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# Marketers, publishers, editors: Trends in international publishing

Media, Culture & Society  
1–12

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DOI: 10.1177/0163443711416068

mcs.sagepub.com



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Many of those who kept an eye on developments in the publishing industry 10 years ago, anticipated the emergence of an integrated media industry dominated by major international conglomerates.<sup>1</sup> A handful of companies would meet the demand of all the different media and distribution channels. It was expected that there would be an utterly oligopolistic system based on mergers and acquisitions across established media boundaries. Converging media technologies revealed the contours of new business models, in which company size and media mix would be critical. From the book publisher's point of view, the situation appeared ominous: in an integrated media industry, the book would be just one of many distribution platforms for digital content. Traditional publishing would survive merely as a sub-set of converging multinational media groups.<sup>2</sup>

One of the more outspoken critics of the international development of converging media conglomerates was American publisher André Schiffrin. In 2001 Schiffrin described how book publishers were on the brink of adopting the same commercial logic that previously had spread throughout other types of media. Books were now expected to comply with the same performance indicators as magazines, newspapers and television channels. According to Schiffrin (2001), traditional publishers of quality material had so far managed well with an annual profit margin of 3–4 percent. Suddenly, everything was weighed on a financial scale, and Schiffrin identified a number of potentially negative consequences. Publishers would have to abandon their cultural and literary value systems. Outright commercial titles and projects suitable for combination with other media

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platforms would be preferred. From an organizational point of view, the various publishing departments would be linked to and integrated with the corporation's general policy of profitability. Further integration could lead to a demand for profit margins in the neighbourhood of 25 percent annually, according to Schiffrin. As a consequence, Schiffrin's worst fears would have come true: a decline in the role of the editor and outsourcing of the publisher's spiritual centre – the editorial desk.

## From consolidation to specialization

The publishing industry no longer bases its business models on the idea of integration and synergy. A good example of alternative strategies is French publishing giant Hachette. The company is owned by the multinational Lagardère Group, which, among others, took over the Time Warner Book Group in connection with the AOL merger. Through a series of local acquisitions, Hachette has in recent years established substantial publishing groups in France, Great Britain, the US, Italy, Spain, Poland, Australia and Canada, among other countries.<sup>3</sup> The other big French publishing group, Editis, is owned by the financial and industrial conglomerate Wendel Investimente.<sup>4</sup>

These acquisitions and mergers focus exclusively on printed media and editorial competence, and although they also cover other forms of print media such as magazines, the book seems to be the central medium for companies involved in such transactions. Looking at the profit trends of individual international publishers, it appears that a combination of specialized publishing as part of a larger alliance provides the best rate of return. Within the framework of corporations, publishers function more like independent publishing units, and expectations of convergence and synergy are far less widespread today than they were just 10 years ago.

Instead of a continuing trend towards media convergence, we are therefore currently experiencing a situation in which convergence and divergence coexist. Parts of the industry have once again begun to cultivate the book as a medium in its own right. Although consolidation does take place in the publishing world, it does not centre on multimedia. It takes place in the realm of the book itself, as a battle between analogue and digital, offline and online. Publishers of educational materials, non-fiction and scientific, medical and technical (STM) books are especially eager to cultivate their particular specialities, thereby boosting their own importance within the industry. These segments of the publishing business are prime movers in the area of digital media. However, there is also a general trend towards niches and specialization, both inside and outside the major publishing groups. This translates into more competition between individual publishers within a single group, while large publishing multinationals diversify across national frontiers by turning transnational. In spite of increasing globalization, linguistic as well as national and regional characteristics impact the various book markets and the position of publishers. Seven of the ten biggest global publishing groups that operate within the general book market are European. This shows the importance of the publishing sector in the cultural industries of Europe.<sup>5</sup>

At the same time, it is important to bear in mind that the industry's most profitable segment is made up of companies specializing in educational, scientific and professional/trade publications. This means that European publishers are currently facing a particular

challenge in these areas, and Anglo-American dominance in academia and the sciences may ultimately play an important role in other parts of the publishing business as well. Furthermore, it means that the publishing industries in smaller countries in particular will have to confront the question of how educational books and academic publications will be published in the future – in their native language and by domestic publishers, or through international publishing enterprises? Economies of scale depend above all on the prevalence of a given language and its position in the global hierarchy of languages.

