

ENGLISH-LANGUAGE READING IN  
THE NETHERLANDS AND ITS CONSEQUENCES ON  
DUTCH-LANGUAGE PUBLISHING

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A thesis submitted in partial fulfilment of the requirements of Edinburgh Napier  
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## Declaration

This thesis is presented in accordance with the regulations for the degree of Doctor of Philosophy and is the result of the my own independent work. The work has not been submitted for any other degree or professional qualification. None of the material associated with this research has been published elsewhere yet.

Date: 12 January 2020

Signature:



# Abstract

English-language proficiency, and thus the number of consumers able to read in English, is rapidly growing in Europe. Concomitantly, digitization and online retailing make English-language books readily available to consumers.

Whilst representing an opportunity for Anglophone publishers to export to non-Anglophone markets, this constitutes a significant threat to local publishers, as they must face competition from English-language editions. Perhaps due to the relatively recent upsurge in this trend, this phenomenon and its consequences on local-language publishing have been little studied. This thesis helps fill this gap by undertaking an empirical study on English-language reading in one of the European countries with the highest level of English proficiency: the Netherlands.

Drawing on the theoretical framework of field theory, two methodological approaches are adopted in this study: 1) quantification of the scale of the phenomenon by gathering statistics on English-language sales in Europe and the Netherlands; and 2) investigation of how Dutch publishing and translation professionals are affected by this issue through in-depth qualitative interviews.

The quantitative results show a steady rise in English-language books sold in the Netherlands between 1976 and 2018, when they accounted for 15% of the trade book market. The qualitative results show that the main defence strategy used by Dutch publishers is to release translations simultaneously with English-language originals. However, through acceleration of publication rhythms, simultaneous publication was felt to exert significant pressure on publishers and translators. Also, Dutch publishers indicated they increasingly concentrated on publishing Dutch originals and non-Anglophone books.

This study enhances Dutch publishing professionals' awareness of this phenomenon and lays the foundations for self-reflection. Moreover, its findings set the basis for further research into this topic in the Netherlands as well as in other markets and fields facing similar challenges.

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## List of abbreviations

AAP	American Association of Publishers
ASEAN	Association of Southeast Asian Nations
CA	Conversation analysis
CPNB	Stichting Collectieve Propaganda van het Nederlandse Boek
DA	Discourse analysis
EAP	English for Academic Purposes
EC	European Commission
EEA	European Economic Area
EF	Education First
ELF	English as a Foreign Language
EU	European Union
FBP	Fixed book price
GAU	Groep Algemene Uitgevers van het Nederlands Uitgeversverbond
Gfk	Growth from Knowledge
HAVO	Het hoger algemeen voortgezet onderwijs
HMRC	Her Majesty's Revenue and Customs
IPA	International Publishers Association
ISBN	International Standard Book Number
IT	UNESCO's Index Translationum
KVB	Koninklijke Vereniging van het Boekenvak
L1	Language one (native language)
L2	Language two (second language)
MBO	Het middelbaar beroepsonderwijs
NF	Non-fiction
NIPO	Nederlands Instituut voor de Publieke Opinie
PA	Publishers Association (UK)

P&L	Profit and loss statement
PASM	Publishing Association Sales Monitor scheme
QDAS	Qualitative Data Analysis Software
RPM	Retail Price Maintenance
SMB	Stichting Marktonderzoek Boekenvak
SS	Stichting Speurwerk Betreffende het Boek
TFEU	Treaty on the Functioning of the European Union
TPO	Tweetalig primair onderwijs
UN	United Nations
USSR	Union of Soviet Socialist Republics
VMBO	Vorbereidend middelbaar beroepsonderwijs
VVTO	Vroeg vreemdetalenonderwijs
VWO	Vorbereidend wetenschappelijk onderwijs
YA	Young Adult

# Chapter 1: Thesis Introduction

## 1.0 Thesis overview

English-language proficiency in Europe is growing. The most recent European survey on linguistic skills (Eurobarometer 386) shows that around 38% of Europeans speak English, with the share being close to 90% in some countries (e.g. Netherlands, Sweden and Denmark) (European Commission, 2012). Moreover, almost 100% of European pupils now learn English in primary and secondary education (Eurostat, 2015), while internationalization – and therefore English-medium teaching – has risen sharply in European higher education in the last two decades (+239% between 2007 and 2014), with the Netherlands, Germany and the Nordic Countries being at the forefront of this trend (Wächter & Maiworm, 2014). The advancement of English in Europe – especially among young educated Europeans – means that potential number of bilingual readers in non-Anglophone European countries is constantly growing. Simultaneously, technological developments in publishing, such as digitization and internet retailing, are helping make English-language products easily discoverable and readily available to consumers (Steiner, 2005; McCleery, 2015, Kovač, 2014; Rivièrè, 2017).

Such trends can be expected to have serious repercussions on the reading habits of bilingual Europeans and, thus, the publishing industry. Although these trends represents huge opportunities for Anglophone publishers to export their products to non-Anglophone European markets, they represent a significant threat to local-language publishers, who potentially see their market share diminished by English-language products.

The effects of these trends on the European trade publishing industry are still insufficiently studied, with relatively few contributions in publishing studies addressing this issue (e.g. Steiner, 2005; Kovač & Wischenbart, 2009a and 2009b; Kovač, 2014; Craighill, 2013 and 2015, and McCleery, 2015). Moreover, to this researcher's knowledge, none of these contributions includes an empirical study of this phenomenon.

Thus, this thesis aims at filling this gap by carrying out the first exploratory empirical study on how the phenomenon of English-language reading in a European country with high average English-language proficiency (the Netherlands) impacts on the local-language publishing scene. Although English-language reading in non-Anglophone areas concerns all industry areas (e.g. educational, academic, professional, trade publishing, etc.), the present research sets out to examine the effects of this phenomenon on the trade sector (fiction, non-fiction and children's literature categories). In particular, this thesis concentrates particularly on the perspective of European book producers (i.e. publishers) who are potentially affected by increasing competition from English-language products. Consequently, the study provides an insight into how increasing English proficiency in Europe impinges on the reading habits of Europeans and how this in turn has a consequent impact on the publishing practices of local-language trade publishers. The consumption of English-language titles interests many non-Anglophone countries of Europe (see the statistics in Chapter 4); however, in order to focus on a specific area with sufficient depth, the study concentrates on one national context within Europe (the Dutch book market).

The reason for choosing the Netherlands as a case study is the high penetration of English in Dutch society and the fact that English-language reading is already

quite popular in this market and has been so for a long time (Edwards, 2016). Also, the book market in the Netherlands is highly dependent on translations, with most translations originating from Anglophone countries (Heilbron, 2008). Given this reliance on Anglophone translations, the competition of English-language books can be expected to have severe repercussions in this market.

Thus, the Dutch book market represents a good case in point to investigate how the competition of English-language titles influences the publishing practices in a small/medium book market highly focused on Anglophone translations. While the findings of this thesis are mostly relevant for the Dutch book market, it is hoped they can serve as model and initial reflection for future research into the influence of English-language reading in other non-Anglophone publishing markets.

To examine the issues described above, the research adopts two different methodological approaches. In one it showcases statistics on English-language export sales into Europe and into the Netherlands to provide a quantitative account of the scale of the phenomenon under study. In the second, the role of English-language titles in the European publishing market is considered from the perspective of Dutch publishing and translation professionals through in-depth qualitative interviews exploring the consequences that English-language reading has on the Dutch-language book market and the strategies that local players adopt to cope with the competition of Anglo-American editions.

In its consideration of a relatively small publishing market such as the Netherlands, the study also investigates issues such as the power relations and imbalances involved in the competition between local companies (Dutch publishers) and global players (Anglo-American publishers). In this respect the



findings show that the competitive advantage held by global publishing conglomerates cannot be easily overcome by Dutch companies, who often struggle to maintain their competitive pricing strategies vis-à-vis English-language imported editions.

As this thesis demonstrates, the main approach Dutch publishers adopt to limit the damages inflicted by competing English-language editions is by aligning the Dutch publication date to the publication date of English-language original editions. This is the most salient defence strategy adopted by Dutch publishers to cope with the competition of English-language editions. Yet, such simultaneous publication bears an influence not only on the publication strategies of Dutch publishers, but also on the translation workflow and duration, given that the time frame available for translating a book is shortened significantly, thus making the process more hurried. This thesis analyzes the ramifications of simultaneous publication on the Dutch publishing industry, both in terms of publishing and translation practices.

The remainder of this introductory chapter provides an overview of the thesis structure chapter by chapter, as well as a broad contextualization of the position of English in Europe, with a specific focus on the role of English in the Netherlands.

## 1.1 Thesis structure

This thesis is divided into eight chapters. This first introductory chapter contextualizes the research within the framework of the expansion of English in contemporary society, with particular emphasis on the situation in Europe and in the Netherlands. By doing so, the chapter provides a background against which the phenomenon of English-language reading in Europe can be situated. The

discussion demonstrates that English is already a pervasive presence in the lives of Europeans, especially among the younger generations. Particular attention is devoted to the factors contributing to the advancement of English (among others the exponential growth of English-medium higher education). Overall, by contextualizing the phenomenon under study, the chapter highlights the topicality and the value of the present research. Furthermore, by focusing on the growing Anglicization of European higher education, it raises the question of whether such developments could further contribute to intensify the phenomenon of English-language reading in non-Anglophone countries in the near future.

Chapter 2 provides a general overview of Pierre Bourdieu's field theory, which represents the theoretical framework underpinning this study. Furthermore, it maps the context of this research (the international field of publishing) and provides an overview of the available literature addressing the transnational circulation of books. The chapter first explains how Bourdieu's key notions have been applied by Bourdieu himself and by Thompson to the study of the publishing field, and how these concepts will be specifically applied in the context of this thesis. The discussion then moves on to address the transnational circulation of books by way of translations. As demonstrated by the sociology of translations, patterns of book circulation are deeply influenced by the power relations between languages which results in the domination of Anglo-American translations worldwide. The chapter then deals with the other way that books have to circulate internationally, i.e. export. In particular, the chapter delves into the available literature regarding the export of Anglophone books into non-Anglophone European countries, with a special emphasis on the Dutch case. The discussion first provides an historical overview of the export of British books to the

Netherlands during the nineteenth century; this overview demonstrates that the Netherlands has a long history of importing English-language books. Given that Dutch publishers have been competing with English-language editions for a long time, the Netherlands represents a clear case in point to study the strategies devised by local-language publishers to resist the competition of English-language books. Then, the chapter reviews the available studies on English-language exports in Europe today and highlights the existing knowledge gaps that justify the present study. Lastly, the chapter considers some key themes and regulations influencing the export of Anglo-American books into the European open market, such as the role played by online retailers and digitization, and the effect of Retail Price Maintenance regulations on the pricing of English-language editions in Europe. By outlining the multitude of players involved and the variety of factors that come into play when examining the dynamics of competition in the European book, the section emphasizes the difficulties of studying such a complex and crowded trading floor. At the end of the chapter the study's research questions are outlined.

The methodology chapter (Chapter 3) provides a broad introduction to research paradigms, research strategies and methodologies, and describes the specific methodological framework and data collection method employed in this research. The study consists of a mixed-method approach, putting together quantitative evidence and qualitative findings. The quantitative part of the thesis consists in a showcase of the available statistics regarding sales of English-language titles in Europe and in the Netherlands. The qualitative part of the study instead consists of expert in-depth interviews to publishing and translation professionals operating in the Dutch publishing field. Qualitative interviews were chosen for their ability to stimulate self-reflection and produce insightful and rich data; in

particular, this method allowed the researcher to gain a deep understanding of participants' attitudes towards the issue of English-language reading, as well as providing a meaningful insight into the motivations that determine their choices and guide their publishing strategies.

Chapter 4 presents the findings of the statistical analysis of the export flows from the two leading exporters of English-language books, the UK and the US, towards Europe, both in terms of digital and physical exports. The statistics relative to British exports cover a period of 17 years, from 2001 to 2017, while American figures run for a much shorter period, from 2012 to 2015. The statistical analysis shows that export sales represent an important source of revenues for Anglo-American publishers and that Europe is one of the leading export destinations for both US and UK publishing companies.

Chapter 5 presents the second part of the quantitative analysis and concentrates specifically on the Netherlands, by analyzing the available statistics regarding sales of foreign-language books between 1976 and 2018. The analysis relies on two datasets, namely the Stichting Speurwerk Omnibus material (covering the period 1976-2000) and the more recent material provided by the research company GfK that currently performs market research on the Dutch book market (covering the period 2007-2018). Due to methodological differences the two datasets are difficult to compare against one another. The more recent GfK data indicates that the value of English-language sales is rising in the Netherlands and that non-fiction is the most popular category, followed by fiction and by children's literature. Thus, these statistics confirm the hypothesis that English-language reading is currently growing at a fast pace in the Dutch book market. Furthermore, GfK data shows that there are differences between genres and that non-fiction is the area where English-language editions enjoy the most success.

Chapter 6 presents and discusses the findings of the qualitative interviews to Dutch publishing professionals. The chapter is organized in various sub-sections addressing the following issues:

- Dutch publishers' perceptions on the competition of English-language editions;
- how Dutch publishers' assess whether a specific title risks being affected by the competition of original editions;
- the issue of simultaneous publication, which represents the key defence strategy used by Dutch publishers to avoid losing readers to English-language originals;
- the issue of price competition between English-language editions and Dutch books;
- the situation in the Young Adult literature segment, which is the area of Dutch publishing that is most harmed by the competition from English-language originals;
- the increasing presence of local authors and non-Anglophone ones and how this trend is related to the competition from English-language authors.

Chapter 7 concentrates on analysing the results of interviews with Dutch-to-English literary translators; in this chapter, the influence of simultaneous publication on the translation process is explored from the point of view of translating professionals.

Overall, the key finding emerging from the analysis of qualitative data is that simultaneous publication is considered to be the most feasible and effective defence strategy by Dutch publishing professionals. Simultaneous publication in

turn bears a deep influence on the acquisition and publication practices of Dutch publishers, as well as on the activities of translators. An ongoing issue is that due to the restricted size of the book market in the Netherlands as compared to the global nature of the operations of competing Anglo-American companies, Dutch publishers struggle to lower their prices to match those of English-language editions. In addition, the data indicates the existence of a new trend, whereby Dutch publishers are concentrating more on Dutch-language original books and on books in languages other than English, as a way to facilitate their marketing and promotion efforts, to reduce the production costs, and to counter the issue of competition from English-language originals.

Chapter 8 draws the final conclusions from the study, describes its limitations and outlines some suggestions for further research in this area.

## 1.2 English in today's society and its role of international lingua franca

An historical overview of how English became the world lingua franca provides a context for the European and Dutch situation. The transnational transmission of books rests primarily on linguistic intelligibility (De Swaan, 2001) and thus, a bilingual audience that can access the text without the need of translation (ibid). Ultimately, this means that this modality of book transmission is tightly connected to a sociolinguistic phenomenon of foreign-language proficiency among a given population. Indeed, books written in languages that are widely spoken benefit from having a large audience and greater total market, even for specialized literature (Feather, 2003). Notably, given English's prominence as the foremost international language (Seidlhofer, 2011), anything published in English has access to a very wide audience.

Significantly, some estimate that there are around 329 million people using English as a first language (L1) and a huge number of approximately 430 million using it as a second language (L2) (Crystal, 2003). A more conservative assessment is instead provided by the *Ethnologue* website which estimates the number of L2 speakers at 199 million (cited in van Parijs, 2011). At the end of the 1990s, a study commissioned by the British Council estimated that around 1 billion people worldwide were learning English as a foreign language (EFL) (Graddol, 1997). If we put together these rough estimates, the number of speakers amounts approximately to 1.5 billion people (including L1, L2 and EFL speakers) – meaning that one in four of the world’s population is somehow able to communicate in English, although with different levels of proficiency (Crystal, 2003).

Nevertheless, as highlighted by van Parijs (2011), a number of world languages come close to English for what concerns the number of non-native speakers (e.g. French, Russian and Hindi), while other languages surpass it in terms of number of speakers (e.g. Mandarin). Consequently, many argue that to fully understand the role of English in today’s society, it is necessary to concentrate on its role as the key language of globalization and on its function as an international connecting language (‘lingua franca’), rather than on its geographical spread (Crystal, 2003; Seidlhofer, 2011; van Parijs, 2011).

Globalization and the global spread of English are two interconnected phenomena; in fact, it can be argued that it is impossible to consider them separately. As noted by Crystal, the presence of a global language – English – stimulates globalization, and globalization intensifies the need for a global language (Crystal, 2003: 14).

The connecting function of English and its central position in today's linguistic panorama is well illustrated in De Swaan's theoretical model representing the dynamics of the "world system of languages" – a sort of worldwide constellation that links together the multitude of world languages and which is structured according to a well-defined centre-periphery framework (De Swaan, 2001: 1).<sup>1</sup> What defines this hierarchical order and keeps the system together are multilingual speakers that ensure communication between the different linguistic groups. Following this argument, the centrality of a language is given by its ability to be employed as a connecting language by multilingual speakers, i.e. in its ability to be used as a lingua franca. For its prime role as connecting language, De Swaan places English at the very centre of this system (ibid).<sup>2</sup>

Historically, English came to occupy this position thanks to a complex set of circumstances that unfolded over the last two centuries. In particular, the second half of the 20<sup>th</sup> century is generally considered to be the turning point for the

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<sup>1</sup> De Swaan's analysis draws extensively on world-system theory – a socio-economic post-Marxist theory developed by the American sociologist Immanuel Wallerstein in order to explain the macro dynamics of capitalist economy. Wallerstein's approach employs the "world-system" (and not the individual nation-states) as a unit to analyse socio-economical dynamics. According to this theory, capitalist society has a structured division of labour consisting of central, semi-peripheral and peripheral countries. The first consists of highly developed and wealthy areas (like the US and Europe), while the latter correspond to the areas generally defined as Third World, which occupy a dominated position in the system. For a concise introduction to world-system theory see: Wallerstein, I., *The Essential Wallerstein* (2000) or *World-System Analysis: an Introduction* (2004).

<sup>2</sup> An interesting attempt to introduce a constructed language for international communication is the case of Esperanto. Designed at the end of the nineteenth century by a Polish oculist with the aim of creating a politically neutral lingua franca that could eradicate linguistic barriers in the world, Esperanto is nowadays the most widely spoken planned language in the world, counting over two million L2 speakers scattered in approximately 100 countries (Simons & Fennig, 2018). By many Esperanto is considered as a neutral alternative to the imperialistic domination of English (e.g. Phillipson, 1992; Skutnabb-Kangas, 2000); however, in practice, Esperanto has failed in its goal of becoming the international auxiliary language and is certainly far from resembling the status and functions that English has in today's society (Li, 2003).



establishment of English as the *de facto* global language vis-à-vis other possible candidates, especially French (ibid; Crystal, 2003).

Of course, English is not the first language in history to fulfil the function of lingua franca; the current role of English as the language of international exchange has often been compared to that of Greek, Latin, Arabic and French in different historical moments (Crystal, 2003; Seidlhofer, 2011). Although the domination of English appears nowadays as an established fact, it is instead a relatively recent phenomenon – and one that could change in the future (De Swaan, 2001; Graddol, 2006; on the future of English in Europe cf. 1.2.1).

Crystal claims that English owes its success to the fact that it “has repeatedly found itself in the right place at the right time” in history (Crystal, 2003: 120). As he goes on to explain, it happened to be the language of the major colonial nation, Britain, in the 17th and the 18th centuries; the language of the country leading the industrial revolution, again Britain, throughout the 18th and the 19th centuries; and the language of the state that championed neo-liberalism and the free market, the US, in the 20th century. The preeminent role played by Britain and the US throughout the modern era made English the foremost language of innovation and progress – including technological and scientific advances in the manufacturing industries, improvements in mass transportation systems and in long-distance communications, the discovery of new sources of energy, the development of the finance and trading sectors, as well as a more wide-spread access to knowledge (ibid). De-colonization contributed to further strengthen the international role of English given that after the collapse of the British Empire in the second half of the 20th century, many ex-colonies decided to continue using English in their newly established independent states – often giving English an

institutionalized status (e.g. India where English has been recognized, along with Hindi, as an official language) (Wright, 2016).

As claimed by Wright, the position of English – which was, together with Russian, the language of the winners – was reinforced by the outcome of World War 2 (Wright, 2016). When at the end of the conflict, the world was divided in two ideological blocs, English consolidated itself as the most used language for cross-country communication within the Western block – slowly but steadily replacing French –, while Russian served as the connecting language among the countries of the Soviet Union. With the dissolution of the USSR in the 1990s, Russian has been rapidly losing its prime role in ex-Soviet countries – what has been defined by De Swaan as a “true stampede out of a language” –, while English is undergoing a rapid expansion in those territories (De Swaan, 2001: 154; Wright, 2016).<sup>3</sup>

In addition, English happened to be the language of the electronic revolution which started in the US in the 1970s and lead to the rapid development of communication technologies (Crystal, 2003).

