double digits – anywhere between 15 and 25%, most likely – the new appraisal we are able to make now indicates that the actual result has been much better in most countries: the overall loss across Europe appears closer to something between 2 and 5%. Not a good year, by any standards, but far from the disaster that a crisis such as the COVID-19 one could provoke. It seems that the book sector man-

aged to express a much higher degree of resilience than many predicted, or even hoped. This result has in fact come to a certain extent even as a surprise. Nonetheless, as we will see, this single figure – as is often the case – hides a much more diverse underlying scenario, which we will explore more in detail. While the year's outcome could be deemed as acceptable given the circumstances, a deeper observation will highlight the vast differences between the players of the fragile book ecosystem and identify the risk of longer-term consequences on cultural diversity.

“...the overall loss across Europe appears closer to something between 2 and 5%.”

A good summer and autumn

How did the sector recover from the low point reached just before the summer of 2020? Simply put, once bookshops reopened, people went back to buying books, as much as they could, and despite some initial difficulties – due for example to restrictive safety measures in retail – kept doing so for the next months. In mid-July, print book sales since the reopening of bookstores were up 18% year-on-year in the UK; sales were also back to normal levels, or better, in Italy, where before the middle of the month the cumulated loss for the year was down to 11% in the trade book sector; in France, July sales were 8% higher than the previous year. By the end of the summer, in many countries the gap was narrowing. In Austria, for example, the cumulated loss by end August was 7%; it was the same in Italy, 9% in

France, 10% in Spain and 6% in Germany. In these, and many other countries, sales over the summer were very strong, possibly also due to widespread travel and other restrictions, which limited the range of leisure activities available to people. In Ireland, some publishers over the summer reported difficulties replenishing their stocks due to the sudden resurgence of demand.

At the same time, the phenomenon had a strong component of specific interest in books and reading, including an element of solidarity by readers towards their local booksellers. All in all, it seemed that the damage would be contained to about 10-15% of the total turnover, considering that some countries were doing well (even before), while others still had more serious trouble. In addition, many

operators drew valuable lessons from the experience of the first lockdowns and increased their presence online and/or put in place alternative ways of serving the readers, which would enhance their

resilience in the following months.

Winter's ups and downs

Things kept improving into the autumn. By the end of October, sales were down "only" 4% compared to 2019 in France, and 6% in Latvia, while the gap had been almost completely closed in Italy. It looked as though it would be closed as well by the end of the year in other major markets like Germany and Spain. Countries performing well this far, such as the Netherlands, Sweden, Norway and Finland kept doing so; others (Portugal, Hungary, Romania, to name a few of the most affected) did not seem able to recover significantly. Altogether, however, the European market was on course to close the year at a level very close to that of 2019, with great expectations for the Christmas season, which represents a very large share of annual book sales in every country.

However, with the pandemic worsening again, new restrictive measures were put in place by many governments. This included some lockdowns, which in many cases resulted once again in the closure of bookshops. At the end of November, this was the case, for

instance, in Austria, the Czech Republic, France and the UK. In other places, restrictions applied, such as shorter opening hours. The end of the month saw a new lockdown applied in Bulgaria, and in December the same happened in Germany (mid-month), The Netherlands and Slovakia, among others, with bookstores being obliged to close. Some countries, like Italy and Belgium, declared bookstores essential shops, so they would not have to close despite all non-essential retail shops having to shut. In France, bookshops would only be declared essential in February 2021, but benefited from the reopening of all shops at the end of November, which led to an impressive +25% in sales for December. In Greece too, with bookstores open, December was a very good month for book sales. The new wave of safety measures, in any case, in many instances slowed the recovery of the sector (especially in markets like France and Germany, which could have ended the year at a level closer to that of 2019 otherwise), so that finally 2020 saw a contraction in the European market of around 2 to 5%.

A very uneven picture

This overall result, as we hinted already, hides huge differences; "uneven" is the keyword when trying to assess and interpret the im-

pact of COVID-19 on the book sector. This is obvious, first of all, from a geographical point of view.