## Organizational vs. technological convergence

Our interviews with prominent leaders in the international publishing industry in September 2009 gave us insight into the various effects of convergence that were attempted *within the individual publishing company itself*, rather than the publishing group as a whole. One of the few publishers still controlled by an American-based media conglomerate (CBS/Viacom) is Simon & Schuster. In September 2009, the company's CEO, Carolyn Reidy, declared that the alleged synergy between books and other types of media was 'a myth'. Certainly it was possible to promote books with the help of other media within the same company and without making the content itself available via other media platforms. But Simon & Schuster exploited its connection with the parent company mainly to produce videos in conjunction with the publication of books. *Vooks* (video + books) were an attempt to bring authors into contact with a new readership. Videos with interviews and background material by and about the authors were presented on the publisher's home page. The book, although still central, had increasingly turned into a 'community project'. Special attention was given to promotional strategies targeting forums and networks dominated by women, where authors were promoted as brand names. This type of 'community thinking' meant that authors had to be encouraged to enter into a direct dialogue with their readers, both face to face and via the internet. The videos themselves were straightforward in-house productions, and authors were able to add texts or exchange blog comments directly with readers. Particularly in the area of general fiction, the ability to communicate with readers personally has become an important sales factor that can compensate for the more traditional brand impact enjoyed by only a few authors.

Another issue publishers continued to address was the implementation of organizational expertise across editorial departments. Carolyn Reidy considered it essential that imprints, the various trade names under which books are published, maintain their integrity under the umbrella of Simon & Schuster. Convergent services increasingly took on the role of maintenance and support in connection with logistics, legal issues, marketing and ICT. In other words, we are talking about *organizational* convergence, characterized by greater efficiency, optimization and cost control *within the publishing unit*, rather than *technological* convergence based on recycling, reuse and economies of scale *within the entire group*.

There are also other reasons why these publishing units have not been sold off, but remain independent units within the major media companies. First, they represent a certain symbolic capital and status for media companies involved in publishing. Books continue to have more prestige than television or film, we were told by several industry

leaders, and publishers are allowed to operate with lower profit margins than elsewhere in the company. Another reason is that some publishing units simply are not that easy to dispose of: it is rumoured, for example, that News Corporation has long wanted to rid itself of HarperCollins, if only they could find a buyer willing to pay an acceptable price.

Thus organizational convergence largely occurs *within* the publishing industry as a whole, rather than merely within the narrow field of the book itself. Publishing is no longer confined to books, but also includes magazines, newspapers, journals and educational materials in printed as well as in digital formats. One prime example of this is Time Warner, which controls over 150 different magazines and journals worldwide. Publishers buy up other publishers in order to position themselves in print media. In many ways, this type of horizontal integration goes back a long time, even long before the digital age, but technological advances in reading tablets and digital libraries have made the strategy more imperative and complex than before. The development of digital solutions and products is frequently centralized along with distribution and financial services, while the development of content and editorial products takes place within individual publishing houses and their various imprints.

Rather than seeing the contours of a converging oligarchic publishing industry, we see those of strong, specialized publishing groups both inside and outside of major companies. Publishers that have been absorbed by one of the large multimedia groups do particularly well, although there are strong indications that they are allowed to operate at lower profit margins than other divisions within the company. Today's technologies and production procedures also provide opportunities for new niche publishers to establish a position outside areas dominated by the major corporations. There is a steady supply of small, expeditious market players, while larger publishing houses buy up new imprints and bolster their own, particularly in the US.

## **Imprints, long tails and backlists**

Imprints are established in one of three different ways in the publishing business. This occurs particularly when major publishing groups buy up smaller publishers and they maintain their organizational integrity within the parent company. They become imprints when the parent company assumes responsibility for accounting, distribution and marketing, while an editorial staff manages brand names and positioning vis-a-vis authors and readers. Parent companies may also take an active part in establishing new niches and trade names in order to meet the competition from smaller niche market players. The large corporations have realized that innovation and development frequently are most effective at an arm's length from the parent unit. In some cases one would hesitate to make any changes whatsoever after acquiring a publishing company, and choose instead to maintain it as an independent organizational unit under the corporate umbrella.