As is discussed later on in the chapter, some commentators argue that recent political developments – i.e. the spread of nationalist anti-globalization populist movements in the West and Brexit – might weaken the domination of English

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<sup>3</sup> According to the last Eurobarometer on language, the proportion of Russian speakers has dropped in Bulgaria (-12 points), Slovakia (-12 points), Poland (-8 points) and the Czech Republic (-7 points) (European Commission, 2012: 16). A similar phenomenon is true for German in Hungary, Czech Republic and Slovakia. These declining trends are caused by the fact that “many of those who were able to speak German (following the Second World War) or who learnt Russian at school [...] are now deceased, or, as time has elapsed, have forgotten how to speak these languages” (ibid).

worldwide (and more specifically in Europe) in the future (Schneider, 2017; Deneire, 2017; on this cf. 1.2.1).

The key drivers behind the progressive spread of English are to be found in the complex interactions between the legacy of colonialism on the one hand, and a variety of “demographic, economic, technological and long-term trends in society” on the other (Graddol, 2006: 9). Global English is therefore the result of an active process of exportation, carried out by native speakers through colonization, and of a process of voluntary importation on the part of foreign speakers that decide to learn English because of the advantages that this language brings them (De Swaan, 2001; Graddol, 2006; Ferguson, 2015). The strength of English therefore resides in this synergy between push forces of different nature. As convincingly argued by Phillipson, the acquisition of English is motivated as a top-down process in the case of professional life and education, and as a bottom-up process in domains such as that of entertainment and computing (Phillipson, 2003). Ferguson, highlights that precisely because of these ‘bottom-up’ push forces English possess a “self-accelerating quality in that the greater the number of users (and learners), the more attractive the language becomes for still further potential acquirers” (Ferguson, 2015: 6).

Due to push factors of varying natures, English has become the chief language of communication in many fields, such as international relations, business – as exemplified by the many companies that are adopting English as the in-house corporate language –, science and education, the media – for instance in advertising, broadcasting, music, cinema –, international travels and safety, to name but a few. In sectors such as broadcasting, advertising, music or business the expansion of English is mostly driven by bottom-up demand, while in other fields, such as aviation, the use of English is mostly driven by a top-down process.

As a result, English is considered as essential for those who wish to function within the international economic and cultural fields and for those who aim to actively partake in the global exchange of information which is today mainly taking place online (Wright, 2016).

In terms of the subject analyzed in this thesis, the dominant role of English in today's society means that a growing number of people in the world are fluent enough to consume English-language media and cultural products (including textual ones, such as books) without the need for local adaptations (i.e. translations). Non-native speakers of English are therefore able to read books in English and English-language publishing companies exploit this situation by exporting their products beyond the Anglophone linguistic sphere. As this study demonstrates, publishers operating in areas with high English proficiency – such as the north of Europe – are increasingly competing with imported Anglo-American products in their own domestic markets and this bears direct consequences on their publishing and translation strategies.

### 1.2.1 The European linguistic situation

Counting over 500 million citizens and as many as 24 official languages (per 28 member states), the European Union “boasts the most polyglot institutions in the world” (De Swaan, 2001: 144). Since the 19th Century, European languages have increasingly been identified with nation states and therefore as a key symbol of nationalism (Anderson, 1991; Wright, 2000; De Swaan, 2001; van Els, 2001, 2005; Extra & Gorter, 2008). The strong tie between official languages and their nation states protects European idioms and gives them a robust status within their national borders (De Swaan, 2001).

While the status of EU languages in their respective domestic settings is strong, the influence of English has increased significantly in Europe during the course of the twentieth and twenty first centuries at the detriment of other big European languages – mostly French, but also German and Russian (in Eastern Europe) (Smith, 1996; De Swaan, 2001; Görlach, 2002; Wright, 2009, 2016; Seidlhofer, 2011; Jenkins, 2014). Today international communications in Europe rely increasingly on English, both at the level of EU institutions and at the level of civil society (Van Els, 2001).

At the institutional level, the EU has adopted a plurilinguistic model whereby all official languages benefit from equal rights and are in principle considered as working languages of the EU institutions (van Els, 2001, 2005; Ammon, 2006).<sup>4</sup> However, the every-day running of EU institutions demands a more pragmatic and flexible approach, which means that for most informal meetings and for internal communications only a restricted number of working languages are usually employed: English, French and, to a lesser degree, German within the European Commission; and English, French and the language of current presidency within the Council of ministers (ibid). While initially French was the dominant language at the institutional level, its status began to be challenged by English when the United Kingdom and the Republic of Ireland joined the EU in

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<sup>4</sup> In 1958, the Council of Ministers recognized the four national languages (Dutch, French, German and Italian) of the founding members as official languages of the Union. Since then, each time new members joined the union, their official languages were added to the roster of official EU languages. All European citizens have the right to address and be addressed by European institutions in their own native language whenever they communicate with governmental bodies (European Commission, 2008). In addition to this, EU legislations and official documents are always translated into all the official languages and interpretation services are available for every official sessions of the European Parliament and the European Council of Ministers (De Swaan, 2001).

1973, and increasingly when Scandinavian countries became members in 1973 (Denmark) and 1995 (Finland and Sweden). In addition, Malta – which has English as one of its official languages – joined the EU in 2004.

With the rapid increase of official languages due to the enlargement of the EU in the 2000s, the pressure to reduce the number of working languages has increased recently. Some linguists have suggested that reducing the number of working languages to one would benefit communication and therefore ensure a more efficient functioning of EU governmental bodies (van Els, 2005). If this recommendation was to be implemented, English would, with all likelihood, be the most suitable candidate to become the sole working language of EU institutions (van Els, 2005; House, 2008). However, this proposal is not greeted with enthusiasm by everyone; in particular, larger linguistic areas (such as Germany and France) appear reluctant to agree upon an English-only solution (Ammon, 2006). For their intrinsic ties with culture and nationalism, language policies are always extremely charged issues and the linguistic situation of EU institutions is no exception. Working languages are largely perceived as reflecting the power relations of European languages and as a result, the various attempts at changing the current linguistic policy have resulted in a persistent immobility at the institutional level (De Swaan, 2001).

If we move our attention to the level of civil society we find instead a rapidly evolving situation, where English is advancing quickly among Europeans in many domains, from business, to education, diplomacy and international relations, technology, science, travel, traditional and new media, as well as entertainment (Edwards, 2016). As noted by Seidlhofer et al., the presence of English in Europe today is pervasive:

English impinges on everybody's life in Europe [...]: people watch CNN and MTV, they attend English classes, they encounter commercial slogans [...]; hip hoppers as well as bank executives use English in their (very different) everyday activities; companies choose English for internal communication; tourists ask and are given directions in English [...] English is everywhere and we cannot avoid it (Seidlhofer et al, 2006: ).

English is the most widely studied language in European primary and secondary schools. In various EU countries close to 100% of pupils learn English starting from primary education (Eurostat, 2015). The average European percentage of pupils studying English in upper secondary education is strikingly high (96%), especially if compared to the share represented by French (23%), Spanish (22%) and German (19%) (ibid). In addition, English is a ubiquitous presence in European higher education due to the implementation of various measures to increase internationalization and student and staff mobility such as the Bologna Process, the European Credit Transfer System and the Erasmus scheme (Edwards, 2016; see section 1.3).

The status of English as the most desired and most widespread language in Europe is confirmed by the most up-to-date Eurobarometer report on the linguistic competences of Europeans carried out by the European Commission in 2012 (European Commission, 2012). According to the survey 54% of Europeans are able to speak at least one second language (the figure was 56% in 2005 and 47% in 2001) (Table 1). Predictably, the most widely spoken second language is by far English (38%), followed by French (14%), German (11%), Spanish (7%) and

Russian (5%) (Figure 1).<sup>5</sup> English is in fact the most widely spoken language in 19 of the 25 member states (excluding the UK and Ireland where English is the first language).<sup>6</sup> English proficiency is remarkably higher than the European average in certain countries; for instance, 90% of respondents declared to be proficient in the Netherlands and 86% in Denmark and Sweden (see Table 2).

	<b>2001 (EU15)</b>	<b>2005 (EU25)</b>	<b>2012 (EU27)</b>
<b>English</b>	32%	38%	38%
<b>French</b>	11%	14%	12%
<b>German</b>	8%	14%	11%
<b>Spanish</b>	5%	6%	7%
<b>Russian</b>	-	6%	5%

Table 1: Replies to question: “Languages that you speak well enough in order to be able to have a conversation (excl. your mother tongue)”. Source: European Commission, 2012: 19; European Commission, 2006: 12; European Commission, 2001: 83.

<b>2012 (EU27)</b>	
<b>Netherlands</b>	90%
<b>Malta</b>	89%
<b>Denmark</b>	86%
<b>Sweden</b>	86%
<b>Austria</b>	73%
<b>Cyprus</b>	73%
<b>Finland</b>	70%
<b>Germany</b>	56%

Table 2: Countries where English is spoken as the first second language by more than half the surveyed population. Source: European Commission, 2012: 21.

Around 44% of respondents said that they are able to follow the news on TV or on the radio and read articles in newspapers or magazines in a second language,

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<sup>5</sup> The number of countries surveyed in the reports has changed over the years due to the enlargement of the EU in 2004 and 2007. The 2012 survey was carried out in 27 member states (EU 27), the 2005 one in 25 member states (EU25) and the 2001 in 15 member states (EU15).

<sup>6</sup> The few predictable exceptions being the Baltic counties, where the most widely spoken second language is Russian, Luxemburg (French), Slovenia (Croatian) and Slovakia (Czech) (European Commission, 2012).



while 39% of them use a second language online. Again, the most commonly used language is English, with an average 25% of respondents reporting to use it to follow news and read and 26% to communicate online. Only a small minorities of respondents said that they are able to carry out the same activities employing other languages than English. The countries where people demonstrated to be more likely to follow the news in English were Malta (85%), Cyprus (63%), Denmark (57%), the Netherlands (57%) and Finland (50%); figures are largely similar for what concerns the ability to read articles in English and online usage (European Commission, 2012: 29-37). When asked which language they considered most useful for their development, 67% of respondents indicated English.<sup>7</sup>

The large penetration of English in Europe attracts polarized views on the part of the scholarly community and public opinion. On the one hand, supporters of the imperialistic stance maintain that English is a threat to local languages as it is causing the progressive linguistic weakening of other European languages (Phillipson, 2016). In some European countries policy makers and part of the public opinion have been expressing concerns regarding the spread of English and have been calling for protectionist cultural policies to defend national languages. A key example of state intervention in this respect is the French Loi Toubon (1994) which mandates the use of French in all public and commercial communications (including for instance public education, advertising, commercial contracts, etc.) (Walsh, 2014). More recently, with the *Declaration*

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<sup>7</sup> The second most desirable language was considered to be German (17%), followed by French (16%), Spanish (14%) and Chinese (6%) – significantly, none of these alternatives is remotely close to the results scored by English (European Commission, 2012: 69).

on a *Nordic Language Policy*, a common linguistic strategy was agreed upon to avoid any form of linguistic dispossession in the Nordic Countries.<sup>8</sup> Among Nordic Countries, Sweden has been particularly active in trying to regulate its linguistic situation.<sup>9</sup>

Despite the anxiety that transpires from such initiatives and legislations, supporters of the English as a Lingua Franca approach (ELF) propose a more inclusive and pragmatic way to conceptualize the role of English in today's society. According to this view, the proliferation of English worldwide should not be regarded as a form of dangerous linguistic colonization, but instead as an instrument that enables wider communication among speakers of different native languages and also as an opportunity for non-native speakers to claim ownership of English by playing an active role in shaping the development of the language (Modiano, 2009; Seidlhofer, 2011).

This recognition of second-language English varieties as legitimate is indebted to Braj Kachru's work on postcolonial Englishes (Kachru, 1992; Kachru, et al., 2009). The main merit of Kachru's work lies in introducing a more inclusive and

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<sup>8</sup> In particular, the Declaration suggests that Nordic societies should aim at "using English not instead of but in parallel with the local language(s)" (Nordic Council, 2007: 10). The declaration thus endeavours to promote parallel competence ("parallelingualism") in every area of society – most notably in scientific research and dissemination, university instruction, and business (Doiz, et al., 2012) – in order to preserve the full functionality of Nordic languages in all domains and in all registers (Hultgren, 2014).

<sup>9</sup> In 1998, the Swedish Language Council published a report entitled *Draft Action Programme for the Promotion of the Swedish Language* in which a plan aimed at protecting and promoting Swedish was first sketched. The report acknowledges the powerful status of English in Sweden, while also recognizing that the eviction of English from Swedish society would represent an unrealistic and counterproductive effort. What the Swedish Language Council instead calls for was legislation to ensure that Swedish is "preserved as a complete language serving the needs of society" (Swedish Language Council, 1998). The Action Plan has been followed in 2009 by a Language Act that designated Swedish as the official language of Sweden for the first time (Swedish Government, 2009).

pluralistic conceptualization of English – or rather Englishes –, by acknowledging and legitimizing the status of outer circle varieties (second language varieties), which are “no longer seen as a corrupt form of inner circle varieties but as the (legitimate) result of nativisation processes” (Pennycook, 2007; Motschenbacher, 2013: 13).

Given its high penetration in various domains of European society, various sociolinguists have claimed that Europe is on its way to developing its own regional variety of English (e.g. Berns, 1995; de Swaan, 2001; Jenkins et al., 2001; Modiano, 2009). Supporters of this stance have noted that English in Europe is starting to fulfil some of the functions typical of outer circle varieties as described by Kachru (Berns, 1995); as a consequence, English in Europe – or Euro-English – should no longer be regarded as a foreign language, but rather as a second language (Berns, 1995; Jenkins et al, 2001). Euro-English supporters believe that “idiosyncratic features found in the English of mainland Europeans – their accents, local lexical coinages, and various lexico-grammatical features – can be the basis for a second language variety” (Modiano, 2009: 215). According to this view, English in continental Europe is evolving into an endonormative variety – i.e. a variety deriving its norms from non-native speakers who are increasingly asserting agency over the use of the language and not just mimicking native language varieties (Modiano, 2009; Seidlhofer, 2011). The process of nativization that English is allegedly undergoing in Europe implies an emancipation from standard varieties – what Berns defines as “de-Anglicization and de-Americanization” of English (Berns, 1995: 10). Modiano claims that – by empowering European speakers and freeing them from the normative influence of native speakers – Euro-English will play a crucial role in the development of a “mainland European identity” (Modiano, 2009: 217). Based on these premises,

the taxonomy of Euro-English is being investigated through empirical research in order to attest the existence of new European varieties (Jenkins et al, 2001; Mollin, 2006; Seidlhofer, 2009: 237; 2011; Modiano 2003, 2009; Berns, 2009).

Whether Euro-English really stands as a new variety of English is widely debated and various commentators have expressed skepticism towards this idea (see for instance Görlach, 2002; Bruthiaux, 2003; Mollin, 2006). Despite his disbelief towards the existence of a uniform European variety, Bruthiaux admitted that small linguistic areas with high-levels of proficiency (like the Netherlands and Scandinavia) could be on the way to developing their own indigenized varieties:

Allowance could be made for nations such as the Netherlands or the Scandinavian countries where English is widely used in higher education . [...] In this sense, there may be a marginal case for speaking of “Dutch English” or “Norwegian English” (ibid: 168).

Thus, the possible existence of various national European English varieties seems to be supported especially in small countries with a high average proficiency (Berns, 1995).

Even though various commentators have claimed that Euro-English fails to classify as a proper outer circle variety, there are signs that English is beginning to play a key role in terms of identity-building for Europeans (especially young Europeans). In this respect, Preisler’s empirical study of Danish Anglo-American young sub-culture groups found that in these contexts speakers use codeswitching to English as a way to “position themselves socially and culturally in relation to their surroundings” and as a marker of sub-cultural identity and group membership (Preisler, 2003: 111). Similar observations have been made by Hult in relation to Swedish society (Hult, 2003), by Leppänen et al. in relation to

Finnish society (Leppänen et al., 2011) and by Erling in relation to German university students (Erling, 2004).

Over the last two years, following the Brexit referendum, there has been a lot of speculation about the future of English in a UK-less European Union. Despite the fact that English might lose its status as official language of the EU (the Republic of Ireland and Malta have chosen Gaelic and Maltese as their respective official languages)<sup>10</sup>, and despite the various claims (mostly coming from French representatives) that English should not have a place in the EU after Brexit, various linguists have predicted that British membership in the EU will have no bearing on the status of English among Europeans and that no decline in the use of English should be expected following Brexit (Crystal, 2017; Modiano, 2017; Schneider, 2017; Saraceni, 2017). One of the key reasons why this prospect seems unattainable is the huge investments that over the decades most EU member states have put into promoting English-language training in primary and secondary education, as well as in higher education – as we shall see in section 1.3 below. To this we need to add the fact that English is now today largely employed by the major business partners of European countries; in fact, three of the EU's ten largest trading partners have English as an official language (US, India, Canada) (European Commission, 2019).<sup>11</sup> Other trading partners, like ASEAN countries and China, use English extensively for business purposes. As noted by Berns, it seems improbable that other languages will replace English in

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<sup>10</sup> Despite this, English is an official language in both countries, and both countries continue to use English in an official capacity. Furthermore, Malta is a member of the Commonwealth.

<sup>11</sup> After Brexit the UK is likely to join the list of EU's largest external trading partners, thus bringing this number up to four.

these business interactions any time soon (Berns, 2017). One important issue to consider when addressing the future of English in Europe – and worldwide – is the current rise of populist, nationalist, anti-Europeanist and anti-globalization forces, which could in the long run undermine the role of English as the major driving force of globalization (Deneire, 2017; Schneider, 2017).

Regardless of the changing role of Great Britain in the EU and the widespread sentiments of skepticism towards globalization that pervade today's political landscape, English is very deeply embedded within European society. Europeans, especially younger generations, increasingly use English in their day-to-day life and are able and willing to consume cultural products – such as TV shows, music or books – in English without the need for local adaptations.

The next sub-section will examine more closely one of the domains of European society where the growth of English is more visible, namely higher education.

### 1.3 English in European Higher Education

As noted by Dimova et al, “Englicization affects all or most communicative activities associated with universities: research dissemination, preparation for funding bids, teaching and supervision, internal and external communication” (Dimova et al, 2015: 1). The overall number of English-taught programmes in Europe reportedly went from 2,389 in 2007 to 8,089 in 2014, thus experiencing an increase of 239%. The spread of these programmes differs regionally, with the Nordic region being the area of Europe where most programmes are concentrated (60.6%), followed by Central West Europe (44.5%) and the Baltic States (38.7%) (Table 3) (Wächter & Maiworm, 2014). In absolute terms, the Netherlands is the country that has the highest number of English-language programmes (1,076 in

2014), followed by Germany (1030), Sweden (822), France (499) and Denmark (494) (ibid).

	<b>REGIONS</b>						<b>Total</b>
	Nordic Countries	Baltic Countries	Central West Europe	Central East Europe	South West Europe	South East Europe	
<b>Proportion of HE institutions offering ETPs</b>							
<b>2007</b>	31.5%	25%	22.6%	19.9%	7.6%	20.7%	18.1%
<b>2014</b>	60.6%	38.7%	44.5%	19.9%	17.2%	18.3%	26.9%
<b>Proportion of programmes in English</b>							
<b>2007</b>	5.9%	1.7%	4.0%	1.6%	0.5%	1.1%	2.1%
<b>2014</b>	19.9%	10.3%	9.9%	5%	2.8%	2.1%	5.7%
<b>Proportion of students enrolled in ETPs</b>							
<b>2007</b>	1.7%	0.8%	1.2%	0.4%	0.1%	0.8%	0.7%
<b>2014</b>	5.3%	1.7%	2.2%	1%	0.5%	0.8%	1.3%

Table 3: English-taught programmes by region in percentage (%). Source: Institutional Survey, Programme Survey, StudyPortals, EUROSTAT (Wächter & Maiworm, 2014: 49).

The large majority (80%) of English-language programmes are being offered at postgraduate level. As shown by table 4 and figure 1, English-taught masters' have been growing significantly in most European countries (Brenn-White & Van Rest, 2012; Mastersportal, n.d.). As observed in Brenn-White and Van Rest's study, the switch to English is affecting almost all postgraduate programmes in smaller countries (such as the Scandinavian countries and the Netherlands), while in larger countries, despite the large amount of programmes being offered, English-taught Master's still represent a minority (Brenn-White & Van Rest, 2012). For instance, it has been calculated that in 2013 English-language masters' represented a staggering 92% of the total amount of postgraduate programmes offered at Dutch universities (Gerritsen, 2016: 463).<sup>12</sup>

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<sup>12</sup> According to data available on MastersPortal's website the percentage has grown to 95% in 2016, thus leaving only 51 postgraduate programmes in Dutch (Mastersportal, 2016).