"...“uneven” is the keyword when trying to assess and interpret the impact of COVID-19 on the book sector. ”

Winners, losers and the middle ground

A number of markets did surprisingly well during the pandemic. Spearheading this group of "winners" are the Nordic countries. In Norway, the market (educational and trade segments) was up 10% in 2020; in Sweden, sales grew 8.7% in value and 21.5% in volume (trade books); in Finland, the market was up 12% (trade books), and Iceland closed at +4%. In all these cases, digital sales – and especially audiobook subscription services – were the main drivers of growth. In Norway, whereas paperback sales were 10% down in volume, audiobooks increased by 14% (26% via subscription) and ebooks by 3%; in Sweden, print sales grew by 4.1%, while digital sales grew by 22.7%

(subscriptions were up 25%), and for the first time ever unit sales of digital books (including audio) overtook print sales; in Finland, growth was the result of an increase of 2% in print sales and 37% in digital.

The Netherlands also saw a positive year, with the trade book market gaining 6%, thanks to online sales; educational and academic books performed well, too. The consumer publishing sector did well in the UK, too, with sales up 5.5% in value according to some sources; here as well with online sales of print books driving the increase; educational and academic sales here were more negatively affected, however.

Other countries, while not displaying such exceptional results, performed quite well given the circumstances. These include the largest continental markets: in Italy, trade book sales were up 2.4% (0.3% considering only print), and academic books did well, too; in France, different sources indicate a decrease of 2.7% or 4.5% (trade books in retail, textbooks excluded), including digital sales; in Germany, overall turnover was down 2.3%; in Spain, domestic sales were down some 1% (4% including textbooks), while exports dropped by more than 40%. In these cases, the recovery and resilience depended on the reopening (and the remaining open, where possible) of the bookstores and on the retailers' capacity to keep serving their customers through full lockdowns and restrictions, for example via click-and-collect. French booksellers, while affected, were able to maintain on average 60-65% of their business volume thanks to this system. The closure of bookstores just before Christmas prevented the turnover in Germany from reaching the level of 2019.

Similarly, sales in Austria were down 4.4% by the end of the year. In Belgium, book sales were up 5% for Dutch-language titles and down 3% for French-language ones. There are no global figures from Latvia, but data from the biggest bookshops indicate that the market was down by 4%. Turnover in Poland was also down close to 5%, though in this case this was due rather to a contraction of prices due to price wars than to a significant decrease in sales.

The intensification of discounts was seemingly a phenomenon relatively common in some countries of Eastern Europe, where fixed book price legislations are not in place. The market in Bulgaria saw a decrease in value of 10-15%, while volume sales remained comparable to the previous year. Other countries in the region also had a rather difficult year, though not necessarily as bad as initially expected: sales in Hungary and Slovenia were down 20%, 10% in Romania; they fared similarly or possibly a little better in Slovakia and Lithuania, as well as in Estonia (where the feeling is that the decrease could have been between 5 and 10%).

An interesting case was that of Ireland, where sales growth of 9.5% was measured compared to 2020, but Irish-published book sales fell by 6%, highlighting how online discoverability, particularly given the power of UK-based online retailers like Amazon, created a challenging environment for smaller local players.

The year closed clearly in the red also for the book market in Greece, with retail sales down 9.4%, but some sources reporting a decrease of 20-30%. Sales in Portugal were down 17% by the end of the year, partly due to a scarcely developed online sales infrastructure. In all these cases, digital book sales increased, but their overall level was too small to make a difference.

“A number of markets did surprisingly well during the pandemic. Spearheading this group of “winners” are the Nordic countries.”

Online takes it all?

In addition to these wide differences between countries, the impact of the pandemic has been very diverse across several other domains, within each country, such as trade channels, publishing sectors, players of different sizes, and types of books.