One indication of a less oligopolistic trend in the book industry is the ability of niche and specialty publishers to establish and strengthen their market positions. In part, they have achieved this by creating their own distribution channels through specialty bookstores, and distribution increasingly takes place via the internet. Releases include everything from poetry to mysticism and technical literature. Even well-established niche publishers and small, specialized academic publishers who take advantage of their own

backlists can to some degree maintain their position through digital distribution. New net-based distribution channels breathe life into old books and publishing alike. Small domestic niche markets now have the opportunity to think globally with respect to exile communities and scattered ethnic or religious groups.

This is a good illustration of the publishing industry's new opportunities to exploit the 'long tail'. On his blog in November 2005, the inventor of the term, *Wired* magazine's editor-in-chief Chris Anderson, commented on how the publishing industry and niche publishing fit into the book market as a whole.<sup>6</sup> He estimates that the long tail is responsible for approximately 15–16 percent of the total US book market. Anderson and other commentators expect this particular long tail to grow through print-on-demand and other electronic distribution methods. As Richard Sarnoff of Bertelsmann US pointed out to us, the importance of backlists will increase, and publishers will have to find better ways to exploit them. He further emphasized that Bertelsmann's various sub-publishers were competing against one another, not least in order to win over bestselling authors. This trend allows niche publishers to increase the possibility of finding their place in a book industry that is converging and diverging at the same time. The challenge for small and medium sized publishers, however, lies in finding the proper distribution channels.

## Bookstores and other distribution outlets

While many national characteristics and different international trend patterns must be taken into account, it seems that independent bookstores may be losing ground. Chains dominate the market, and even they are enduring hard times. Battered by competition from internet retailers and burdened with too much debt, the major US book chain Borders filed for bankruptcy protection in February 2011 and planned to close one-third of its shops and concentrate on e-books and non-book products (Checkler and Trachtenberg, 2011). In Norway, we are more familiar with publishers that have acquired and developed bookstore chains and thus established a market with pronounced vertical features. In Norway the three main publishers own the big bookstore chains. We see similar developments in other countries, such as Germany, but not in the United States. Booksellers are facing problems throughout the US, and the sale of digital books is becoming increasingly important. Only booksellers located in large shopping malls, or in cities with a traditional book-reading public and large educational institutions, such as New York or Boston, will survive – although on 31 August 2010, the *New York Times* announced that Barnes & Noble on Upper West Side would close down early in 2011 (Bosman, 2010b).

But this is mostly an American development, and we must remember that US booksellers traditionally have had a far less central position than in Europe. Europe is not experiencing the same type of development, partly due to business agreements between publishers and booksellers, for example, those in Norway and Germany with net book agreements, and France and Switzerland with literature laws. Nor has the development of retail chains been quite as rapid in Europe as in the United States. With the exception of the situation in Great Britain, European bookstores – chains and individual booksellers alike – seem to be doing reasonably well. Still, here too there is a growing feeling of

insecurity concerning the future, as there is among the small, specialized bookshops, the '*bouquinistes*' on the left bank in Paris (Chrisafis, 2008).

Booksellers are vulnerable. The industry is capital-intensive, with major expenses for storage and large numbers of books on the shelves, many of which remain there for a long time before they are sold. In recent years, numerous alternative distribution channels have been established. Kiosks came first, followed by book clubs, and now supermarkets and chain stores such as Walmart have entered the market. Bestsellers are sold at major discounts in supermarkets; in Britain the Tesco supermarket chain commands extremely high discounts from the publishers (Thompson, 2010: 55–7).

Online bookstores such as Amazon have been around for quite some time, and now the e-book revolution is in full swing. Some of the larger quality bookstores are still doing well, but the question is whether they will be able to survive if the print-on-demand and e-book markets experience substantial growth. Experiments with selling books in new ways are under way: Blackwell's bookshop in Charing Cross Road in London now has a machine called Espresso. In the course of five minutes it can print and bind a paperback edition of a book that exists in digital form (*The Economist*, 2010). And Barnes & Noble, the world's largest bookstore chain, has developed its own e-book reader, *The Nook*.