	2007	2008	2009	2010	2011	2016 <sup>13</sup>
<b>Netherlands</b>	386	466	679	767	812	1091
<b>Germany</b>	88	170	414	522	632	1107
<b>Sweden</b>	168	238	294	383	401	696
<b>France</b>	11	31	123	260	346	721
<b>Spain</b>	8	45	87	189	327	648
<b>Switzerland</b>	31	47	134	196	237	504
<b>Belgium</b>	62	108	144	202	214	298
<b>Italy</b>	7	26	77	144	191	559
<b>Denmark</b>	67	71	110	141	188	410
<b>Finland</b>	42	99	138	155	172	339

Table 4: Increase in English-taught master's programs listed on Mastersportal. Top countries by total number of programs and increase from previous year in percentage (Source: Brenn-White & Van Rest, 2012).

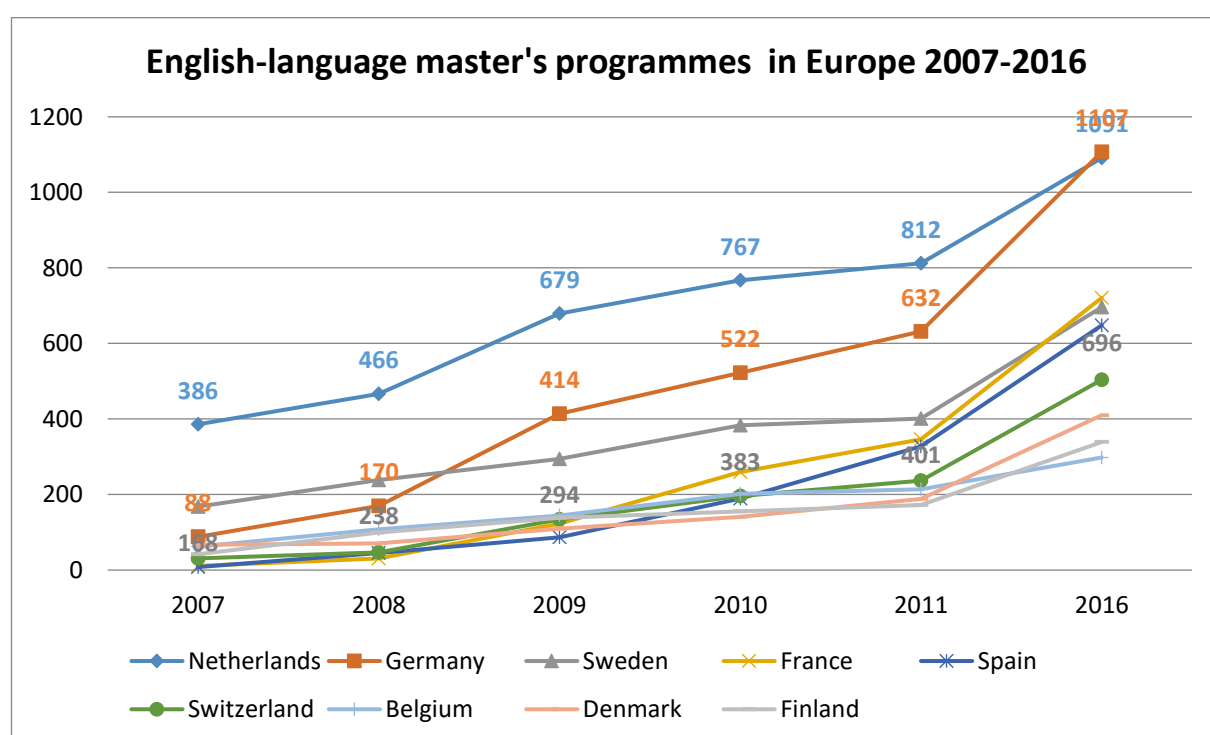


Figure 1: Increase in English-taught Master's programs listed on MastersPortal. Top countries by total number of Programs and increase from previous year in percentage (source: Brenn-White & Van Rest, 2012).

<sup>13</sup> The data relative to 2016 are drawn from Masterportal website and were not included in Brenn-White & Van Rest's study (2012). All the data in this section do not consider Anglophone European countries (UK and Ireland).



This process of Anglicization of European universities is accelerated by the broader trend towards the marketization of the higher education system globally (Coleman, 2006; Phillipson, 2008; Borghans et al., 2009). As noted by Graddol:

If an institution wishes to become a centre of international excellence, it needs both to attract teachers and researchers from around the world (Graddol, 2006: 74).

In countries where English is not a first language, the push for internationalization and marketization has in practice been translated into a general shift towards English-medium teaching. Within Europe, the process of internationalization has been also prompted by the European Council's Bologna Declaration of a European Space for Higher Education (1999), which aimed at making Europe's education market competitive vis-à-vis the US and Asia by creating a "borderless European higher education space" (Doiz et al, 2011: 347). To do so, the Bologna process has introduced common diplomas across European institutions to boost student and staff mobility (Ljosòand, 2005; Berns et al, 2007; Hultgren, 2014). Although the Bologna Declaration did not mention language issues, the call for internationalization has been interpreted by many countries and institutions as a push towards English-medium teaching (Ljosòand, 2005; Dimova et al., 2015). It has been argued that employing a common language – English being clearly the most likely candidate – is the only way of ensuring large scale student and staff mobility, especially in countries whose languages are not widely studied. It is not by chance that small countries with relatively restricted linguistic areas – like the Netherlands, Sweden or Denmark – are at the forefront of English-medium teaching (Coleman, 2006).

Another aspect that intensifies the use of English at universities is that English is the preferred language of scientific communication, with roughly 80% of

academic publications being written in English (Research Trends, 2012; on this issue see also: Hamel, 2007; Haberland, 2014; Curry & Lillis, 2018).

While advocates of internationalization (such as politicians and university leaders) strive to increase the international outlook and the ranking of their institutions, the transition towards English-medium instruction has been met with resistance by some linguists and policy makers, who warn about the risks of cultural and linguistic dispossession associated with this trend (Phillipson, 2008).

Despite controversies, English-medium teaching is a reality in the north of Europe, and the process of internationalization is continuing at a fast pace in most other European countries. With the majority (in many cases totality) of lectures, readings and assignments being carried out in English, we can expect English-language education to increase drastically the level of proficiency of younger generations in the long- and medium-term. In turn, bilingualism and biliteracy in English might have an impact on the reading and media consumption habits of students beyond the lecture room. In this respect, a 2013 study investigating multilingual reading proficiency in a parallel-language Swedish university found that the surveyed sample of undergraduate students read both English and Swedish books in their leisure time without showing a strong preference for one language over the other:

Swedish students do not find the language of their reading material to be the most important factor when choosing what to read for pleasure. Many have reached a level of reading skills where they feel comfortable reading in either Swedish or English. In this sense their choice of reading material is not constrained by language (Mežek, 2013: 176).

According to the study, the factors influencing the linguistic choices of students were mostly related to the availability and quality of books, rather than language proficiency. The most commonly mentioned motivations for choosing English-language books were: 1) the availability of books (i.e. if a book was not yet translated into Swedish students would read it in English); 2) preference for reading Anglophone books in the original language; and 3) the fact that some authors and genres (like fantasy, manga or sci-fi) were considered best if read in English (ibid). Mežek's analysis therefore points out to a direct connection between English-medium teaching and English-language book consumption in leisure time. Unfortunately, at present research in this area is very limited.<sup>14</sup> To the researcher's knowledge, this study is the only one investigating this issue and shedding some light on the reading and media consumption choices of young adults in a context of "high societal proficiency" like that of the Nordic countries (ibid: 167).

As argued in this section, English-medium teaching in higher education has seen exponential growth in continental Europe – and worldwide (see: Fenton-Smith et al., 2017) – over the last decade, which is evidently contributing to increasing the English skills of young Europeans. Students that are being partially or fully educated in English are therefore becoming more comfortable reading books in English both for educational or recreational purposes – as the study cited

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<sup>14</sup> In the field of EAP studies (English for Academic Purposes) various studies have analysed the adequacy of students' English-language skills in parallel-language environments in order to assess whether being educated entirely or partially in a second-language (English) affects the learning process. Findings seem to confirm that, even in areas with high average English skills like the Nordic countries of the Netherlands, there are negative correlations between being taught in a L2 (English) and academic performances (on this see for instance Hellekjær, 2009; Kuteeva, 2011).

immediately above demonstrates with regard to Swedish undergraduate students (Mežek, 2013). Thus, the growing emphasis on English-medium teaching internationally suggests that the phenomenon of English-language reading in non-Anglophone areas of Europe could see a further surge in the coming years. In terms of the subject of this thesis, the expected intensification of English-language reading in Europe could determine an exacerbation of the competition between English-language books and local-language translations.

### 1.3.1 English in the Netherlands

As shown above, English plays a much more prominent role in some parts of Europe than it does in others. Notably, the Netherlands is one of the most proficient countries in the world. This is confirmed by the EF English Proficiency Index which assessed the Netherlands as the most proficient country in the world in 2017 (among countries where English is not an official language), followed closely by Sweden Denmark, Norway and Finland (Education First, 2017).

Due to its commercial and colonial history, the Netherlands has a long-standing tradition in terms of language learning (Edwards, 2016). The presence of English in the Low Countries started to increase during the Dutch Golden Age (the sixteenth century) which was a period of intense trade relations between the United Provinces and the nations of the British Isles (ibid). Nevertheless, throughout the seventeenth, eighteenth and nineteenth centuries, French and (to a lesser degree) German remained the most popular foreign languages (Bonnet, 2002). In 1863, the Secondary School Act gave an institutionalized status to foreign language learning for the first time, by making English, French and German compulsory subjects in Dutch secondary schools. The French and German domination continued until the end of WW II, but by the 1960s English had already become the first foreign language in Dutch education (Bonnet, 2002).

Today, English is widely present in many societal domains, from education and research, to business and commerce, public administration, and the media (Edwards, 2016). In the Netherlands, English is widely employed for intra-national functions – in advertising, entertainment, business communication and higher education (Gerritsen et al., 2016: 464).

As far as education is concerned, English has been introduced as a compulsory subject during the last two years of primary school in 1986, with pupils receiving a total of 50 hours over two years (Bonnet, 2002). In addition, in the last two decades many Dutch schools have introduced early English-language training (*vroeg vreemdetalenonderwijs*, VVTO) starting from the first year of primary education at age 4 or 5. Schools offering VVTO partly use English as a medium of instruction, therefore implementing a system of bilingual education whose goal “is for the pupils to reach high levels of language proficiency in English and [...] to prepare them for the International Baccalaureate” (ibid: 46). The number of VVTO schools grew quite rapidly from 20 in 1999 to 1,000 in 2013 (representing 17% of primary schools in the country) (Edwards, 2016: 27). Currently, 19 primary schools are participating in a nation-wide bilingual primary education pilot programme (*tweetalig primair onderwijs*, TPO) that features between 30% and 50% of teaching in English (Nuffic, n.d. a). It is interesting to note that bilingual primary education is mostly the result of a grassroots movement initiated by parents and teachers (Bonnet, 2002: 46).

For what concerns secondary education, since 1968 English is the only compulsory foreign language in Dutch schools and is present in all three

secondary education streams (VMBO, HAVO and VWO).<sup>15</sup> Bilingual secondary education – consisting in half or more of the subjects being taught in English – has been introduced in the Netherlands almost 30 years ago. The popularity of this option has been growing steadily, as proved by the fact that bilingual schools went from being one in 1989 (Edwards, 2016) to being 120 in 2015, involving more than 190 departments in all three streams and educating around 30,000 pupils yearly (Landelijk netwerk tweetalig onderwijs, 2015). According to the Dutch Organization for Internationalization in Education,<sup>16</sup> the mission of bilingual schools is making pupils “functional second language users” and increasing their intercultural competence (Nuffic, n.d. b). Evaluations indicate that pupils attending these bilingual schools score significantly higher than pupils in non-bilingual education in the Netherlands and in other countries in terms of English skills (ibid). Again, bilingual secondary schools are also the result of a bottom-up drive on the part of parents and educators “who are aware of the educational and socioeconomic benefits of proficiency in English” (Edwards, 2016: 29).

As seen in the previous section, English occupies a ubiquitous presence in European higher education due to the twin processes of internationalization and Anglicization that characterise higher education worldwide (cf. section 1.3). In Europe, the Netherlands is one of the countries at the forefront of this shift, as

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<sup>15</sup> The VMBO stream consists of pre-vocational secondary education and trains students for further vocational training (MBO); the HAVO stream consists of senior general secondary education and prepares pupils for attending universities of applied sciences; lastly, the VWO consists of pre-university education and is aimed at pupils who want to attend research universities. In the VWO and HAVO streams pupils are also taught other two foreign languages, usually French or German (Bonnet, 2002).

<sup>16</sup> In Dutch: De Nederlandse organisatie voor internationalisering in onderwijs.

highlighted in Table 4 and Figure 1 (cf. Section 1.3). According to the Study Finder tool available through the Study in Holland website, as of April 2019 there were 391 bachelor's degrees and 1,326 master's degrees being offered in English in the Netherlands<sup>17</sup> – a notable increase if compared to the 386 master's degrees available in 2007 (Brenn-White & Van Rest, 2012). As already noted in Section 1.3, the shift to English does not only concern the medium of instruction, but also all the activities that are related to academic life – such as scientific research and dissemination, conferences and seminars and so on (Berns et al, 2007). It can be anticipated that the growth of English-medium university programmes will function as a further incentive for the increase of bilingual primary and secondary education in the near future.

Education is not the only way through which Dutch citizens are exposed to English. In fact, English features heavily in Dutch business and commerce – in emails, meetings, as well as in company's websites and annual reports; this is evident from the fact that the Dutch divisions of various international companies (such as DSM, Reed Elsevier, Ahold) have adopted English as their in-house language (Gerritsen, 2016).<sup>18</sup> English is therefore deeply established in the Dutch work environment; as noted by Edwards, “the use of English by Dutch workers is not restricted to international companies; rather, it seems to have become a fixture of working life for all” (Edwards, 2016: 37).

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<sup>17</sup> <https://www.studyfinder.nl/>, accessed 14 April 2019.

<sup>18</sup> According to a report by Daelmans, English was preferred three quarters of the times to Dutch in the internal and external communications of the 20 largest companies active in the Dutch market (Daelmans, 2005). Notably, this result sets the Netherlands apart from the other European countries investigated (France, Germany, Italy and Sweden) (ibid).

Advertising is another area where English is extremely widespread, with 54% of TV adverts featuring English in 2012 – an increase of 25% on 2000 (Gerritsen et al., 2016).

Furthermore, English is widely present in the media landscape given that subtitling is more popular than dubbing. English-language TV and radio channels such as BBC and BBC Radio have been available for decades in the Netherlands (Edwards, 2016). According to various studies quoted in Berns et al., 40-60% of TV programmes on Dutch-language channels are in a foreign language (mostly English) and Dutch viewers usually get at least one hour of TV a day in English (2007).

Music is another area where Dutch speakers are widely exposed to English. According to De Bot et al., 80% of Dutch secondary school pupils listen to English-language pop-songs (De Bot et al, 2007). By examining the top-40 single charts for one week in August 2013, Edwards found that in 2013, the share of English-titled songs amounted to 75%, while song with Dutch titles amounted to 20% (Edwards, 2016: 52).

As for print media, Edwards reports that English-language magazines and newspapers are readily available everywhere in the country; in addition, regular Dutch publications often code-switch and code-mix with English (e.g. by using English headings or by adding untranslated quotes) (Edwards, 2016).

If we move the attention to the topic of this research (books), Edwards noted that “English-language books are readily accessible in the Netherlands, and they ‘are not there for the tourists’” (Van der Horst, 2012: 180, cited in Edwards, 2016).

As seen in this brief overview, the penetration of English in the Netherlands is deep; for this reason, many experts have claimed that English in the Netherlands



is evolving into a virtual second language and is therefore entering a situation of diglossia with local languages (McArthur, 1996; De Swaan, 2001; Phillipson, 2003)<sup>19</sup>. In her recent sociolinguistic analysis, Edwards concluded that the conditions are met to qualify English as a second language variety in the Netherlands (Edwards, 2016). The criteria used to establish this were: the widespread “societal bilingualism” of Dutch society which ultimately means that “today it is scarcely possible to find a Dutch citizen under the age of 50 who does not speak English” and this is not restricted to the population elite (ibid: 61); and the fact that the functions reserved to English “go far beyond the lingua franca uses to which ELF is typically restricted” (ibid: 66). As part of her analysis, Edwards surveyed Dutch citizens about their attitudes towards English and found that the large majority of Dutch respondents was positive towards English and felt confident using it, while only one third of respondents declared to resent it. It is particularly interesting to note that positive attitudes were most commonly found among young respondents (ibid). As noted by Edwards, the fact that Dutch citizens have a broadly positive attitude towards English “will likely allow the trends identified here to develop further, such that people with lesser English may find themselves unable to function fully in Dutch society” (ibid: 103).

Evidently, the sociolinguistic profile emerging from this brief analysis bears important consequences on the topic under consideration in this thesis. The fact that English is already so widespread in the Netherlands – to which we need to

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<sup>19</sup> Diglossia indicates the linguistic phenomenon whereby two variants of a language or two different languages are used in parallel within a linguistic community. In diglossic contexts the two variants usually cover different functions, with one of the two usually retaining a higher prestige, and another used in vernacular or familiar domains (Bayley, et al., 2013).

add the fact that the Dutch educational system is contributing to rapidly improving the English skills of new generations further – means that the proportion of Dutch-speakers who are comfortable consuming English-language books directly in the original language is high and is also likely to be on the rise. This thesis therefore explores the consequences of this phenomenon on the Dutch publishing industry, in order to understand if and how Dutch publishers are adapting to the competition of imported English-language editions in their domestic territory.

#### 1.4 Summary

To sum up, as seen in this sections (1.2), thanks to high educational attainment levels and to a strong emphasis on foreign-language teaching, English proficiency is well spread across social strata in continental Europe – especially in the north of Europe. The presence of English in the everyday life of Europeans is pervasive, from TV and films, to music, advertisement, social media, business, and education. The already strong position of English is further reinforced by a major shift towards English-medium teaching which is taking place across most European higher education institutions.

As this section demonstrated, the Netherlands is one the countries with the highest level of English in Europe and the penetration of English in all societal domains is constantly growing. One of key the factors determining the further expansion of English in the Netherlands is the process of internationalization and Anglicization of higher education. The high-level of English proficiency in this region means that there is a large number of bilingual and biliterate consumers who are already able to access English-language cultural products (being them TV series, films, magazines or books) without the need for any linguistic mediation. The fact that a large number of Dutch consumers are sufficiently

familiar with the language to consume books in English arguably constitutes a threat to Dutch-language publishers. The competition of English-language original editions is therefore an element that Dutch publishers need to take into account and address in their publication strategies. This thesis explores how the competition between Dutch and Anglo-American editions has evolved in the Netherlands, with a particular emphasis on exploring the coping strategies developed by Dutch publishing companies in order to avoid losing readers to English-language imports.

## Chapter 2: Literature Review

### 2.0 Introduction

This chapter introduces the basic notions of Bourdieu's field theory – such as those of field, agent, habitus, capital and doxa – which represent the theoretical framework underpinning this research. The chapter also provides a broad overview on how these concepts have been employed for analyzing the cultural industries in general, and the publishing industry in particular (section 2.1). Then this review analyzes the connections between language and publishing and describes how the power relations between languages, and in particular the domination of English, shape the international circulation of books – both in terms of translation flows (section 2.2) and book exports (section 2.3 and 2.4). Lastly, the chapter sheds light on the dynamics characterizing the export activities of Anglo-American publishers in Europe (including the notions of territorial rights, open market, Retail Price Maintenance) and explores how these issues influence the competition between English-language and local-language editions (section 2.5). Overall, this literature review provides a broad contextualization of the topic under investigation, i.e. English-language reading in Europe and more specifically in the Netherlands, and highlights the research gaps that informed the research questions.

### 2.1 Theoretical framework: Bourdieu's field theory to explain patterns of cultural production

Field theory, when applied to the study of publishing, represents a powerful tool to understand the relationships between the various agents, the rationale

governing their actions and the power relations that exist within a given publishing field. Consequently, the present analysis of the Dutch trade publishing draws extensively on field theory. By employing the theoretical tools described in this section, this thesis sets out to understand the dynamics of competition between Anglo-American and Dutch publishers in the Dutch publishing field.