We have already hinted at how sales shifted towards the internet, for obvious reasons: brick and mortar bookstores were sometimes closed, and in general people did not feel very confident going shopping in person. Some figures give an idea of the proportion of this shift, as well as of the fact that some trade channels did much better or worse than the average of the sector in most countries.

Among countries that experienced growth, this was driven by online and digital sales: in Sweden, physical bookstores lost 19.1% compared to 2019, whereas online retail and book clubs were up 19%, reaching 51% of revenues, and digital subscription services grew by 25.2%; in The Netherlands, sales in bookshops went down 10%, while

online sales increased by 40%, bringing the two channels almost to the same level.

In Italy, online sales of print books saw their share go from 27% in 2019 to 43% for the year 2020 (having peaked at 48% around the end of the first lockdown). In Germany, brick and mortar bookstores lost 8.7% (almost four times more than the average of the sector's retailers), and in Austria their sales shrank by 12.8% (almost three times more than the average). In Flanders, online sales went up 58%, while bookshops lost between 7 and 10%. Sales through the internet reached 55-60% of all sales in Poland; they doubled in Latvia, going from 5 to 10%; they increased by 50% in Portugal, their share going from 8 to 12%. This goes to show how countries with a weaker online sales infrastructure were likely to suffer more.

The shift towards online sales obviously favoured the players that already had a solid presence on the internet, as well as those who

were able to adapt quickly to the new situation. On the one hand, this meant a strengthening of the position of large online platforms such as Amazon (whose share of sales in the UK, for example, skyrocketed). On the other hand, many small, independent booksellers who were flexible and agile enough to quickly increase their online presence or find creative ways to deliver books to readers – including click & collect options – were able to reduce the damage significantly, and in a few cases even to thrive. Generally speaking, independent booksellers fared better than average in book retail, often supported by the loyalty of their local communities.

Bookstore chains, instead, experienced significant difficulties. One explanation is that these are often located in shopping malls, which in many cases were closed or avoided by customers. More-

over, these shops might have lacked some of the flexibility that helped smaller operators to adapt. Unsurprisingly, bookstores in airports and stations also suffered heavily (and these are mostly chain stores, too). Things were harder also for shops in downtown areas and districts with a high density of offices. These differences notwithstanding, it is worth keeping in mind that all in all booksellers have been among the hardest hit by the crisis in the sector, not least because even those that managed to maintain a good level of sales saw their profits affected by increased costs and investments (in digital technology, online shops, protective equipment, etc.). The booksellers' struggles affected sales of some categories of books, as we will see below.

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Readers' “new” choices

We have already seen how, understandably, sales of digital books and audio books increased in almost all countries surveyed. Digital sales drove growth in the Nordic countries: in Norway, more than one third of books accessed by customers were streamed audio books; in Sweden, ebook sales were up 12.1%, and digital audio book sales grew by 41.5%, with audio books representing 90% of all digital sales; the Finnish audio book market doubled in size.

In Italy, ebook sales went up 37% and audio book sales did so by a stunning 94%. The German trade ebook market grew by 16.2%, passing from 5% to 5.9% of the total market. The share of ebooks went from 3 to 3.5% in Austria, showing a very similar growth rate as in its neighbour, and from 5-6 to 6-7% in Spain. Sales multiplied also in Greece, where some publishers re-entered the ebook market after several years of absence; the overall share remained very small nonetheless – likely below 1%, the same as in Portugal, Latvia and probably other smaller markets.

While almost all countries reported strong growth in ebooks, audio books, or both, in many cases the initial market share of these formats was too small for this to make a difference in the overall result for the year (Nordic countries being the outstanding exception).