There is some disagreement as to whether Amazon will emerge as the main digital outlet for all publishers. Many would feel threatened by such an outcome and publishers are wary of Amazon.<sup>7</sup> Admittedly, Bertelsmann, which also has a stake in Amazon, has fewer objections than any of the other publishers we interviewed. Just how the ongoing price war will eventually affect the bottom line in e-book sales, is one of the most prominent questions. Amazon sells all its e-books at US \$9.99, despite paying a higher price to publishers. The entire global e-book market would be affected if Amazon's customers and those of other major players were to get used to these extremely low prices. At the end of January 2010, Macmillan confronted Amazon about the price of the e-books Amazon was selling in connection with its own Kindle device. Macmillan demanded that the price of new books should be higher than Amazon's US \$9.99. Macmillan won the battle after one week during which Amazon had boycotted the publisher and its various imprints, among them Farrar, Straus & Giroux and St. Martin's Press. When Amazon realized that it would have to face competition from other e-book distributors with reading tablets such as Sony, Google and Apple with its iPhone and especially the iPad, it became clear that publishers were able to play distributors out against one another. Apple suggested an agreement whereby the company would act as a kind of agent for the publisher in return for a 30 per cent distribution fee. The rest would go to the publishing company, which in turn had to negotiate with writers and their agents for their share of the proceeds (Rich, 2010). An example of the kind of struggles taking place in the field is the announcement in July 2010 by leading literary agent Andrew Wylie that he had started his own publishing venture called Odyssey. The aim was to unite the digital and print revenue streams. The initiative immediately encountered protests, first from Random House, and it ended with Odyssey removing their titles from their programme. Later, 50 French publishers protested against Wylie's move by insisting that electronic rights and printed book rights have the same basis with the publishers, and that agents should not position themselves as competitors to publishers over the rights of authors,

among other things. This struggle illustrates well the murky waters that rights in the e-book sectors represent (Bosman, 2010a; Cassasus and Jones, 2010; Deahl, 2010; Li and Gapper, 2010).

Ultimately, this may mean that unregulated book markets will adopt a four-part distribution structure. In all likelihood, one or perhaps a few large chains will remain, with a smaller selection of books than before. In addition, there will be a few specialty stores for niche books. That being said, most long-tail sales will take place over the internet – via print-on-demand – in combination with the evolving e-book, and with Amazon and Google as the most likely dominant players in a global market.

## Cycles, genres and bestseller thinking

As things stand at the moment, different types of publishing houses face different challenges. The general book market demands an ever-greater number of bestsellers. Studies show that a global market has been established for a few international bestsellers that spread rapidly and simultaneously over large parts of the world. More than before, major publishers' earnings are the result of such unique sales phenomena as the books by Dan Brown and Stephenie Meyer. At the same time, national bestsellers tend largely to be associated with specific genres (Kovac and Wischenbart, 2009a, 2009b). In the 12 months between April 2008 and March 2009, 7 of the 40 bestselling titles were identical in four or more Western European countries. Fourteen of these were originally written in English, indicating that the search for global bestsellers among international publishers currently favours books in English. At the same time, the English-language markets are also the most difficult to break into for writers with other native languages. Only a handful of authors writing in languages other than English make one or two bestseller lists outside of their own language area. There are a few exceptions, of course, such as the books by Swedish crime author Stieg Larsson, but for the most part these are the exceptions that prove the rule. The study of translations between different language areas provides an interesting indication of the continuing and increasingly lopsided relationship between centre and periphery in international publishing.<sup>8</sup>

In all other regards, the top titles on the various bestseller lists largely consist of books from their own respective language area, which, with the exception of a few blockbusters, find it difficult to attain major international success. One interesting aspect of the bestseller phenomenon is that those who buy and read bestsellers do not read much else. Someone who only reads one or two books a year will therefore most likely pick up the latest novel by Dan Brown, but not buy any other types of books (*The Economist*, 2009). At the opposite end of the scale, one finds those who read typical 'long-tail books'. These are avid readers with a variety of tastes, who tend to expect a certain standard from the books they read. It is therefore important to distinguish between different literary cycles; in the bestseller market, for example, particular attention should be paid to what is often referred to as pulp fiction, popular literature or the mass market.