According to Bourdieu, modern society is articulated in a series of autonomous social spaces, or fields – each one representing a “relational space of its own, dedicated to a specific type of activity” and functioning according to its own set of rules (Hilgers & Mangez, 2014: 5). A field can be envisioned as a force field, or *champ de force*, within which struggles for social positions take place between the agents (individuals and institutions). Positions in the field are the result of a constant negotiation through which agents seek to impose their power, and therefore to (re)define the hierarchical configuration of the social space. These social dynamics are influenced, above all, by two factors: the habitus, and the capital, both of which are strictly connected to each other. The former has been defined by Bourdieu as a set of “durable, transposable dispositions” that determine the way the world is interiorized, classified and understood by the individual (Bourdieu, 1990a:53). According to Bourdieu the world is a “system of cognitive and motivating structures” that operates at a subconscious level as a second nature (ibid). One of the fundamental properties of the habitus is that it is at the same time a structured and structuring force – in short, it is acquired in the process of socialization (through upbringing, class membership, education, life experiences, etc.), but at the same time it determines the agent’s social practice within the field (Harker et al, 1990). It is through this notion that Bourdieu reconciles the roles of individual agency and social structures (Grenfell, 2010).

The second key concept in Bourdieu's social theory, capital, represents the resource – the “currency” – that is exchanged in social struggles (Harker et al, 1990). The notion of capital developed by Bourdieu is rather broad and consists of various types of resources, including “material things (...) [economic capital], as well as ‘untouchable’ but culturally significant attributes, as prestige, status and authority (referred to as symbolic capital), along with cultural capital (defined as culturally-valued taste and consumption patterns” (ibid: 13). One of the main characteristics of capital is that it is convertible and can be transformed from one form to another; economic resources can, for instance, be turned into cultural and social capital, and vice versa. In fields where the most valued resource is symbolic recognition (such as in the artistic field), the most “powerful conversion to be made is to symbolic capital, for it is in this form that the different forms of capital are perceived and recognized as legitimate” (Harker et al, 1990: 13). It is in this recognition of the interactions between strictly material resources and symbolic logic that resides one of the most innovative aspects of Bourdieu's theoretical apparatus.

Another fundamental concept in Bourdieu's field theory is that of *doxa*, which can be defined as a set of unconscious beliefs and presuppositions that are generally taken for granted by agents and that guide their actions and position-takings in the field. Thus, it consists of a “misrecognized shared allegiance to the ‘rules of the game’ on the part of agents” (Greenfell, 2014: 59).

To make these concepts more accessible, Bourdieu has often compared social dynamics to a game. If we consider football (a metaphor he often used), the pitch can be envisioned as the field – the space where the game is played. The players occupying the various positions in the field are the social agents. Each player carries certain dispositions – a “feel for the game” (*habitus*) – and acknowledges

the existence of shared and often unspoken rules and practices (doxa) (Bourdieu, 1990b: 63).

A key peculiarity of Bourdieu's social theory is the idea that fields are by definition autonomous spaces functioning according to their own internal logic. However, fields also belong to a common social sphere: the field of power. This rather abstract concept can be envisioned as "a metafield that regulates the struggles for power throughout all fields" (Vandenberghe, 1999: 53, quoted by Hilgers & Mangez, 2014: 185). Each individual field can be more or less autonomous from the field of power, depending on the type of predominant hierarchical principle within it (Hilgers & Mangez, 2015).

The structures of the field of arts and the dynamics of cultural production have been the object of Bourdieu's close attention; in this area, his major contributions are *The Field of Cultural Production* (Bourdieu, 1993) and *The Rules of Art* (Bourdieu, 1996).

Bourdieu's analysis of the field of cultural and artistic production rejects the "ideology of the uncreated creator", and instead insists on the necessity of considering art as a social product, a fruit of the power relations characterizing the social arena in which it is produced (Sapiro 2003: 441). Struggles among the agents in the field (including individuals such as artists and critics, but also more institutionalized actors such as publishers, museums, galleries, theatres, etc.) determine the symbolic value of the product, its recognition as work of art, and its consecration. Therefore, literary production "has to be approached in relational terms, by constructing the literary field, i.e. the space of literary *prises de position* that are possible in a given period in a given society" (Bourdieu, 1983: 311).

The field of cultural production, as any other field, is contained within the field of power, but is also independent from it. Bourdieu recognizes symbolic logics to be the autonomous principle of hierarchization in the cultural field. As such, the level of autonomy of the field will be higher when the prevailing principle of consecration is the specific recognition accorded by agents endowed with symbolic capital. On the other hand, the predominance of economic capital in a given field can be identified with commercial success. It follows from this assumption that products and producers that are highly popular, what Bourdieu defines as “mass audience production”, are the ones who are most dependent on the field of power (Bourdieu 1983: 320). As Bourdieu puts it “at its most autonomous state the artistic field works in the opposite way of the economic one”, that is to say that the most valued resource is symbolic recognition, and not economic compensation.

Bourdieu’s theory of cultural production is based on the opposition between two types of production – small-scale and large-scale production – which mirror the struggles between the autonomous principle of hierarchization (symbolic recognition) and the heteronomous one (popular success) (Bourdieu, 1993). Restricted production is situated at the autonomous pole, it is mainly driven by a long-term logic and it is devoted to aesthetic criteria – to use Bourdieu’s words it lives in “the strictest observance of the religion of literature” (Bourdieu, 2008: 126). Small-scale producers are usually newcomers in the literary field and, as such, do not retain economic capital. They can therefore be identified with avant-garde publishers, responsible for the majority of innovations within the literary



field.<sup>20</sup> On the opposite side (heteronomous pole), Bourdieu positions large-scale producers who are mainly concerned with commercial logics, and that retain both economic and symbolic capital. These publishers follow a short-term, profit-driven rationale, mainly devoted to the achievement of commercial success. The distinction between small-scale and large-scale production has been adopted by sociologists (Bourdieu included) to explain the levels of diversity and homogeneity in the publishing market, one prominent examples is Gisele Sapiro's work (Sapiro, 2010; 2014; 2015; on this see 2.1.1).

Bourdieu's work on the field of cultural production has been employed to analyze the book industry in two of the most comprehensive recent publications in the field of publishing: *Books in the Digital Age* (Thompson, 2005) and *Merchants of Culture* (Thompson, 2010) by the sociologist John B. Thompson. As advocated by Thompson, field theory is particularly helpful to investigate the publishing industry for four reasons:

1) Field theory shows that the publishing field is not a uniform realm, but is instead made of a plurality of independent (or semi-independent) fields (e.g. the field of trade publishing, the field of scholarly publishing, and so on) – each with its own characteristics and distinctive logics. In Thompson's words, publishing fields are comparable to board games: “there is chess, checkers, Monopoly, Risk, Cluedo and so on. To the outside observer they may look similar – they are all board games with little pieces that move around the board. But each game has its

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<sup>20</sup> However, as Sapiro points out, “the functioning of the small-scale pole is not entirely devoid of economic rationality” since symbolic capital can, in the long-run, be converted in economic capital (2008: 155).

own rules, and you can know how to play one without knowing how to play another” (Thompson, 2010: 4). This thesis deals specifically with one publishing sub-field, characterized by certain linguistic, geographical, economic, politic and cultural connotations: the Dutch trade book publishing. As such, it describes the dynamics, the actors, the forms of capital, and the logic at play within this field, making use of Bourdieu’s and Thompson’s notions of field theory applied to the publishing field. Due of the individual nature of the field, these findings will be mostly applicable to the Dutch publishing industry and will not necessarily be generalizable, although the theory and approach may well be (Flyvbjerg, 2006; on this cf. Chapter 3).

2) The second reason why field theory assists us in better understanding the functioning of the publishing industry is because it allows us to think in “relational terms”, i.e. by considering that “agents, firms and other organizations in the field never exist in isolation”, but instead always compete and cooperate with other agents in the field (Thompson, 2010: 4). This way of conceiving the relationships of interdependency between agents in the field, when used in this thesis, reveals a fuller understanding of the rationale behind agents’ attitudes and choices, as well as explains the dynamics of competition between Dutch, British and American publishers.

3) As Thompson notes, the ability of agents to function within a field “is always rooted in and dependent on the kinds and quantities of resources that the agent or organization has at its disposal” (ibid: 5). Therefore, Bourdieu’s notion of capital makes it possible to conceive power relations between agents and companies in the publishing world in a broad sense. This analysis reveals how the decisions and the dynamics of competition between agents are deeply influenced by the resources at their disposal – especially when comparing the acts and

decisions of organizations operating in a small field such as the Dutch trade market to those of organizations operating on a global scale, such as American and British companies.

4) Lastly, as Thompson notes, by definition, fields function according to a specific dynamic, i.e. “a set of factors that determine the conditions under which individual agents and organizations can participate in the field – that is, the conditions under which they can play the game (and play it successfully)” (ibid: 11). The theoretical tools proposed by Bourdieu allow researchers to uncover this ‘logic of the field’ and the present analysis of the Dutch book trade field aims to reach a practical understanding of the logic underpinning the circulation of English-language texts in the Netherlands (and more broadly in continental Europe).

In summary, the concepts of field theory assist in describing and interpreting the dynamics of the Dutch trade book market. In addition, for its emphasis on the relational dimension of publishing and for its focus on describing the distinctive dynamics of publishing fields, Thompson’s investigation of the Anglo-American scholarly and trade publishing field constitutes the chief methodological and theoretical footprint for this research (Thompson, 2005; 2010).

## 2.2 Defining the international publishing field

The strict connections that exist between publishing and language, and the various historical developments that determined the creation of publishing fields in different languages are key elements to discuss. This is particularly so in terms of how the power relations between languages have shaped (and shape) the transnational circulation of books.

To date, the publishing field is often referred to as a uniform domain. However, as noted by Thompson, the publishing field consists of a series of different subfields involving “certain linguistic, spatial and technological properties” (Thompson, 2005: 41). Language is one of the key elements to define publishing subfields given that, of all the various types of cultural goods, books are the most reliant on language for their transmission. As such, publishing fields tend to correspond to linguistic regions (Feather, 2003; Thompson, 2005; Sapiro, 2014).

Initially, publishing developed in Latin, the lingua franca of the educated elite in the early modern period. However, from 1550 onwards, the publishing industry slowly switched to vernaculars, which meant that publishing fields started to be effectively defined by language and that translations became the chief way for books to travel across linguistic borders (Feather, 2003). Colonialism played a crucial role in exporting European languages across the globe, thus establishing large, linguistically homogeneous areas, and transforming publishing into a truly international business. In this context Anglophone, Francophone, and Hispanophone (and on a smaller scale German- and Dutch-speaking) transnational book markets emerged, encompassing the linguistic and political maps of colonialist geography (Feather, 2003; Thompson, 2005). In most cases, colonizing states acted as cultural centres within these newly formed international publishing fields; however, the process of affirmation of national identities in the course of the 19th century began to challenge the domination of European cultural centres and led to the formation of more or less independent national publishing fields in the ex-colonies. The clearest example of this is the United States, which managed to establish its autonomy from the British book market by the end of the 19th century, and after WW II, succeeded in reversing the power relations with its ex-coloniser and becoming the most prominent

publishing market in the world (Sapiro, 2009; 2010; 2014). The internationalization of the publishing field and the creation of a global marketplace for cultural products accelerated after WW II, mostly due to the liberalization of markets (Sapiro, 2010). Starting in the 1960s and continuing until today, the publishing field (especially the Anglophone one) has undergone a long series of mergers and acquisitions that have led to a progressive consolidation of the industry. As a result of this process, most publishing firms in the Anglophone world are now owned by a restricted string of transnational media conglomerates – such as Bertelsmann and Holtzbrinck, Lagardère, Pearson and News Corporation (Feather, 2003; Thompson, 2010; Greco et al., 2014). It has been argued that globalization, the implementation of neo-liberal trade policies throughout the 1970s and 1980s, and the push towards more concentration in the industry “fostered the unification of a global market” and determined the affirmation of a more profit-driven and commercial logic within the international publishing field (Sapiro, 2014:34; on this see also: Whiteside, 1982).

As remarked by Feather, publishing “at the beginning of the twenty-first century [...] is [...] global in scale, although dominated by products in the English language” (Feather, 2003: 22). The rise of English as the chief language of globalization determined the progressive domination of Anglophone firms in the global marketplace, as noted by Thompson:

Today the United States and Britain publish many more new books than other countries and their book exports, measured in terms of volume of sales, are much higher. Moreover, books and authors originally published in English tend to dominate the translation market (Thompson, 2010: 13).

As illustrated by Table 5, the annual revenues of the two leading Anglophone markets (the US and the UK) taken together reached over € 29 billion in 2015 – almost 3 times the revenues of China, the second largest market in the world (IPA, 2016). It must be noted that due to its fast growth in terms of book output and revenue, China can be expected to become the largest book market in the world within the next decade (Anderson, 2019). The UK and US are also the largest producers of books in the world, considering that – again if taken together – they produced over 510,000 new titles in 2015 (Table 6) (IPA, 2016).

	<b>2014</b>	<b>2015</b>
<b>USA</b>	22,918	24,986
<b>China</b>	10,578	10,512
<b>Germany</b>	5,541	5,430
<b>UK</b>	4,587	4,151
<b>France</b>	2,652	2,667
<b>Brazil</b>	1,650	1,433
<b>Italy</b>	1,576	1,584
<b>Netherlands</b>	1,058	1,058
<b>Thailand</b>	356	390
<b>Norway</b>	297	318

Table 5: Top publishing markets by revenue in millions of Euros, 2014-2015 (Source: IPA, 2016).

	<b>2014</b>	<b>2015</b>
<b>China</b>	448,000	470,000
<b>USA</b>	-	338,986
<b>UK</b>	220,330	173,000
<b>France</b>	98,306	106,760
<b>Germany</b>	87,134	89,506
<b>Brazil</b>	92,209	88,685
<b>Japan</b>	76,465	76,445
<b>Spain</b>	78,508	73,233
<b>Italy</b>	63,922	65,886
<b>Republic of Korea</b>	47,589	45,213

Table 6: Top publishing markets by new titles produced, 2014–2015 (Source: IPA, 2016).

Thus, English-language publishers find themselves in an extremely favourable position as they can rely both on large domestic markets (especially the US) and

also on an huge extended linguistic area outside of their national borders where English is spoken as a second language (Feather, 2003, Thompson, 2005). This has allowed Anglo-American publishers to branch out their activities internationally by exporting their products globally. Conversely, nations whose languages are not as widely spoken find themselves operating in much more restricted linguistic fields, and are therefore forced to concentrate their operations within their domestic borders. In the case of Dutch publishing, which relies on 23 million speakers of Dutch (including speakers in the Flanders and in the Dutch Caribbean), a key question to ask is how having to compete with large Anglo-American conglomerates affects the local-language publishing industry considering the restricted size of Dutch publishing operations.

### 2.2.1 The transnational circulation of books: translation flows as an indicator of inequality in the field of publishing

The transnational circulation of cultural products is the result of a complex interplay between political, economic, social and cultural factors (Sapiro, 2016).

Books are language-bound cultural products and their circulation across linguistic borders depends first and foremost on linguistic intelligibility. Therefore, texts have two main modes of circulation: they can travel with the aid of translators, who make them accessible to readers in foreign languages, or thanks to multilingual audiences that can access them in the original language without translation (De Swaan, 2001).

Because language plays such a key role in this process, the cross-national circulation of literature – either by way of translations or in the original language – is linked to the power relations between languages (Heilbron & Sapiro, 2007).

As noted by Rivière, “depending on the language in which they are written books are not exchanged and distributed evenly across the globe” (Rivière, 2017: 337).

To date, the majority of contributions addressing the issue of book circulation have concentrated on analyzing translation flows as a way to make sense of the dynamics of globalization in the book market (Sapiro, 2010). In this view, patterns of book circulation by way of translation have been considered as indicators of the symbolic, political and economic capital of a certain source language and of its dominant or dominated status within the literary field (Heilbron & Sapiro, 2007). Research in this area led to the establishment of a new strand of research: the sociology of translation (Wolf & Fukari, 2007). By drawing on world-system analysis, on De Swaan’s centre-periphery theory (cf. section 1.2), as well as on quantitative data regarding the international market for translations, Heilbron theorized the existence of a hierarchical structure regulating translation flows – a “world system of translations”. According to Heilbron, the international translation system is characterized by a hierarchical structure whereby the number of translations made from a language and into it is strictly linked to the centrality of the language. The hypercentral position of English within the system therefore means that the majority of translations in the world are made from Anglophone texts (Heilbron, 2000; Heilbron & Sapiro 2007; Mélitz, 2007; Sapiro, 2010; 2016). The dominant status of English is evident in the available statistics on global translation flows (Table 7).

<b>Language</b>	<b>1980-1989</b>	<b>%</b>	<b>1990-1999</b>	<b>%</b>
<b>English</b>	24,251	44,7	39,808	59,1
<b>French</b>	5853	10,8	6609	10
<b>German</b>	4678	8,6	6234	9,3
<b>Russian</b>	6213	11,5	1565	2,5
<b>Italian</b>	1595	3	1963	2,9
<b>Spanish</b>	893	1,7	1737	2,6
<b>Other</b>	10,655	19,7	9048	14
<b>Total</b>	54,138	100	66,964	100



Table 7: Translations by source languages, 1980-1999 (reproduced in Sapiro, 2010: 424; original source: Index Translationum).<sup>21</sup>

Significantly, the overall growth of translations that took place between the 1980s and the 1990s is due to a huge increase of translations from English. Table 7 shows that English represented as much as 45% of all translations in the 1980s, and 60% in the 1990s. The other most translated languages after English are French, Russian and German, which accounted for approximately 10-12% each throughout the same period of time (Russian saw its share drastically reduced to >3% in the 1990s in the aftermath of the dissolution of the Soviet Union) – these languages are classified as central languages. Other languages (Italian, Spanish, Polish, Danish, Swedish and Czech) account for 1-3% of all translations, and are considered as semi-peripheral. The remaining world languages represent less than 1% of translations and have a peripheral role within the world system of translations (Heilbron, 2000; Sapiro, 2010).

A key rule governing the world system of translations is that the flow of translations tends to be unidirectional, i.e. translations flow from the centre to the periphery, but not the other way round. This means that hypercentral and central source languages are more widely translated than peripheral ones, but also that these languages translate less and are more focused on indigenous literature:

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<sup>21</sup> UNESCO's Index Translationum (IT) is the most comprehensive source of information on translated books worldwide. The database was first established in 1932 in Geneva by the League of Nations, and is now run by UNESCO. The data contained in the Index are usually collected from each UN member state through their National Libraries. Data on translation are not collected in a systematic way and therefore the reliability of the database is highly questionable. However, the IT is the only source of information available on translation flows and it is widely employed in academic research as an indicator of broad trends, rather than as a precise reference.

While the dominant countries “export” their cultural products widely and translate little into their languages, the dominated countries “export” little and “import” of foreign books, principally by translations (Heilbron & Sapiro, 2007: 96).

A concrete example of this mechanism at work is the extremely modest translation output of Anglophone countries, which is estimated to be around 3% of the total annual book production both in the US and the UK (Venuti, 1995; Allen, 2007; Dalkey Archive Press, 2011; Büchler & Trentacosti, 2015; Trentacosti & Nicholls, 2017). As a term of comparison, Büchler and Trentacosti report that translations amounted to 12% of all books in Germany in 2011 (out of a total annual book production of 96,237); 16% in France (annual book production: 81,268); 33% in Poland (annual book production: 24,380); 19% in Italy (annual book production: 63,800) (2015: 9; Table 1). This data clearly points to a significantly lower translation output in the UK and US, if compared to other large European markets. However, being the UK and US among the largest book producers in the world (with 100,000+ new titles per year) this 3% figure indicates a respectable absolute number of books in translation if compared to smaller book markets, such as for instance Austria, Denmark, Greece whose book production is less than 10,000 new titles per year (Federation of European Publishers, 2017: 6). For a more detailed account of this debate and for the exact data about translation relative to the last decade see Büchler and Trentacosti, 2015 and Trentacosti and Nicholls, 2017 (for UK data) and the Three Percent database maintained by the University of Rochester (for US data).<sup>22</sup>

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<sup>22</sup> Available at: <https://www.publishersweekly.com/pw/translation/search/index.html>

In summary, the sociological approach to the study of translations demonstrates that translation flows are highly unequal exchanges that favour dominant languages and determine a widespread lack of literary diversity in the international publishing field (Heilbron, 2000; 2008; Heilbron & Sapiro, 2007; Sapiro, 2008; 2010; 2014). Given the dominant position of English in today's society, Anglophone literary works tend to dominate the international publishing scene. The sociology of translation has demonstrated that English is today the most translated language across the world, accounting for more than half of literary translations worldwide (Heilbron & Sapiro, 2007).

The Netherlands is a relatively small and highly internationalized country, where “cultural imports have always played a significant, even dominant role” (Heilbron, 2008: 189). As estimated by Heilbron, 30% of the books produced in the Netherlands were translations in the year 2000, with the share of translations in the prose category amounting to 70% (ibid). English is the dominant source language, accounting for 75% of all Dutch translations in 1997. In addition, the overall share of translations from English rose from 14% to 21% between 1986 to 1997 (ibid).<sup>23</sup> In a small market like the Netherlands, where such a large share is occupied by translations from English, the issue of competition from English-language editions becomes particularly urgent, given that Dutch publishers rely heavily on the profits of English translations.