Huge differences were recorded also with regard to the impact of the crisis on different book genres. Across Europe (as always, with exceptions), children's book sales performed well, even very well at times: the only segment that grew in Germany (a remarkable +4.7%) and Austria, they also closed the year positively in France, Poland,

and The Netherlands, and mitigated the damage in Italy. Other segments doing reasonably well in some countries include comics, self-help books, cookbooks and books with educational activities for kids. General fiction and non-fiction titles presented more mixed results, although “entertaining” books, offering an escape from the dire situation most people found themselves in, tended to do well. On the opposite side of the spectrum, literary fiction fared worse than the average, as sales of this kind of book depend a lot on booksellers' advice. The case was similar for fine arts and illustrated books. The worst results – in this case really disastrous – concerned travel books, for obvious reasons: the sector shrank by 26% in Germany, by 36% in Austria and by 44% in France, just to name a few examples.

In addition, bestsellers have been reported as performing well, because readers went for well-known authors and titles and because publishers and booksellers often relied on safer bets. There was a resurgence of backlist titles as well, which tend to be favoured by online sales (the “long tail” effect). On the other hand, the crisis affected more significantly the sales of new titles, especially those by younger and lesser-known authors; these were the titles that were most likely to be cancelled or postponed. Frontlist titles were also greatly affected by the cancellation of events (fairs, presentations and so on), which are essential promotion opportunities for new releases.

Adaptability makes the difference – when possible

We have already touched upon the uneven impact of the crisis on different types of retailers and trade channels. This diversity of outcomes was also reflected along the rest of the value chain. Things in general were harder for smaller publishers than for larger groups, for several reasons: small publishers rely more on sales in bookstores, and on fairs and other events; they tend to be specialised, and many are active in the fields that suffered the most from the crisis. Large groups, on the other hand, were able to take advantage of more diversification, larger catalogues, and a higher incidence of bestsellers.

Some publishers managed to safeguard healthy financial results in 2020 despite a broader negative situation and decreasing turnover, due to some of the phenomena previously described. Higher reliance on online sales usually entails fewer returns – but the threat looms of a surge in returns when bookstores reopen and need to make room for new releases. In addition, backlist sales are on average more profitable. The cancellation of titles entailed a reduction of costs, and fewer novelties meant also fewer risks. All in all, the crisis prompted a drive towards increased efficiency, at the expense, however, of cultural diversity.

Maybe the most visible impact of the crisis has been the cancellation of virtually all book fairs and other events. After the Brussels Book Fair in early March 2020, the only other fair that took place in almost normal conditions was the Lisbon Book Fair (an open-air event). Every other fair for the year was cancelled or moved largely online. This affected all players who need the visibility that these events provide, and in particular authors and smaller publishers.

Different experiences also showed that the chances of the sector to adapt to the situation could be greatly enhanced by adequate, targeted support from public authorities. Not only did allowing bookstores to stay open or reopen boost sales; specific initiatives – such as the massive purchase of books by libraries in local bookshops – were extremely helpful for the whole value chain in countries that were experiencing difficulties. On the other hand, the lack of support and understanding from governments could only aggravate the conditions of authors, publishers and booksellers in the countries hit the hardest by the crisis.

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Gratuity on the rise

It is worth touching at least briefly upon a series of other trends revealed by our survey on the impact of the COVID-19 crisis. One such element is the impressive growth of e-lending in many countries; in France, for example, ebook loans via the Library Digital Lending service (Prêt Numérique en Bibliothèque, PNB) grew by 78% in 2020, reaching more than 1 million. US company Overdrive, which provides digital resources to 65,000 public libraries and schools, announced a record 430 million digital book, audio book and digital press loans worldwide via its platform in 2020, which represents a 33% increase on the previous year. Digital books reached

289 million loans, a 40% increase on the previous year; audio book loans were 138 million. Growth in the e-book market would in all likelihood have been even greater if the use of free ebook lending in libraries had not increased as sharply as it did. Research conducted in Germany shows that many users of free electronic lending services have been buying fewer or no books at all since starting to borrow ebooks from their library. A surge in digital piracy was also reported during the pandemic, especially during lockdowns.

Less cultural diversity?

Moreover, the trend already identified in July, which saw many new titles being cancelled or postponed, was confirmed by the end of the year to some extent in many countries. For example, there was a 20% reduction in the number of new titles published in Ireland, close to 10% in France, and more than 16% in Latvia – in the latter, the total

print run fell below 2 million copies for the first time since the country's independence. This is yet another detrimental effect of the crisis for cultural diversity.