European bestseller lists also illustrate an interesting trend in the area of translated literature. Many of the books that sell best in multiple markets are international releases that cross geographical and language boundaries. Yet it is also a fact that a given novel can do well in one or two countries without seeing an international breakthrough. Apart

from the obvious bestsellers, there are strong indications that translated literature is generally in a more difficult position than before. This may be due to two main factors. First, the battle for media attention has become fiercer, with a particular focus on national authors and big international names in the individual book markets. This means that even exceptionally well-translated books do not receive the coverage they deserve. The second factor is related to pressure exerted in connection with the distribution stage, with bookstore chains devoting more attention to bestsellers and books that receive media coverage than to books expected to appeal to a limited readership. In this context, it is worthwhile to point out that although some titles may not perform well upon their release, they can be revived as paperbacks or e-books and become part of the long tail. Thus, translated literature may ultimately become an important part of publishers' new backlist strategies.

## What is a publisher?

Historically speaking, publishers emerged as industrial and economic players at the interface between a growing, more literate readership and an increasingly professional field of authors. Publishers are positioned at the intersection between what may be called cultural production on the one hand, and the marketplace, or commerce, on the other. From there, they deal with the various aspects or tasks associated with the field of literature and its economy of symbolic commodities. Different languages variously refer to publishing houses as 'Verlag', 'publishers' or 'éditeurs'.

Germanic languages use the term *Verlag* (German). Originally, a *Verlag* had the function of organizing the production and marketing of handicrafts, especially in connection with the manufacture of textiles. The *Verlag* sub-contracted individual craftsmen who sat at home and made their products, which then were brought to market. The term *Verlag* derives from the verb *verlegen*, literally 'to bring from one place to another', because they either paid manufacturers an advance, or supplied them with raw materials for production. Eventually, when the term became associated with book publishing, the *Verlag* was the player that brought the books to market and negotiated contracts with authors. Thus, the Germanic term emphasizes the publisher's *financial* role as a link between a private economy (the author's) and a collective economy (a market).

English uses the term 'publisher', that is, an institution that makes certain content available to the public. The emergence of a bourgeois public sphere, as described by Jürgen Habermas, provides a backdrop for understanding this aspect of the publisher's role. Indeed, Habermas points out that parallel to the development of a reading public in Europe at the beginning of the 18th century, publishers began to take on the role of both client/employer, as well as the agent responsible for bringing the author's works to the literary market and to culture in the public sphere. Whatever an author writes assumes significance as a statement in a larger public context. A 'publisher' therefore fulfils an important legal and political function by making the author's works publicly available. German uses the term *Herausgeber* to describe enterprises in the publishing industry. One could say that the notion of a publisher or *Herausgeber* highlights the *normative and legal role* of the publishing business when it transforms an otherwise private statement (the author's) into a public one (the publisher's).

Romance languages refer to the publisher as an *editeur* (French) or *editore* (Italian), that is, someone who edits, a term we will use to remind us of the third aspect of the publisher's role in the literary arena. It refers to the processing of textual material supplied by the author. In the role of editor, a publishing company gets directly involved in the author's production process for the purpose of influencing and refining the written text. This implies a *cultural function*, the practice of which ensures that concepts and notions of quality and good literary craftsmanship are safeguarded, applied and challenged in the meeting between author and publisher.

These three functions are affected in a number of ways by ongoing changes in the international publishing and media industries. It is the close connection between the three key participants writer/producer, editor/publisher and the public, that creates the conditions under which literature in all its guises will continue to rise above the level of converging interests and purely commercial media production. Herein lie the real opportunities and challenges publishers have to face.

The new world of digital publishing will pose a considerable challenge to authors. In connection with the publication of research, we observe a tendency where those who finance the research, and possibly the authors themselves, now frequently have to pay in order to ensure quality control and publication of their articles and books. This applies to analogue and digital releases alike. When it comes to publications in the general book market, we may see changes regarding authors' contracts and copyrights. In the first place, it is the author who puts in the most important initial investment by preparing a manuscript and thus creating a basic product. This begs the question of how this product should be communicated, and by whom: by the author himself? By a publisher? By a digital distributor and print-on-demand service? And how much of the proceeds should the author receive?

In the second place, books are frequently the result of initiatives and efforts launched by the editorial staff of a publishing company. Questions arise as to distribution, remuneration and intellectual property rights. Should the author continue to be regarded the sole originator? Or will publishers in future be able to claim copyright privileges on the basis of having initiated a project? Should authors receive compensation in the form of a one-time fee or by collecting royalties?