The analysis of global translation flows in this section showed that Anglophone products have the upper hand in the translation market worldwide. However,

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<sup>23</sup> This figure refers to translations from English as a percentage of the total number of Dutch books (cf. Heilbron, 2008: 191, Figure 1).

translation flows are not the only indicator of Anglophone domination in the publishing industry. In the next section, the focus shifts to the other modality of international literary transmission – i.e. the consumption of texts in the original language by bilingual readers. This latter modality of book circulation has received less attention in the scholarly debate than translations, which is a key motivation for undertaking this study.

### 2.3 English-language books in continental Europe

As Chapter 1 outlined, the presence of an established and growing English-speaking community across continental Europe is clearly apparent (Crystal, 2003; Seidlhofer, 2011). The fact that English is widely spoken in Europe has direct implications on book circulation patterns. With the progressive increase of English-language proficiency across Europe (and the world), Anglophone publishers are presented with a huge opportunity to export their products in areas where English is spoken as a second language – as observed by Thompson:

Publishers operating in English found themselves in the position of having a continuously expanding linguistic region in which English was either the primary or the preferred second language, and hence they had a potential market for their books (Thompson, 2005: 42).

The next section examines the export of Anglophone books to European countries where English is spoken as a second language, with particular emphasis on the Netherlands. The discussion starts by providing an historical overview of the export of British books to continental Europe during the nineteenth century, with specific focus on the Dutch case, to then concentrate on the available literature about English-language imports in Europe today.

### 2.3.1 English-language books in continental Europe in the nineteenth and early twentieth centuries: an historical overview

The export of British books to Europe remained very limited during the sixteenth and seventeenth centuries, mostly due to the lower quality of British printing (especially when compared to other areas, such as the Dutch Republic and the Holy Roman Empire) and to the fact that English was little known outside Britain (Hoftijzer, 2002). However, from the end of the seventeenth century and throughout the eighteenth century, the level of trade with other European countries (and with the British colonies) began to increase as English started to be spoken more widely in the continent and further afield. By the middle of the eighteenth century Britain had established a flourishing trade in books with other European countries, which included “the export of books in English, import of books in European languages and in Latin, and translations of English books into various foreign languages” (Feather, 2005: 124). During the French Revolution and the Napoleonic rule, trade between Britain and Europe was interrupted, but after 1815 British exports started to flow once again towards the continent, which progressively became “a major export market for British publishers” (ibid). Due to the dominant role played by Britain during the war and in the post-war period, the English language was slowly but steadily gaining ground in the continent, where “English books, and especially English novels, became something of a fashion” (ibid: 92). The appetite for English texts in Europe is demonstrated by the popularity of continental reprints of British books, such as those produced by

the French publisher/bookseller Galignani and by the German company Tauchnitz.<sup>24</sup>

Throughout the eighteenth century, printing and publishing in America remained very much a “colonial endeavour” (Casper & Rubin, 2013: 683). During the nineteenth century, however, the United States underwent a phase of extraordinary geographic, demographic and industrial growth, which resulted in the emergence of a “distinctive national book trade system” (Winship, 2009:57). By the mid-nineteenth century, American publishing companies were increasingly involved in international trade. As Table 8 below shows, US exports to most European countries grew consistently during the period under examination; however, exports to Europe are dwarfed if compared to those to Canada and Great Britain.

<b>Value of US exports in dollars</b>				
	1845-46	1855-56	1865-66	1875-76
<b>Belgium</b>	200	992	0	659
<b>Denmark</b>	873	1,134	4,317	750
<b>France</b>	2,585	8,119	14,086	13,713
<b>Germany</b>	1,132	4,678	5,394	38,774
<b>Italy</b>	200	100	1,480	10
<b>Netherlands</b>	114	1,516	1,634	1,178
<b>Spain</b>	3,779	6,344	34,031	9,867
<b>Sweden &amp; Norway</b>	0	30	0	60
<b>United Kingdom</b>	14,954	21,640	97,296	97,499
<b>Canada</b>	9,869	110,366	94,072	481,148

Table 8: Books and other printed matter. US exports by destinations, 1845-1876 (table reproduced in: Winship, 2007: 152).

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<sup>24</sup> Tauchnitz’s inexpensive paperback editions, characterised by a recognisable and consistent format, became an institution across Europe; during its 100 years of activity (1842-1943), the Leipzig-based company published the European English-language editions of all the most acclaimed British and American contemporary authors, selling over 40 million copies in the continent (Todd and Bowden, 1988). On Galignani’s English library see: Barber, 1961.

Although no exact statistics about British exports into Europe during the Victorian period are available for comparison, it is safe to assume that most of the English-language books imported into the continent originated in Britain.

The remainder of this section looks more specifically at the situation in the Netherlands which, starting in the mid-nineteenth century, developed a growing interest for English books, thus becoming one of the most important export markets for British editions in Europe.<sup>25</sup>

The Low Countries occupied a dominant position in the European book trade throughout the sixteenth and seventeenth centuries as they constituted one of the most important exporters of books in Latin (van Vliet, 2007). However, with the decline of Latin and the surge of publishing in vernacular languages, the Netherlands began to lose its leading position. By the nineteenth century, the Dutch “book production was focused largely on the home market” and was increasingly dependent on imports from other countries – both in the form of translations and in the original language (Van der Weel, 2006: 30).

Despite French and German remaining the most widely spoken second languages throughout the nineteenth century, British books started to become more popular in the Netherlands during the second half of the century. According to contemporary sources, British imports experienced a phenomenal growth

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<sup>25</sup> A similar pattern applies to Sweden. Given the small size of the population, Sweden has always relied heavily on cultural imports, with translations reportedly accounting for 70% of the whole book production around 1870. Already in the 19th century, books in English, German and French enjoyed a good level of popularity among Swedish readers. After WWII, the English language underwent a rapid expansion in Swedish society which in turn resulted in an increase in the interest for English-language books. Between 1955 and 1961 Anglophone titles represented around 7% of the Swedish book market, with sales of English-language growing even more in the following decades (Steiner, 2005).

between 1850 and 1879, going from a value of 21,085 Guilders in 1850 to 161,925 Guilders in 1879 (+760%) (Kruseman, 1886-1887, cited in: Van der Weel, 2000: 279). Statistics showcase a pattern of uninterrupted growth, with English books representing 6% of all Dutch book imports in 1850, 10% in 1879 and 18% in 1939 (Van der Weel, 2000). Sir Stanley Unwin in his *The Truth About Publishing* defined the Netherlands as “the greatest per capita market for English books on the Continent” (Unwin, 1926; cited in: Van der Weel, 2000: 277), which is demonstrated by the fact that in 1930 the value of British exports to the Netherlands was twice that of Germany (£84,209) (ibid).

This growth in the import of English books was the result of a series of cultural, economic and social factors. To begin with, during the second part of the nineteenth century the Netherlands underwent a rapid population growth (growing from 3 million in 1850 to 5.1 million in 1900). Furthermore, the 1863 reform of the secondary education system contributed to improve the knowledge of foreign languages among the Dutch population (the languages taught were: French, German and English) (Van der Weel, 2006; cf. also 1.3.1). The improvement of the linguistic capabilities of the population also coincided with a progressively increasing interest in British culture and British books, as demonstrated by the fact that authors such as Walter Scott and Charles Dickens were in great demand amongst contemporary Dutch readers. As noted by Van der Weel, British imports satisfied the demand for a number of popular mass genres which were themselves not produced in the Netherlands, such as “detective and crime novels, and in general a type of non-moralizing popular literature” (van der Weel, 2000: 281).

The cheap prices of British imports – mostly due to the benefits of economies of scale – might also have played a role in stimulating the popularity of English



books, although this claim is difficult to substantiate with evidence due to the lack of systematic price comparisons (ibid).

Until the middle of the nineteenth century the majority of imports were fulfilled by a small number of importing booksellers; however, when the request for British books began to increase, the process of importation became more specialized, with many booksellers starting to self-import books and various wholesaling importers specialized in English books making their debut in the Dutch scene. Towards the end of the century, the importation of English books was concentrated in the hands of a few wholesaling companies, among which were: G. Robbers (Rotterdam), Krap and Van Duym (Rotterdam), W.H. Kirberger (Amsterdam) and K.H. Schadd (Amsterdam). According to Van der Weel, the competition between these firms was fierce – with importers competing to be the first to introduce new British titles into the Dutch market and trying to beat their competitors by offering better deals to booksellers (ibid).

In terms of the topic of this thesis, this brief historical overview demonstrates that English-language books were already popular in the Netherlands starting from the nineteenth century – so much so that the Dutch book market represented the most profitable export destination for British publishers at that time. Thus, the Netherlands is a suitable case study for studying the dynamics of competition between English-language and Dutch-language editions given that Dutch publishers have a long history of competing with imported Anglophone editions. Since the popularity of English texts is not a new phenomenon in this market, it is reasonable to assume that, over the years, Dutch publishers have developed strategies to limit the damages inflicted by imported English-language editions in their market. As such, it is a critical question how Dutch publishers have

adapted to this situation and what strategies they have devised to counter the competition of English-language originals.

### 2.3.2 English-language books in non-Anglophone European markets today

As seen in Chapter 1 (section 1.3), Mežek's study demonstrated that it is possible to establish a connection between the advancement of English-taught higher education in Europe and the increase in English-language leisure reading among university students (Mežek, 2013).

A 2007 Eurobarometer on European Cultural Values commissioned by the European Commission provides further insights into the ability of Europeans to read in languages other than their native languages. The study highlighted that, overall, 7% of Europeans read books and 9% read newspapers in languages other than their first language – unfortunately, the survey fails to specify which languages respondents read in. It is interesting to note that the share was well above the overall European one in some countries and among younger and more educated respondents; for instance 29% of respondents declared to be able to read books in other languages than their native language in Denmark, 26% Sweden, and 22% in the Netherlands. In addition, the share was higher than the average in the 15-24 age-group (10%) and among interviewees that had been in education for 20+ years or were still studying (14%) (European Commission, 2007).

Considering the growth in popularity that English experienced over the last two decades (cf. Chapter 1), we can advance the hypothesis that the share of Europeans consuming English-language books might be on the rise. However, this hypothesis cannot be confirmed with evidence given the scarcity of research

into this area. This clearly points to a knowledge gap, with most of the studies on the consumption of English-language cultural products in Europe focusing on other types of products, such as television shows (see Chalaby, 2009) or music (see for instance Bernstein, A.; et al., 2013; and Buma-Stemra, 2004).

In the field of contemporary publishing studies, a few scholarly sources have addressed the issue of English-language reading, namely Steiner (2005), Kovač & Wischenbart (2009a; 2009b), Kovač (2014), Craighill (2013; 2015) and McCleery (2015). Similarly, some industry insiders have discussed this issue in a series of articles and blog posts in various publishing-related magazines, reports and websites (e.g. Jones, 2010; 2011a; Shatzkin, 2010; Campbell & Jones, 2012). Nevertheless, much of the literature on this subject appears to be anecdotal, as it fails to produce a significant quantitative analysis examining the consumption of English-language books in continental Europe. One of the aims of this thesis is to fill in this gap, by providing a statistical overview of the consumption of English-language books in Europe and specifically in the Netherlands.

For industry members and insiders the presence of a sizeable readership for English-language books in Continental Europe is an established fact. In a 2011 *Bookseller* article, Jones described the market for English-language titles in non-speaking European countries as a “quiet but very useful” one for UK publishers, adding that Anglophone best-selling titles have a loyal and stable customer base in Europe and that publishers have stable commercial relationships with booksellers in the continent:

We know historically that when a Harry Potter or Dan Brown is released it is the English-language version that will chart in Europe, well before any translated edition is released by a local publisher. In fact, it is estimated that 10% of the German market is English-language books. Nice business.

This dual market is just about sustainable. There are English-language bookshops across continental Europe, and UK publishers have established relationships with the foreign retailers (Jones, 2011a; para. 2).

Indeed, the example of the Harry Potter series is often cited as a case in point to illustrate the potential for English-language reading in non-Anglophone European countries, since the title reached top positions across various European charts in the original language (Gunelius, 2008; Craighill, 2015).<sup>26</sup>

Publishing professionals seem to be aware of the opportunities for further growth granted by the expansion of English in non-Anglophone export markets, as noted by Ben Wright (International Sales Director of Hachette UK) in the introduction to the 2015 UK Publishers' Association *Statistical Yearbook*:

Our future [that of UK publishers] remains bright. The adoption of English across the world will continue. [...] Importantly, UK publishers will continue to recognise that their biggest audience for the right books may be beyond their own borders (Publishers Association, 2015: 21-22).

Even though exporting English-language titles into continental Europe appears to be a common practice for Anglophone publishers, the scholarly debate around this subject is rather fragmentary and patchy – with only few contributions addressing the phenomenon of English-language reading in Europe. Thus, more research is needed to evaluate the current demand for English-language books in Europe and to assess how this practice influences the local-language publishing

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<sup>26</sup> The wide success enjoyed by the series in the original language in many countries is mostly a consequence of the embargo imposed by the original publisher to avoid plot leaks which resulted in a significant lag between the publication date in English-speaking countries and non-English-speaking countries (Gunelius, 2008: 55-56).

scene. This thesis provides a first attempt at quantifying the consumption of English-language texts in a context of high English L2 proficiency (the Netherlands) and at gathering an insight into how this phenomenon is perceived by local producers and if and how it influences their publication strategies.

As seen in section 2.1.1 of this chapter, the analysis of global translation flows shows a high degree of uniformity, with translations from English dominating the translation market worldwide. However, a 2009 report analyzing the literary diversity in the European book market (*Diversity Report*) provided a more diverse portrait of European translation flows (Kovač & Wischenbart, 2009a). According to this study, European bestseller charts tended to be dominated by local authors and by a restricted string of European authors, while translations from Anglophone authors accounted for around 1/3 of bestselling titles on average. Rather than interpreting these findings as a sign of the decreasing influence of Anglo-Saxon literature in the publishing market, Kovač and Wischenbart have argued the opposite. In a 2009 article, they hypothesized that the decreasing influence of Anglophone best-sellers could be linked to a surge in English-language reading: “perhaps there is a trend that book readers in Europe started to prefer to read English originals and consequently buy English originals instead of translations” (Kovač & Wischenbart, 2009b: 125). In concluding their article, Kovač and Wischenbart point out a lack of data on this subject and thus encourage research into the current state of Anglo-Saxon translations and into the market for English-language originals in Europe (ibid).

According to Kovač, one key reason why many English-speaking Europeans are drawn to English-language titles is the wider choice available in English; as demonstrated by the fact that between 2010 and 2014 the UK and US published around 500,000 book titles, which is double the amount of books produced by

the whole of the remaining 25 non-English speaking European countries (excluding the UK and Ireland) (Kovač, 2014). In addition, Steiner points out that a further advantage of reading Anglophone books in the original language is that these can be accessed immediately upon publication, whereas translations usually take some time to become available in local languages (Steiner, 2005).

The assumption that Europeans are increasingly accessing English-language books in the original language has been confirmed by Craighill, whose PhD thesis investigated the status of translations in the Swedish and French fiction markets (Craighill, 2013). Craighill's research suggested that translations from English underwent a stark decline in Sweden in recent decades, whereas the phenomenon of English-language reading appeared to be on the rise. The publishers interviewed by Craighill suggested the existence of a causal relationship between the two phenomena, and lamented an increasing difficulty in publishing translations from English, given that Swedish readers were often consuming English-language books in the original language (Craighill, 2013; 2015). The rights director at Norstedts, one of the leading publishing houses in the country, told Craighill: "it's really hard to launch a new Anglo-Saxon author in Sweden, because they find their readers really early on, before we have the time to translate and publish the books". Similarly, a publisher at Damm Förlag said that translating genre fiction was becoming challenging in Sweden: "you can't really translate it into Swedish anymore because people read it in English... we used to publish a lot of fantasy fiction before and we've almost stopped doing that" (Craighill, 2015: 97-98). Echoing the conclusions of Kovač and Wischenbart (2009a; 2009b), Craighill (2015) suggests that the decline of translations in some European markets could be interpreted as a sign of the intensification of the domination of Anglo-American literature:

In Sweden the reduction of fiction titles that derive from English language markets may be symptomatic of a new phenomenon indicative of the global market. Rather than revealing a lessening of the homogenizing effect of globalization, it could suggest that the problem is only intensifying, with readers bypassing Swedish translations of fiction titles and consuming English-language editions in their original form (ibid: 137).

In summary, Craighill's, and Kovač and Wischenbart's works highlight that translation flows are not the only indicator of cultural exchange anymore and that in order to understand what the influence of Anglophone literature is on today's European literary landscape, we need to take into account English-language reading. Furthermore, Craighill's field work in Sweden documents a certain discontent on the part of local publishers. However, a key question remains of whether this pattern is mirrored elsewhere in other European countries; another aspect deserving more attention is whether and how the competition of English-language texts is reflected in the publishing strategies and practices of European publishers. Both these questions are considered in this thesis in the context of the Dutch trade publishing market in order to establish the impact of English-language reading on the local-language publishing scene.

## 2.4 The role of internet retailing and digitization in supporting the export of English-language books

As highlighted by various industry insiders and scholars, technological advancements such as online retailing and digitization have played a pivotal role in developing a readership for English-language originals in Europe, by making English-language contents more visible, and more easily and cheaply accessible to readers (Steiner, 2005; McCleery, 2015; Kovač, 2014; Shatzkin, 2014; Rivière, 2017). Online bookshops not only offer readers a huge selection of titles due to

their virtually unlimited shelf space, but they also provide a global marketplace where these products can be easily located and accessed (Steiner, 2005; Kovač, 2014). Regarding the role of internet bookselling in Sweden Steiner notes:

The launch of Amazon.com on 16 July 1995, barnesandnobles.com in May 1997 and several other Swedish counterparts in 1997, made books in English available in Sweden in a way they had not been before. The significance of the new form of distribution for the Swedish consumption of books in English was crucial (Steiner, 2005: 73).

Today, e-commerce has established itself as a key sales channel in most European book markets.<sup>27</sup> Contributing to the success of internet bookselling in Europe is the expansion of Amazon, which, since 2010, has invested around €15 billion in the EU and has launched five fully-fledged online shops in the UK, Germany, France, Italy and Spain and a Kindle store in the Netherlands (Amazon Europe, 2017). In addition to Amazon, various local online bookstores have developed in many European countries, such as Fnac in France, Mondadori and Feltrinelli in Italy, or Thalia and Hugendubel in Germany.

Before the advent of online retailing, European customers who wanted to access English-language books had to rely on the usually limited English-language section available in physical book stores, or otherwise order the titles and wait for the delivery, often for days or weeks. Today, readers can easily find English-language titles through the internet and have them delivered on their doorstep

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<sup>27</sup> Online retailers accounted for 19% of total book sales in the Netherlands in 2017; 18% in Germany in 2016; 19.5% in France in 2016; 13% in Italy in 2016 (this figure includes only physical sales); and 22% in Sweden in 2015. Sources: Associazione Italiana Editori, 2017; Börsenverein des Deutschen Buchhandels, 2016; CB, 2017a; Économie du livre, 2017; Swedish Publishing Association, 2017.



efficiently and inexpensively, given that most online bookshops now offer national one-day delivery options (Steiner, 2005).

In addition to online retailing, digitization is often quoted as a key development for the expansion of English-language reading in non-Anglophone markets. As noted by Shatzkin, e-books have great potential for export since they allow publishers to reduce the costs and obstacles associated with physical distribution: “servicing an export market with print is a lot more difficult and a lot less profitable than providing an export market with e-books. Eliminating both the costs and risks of inventory has an even greater impact on margins” (Shatzkin, 2010: para. 4).

Although European digital markets have been slower to develop than Anglophone ones, European digital uptake has increased steadily in recent years, with e-books now representing almost 6.7% of the market share in the Netherlands, 6.5% in France, 5% in Italy, and 4.5% in Germany.<sup>28</sup> This trend has been greatly assisted by the European debut of the two leading e-book platforms in the world: Amazon’s Kindle, and Kobo. While statistics regarding the market share of Amazon, Kobo and other European e-book retailers are hard to find, it can be speculated that their presence has played a pivotal role in the progressive surge of e-book adoption in Europe and in the development of local-language digital markets.

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<sup>28</sup> Sources: Associazione Italiana Editori, 2017; Börsenverein des Deutschen Buchhandels, 2016; CB, 2017b; Économie du livre, 2017.