Conclusions and the outlook for 2021

The relief at a result that altogether is much better than initially feared is tempered by the diversity of consequences for different players and segments of the book sector. The ones that suffered the most are facing huge difficulties, and their problems could cause more widespread complications in the sector. There is a lot of uncertainty about the potential of the trends that emerged in 2020 to last beyond the end of the crisis, and about the long-term effects of this situation.

Most worrying is how several of these trends are likely to negatively affect cultural diversity: fewer titles have been published, concentration in online retail has increased, brick and mortar bookstores altogether have been hit hard, as have smaller publishers

and lesser-known authors. The subscription model, one of the clear winners of the year, has yet to demonstrate its sustainability and contribution to cultural diversity in the long run. All these elements can spell trouble for the diversity of the sector, if trends are confirmed; less diversity will exacerbate the fragility that the crisis has inevitably generated in the sector.

As 2021 unfolds, the differences persist: in some countries, bookshops are open and doing very well, whereas in others they are closed, with negative consequences already quite significant. In Italy, for instance, where bookstores have been open during the most recent lockdowns, sales were up 20% for the first 6 weeks of the year compared to the beginning of 2020. Bookshops are open

“There is a lot of uncertainty about the potential of the trends that emerged in 2020 to last beyond the end of the crisis, and about the long-term effects of this situation.”

in Belgium, too, with good results. At the end of February, in France, where local lockdowns have been recently enforced, authorities finally recognised bookshops as essential shops, so they will be able to stay open. Germany, which closed all bookshops in most regions as “non-essential” shops just before Christmas, has now re-classified books as essential and allowed their reopening since 8 March; sales for the first 8 weeks of the year had already been affected significantly, recording a -11.7% compared to 2020, and have started catching up since, reaching -8.2% (physical bookstores of course were hit more heavily, with sales down 38.9% by week 8 and 33.8% by week 10). In Portugal, after months of complete closure (even click-and-collect was not permitted), the government allowed the reopening of bookshops on 15 March.

On the other hand, the worsening of the health crisis has caused

closures in many other countries, including some in which bookstores had not had to close before; booksellers have had to close (or still are) in Estonia, The Netherlands, Slovakia, Portugal, Ireland, and Greece, among others – in most cases already during the festive season. In Latvia, bookstores could only sell online in January and recorded a drop of sales of 70% compared to the previous year; now at least they have been allowed to stay open as normal. National publishers' associations, supported by FEP, have been extremely active throughout the crisis in calling for the reopening of the bookshops or for these to be allowed keep on welcoming readers. Such commendable efforts have often proven successful.

Prolonged uncertainty is taking its toll: lockdowns loom, in some cases bookstores open and close every few weeks, support measures are at times missing or hard to obtain, liquidity problems abound and

the possibility to organise events seems still remote – several book fairs have already been postponed or cancelled in 2021. A certain pessimism is creeping in on players in some countries as some fear the worst is yet to come. Attitudes, like everything else, vary. Certainly, the sector could use all the support that public authorities will be able to give to it; this support should apply to the whole value chain, from the creators to the readers (with measures supporting demand in addition to those on the supply side), in the name of safeguarding the diversity of the sector and cultural diversity in general.

It would be simplistic and ultimately inaccurate to focus only on the good news contained in this report and conclude that the book

sector has been left largely unharmed by the COVID-19 crisis. Within the sector, large national disparities exist, as well as between genres and retail segments. In several countries such as Italy, it is also because the public sector stepped in, for instance with massive public purchases of books for libraries, that the whole chain has resisted. As European governments finalise their recovery plans for the affected sectors, and as European institutions are considering further regulating platforms, public authorities should pay close attention to those in the book chain who have borne the brunt of the crisis and ensure that they are able to continue contributing to the cultural diversity that we all cherish.

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