This will affect the contracts between authors and publishers. Of importance in this context, for example, is the issue of when the rights to a book should be assigned back to an author because the book is no longer 'in print'. In the digital world, in which analogue and digital distribution coexist (online, e-book, print-on-demand, etc.), a book is, in principle, never 'out of print'. This may eventually lead to agreements between authors and publishers being designed in such a way that separate conditions of contract will be worked out for each form of release.

Contrary to popular belief, and with a view to the advancement of different types of electronic and digital publishing, we expect the role of the editor to become more important. A 'book' will increasingly be the result of collaboration between writer and editor. If this cooperation is to spawn quality products, pressure from the distribution stage must not become excessive.

Increasing internationalization and intersecting ownership relations across national borders and language boundaries also raise a number of cultural and political questions

about the kind of audiences publishers are trying to reach and maintain in the future. And what type of product they will utilize. Not surprisingly, perhaps, we believe that the publishing products of the future will consist of traditional as well as of digital books. The printed book will not disappear, but coexist with electronic publications on different platforms and via different standards for a long time to come.

Despite the major changes currently taking place in the international publishing world, we conclude that the three traditional functions of a publisher will remain central. The industry has to contend with two contradictory currents: convergence and divergence. Large, consolidated publishing groups and small niche publishers will exist side by side, while many medium-sized publishers will have to take a clearer stand on either catering more to the market, or venture to stand or fall by a distinct cultural profile and commitment. While this development lends a stronger position to transnational companies, national interests will not disappear. It means that the book industry will continue to do business and, at the same time, retain its important function as a promoter of cultural values and products. Regardless of whether publishers are consolidated into larger multinational business empires, they will have to stand out and operate as credible cultural institutions. Therefore, and despite growing tendencies to consolidate the industry nationally as well as internationally, we believe that there will be sufficient dynamic latitude. All over the world, independent publishing is on the rise. New niches and opportunities are constantly explored in the various book markets. Hopefully, they will exist in future as well, whether in digital or in analogue form.

Books are our oldest mass medium, and the first cultural industry to develop on an international scale. Thus, as digitalization spreads over the media landscape, media researchers must again turn to the study of the book as a medium. In this article, we have addressed the economic and market-related trends currently emerging in the international publishing industry.

## Notes

1. This article is the result of research undertaken on behalf of the Norwegian Non-fiction Writers and Translators Association (NFF). It may also be read as a parallel perspective to that presented by John B. Thompson in his recent excellent book on the publishing industry, *Merchants of Culture* (2010).
2. Our presentation of what has happened in the last 10 years in publishing is based on analyses of financial data about the industry and the key players in the international arena, as gathered from trade journals, newspapers and international technical publications. In addition, we have consulted the financial and strategic documents of publishing companies, as well as independent financial analyses and reports from recent years. Our most important source of information, however, has been a series of interviews we conducted with leaders of international publishing houses in New York in September 2009. Tina Jordan of the Association of American Publishers provided invaluable help in setting up these interviews.
3. See: <http://ketupa.net/hachette.htm>.
4. See: <http://www.editis.com/content.php?lg=en&id=51>.
5. The European dominance in the publishing industry was one of the reasons why a consortium of European publishers' and authors' associations entered into an agreement in 2004 to study the European book market in order to arrive at mutual solutions, judicial frameworks and network alternatives that would further strengthen their position. See [www.booksineurope.org](http://www.booksineurope.org) for cooperation agreements and the final report.

6. See: [http://www.longtail.com/the\\_long\\_tail/2005/11/sizing\\_the\\_book.html](http://www.longtail.com/the_long_tail/2005/11/sizing_the_book.html).
7. There is much uncertainty around Amazon, says Paul Aiken of the Authors Guild: 'If Amazon wins the game they are playing ... it's a scary situation.' Our other conversations with international publishers evinced a variety of views about Amazon. Richard Sarnoff of Bertelsmann, for example, believed that Amazon 'was the future', and that his own company could not possibly achieve better sales than through Amazon. David Young of Hachette expressed a more critical view: he experienced Amazon as extremely aggressive, forcing discounts from smaller publishers in a way that showed 'where power is on its way'.
8. Johan Heilbron (1999) and Gisèle Sapiro (2009) have developed the field analytical approach into research methods capable of mapping the degree to which the international sociology of translation continues to be hierarchically structured.

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