In terms of evidence to confirm such growth, there are anecdotal signs that the demand for English-language digital contents is growing at a fast-pace in non-Anglophone markets. A 2011 Bookseller article reported that David Naggar, vice president of Amazon's Kindle, on the occasion of the 2011 Publishers Launch conference in Frankfurt stated that "publishers were selling 'millions of units' in non-traditional markets" and that "sales this year [2011] are more than double 2010 and more than five times 2009" (Jones, 2011b: para. 3). Michael Tamblyn, vice-president of at Kobo, declared in the same occasion that "Kobo's English-language e-book business outside the US, UK, Canada and Australia was up 300% in 2011" (ibid: para: 4). Nevertheless, exact data on the proportion of the market for English-language digital exports in Europe are absent due to the reluctance of global players, such as Amazon, to share such information. Thus, the lack of comprehensive data on the market for English-language e-books in Europe does not make it possible to draw meaningful conclusions on this subject.

In summary, various industry sources claim that there is a growing readership for English-language originals in non-Anglophone areas of Europe and that this trend is significantly encouraged by the advent of online retailing and digitization which allow European readers to discover and access Anglophone contents more easily.

## 2.5 The dynamics of the European open market field

This section introduces the notions of international copyright, territorial rights and open market, all of which are essential to understand the dynamics regulating the export activities of English-language publishers in Europe. The discussion describes: territorial rights and the open market; the influence of Retail Price Maintenance systems on price competition in export markets in Europe; the

competition between the two leading exporters of English-language books – the UK and the US – in open market territories.

### 2.5.1 Transatlantic copyright disputes and the competition between UK and US publishers in the European open market

A key aspect to understanding the functioning of the European English-language book market concerns the issue of territorial rights in the so called ‘open market’.

Broadly speaking, publishing licensing agreements involve different types of subsidiary rights – namely territorial rights, language rights, format rights and other rights (e.g. adaptation rights for cinema or TV and so on) (Feather, 2003). Territorial rights grant a publisher the exclusive right to exploit the copyright of a work (i.e. sell and distribute a book) within a specific geographical region (territory). Territorial rights and language rights are strictly linked to each other, since territories tend to correspond to homogeneous linguistic regions. However, the situation is different in large linguistic areas where “territories [...] might not correspond to the full extent of the linguistic region” (Thompson, 2005: 43). This is the case in large linguistic areas which are generally segmented into smaller regions in copyright agreements.

In the second half of the twentieth century copyright disputes between US and UK companies began to intensify (Feather, 2005). In particular, the main issue of contention was the division of English-speaking territories among the two countries. Up until 1976, British and American publishers had a mutual blanket arrangement – known as the British Publishers Market Agreement – that regulated the distribution of English-language rights. According to this agreement, UK companies were automatically entitled to distribute their books on an exclusive basis in their domestic territory and in the Commonwealth area,

while US companies would instead distribute in the US, in their dependencies, and in the Philippines. The rest of the world (including Europe) was instead considered an “open market”, that is to say a non-exclusive area where the UK and US editions were in competition (this notion is considered in more depth below).

The British Publishers Market Agreement was revoked in 1976 under the accusation of being a monopoly and since the revocation of the agreement, exclusive territorial agreements have had to be negotiated on a title-by-title basis (Owen, 2014). This meant that British and American publishers “could no longer take it for granted that the rest of the English-speaking world could be carved up between them into exclusive spheres of operation” (Thompson, 2005: 75). Another consequence of this revocation, according to Feather, was that American companies eventually “began to compete successfully in former British colonies and in the Commonwealth” (Feather, 2005: 148). Today, given the extent of the Anglophone linguistic area, the way in which English-language territorial rights are split differs greatly from contract to contract. For instance, a publisher could acquire exclusive World English-language rights (therefore covering the whole English linguistic area), or instead territories could be split into North American English-language rights (usually including Canada, the USA and the Philippines), or US English-language rights, or UK English-language rights, or Australia/New Zealander English-language rights, and so on (Thompson, 2005; Owen, 2014). This often results in the co-existence of multiple editions of the same title, each one published and distributed exclusively within a given domestic market. For instance, there could be an American, a British, a Canadian, an Australian edition, and so on of the same English-language title (Feather, 2003). Generally speaking, the process of partition of territories is very much welcomed by agents and

authors who have a “financial interest in segmenting the English-language market and selling rights to two or more publishers” (ibid: 75).

Transatlantic disputes are not limited to the distribution of exclusive English-language territorial rights, but also concern open market areas which include continental Europe (ibid). According to the *Dictionary of Publishing and Printing*, an open market can be defined as “a market in which two publishers agree that both can sell the same book”; in other words, open markets are non-exclusive territories where more than one edition of the same title in the same language can be sold simultaneously (Collin, 2006: 183). The non-exclusive status of Europe means that in theory, all legally-published editions of an English-language title can be sold in this region; in practice, it is mostly UK and US editions that are available to European readers.

Territorial rights in the European open market have been an object of controversy between American and British publishers for a long time, with the issue resurfacing regularly over the years. The central issue to this debate is connected to the European Single Market regulations, which ensure the free movement of goods, services, capital and persons within all members of the European Economic Area, EEA. More specifically, Articles 34 and 36 of the 2007 Treaty on the Functioning of the European Union (TFEU) regulate the free movement of goods provision, which ban any barriers to imports and exports between member states. As Owen, points out, “at the heart of the European open market issue is the fact that there are major discrepancies between the exclusive nature of copyright and two sections of the Treaty of Rome affecting trade within the European Union and the EEA” (Owen, 2014: 137). This means that copyright ownership is not able to interfere with the free circulation of goods as the latter supersedes any “geographical market division within Europe imposed by

individual rights holder” (Benson and Jones, 2010: 345). This is of significant relevance in the case of English-language export editions in Europe, since the availability of US editions in Europe means that, technically at least, parallel importation could take place, with American books making their way into the British exclusive domestic market via continental Europe.<sup>29</sup> British publishers have been concerned about this issue for a long time, with their preoccupation growing since the advent of global online retailers like Amazon.<sup>30</sup> The debate about territorial rights in Europe, also referred to as “turf wars”, reached a height in 2006 during a panel discussion at Book Expo America. On this occasion British publishers and agents strongly advocated for exclusive European rights, which would allow them to be the sole exporters of English-language books to the Continent, thus eliminating the risk of parallel importation altogether. To this proposal, US publishers responded by labelling the British demands as a “land grab” and by defending the open market ‘status quo’, calling for even more competition in Europe (Corbett, 2006; Owen, 2010).

To this day, the dispute around European exclusivity has not produced any significant change and Europe remains an open market, with many multinationals “arguing that the granting of world rights might be the only solution” to this issue (Owen, 2014: 123). However, if following Brexit the UK was to exit the European Single Market (this is not clear at the time of writing,

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<sup>29</sup> Parallel importation in publishing can be defined as “the importation of any legitimately published edition of the same book, regardless of the contractual rights held by the publisher of that edition and who holds the national territorial rights in the country into which the edition is imported” (Owen, 2010: 117; for more information on parallel importation see *ibid*: pp. 117-118; 159).

<sup>30</sup> Although most online retailers have committed to respecting territorial rights - on the condition that the correct metadata is provided by publishers -, the risk of parallel importation cannot be discarded in total due to the effects of the exhaustion of rights doctrine (Owen, 2010).

although it appears to be a possibility), the risk of parallel importation would not subsist anymore and British publishers would lose their strongest argument for claiming European exclusivity.

Thus, in terms of how open market regulations affect the import of English-language books into the Netherlands, both American and British books are widely available through Dutch book retailers and in some instances both editions are sold one alongside the other.

Among industry insiders there is general consensus that British publishers occupy a dominant position in the European export marketplace, mostly due to the geographical proximity to continental Europe (Shatzkin, 2010). However, in recent years, various sources have highlighted a change of course, with US publishers taking a more active interest in the European market (Campbell & Jones, 2012).

It can be speculated that this high level of competition between Anglophone editions in the open market puts local-language publishers under even more pressure, by pushing prices of export editions down and thus making Anglo-American products even more attractive to Dutch consumers. Although the dynamics of competition between American and British publishers in Europe is not the focus of this thesis, when analyzing the situation in the Netherlands, it is useful to consider that the competition is not only taking place between Dutch-language and English-language editions, but that American and British publishers are also fiercely competing against each other. European open market territories, including the Netherlands, are therefore very crowded marketplaces, characterized by complex commercial dynamics and by a high-level of

international competition and it is these key characteristics that are further explored in the data collection and analysis.

### 2.5.2 Retail Price Maintenance and its influence on export dynamics

Enforcing fixed book price policies (FBP, or Retail Price Maintenance, RPM), together with direct subsidies and the imposition of lower or zero taxation on books, is one of the most common forms of state intervention in the book market (McCleery, 2015). FBP regimes are widely employed across Europe, and the large majority of European countries apply different variations of this model.<sup>31</sup>

Under an FBP system it is the publisher's responsibility to set the retail price for consumers, and retailers are not allowed to sell books at a discounted price. Each RPM regime has its own characteristics in terms of duration and scope (i.e. whether the regulation applied to physical books or also digital ones) (IPA, 2014). In some countries, FBP regimes are regulated by law or statute, whereas in other countries the regime is the result of a trade agreement between publishers and book retailers (ibid).

The efficiency of RPM systems and the extent of the benefits they provide to customers are much debated among policy makers and industry insiders. The main argument in favour of fixing book prices is that, by levelling the playing field and enabling small retailers to compete with bigger chains and online retailers, this regime maintains a healthy network of small independent book shops, as

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<sup>31</sup> European countries that use Fixed Book Price systems are: Austria, France, Germany, Greece, Italy, the Netherlands, Norway, Portugal, Slovenia and Spain. European countries that do not employ a FBP regime are: Finland, Ireland, Poland, the Czech Republic, Sweden, Switzerland and the UK (IPA, 2014).



evidenced by the thriving and supported independent bookshop scene in France compared to the demise of around two-thirds of independent bookshops in the UK after the termination of the Net Book Agreement in 1995 (ibid).<sup>32</sup> Moreover, supporters of RPM insist that this system promotes more diversity in the book market, through “cross-subsidization”, i.e. by enabling “publishing houses to use the profits generated by bestsellers to subsidize more ‘risky’ ventures: specialist titles, new authors, literary experiments” (ibid: 3). In contrast, detractors of the FBP system claim that markets should always operate under free market conditions; according to this view, fixing book prices is ultimately disadvantageous for customers since prices are artificially kept high by publishers (ibid). Another often mentioned drawback of RPM is the fact that, by hindering competition, this regime effectively limits innovation in the retail system (Towse, 2011).

FBP regulations have a direct impact on export dynamics in the European open market given that European competition legislations mandate that FBP policies cannot be applied to cross-border trade. Thus, foreign-language editions that are imported to countries featuring RPM systems cannot be subjected to fixed book price regulations; in practical terms, this means that imported editions of UK and US titles can be discounted without limitations in most European countries, whereas local-language editions are subject to FBP regulations.

The European Commission (in particular, the European Court of Justice and the Directorate-General for Competition) began to investigate the compatibility of

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<sup>32</sup> The Net Book Agreement was a voluntary agreement between trade associations that had contributed to fixing book prices in Britain throughout the 20th century (IPA, 2014).

the various national fixed book systems with EU competition legislation from the 1980s. These examinations in many cases resulted in EC interventions aimed at imposing constraints on member states' RPM policies (Littoz-Monnet, 2013). The decision regarding RPM and foreign-language editions ensued from a 1998 investigation examining the effects of the Dutch RPM system on cross-border book circulation, which was initiated by the EC's Directorate-General for Competition. The EC accused the Dutch system of infringement of EU competition rules for imposing FBP regulations to foreign editions. As a consequence of this investigation, the Dutch RPM system was amended (IP/99/668) (European Commission, 1999).<sup>33</sup>

Indeed, and the data collected in this thesis confirms this, the exemption of foreign-language titles from FBP regimes can result in price discrepancies between local titles and imported ones. The specific influence of RPM regulations on price patterns for export titles in the Netherlands and the consequences that these regulations have on the competition between English-language and Dutch-language editions is considered in more depth in Chapter 6, where interviews with Dutch publishing professionals are analyzed and discussed (see in particular section 6.4).

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<sup>33</sup> FBP agreements are also considered a violation of European competition laws when they involve cross-border sales within linguistically homogeneous areas. This ban resulted from the European Commission's formal investigation into the German fixed book price agreement, known as *Sammelrevers*, which formerly regulated FBP practices within the whole German-speaking area (Germany, Austria and Switzerland). This agreement allowed publishers to fix prices in cross-border sales to other German-speaking countries. After the EC intervention, in 2000 the *Sammelrevers* was amended so that it only applied to domestic sales (European Commission, 2000). The commission then re-opened investigation into the German fixed book price system in 2002 regarding cross-border online sales. This resulted in a further amendment of the *Sammelrevers* which in turn led to the EC finally dropping all proceedings against the German FBP system (European Commission, 2002). For a more detailed account of the EC's formal intervention on the *Sammelrevers* see: Psychogiopoulou, 2008: 283-286.

## 2.6 Summary and outline of the research questions

The chapter provided an overview of the key notions underpinning field theory and explained how this theoretical framework will be employed in this thesis to describe and make sense of the dynamics of competition in the Dutch publishing market.

As this chapter shows, the circulation of English-language books in non-Anglophone areas of Europe dates back to the eighteenth century (section 2.3.1). However, it is from the second half of the twentieth century that the amount of English-language books exported to continental Europe started to increase substantially – mostly due to the growing importance of English internationally. In the field of publishing studies, various scholarly and industry sources have discussed the phenomenon of English-language reading in the contemporary publishing landscape, claiming that there is a growing readership for English-language texts in non-Anglophone European countries (section 2.4). Kovač and Craighill linked English-language reading to a decline in popularity of Anglo-Saxon translations in Europe, stating that, since an increasing number of Europeans read such texts in the original language, European publishers are struggling more and more to make translations of Anglophone titles economically viable (Kovač, 2014; Craighill, 2013; 2015). Moreover, it has been pointed out that this practice is further encouraged by the increased availability of English-language texts, determined by online retailing and by digitization in the book industry (section 2.5). However, in most cases, these sources lack the quantitative evidence to support these claims.

If we exclude Craighill's contribution (Craighill, 2013; 2015), no source has addressed the impact of the increasing competition of English-language texts on the various local-language publishing markets in continental Europe. This key

issue will be addressed in depth in this thesis by concentrating on the Dutch case. The research therefore sets out to investigate how Dutch-language publishers are affected by the competition of English-language books in their market and how they react to it.

Section 2.6 of this chapter defined the meaning of ‘open market’ and provided an overview of some of the main issues linked to territorial rights in Europe. In particular, the discussion described the disputes between American and British publishers to obtain exclusive distribution rights in the European open market which so far have not produced any significant change in the way English-language copyrights are assigned in this region. Due to the fact that English-language books are distributed on a non-exclusive basis in continental Europe, there is usually an intense competition between American and British editions in this region. The literature review highlights a lack of resources addressing the export dynamics of UK and US companies in the European open market and the issue of British and American competition. The discussion in section 2.5.2 also illustrated how RPM regimes and European trade regulations interact to determine price discrepancies between export editions and local-language ones; this issue and its effects on the competition between Anglophone exports and local titles will be further investigated in this thesis.

Taking these considerations into account, this research project aims to fill the knowledge gap that the literature review identified, by addressing the following key questions to investigate how widespread English-language reading is in Europe and in the Netherlands and how Dutch publishers are responding to the competition of English-language editions:

- 1) What is the value of American and British exports to Europe and in particular to the Netherlands? What data is available and what is missing?
- 2) What market share do English-language export editions represent in the Dutch contemporary trade book market? How does this data compare to the market share of Dutch-language editions?
- 3) To what extent Dutch publishers perceive the competition of English-language titles as a threat?
- 4) What strategies do Dutch publishers adopt to avoid losing readers to imported editions?
- 5) What consequences do these strategies have on publishing and translation practices, especially with regard to the publication of translations from English into Dutch?

The first two research questions fill in a considerable gap as they provide a much needed overview of the export revenues of UK and US companies in recent years (with a specific emphasis on trade exports into Europe). Furthermore, question two produced a detailed historical overview of sales of English-language books into the Netherlands, therefore enabling us to contextualize and better understand the size of the phenomenon of English-language reading in the target country of this thesis.

The third, fourth and fifth research questions instead established whether Craighill's conclusions – i.e. that the competition of English-language books is increasingly being perceived as a problem by Swedish publishers (Craighill, 2013; 2015) – can be extended to another national context (the Netherlands). More importantly, these research questions constituted a first attempt at investigating

how English-language reading influences the publication and translation strategies of Dutch publishing professionals.

The next chapter will provide an overview of the methodological approaches and data collection methods adopted for this research and it will explain in detail how the research questions have been approached and how the data has been collected, processed and analyzed.

## Chapter 3: Research Methodology

### 3.0 Introduction

This chapter describes the methodological framework and research methods used in this thesis and the rationale for the methodological choices made.

This thesis investigates the market for English-language trade books in the European open market. In order to provide an in-depth case study of one national context and considering the time constraints (i.e. the duration of the PhD), as well as geographical and financial limitations, the study's focus has been narrowed to a specific area of publishing (the trade book market) and to one national context within Europe (the Dutch book market). The Netherlands was therefore used as a case study to investigate the consequences that the competition of English-language books has on the local-language publishing scene. The rationale for choosing the Netherlands as a case study is outlined in section 3.4 below.

The methods selected to address the research questions consist of a mixed research design, featuring both statistical analysis and qualitative analysis. The findings of the statistical analysis, presented in Chapters 4 and 5, provide the background information needed to better understand the size of the market for English-language books in the Netherlands and its historical evolution (from 1976 until today) and therefore complement and help contextualize the findings of the qualitative analysis. The qualitative analysis, whose results are presented in Chapter 6 and 7, adopted a flexible research design, relying on grounded theory

and case study as research strategies, and on in-depth expert interviews as a data collection method.

### 3.1 Research paradigms: qualitative and quantitative methods

Social science research paradigms are generally divided in two broad approaches: quantitative and qualitative methodologies. These two traditions have long been considered incompatibly opposed since they are based on different epistemological and ontological positions (Bryman, 2008). The philosophical nature of the contention has made the opposition between these two research modalities polarized – so much so that this opposition is often referred to as a ‘paradigm war’ (ibid).

At the basis of the epistemological and ontological contention there is the adherence to positivist principles on the part of quantitative researchers, whereby qualitative researchers tend to follow social constructivist/interpretative ones (Denzin & Lincoln, 2017).

Traditionally, positivistic approaches pursue objective knowledge of phenomena and believe that the ultimate goal of science is that of “developing universal causal laws” (Robson, 2011: 21). In this paradigm, researchers strive to achieve value-free standardized findings – i.e. data that is as far as possible independent from the social context where the social phenomenon originates or manifests itself. In order to obtain this, research is conducted in controlled environments. Furthermore, positivism places particular emphasis on the objectivity of the researcher, as well as on the reliability (“consistency over time and with different observers”) and validity of findings (showing they [the findings] measure what is intended”) (ibid: 19). In practice, this approach translates into a strong emphasis



on measurable and precise data, usually taking the form of numerical findings, e.g. statistical analysis (ibid). Quantitative inquiry is based on deductive logic, meaning that its objective is that of testing existing theories/hypothesis rather than deriving a theory from data analysis (Creswell, 2013). As a consequence, the research design of quantitative studies is usually determined at an early stage in the research process and remains fixed throughout the data collection process (Robson, 2011).

Although positivism dominated natural and social research for a long time (approximately from the end of the nineteenth century to the middle of the twentieth century), this framework has been subject to much criticism and has now been largely superseded by post-positivist approaches (Denzin & Lincoln, 2017). The latter retain some of the key assumptions of their predecessor, while also incorporating criticisms. For instance, post-positivists argue that reality is ‘only imperfectly and probabilistically apprehendible’; as such, scientific evidence is considered flawed and fallible (Lincoln, et al, 2017: 111). Furthermore, post-positivists acknowledge that ‘the theories, hypotheses, background knowledge and values of the researcher can influence what is observed’ (Robson, 2011: 22). Notwithstanding these differences, the post-positivist agenda does not deviate from positivism in its essence (ibid).<sup>34</sup>

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<sup>34</sup> For a detailed overview of the post-positivist research framework see: Phillips and Burbules, 2000.

It is possible to identify three overarching paradigms that underpin qualitative research: constructivism/interpretivism; critical theory; and participatory and cooperative approaches (Lincoln et al. 2017).

Constructivist/interpretive approaches place particular emphasis on the role of individuals in constructing subjective meanings regarding the world they live in (Creswell and Poth, 2018). From an ontological point of view, constructivist framework(s) maintain that social phenomena do not exist *a priori* but are the result of a constant process of interpretation and interaction between individuals and social groups (Robson, 2011). Rather than uncovering objective and generalizable universal truths, in constructivist frameworks the goal of social research is that of exploring the meanings and interpretations that individuals attach to social phenomena, as well as those of investigating the subjective nature of human thinking and feeling (ibid). Thus, constructivist paradigms are based on the rejection of scientific methods for the study of society and human behavior (ibid).<sup>35</sup> Constructivist researchers (similarly to critical and participatory researchers) are not concerned with reaching an objective understanding of phenomena; instead they acknowledge the active role of participants and researchers in co-constructing meanings (ibid; Creswell and Poth, 2018). This paradigm is the one adopted in the present inquiry (see the end of this section for details about the rationale behind this paradigmatic and methodological choice).

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<sup>35</sup> For an in-depth overview of the philosophical underpinnings of qualitative methods see: Schwandt, 2000.

In critical theory approaches, the key ontological assumption is that reality is based on power struggles, leading to “interactions of privilege and oppression that can be based on race or ethnicity, socioeconomic class, gender, mental or physical abilities, or sexual preference” (Lincoln et al., 2017: 114). From an epistemological point of view, critical researchers believe that reality can be known by way of studying its social structures and power relations (ibid). The goal of social research, according to this paradigm, is that of uncovering the mechanisms of oppression at work in society and to impart social change (Creswell, 2013). This framework aims at tackling situations of oppression and discrimination based on race or ethnicity (critical research theories), gender (feminist theories), sexual orientation (queer theories), mental abilities (disability theories), and so on (ibid).

Similarly to critical theory approaches, participatory frameworks focus primarily on bringing about social change by “helping individuals free themselves from constraint found in the media, in language, in work procedures, and in the relationships of power in educational settings” (Creswell, 2013: 26). To reach this objective, participatory inquiry engages members of the communities in the research process and encourages political participation (Heron and Reason, 1997; Lincoln et al., 2017). In practice, transformative inquirers “ask participants to help with designing the questions, collecting the data, analyzing it, and shaping the final report of the research. In this way, the ‘voice’ of the participants becomes heard throughout the research process” (Creswell, 2013: 27).

As is apparent above, the methodologies stemming from the paradigms just described are qualitative. As opposed to quantitative methodologies, qualitative inquiries favour the use of an inductive logic, that is to say that they construct

theoretical interpretations based on the concepts that emerge from the data collection (Robson, 2011). The research design of qualitative studies is commonly flexible and is defined and adjusted during the research process. In turn, the research process usually involves emerging questions (e.g. open-ended research questions), whereas data collection takes place in natural contexts (i.e. in the participant's settings) (Creswell, 2013).

Table 9 below provides a summary of the key differences between quantitative and qualitative research methodologies.

	<b>Quantitative Methods</b>	<b>Qualitative Methods</b>
<b>Philosophical Underpinning</b>	Positivism; post-positivism	Social constructivism; critical theory (e.g. gender theory, critical race theory, queer theory, disability theory); participatory paradigm.
<b>Research Design</b>	Fixed; pre-determined; closed-ended research questions	Flexible; fluid; adjusted along research process; emerging (open-ended) research questions
<b>Data</b>	Numerical; statistical; value-free	Verbal; non-numerical; rich
<b>Role of Researcher</b>	Objective; distant from participants	Interpretative; self-reflective; close to participants
<b>Logic employed</b>	Deductive; the goal of the research is to test a theory	Inductive; general observations are inferred by interpreting research data
<b>Emphasis on</b>	Behaviours; objectivity, generalizability, validity and reliability of data	Individual meanings and views; complexity of social phenomena; subjectivity; reflexivity; uncovering power relations; social change
<b>Research context</b>	Controlled environment	Natural settings

Table 9: Differences between quantitative and qualitative research methodologies (table based on: Robson, 2011; Lincoln, et al, 2017; Creswell, 2013, 2018).

Although quantitative and qualitative paradigms have been considered for long as incompatible, the divide between these two approaches is blurring – mostly due to the emergence of mixed research frameworks from the 1990s onwards

(Bryman, 2008; Robson, 2011; Denzin & Lincoln, 2017; on this see also: Pilcher and Cortazzi, 2016). These frameworks are “not committed to any one system of philosophy and reality” and were established as a third way – a sort of compromise between purists of the quantitative and qualitative school (Creswell, 2013: 28; Robson, 2011). From the theoretical point of view, mixed methodologies are underpinned by a pragmatic approach that rejects philosophical dualisms (e.g. positivism vs interpretivism) and the theory of immensurability of paradigms, while proposing that qualitative and quantitative methods are instead complementary and can strengthen each other (Tashakkori & Teddlie, 2009; Robson, 2011). A key feature of mixed methods research is that it is the nature of the research question(s) to determine the methodology to be employed in a given study (Tashakkori & Teddlie, 2009); as noted by Robson, ‘a pragmatist would advocate using whatever philosophical or methodological approach works best for the particular research problem at work’ (Robson, 2011: 28).

On the basis of the above, the research paradigm underpinning the qualitative part of this research is interpretivism/constructivism. The chief reason for adopting this approach is that the researcher subscribes to the idea of reality as being socially constructed by social actors, as opposed to existing ‘a priori’. Participants and researcher are therefore seen as active players in the creation and interpretation of meaning and knowledge. It is therefore key for qualitative researchers to reflect on how their cultural background, beliefs, prior assumptions, attitude and personality affect the data collection and interpretation phase (Bourke, 2014).

As an early career academic with limited professional experience in the publishing industry and with no connection to the Dutch publishing context, the researcher had a different professional background to the interviewees. This contributed to position her as an ‘outsider’ to the Dutch-language publishing sphere in the eyes of the participants. On the one hand, being a member of the researched community brings advantages in that it provides easier access to participants and helps in establishing trust, intimacy and legitimacy. On the other hand, being an outsider arguably contributed to conferring the researcher an external and detached observer status (Chavez, 2008; Kerstetter, 2012; Bourke, 2014). The fact that the researcher had limited previous knowledge of the dynamics of the Dutch publishing market is argued here to help ensure that she had no significant pre-conceptions or expectations that co-opted or constrained her role. Lastly, the fact that the researcher does not speak Dutch might have affected the data collection – and this issue is discussed more in-depth in section 3.10 below.

The data collection has been approached using qualitative methodologies (in-depth interviews), since the aim of the research was to reach a comprehensive understanding of the phenomenon under study and the social contexts where the phenomenon was situated by considering the multiplicity of viewpoints and perspectives of participants and their subjective interpretations. Broadly speaking, qualitative interviewing is considered the most suitable method to conduct an in-depth exploration of the phenomenon of English-language reading in non-Anglophone contexts from an insider perspective. This insider knowledge is achieved through participation of social actors who have an in-depth understanding of and an extensive professional experience with the issue at study

(i.e. members of the publishing industry operating in the Dutch and international book markets).

This research employs elements of constructivist grounded theory (Charmaz, 2000). The rationale for adopting grounded theory was that this strategy was particularly suitable for researching understudied areas such as the issue investigated in this thesis, due to its inductive and explorative nature. The choice of relying on Charmaz's approach to grounded theory is in line with the adoption of a constructivist/interpretative paradigm. The data was analysed following Charmaz's coding guidelines; this coding strategy was selected for its emerging and data-driven nature that aims to reflect closely participants' data (regarding further details of the use of grounded theory in this thesis see section 3.3.1).

### 3.2 Statistical analysis

Overall, the statistical part of the research is not intended to validate or triangulate the data gathered through qualitative analysis. The role of statistical analysis in this thesis is rather that of contextualizing the phenomenon under study, by providing an account of the size of the market for English-language exports in Europe and in the Netherlands.

The quantitative evidence gathered is divided in two parts: one accounting for the export statistics of the two leading exporters of English-language books – the UK and the US (Chapter 4); and one accounting for sales of foreign-language books (including English-language ones) in the Netherlands (Chapter 5).

The statistics documenting sales of British and American exports have been collected respectively by the British and American publishing associations (i.e. the national book trade organizations), while data recording the market share of

foreign-language imports in the Netherlands has been collected by two different research companies (Stichting Speurwerk and Gfk) on behalf of the Dutch Royal Society for the Book Trade (KVB).<sup>36</sup> Since the data collection methodologies used differ greatly from organization to organization, the methodologies employed for collecting export and import statistics will be described in separate sections.

### 3.2.1 American and British book exports to Europe: data collection methods

#### 3.2.1.1 UK data

The figures documenting the volume and value of UK book exports are extrapolated from two sets of sources:

- The 2005, 2009, 2013, 2014, 2015 and 2018 *Statistics Yearbooks* by the UK Publishers' Association (Publishers Association, 2005; 2009; 2013; 2014; 2015a; 2018);
- One additional report published by the Publishers' Association, which is based on a different source – namely HM Revenue and Customs (HMRC) data (Publishers Association, 2015b).

Although both sources are published by the same organization, the UK Publishers' Association, the data collection methods employed and the period covered are different. The data is therefore presented in two separate sub-

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<sup>36</sup> In Dutch Koninklijke Vereniging van het Boekenvak.



sections, one dedicated to the *PA Statistics Yearbooks* and one dedicated to HMRC data.

#### *PA Statistics Yearbooks Export Data (2001-2015)*

The *PA Statistics Yearbook* is published annually and the most recent reports can be purchased in digital and print format via the PA website. The report consists of various individual sections which can be acquired online separately; for the purpose of this statistical analysis the Export Book Sales sections have been employed. The 2013, 2014, 2015 and 2018 sections have been purchased making use of the university's research funds, while older reports (2005 and 2009), which were not available for sale on the website, have been kindly provided by the PA (free of charge). Taken together, the statistics contained in these reports cover a period of 17 years, from 2001 to 2017.

Since the year 2000, the *PA Statistics Yearbooks* are based on the Publishing Association Sales Monitor scheme (PASM), which covers around three-quarters of the total sales of British publishers. PASM is administered by Nielsen Book Research (the world leading data provider for the publishing industry) on behalf of the Publishing Association and data is collected from publishers and distributors on a monthly or quarterly basis. Since 2005, this data is applied to a one-off Benchmarking Exercise (carried out in 2005) involving as many publishers as possible who were not already contributing to PASM. The exercise provided an approximate estimate of the total sales of all UK publishers for that year; this data has been subsequently used to calculate the estimated total sales for the following years, based on the yearly PASM growth rate. When examining the data, we have to bear in mind that since 2005 the yearbook takes into account

the results of this benchmarking exercise, i.e. it has a larger number of contributors.

PASM started collecting statistics on digital sales since 2008, but it is only more recently that sales have been split into UK and overseas sales considering the location of the end consumer. As a consequence, data on digital exports is only recorded starting from 2013. PA figures regarding digital sales only account for the traditional publishing sector, therefore self-published books, books published by Amazon's imprints and "new digital-only media companies" are not included (Publishers Association, 2015: 106).

#### *HMRC data on single destination of UK exports*

In addition to the Publishing Association Statistics Yearbook data, further information on British exports can be gathered from a 2015 report by the UK Publishing Association (Publishers Associations, 2015b). As compared to the Statistical Yearbooks, this report covers a shorter period of time (2010-2014) and is based on a different source, namely the data on UK book exports gathered by the HM Revenue & Customs Trade Statistics unit (these statistics are available through HMRC's website). As mentioned by the website, HMRC data includes information on all goods entering and leaving the UK (HM Revenue & Customs, n.d). This data presents some methodological caveats: firstly, the report fails to indicate whether digital exports are included in the count; and secondly, as highlighted in the report's closing remarks, HMRC data tends to overestimate the amount of exported books, as it includes brochures and other similar printed goods, as well as items that are being re-exported.

Despite the methodological challenges that the HMRC data present us with, it is still useful to take this report into account, as it provides an insight into the single destinations of UK exports (i.e. by country) – something that is missing in the PA Statistics Yearbooks, which only groups export destinations by regions (cf. Table 14).

### 3.2.1.2 US data

Figures relative to the export of US trade publishers covering the period 2012-2015 were kindly provided by the American Association of Publishers (AAP). The data included in this section is based on the 2013 and 2015 *Export Sales of US Trade Books Publishers* reports, respectively accounting for the 2012-2013 and 2014-2015 figures (Association of American Publishers, 2013; 2015). Differently from UK statistics, these datasets only record trade categories – meaning that they are more directly relevant to the focus of this thesis. Incidentally, this also makes UK and US data more difficult to compare (for more on this issue see Chapter 4, section 4.3).

The *Export Sales of US Trade Book Publishers* reports from which the figures presented below are extrapolated are based upon data from BookStats. Produced by the Association of American Publishers (AAP) and the Book Industry Study Group (BISG), BookStats collects yearly statistics on the US book market. These datasets are compiled thanks to the data from almost 2,000 US publishers who voluntarily submit information regarding their sales performances. The trade export figures relative to the period 2012-2015 hereby included gather information from respectively 162 publishers (for the years 2012 and 2013) and 172 publishers (for the years 2014 and 2015) and their distribution clients. The publishers that participated in the 2012-2013 report include the Hachette Book

Group (plus 8 distribution clients), Harper Collins, Macmillan Publishers, Penguin Random House (plus 27 distribution clients), Perseus (including over 100 distribution clients), Simon & Schuster (including 20 distribution clients), and MIT. Publishers included in the 2014-2015 figures include Hachette Book Group (plus 8 distribution clients), HarperCollins, Macmillan Publishers, Penguin Random House (plus 38 distribution clients), Perseus (including over 100 distribution clients), Simon & Schuster (including 20 distribution clients), and W.W. Norton.

As was the case for UK data, the tables and figures presented here are not always an identical reproduction of the AAP reports. In many cases, new calculations about growth percentages have been added and most of the tables and figures have been re-designed and re-elaborated in order to combine the results of both reports. Furthermore, given that the focus of the present research is on exports to European countries, the figures have been adapted in order to provide a more focused overview of the European situation, thus leaving aside other world regions.

### 3.2.2 English-language texts in the Netherlands (1976-2018)

The statistical data documenting the market share of foreign-language books in the Netherlands has been aggregated through the periodical reports prepared by two different research companies: Stichting Speurwerk (1976-2000) and GfK (2007-2018).

Overall, the reports span roughly a 43 year time frame (1976-2018) – with an interruption in 1994 and between 2000 and 2007. This section will describe the

data collection method employed by both companies; the data is organized in two sub-sections as follows:

1. 1976-2000: Stichting Speurwerk's *Speurwerk Boeken Omnibus* reports (section 3.2.2.1)
2. 2007-2018: Gfk's annual reports (section 3.2.2.2)

### 3.2.2.1 Stichting Speurwerk data collection method

For 25 years (1975-2000) Stichting Speurwerk (SS) was tasked with gathering statistical evidence about the Dutch book market by the Dutch Royal Society for the Book Trade (i.e. the Dutch Publishing Association, also known as KVB). In turn, SS used to outsource the data collection operations to the statistical institute Nederlands Instituut voor de Publieke Opinie (NIPO). From 1976 to 2000, SS produced quarterly reports – titled *Speurwerk Boeken Omnibus* – documenting the state of the trade book industry in the country. The reports include information such as: the market's overall sales and turnover, the most popular formats and genres, average prices, and so on.

Starting in the second half of 1975, the SS reports began to include information on sales and revenues of foreign-language books in the Netherlands; this part of the *Speurwerk Boeken Omnibus* reports is the one used for collecting the data presented in this thesis.<sup>37</sup>

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<sup>37</sup> Although SS started recording the volume and value of sales by language from the second half of 1975 (July – December 1975), information relative to 1975 is omitted from this overview for ease of reading. The reason for this exclusion lies in the fact that in 1975 SS did not separate translations from Dutch-language originals and English-language from all foreign-languages.

The data collection method used by NIPO consisted of representative sample surveys carried out weekly in randomly selected Dutch households.<sup>38</sup> Every week, addresses spread all over the country were surveyed regarding the book purchases of the previous week. The information gathered was then employed to make national projections. This data collection method is different from the one currently employed by Gfk, which instead relies on point-of-sales data being fed by a large selection of retail outlets spread across the country.

After the research company SS ceased to exist, the company's material has been archived at University of Amsterdam Special Collections Library (Bijzondere Collectie) and is now available for consultation.<sup>39</sup> For the purpose of this research, I was granted access to the archive which consists of physical copies of the *Speurwerk Boeken Omnibus* reports. The physical copies of the reports were photocopied and then reproduced in tables and charts which are presented in Chapter 5. In order to visualize the data in an effective way and provide the broader overview of trends possible, figures from the whole period (1976-2000) have been compounded together. To do so, tables and graphs had to be re-designed from scratch. It is worth noting that there is a one year gap in the data

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Therefore, the data relative to this half-year would not be comparable to the data recorded from 1976 to 1993.

<sup>38</sup> The size of the sample changed considerably during the period under consideration. For instance in 1976 NIPO surveyed 900 households per week, while in 1977 the sample had extended to include around 2,000 households per week. This same sample size was continued until the end of the 1980s. During the 90s the number of interviewed households decreased progressively (e.g. 600 a week in 1992 and 400 a week in 1998) (Stichting *Speurwerk* archive).

<sup>39</sup> When Stichting *Speurwerk* stopped collecting information on behalf of KVB and the *Speurwerk Boeken Omnibus* was discontinued (around the year 2000), another market research agency took over the data collection, implementing a different survey design that did not include figures on foreign-language sales. KVB asked for names of existing market research companies not to be mentioned as part of the secrecy agreement signed in order to access the Stichting *Speurwerk* reports.

in 1994 due to the fact that the Speurwerk Boeken Omnibus reports relative to the year in question could not be retrieved in the archive.

Since the analysis spans such a long period of time, the structure adopted by SS to collect and present the data has changed over the years, which creates discrepancies in the statistical analysis. Due to methodological discrepancies, the data has been divided into two parts:

- 1976-1993: For this period the SS reports classify sales into various language categories, namely: 1) Dutch-originals; 2) translations; 3) foreign-language. The ‘foreign-language’ category is further divided into: ‘English-language’ and ‘all-other languages’. <sup>40</sup>
- 1995-2000<sup>41</sup>: For this period the SS reports does not distinguish between Dutch-originals and translations (both categories are classified as ‘Dutch-language books’), nor did they separate English-language titles from all other foreign languages (all these sales are categories under the umbrella term of ‘foreign-language books’). This change is likely due the increasingly neglectful way in which reports were compiled by SS in the years immediately

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<sup>40</sup> For ten years (1976-1986), the SS reports also provide specific information regarding sales of French-language and German-language books. After 1986, no specific information is given about sales of other languages apart from English, which are simply classified as ‘all-other languages’. To avoid confusion and further fragmentation of the data, the distinction between French-language and German-language books has not been included in Chapter 5. The general category ‘all-other languages’ has been used instead.

<sup>41</sup> Figures relative to 1994 are missing as the reports relative this year could not be retrieved in the Stichting Speurwerk archive.

preceding the discontinuation of the *Speurwerk Boeken Omnibus* series (around the year 2000).

Thus, to sum up, during the period 1976-1993 the data provides a precise indication of the market share represented by English-language books, while the data available for the period 1995-2000 does not distinguish between English-language books and all other foreign languages (and it also does not distinguish between translations and Dutch-language original titles).

### 3.2.2.2 Gfk data collection method

Since 2007, the Royal Society for the Book Trade (KVB) and the Foundation for Market Research Book Trade (Stichting Marktonderzoek Boekenvak – SMB) have commissioned the market research about the Dutch book market to Gfk, the world's fourth largest research institution that operates across different sectors and in more than one hundred countries. Since only a limited part of Gfk's data has been publicly released by KVB/SMB,<sup>42</sup> Gfk were contacted to obtain more information about English-language sales in the Netherlands. Since the scope of this research is not commercial, Gfk agreed to share figures on English-language sales and granted their permission to use this data in the thesis.

Gfk monitors book sales weekly and gathers its data directly from the various retail outlets in the country (i.e. booksellers and online retailers). Although it is quite broad, the surveyed panel of retailers does not cover the totality of the Dutch

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<sup>42</sup> Some general statistics about the foreign-language sales are shared annually on KVB's website and concern the most recent years 2012-2018 (cf. Figures 30 and 31, section 5.3).



book market. As we can see in Table 10 below, since Gfk started collecting data on the Dutch book market, the coverage has increased from 74% to 89%. The coverage is stable since 2013.

	<b>'07</b>	<b>'08</b>	<b>'09</b>	<b>'10</b>	<b>'11</b>	<b>'12</b>	<b>'13</b>	<b>'14</b>	<b>'15</b>	<b>'16</b>	<b>'17</b>	<b>'18</b>
Units	74%	75%	76%	78%	82%	88%	89%	89%	89%	89%	89%	89%
Value	74%	75%	76%	78%	78%	84%	85%	85%	85%	85%	85%	85%

Table 10: Estimated coverage of surveyed panel 2007-2018 (Source: KVB-SMB/GfK).

It should be noted that these figures account for the largest national online retailers, but do not include all foreign online retailers that are active in the Netherlands.<sup>43</sup> In addition to this, Gfk data provides information only on what is generally referred to in the Netherlands as “algemene boekenmarkt”, i.e. the general book market, or trade book market. As such, these figures do not include scientific titles and textbooks.<sup>44</sup>

Gfk released data about sales by language and by genre category, both in terms of revenues and unit sold. This data provided by Gfk illustrates the share percentage represented by each language in the various genre categories, but does not specify the absolute value and volume of sales. The three language categories used to classify sales are: Dutch-language, English-language and other languages. Data is classified in three broad genre categories: fiction, non-fiction and children's titles.

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<sup>43</sup> As confirmed by a Gfk representative via email, some foreign online retailers are included in the panel. However, information on participants is confidential and Gfk did not to disclose any specific information on which foreign online retailers participate in the panel.

<sup>44</sup> However, the figures include the so-called “non-book” category (NUR-categorie), consisting of diaries, audiobooks and so on.

### 3.3 Strategies of qualitative inquiry

Researchers opting for qualitative methods can decide to adopt different strategies; Denzin and Lincoln define strategies of inquiry as tools that “connect researchers to specific approaches and methods for collecting and analyzing empirical materials” (Denzin & Lincoln, 2017: 313).

Some of the most common strategies of inquiry in qualitative research designs consist of ethnographic studies, phenomenology, narrative research, grounded theory research and case studies (Creswell, 2013). This section reviews these strategies, or methodologies, placing particular emphasis on those employed in the present study (grounded theory and case study research); the latter approaches are described in more detail in two separate sub-sections (3.3.1 and 3.3.2).

Ethnographic research has its roots in anthropology and involves “an immersion in the particular culture of the society being studied” on the part of the researcher who therefore tries to “become an accepted member of the group” (Robson, 2011: 142). A key characteristic of this approach is that studies are carried out over a long period of time and within the participants’ natural environment (ibid). Whilst ethnographic research was initially developed to study exotic cultural groups, this approach has been adapted to also investigate social groups in urban society (ibid). The main advantage of this research approach is that it produces thick descriptions that allow researchers to attain a deep level understanding of the social group being investigated. Yet, one of the critiques moved towards this method is that researchers become too involved with the subjects studied and, with their presence in the community, risk “disturbing and changing the natural setting” (ibid: 143). Ethnography was not employed in this inquiry since the aim

of the research is not that of gathering information on the beliefs, values and behaviours of an entire culture-sharing social group (e.g. Dutch society as a whole), but rather on exploring how the issue of English-language reading functions and whether and how it influences the structure of the Dutch publishing market according to a limited number of agents that are closely involved with this phenomenon in their professional life (Creswell, 2013).

Narrative research focusses on the life experiences of individuals and relies mostly on their written or oral accounts (Creswell, 2013). This strategy consists of “focusing on studying one or two individuals, gathering data through the collection of their stories, reporting individual experiences, and chronologically ordering the meaning of those experiences” (ibid: 70). Although in narrative studies interviews are the most common method of data collection, data is also gathered through documents, photographs and observation (ibid). Some popular approaches in narrative research are, for instance, biographical study, auto-ethnography, oral history or life history (ibid). This approach was not deemed appropriate for the purpose of this inquiry since the focus of the project is not on individual life stories and personal experiences, but rather on investigating a social/cultural phenomenon (English-language reading in non-Anglophone contexts) and its effects on the Dutch publishing market.

In contrast to narrative research, which is based on highlighting the distinctiveness of individual life experiences, the main objective of phenomenology is that of understanding and describing the universal essence of the phenomenon under study, i.e. “what all participants have in common as they experience a phenomenon” (ibid: 76). Broadly speaking, phenomenology consists of collecting data from a group of participants that have experienced a certain

phenomenon in order to reach a description of “what” they have experienced and “how” they have experienced it (ibid: 79). This strategy of inquiry was not chosen for this project given the strong philosophical component involved in phenomenological studies which was not considered suitable or necessary for the research problem. Moreover, phenomenological studies are generally used to explore more abstract concepts or ideas (e.g. “the educational idea of ‘professional growth’, the psychological concept of ‘grief’ or the health idea of a ‘caring relationship’”) (Creswell, 2013: 78), rather than concrete social phenomena such as the one explored in this thesis.

The following two sub-sections now discuss the research strategies adopted to conduct the present inquiry (grounded theory and case study research) and the rationale for selecting these approaches.

### 3.3.1 Grounded theory

Grounded theory is generally associated with two American sociologists – Glaser and Strauss – who first developed the approach (Glaser & Strauss, 1967). The appearance of Glaser and Strauss’ work in the 1960s was revolutionary in that it challenged the hegemony of quantitative research in the social sciences and “provided a persuasive intellectual rationale for conducting qualitative research” (Charmaz, 2000: 512).

The ultimate goal of grounded theory as initially conceived by Glaser and Strauss is that of generating “a general explanation (a theory) of a process, an action, or an interaction shaped by the views of a large number of participants” (Creswell, 2013: 86). It derives its name from the fact that theory development is deeply “grounded” in the findings of the field research (Creswell, 2013: 83). In other

words, hypotheses do not precede empirical research, but are originated inductively from the data gathered in the field (Robson, 2011). In grounded theory, data collection and analysis take place in parallel; Creswell compares data collection in grounded theory to a “zigzag” process whereby the researcher goes “out to the field to gather information, into the office to analyze the data, back to the field to gather more information, into the office and so forth” (Creswell, 2013: 86). In practice, the research process consists of a constant comparison between the data gathered in the field and the emerging categories of the analysis. This zigzag process continues until the point of saturation is reached; in other words, data collection continues “until you reach diminishing results and you are not adding to what you already have” (Robson, 2011: 148). The sampling method used in grounded theory is purposive (or theoretical, as it is defined in grounded theory); participants are selected “so that additional information can be obtained to help in generating conceptual categories” (ibid). In other words, if the researcher notices some gaps in the data, they will find participants to fill in those gaps and provide information on specific issues.

The process of data analysis in grounded theory is based on coding (i.e. the process of categorizing the data), as well as on memoing (i.e. the researcher makes a note of their ideas and reflections during the data collection) (Creswell, 2013).

Over the last decade, Charmaz has moved away from the approach of orthodox grounded theory described above and proposed a constructivist version of grounded theory (Charmaz, et al, 2017). As opposed to Glaser and Strauss’ method which rely on “positivists assumptions of an external reality; an objective, authoritative observer; and a quest for generalizations”, Charmaz’s approach

“emphasizes multiple realities, the researcher and research participants’ positions and subjectivities, and situated knowledge and sees data as inherently partial and problematic” (ibid: 417). While retaining the methodological tools of ‘classic’ grounded theory, constructive grounded theory adopts a more relativist epistemology and seeks an interpretive understanding of the phenomenon under study; in addition, Charmaz places considerable emphasis on subjectivity and on the role of the researcher in co-constructing the data through interaction with participants (ibid). In constructivist grounded theory, coding is less prescriptive and linear than in Strauss and Corbin’s version; according to Charmaz’s method, data analysis consists of two phases: initial coding, and focused coding. During the first phase, researchers remain close to the data and “open to a wide range of analytic possibilities”, while meanings and concepts are categorized using “short, simple, precise and active” codes (ibid: 425). In the second phase, codes are further refined and relationships between emerging categories are established (ibid). The codes employed in focused coding are more “directed, selective and conceptual” than initial ones and are able to capture larger amounts of data under broader conceptual categories (ibid: 426). The final stage, theoretical coding, consists of organizing the conceptual categories emerging from the data into more abstract hypotheses to generate a theory. According to Charmaz, the difference between focused codes and theoretical ones is that the former originate directly from the data, whereas the latter “consist of ideas, terms, logics, abstract models, and perspectives that organize and integrate the analysis into a coherent theory” (ibid: 427).

The present research design will adopt a number of elements of grounded theory, for example the use of purposive/theoretical sampling; data coding in parallel to

data collection (constant comparative method); use of emerging approach and inductive logic; and refinement of research questions based on preliminary findings. The data analysis process will be based on Charmaz's flexible guidelines to coding. The rationale for employing elements of grounded theory lies in its 'exploratory' and inductive properties, which are particularly suitable for investigating poorly researched areas such as the one that is the object of this research.

### 3.3.2 Case study approach

Case study research has been defined as "a qualitative approach in which the investigator explores a real-life, contemporary bounded system [...] over time, through detailed, in-depth data collection" (Creswell, 2013:97). As noted by Schwandt and Gates, a case "can be anything – a person, an organization, an event, a decision, an action, a location like a neighborhood, or a nation-state" (Schwandt & Gates, 2017: 341). Case studies can be single (when only one case is investigated) or multiple (when multiple cases are studied and later compared) (ibid). According to Stake, case study research represents a choice of "what is to be studied", i.e. the domain of the enquiry, more than a methodological choice (Stake, 2000: 435). However, others define case study inquiry as a research strategy or methodology (e.g. Yin, 2009; Schwandt & Gates, 2017).

Case study research is often chosen due to its suitability for "describing, explaining, predicting or controlling processes associated with a variety of phenomena at the individual, group and organizational levels" (Gagnon, 2010: 2). According to Yin, case studies are particularly useful to analyze decision-making processes and knowledge utilization in complex and multidimensional social contexts (Yin, 1981). The main advantage of this type of research is that it

allows an in-depth analysis of the dynamics underpinning complex social networks by focusing on the distinctiveness of the context under examination (Feagin, et al., 1991; Gagnon, 2010).

The approach adopted for this thesis is that of a single descriptive case study (also referred to as holistic, interpretive or intrinsic), which aims at developing a “complete, detailed portrayal of some phenomenon” (Schwandt & Gates, 2017: 346). This was achieved by taking into account the many dimensions of the phenomenon under study and by considering the points of views of various actors operating in the Dutch publishing field – such as publishers, literary agents, booksellers and translators (for a detailed overview of the study sample see section 3.6 of this chapter).

Stake distinguishes between two types of case studies depending on the intent of the investigation: instrumental and intrinsic case studies (Stake, 1995). In an instrumental case study “the researcher focusses on an issue or concern, and then selects one bounded case to illustrate this issue” (Creswell, 2013: 99); whereas in an intrinsic case study “the focus is on the case itself [...] because the case presents an unusual or unique situation” (ibid: 100). For the purposes of this thesis, the instrumental case study approach appears to be the most suitable choice – in particular, the issue under investigation here is the phenomenon of English-language reading while the case chosen to illustrate this issue is the Dutch trade book market. The case selected to study a particular phenomenon can be chosen for different reasons: because it has never been studied before, because it represents a unique case, or instead because it is considered as a representative or typical occurrence of the phenomenon (Schwandt & Gates, 2017). The Dutch book market has been selected for being a particularly representative case of the



phenomenon being investigated (the rationale for this choice will be illustrated in depth in section 3.4).

One of the most common objections to case study research – especially to single case studies – is the fact that, being so anchored to a specific context, the external validity of the findings is often limited and results are difficult to generalize (ibid; Stake, 2000). When addressing this criticism, Flyvbjerg points out that in the study of human affairs (thus in social science), “there appears to exist only context-dependent knowledge” which therefore “rules out the possibility of epistemic theoretical construction” (Flyvberg, 2006: 221). As a result, he claims that “formal generalization is overvalued as a source of scientific development, whereas ‘the force of example’ is underestimated” (ibid: 228). Similarly Gagnon claims that researchers choosing case studies should embrace the fact that generalization is not the main aim of this type of investigation (Gagnon, 2010).

It must be stressed that considerations about context-dependency of findings are particularly relevant to the study of publishing fields which are characterized by unique properties and are shaped by distinctive logics (Thompson, 2005).

However, case study research is not entirely devoid of the ability to produce generalizable findings. According to Flyvbjerg, the generalizability of case study research can be improved by selecting strategic cases, i.e. by focusing on atypical or extreme cases that are expected to be richer in information – thus allowing a deeper insight into the phenomenon at study (Flyvberg, 2006). With this in mind, the Netherlands has been chosen for representing an ‘extreme’ case of the phenomenon of English-language reading in non-Anglophone countries.

In summary, case study research enables in-depth investigation from a holistic perspective of the issue of English-language reading by focusing on the distinctiveness of the Dutch trade publishing field. The research aims at providing a deep understanding of the phenomenon (i.e. its consequences and its effects on the Dutch publishing market), as well at uncovering the personal views of various members of the Dutch publishing industry regarding this issue.

Although generalization and “establishing typicality” is not the chief goal of descriptive case studies, their findings can still find use beyond the case study itself, for instance by paving the way for further investigations of the same (or similar) phenomenon in different contexts (Schwandt & Gates, 2017: 347). This study will therefore generate hypotheses from an extreme case which can then be tested and used for the purposes of reflection and comparison in other contexts (Flyvbjerg, 2006); in other words, this study can serve as a blueprint for future investigations of the role and impact of English-language reading in other countries, both in Europe and outside of Europe.

### 3.4 Rationale for the choice of the Netherlands as a case study

The Dutch book market was selected as a case study to investigate the phenomenon of English-language reading in a non-Anglophone European context mainly due to two factors: 1) the high average level of English proficiency of the Dutch population; and 2) the fact that English-language books have been quite popular among Dutch readers for a long time.

Another factor that weighed in the choice is the fact that the Netherlands is one of the non-Anglophone countries with the highest share of English-taught degrees in Europe. According to studies, the Netherlands has more than 1,000

English-taught university programmes and over 90% of its postgraduate degrees are being offered in English (Brenn-White & Van Rest, 2012; Wächter & Maiworm, 2014; Gerritsen, 2016).

Furthermore, as seen in Chapter 2, it has been documented that the importation of English-language books in the Netherlands was a common practice throughout the nineteen and twentieth centuries (Van der Weel, 2000). No comprehensive studies examining the import of English-language books in the Netherlands in the twenty first century have been identified; however, data on UK and US exports confirms that the Netherlands continues to import a high quantity of English-language titles (cf. Chapter 4). As we shall see in Chapter 4, according to HMRC's figures, in 2014 UK publishers exported 75£ million worth of books to Netherlands (all categories included) – down from the £97 million of 2009 (Publishers Association, 2015b). American publishers instead reported a turnover of over \$6 million from the export of print and digital trade titles to the Netherlands in 2013 and 2015 (Association of American Publishers, 2013; 2015). This clearly points out to the existence of a conspicuous market for English-language books in the Netherlands. In addition, according to the Dutch publishing Association (KVB) foreign-language titles accounted for as much as 15% of the total Dutch trade turnover in 2018 (KVB, 2019b; for more specific data on the market share of foreign-language books in the Netherlands see Chapter 5).

In summary, the Netherlands was chosen not only on account of the high English proficiency of its population, but also because of the documented volume of English-language book imports throughout the nineteenth, twentieth and twenty first centuries. Since the Netherlands has been dealing with the competition of English-language imports for such a long time, it is reasonable to assume that the

agents active in the Dutch field will be more capable of systematic self-reflection on this issue than agents in markets where this phenomenon is relatively new (e.g. countries where the English-language proficiency of the population has been growing only recently). Moreover, the fact that the Dutch-language book market is small if compared to its direct competitors, the US and the UK, makes this case study even more interesting, as it allows us to investigate how a relatively small industry – whose main target audience is limited to the Netherlands and the Flanders – is coping with the competition of global players, such as US and UK publishers.

### 3.5 Data collection method: in-depth interviews

The second part of the research has been carried out through in-depth semi-structured expert interviews.

In-depth interviews usually consist of face-to-face verbal interactions between an interviewer and a participant (or more than one). The style of in-depth interviews “is conversational, flexible and fluid, and the purpose is achieved through active engagement by interviewer and interviewee around relevant issues, topics and experiences during the interview itself” (Mason, 2002: 156). This method is usually selected when the researcher seeks to reach a deep understanding of a specific phenomenon, especially with regard to the personal views and perspectives of participants, their values or decisions, or their knowledge about a specific subject or issue (Johnson, 2002). In this case, interviews were employed as a way to acquire information about the phenomenon under examination, and as a way to explore the perceptions, motivations and attitudes of participants. As highlighted by Johnson, “if the interviewer is not a current or former member or participant in what is being investigated, he or she might use in-depth

interviewing as a way to learn the meanings of participants' actions" (ibid: 106). This is particularly fitting to describe the specific purpose of in-depth interviews in this thesis. In the framework of this project, in-depth interviews with key agents in the Anglo-American publishing field and in the Netherlands were used to shed light on the dynamics of competition between local-language editions and imported ones, as well as on the attitudes of informants towards the phenomenon of English-language reading.

The interviews conducted can be defined as "expert interviews", i.e. interviews in which "mostly staff members of an organization with a specific function and a specific (professional) experience and knowledge are the target groups" (Flick, 2014: 227-228). Bogner et al. distinguish between three types of expert knowledge: 1) technological knowledge, which consist in possessing information on the operations and rules that govern a field; 2) process knowledge, i.e. a specific understanding of the dynamics of interaction and the decision-making rationale in a certain field; and 3) interpretative knowledge, involving the subject's personal views and interpretations of a phenomenon (Bogner et al., 2009). This thesis aimed at acquiring a combination of these three types of knowledge from the interviewed experts.

The advantages of in-depth interviews are manifold; firstly, under the right circumstances, in-depth interviews allow the creation of an intimate and relaxing atmosphere between the interviewer and the participant, which is the key to obtaining insightful and meaningful data (Johnson, 2002). Secondly, due to the interactive and flexible nature of this method (especially in the case of unstructured or semi-structured interviews), researchers can easily deviate from

their predetermined plan and follow “where the informant wants to lead” (Johnson, 2002: 111; Mason, 2002).

A specific advantage of expert interviews is the fact they usually lead to insightful data in a limited amount of time – therefore making this method an “effective means of quickly obtaining results and, indeed, of quickly obtaining good results” (Bogner et al, 2009: 2). As further argued by Bogner et al:

Conducting expert interviews can serve to shorten time-consuming data gathering processes, particularly if the experts are seen as the “crystallization points” for practical insider knowledge and are interviewed as surrogates for a wider circle of players (ibid).

As with any research methods, however, qualitative interviews also have some drawbacks. One of these is that interviews can be time consuming and costly. Indeed, setting up interviews, performing and transcribing them, as well as coding and analyzing the data, can be demanding (Robson, 2011). Moreover, given that face-to-face interviews usually require the researcher to travel to the respondent or to an agreed location for the interview, this method of interviewing is not the most cost-efficient one – especially in the case of research projects with an international scope such as this thesis. In terms of cost saving, telephone interviews – or Skype interviews – represent a valid alternative to face-to-face interviews (Sturges & Hanrahan, 2004). Broadly speaking, telephone interviews can be employed to substitute or complement face-to-face interviews when the research questions do not necessarily require face-to-face interaction between the interviewer and the participant (ibid; Shuy, 2002). Under the right circumstances, telephone interviews have been proved to generate good quality

data and, given the logistical flexibility they allow, can help in recruiting higher numbers of participants (ibid).

Another common criticism is that interviews are subjective, since the results they produce depend heavily on how the researcher frames and interprets the data (Fontana & Frey, 2000). For instance, the wording of the interview questions can shape the answer of the respondent, and leading questions can jeopardize the outcome of the research (Kvale & Brinkmann, 2015). In addition, interview data can be distorted by the interviewer's biases, emotional state, political views and anxieties (Patton, 2002). Because of the intimacy that the interview creates between researchers and participants, interview results can also be subject to "recall error, reactivity of the interviewee to the interviewer, and self-serving responses" (ibid: 306). Moreover, interviews are often criticised for producing data that are difficult to generalize (Kvale & Brinkmann, 2015).

However, over the last four decades, postmodernism and constructivism have influenced social science research by debunking the traditional myth of value-free, completely neutral and generalizable data and by placing a strong emphasis on the "contextuality and heterogeneity of social knowledge" (ibid: 199). The postmodernist turn in qualitative research interview has brought attention to the active relationship between the interviewer and the interviewee which inevitably occurs "in a context permeated by issues of power, emotionality, and interpersonal process" (Ellis and Berger, 2002: 851). Within this framework, interviewers are increasingly considered as active agents in the interview process – rather than detached ones –, while interviews are seen as collaborative events, in which the researcher and the respondent are both involved in negotiating a narrative, i.e. the research data (Fontana, 2002). Similarly, constructivist theory

introduced new ways to assess research quality which are less centred on scientific generalization and neutrality (Patton, 2002).

Therefore, by freeing interviews from the constraint imposed by more traditional approaches, postmodernist and constructivist approaches greatly contributed to legitimizing the communicative, collaborative and non-neutral essence of qualitative interview methods (Fontana, 2002).

### 3.6 Sample recruiting and composition

A preliminary list of respondents was selected using a purposive sampling strategy, that is to say “a non-probability sampling procedure in which elements are selected from the target population on the basis of their fit with the purposes of the study and specific inclusion and exclusion criteria” (Daniel, 2011: 87). A random sampling strategy was not deemed appropriate, since the aim of the thesis was to explore and obtain an in-depth understanding of the phenomena at hand, rather than produce generalizable data from a representative sample of a given population (Patton, 2002). Purposive sampling is particularly appropriate for investigations concentrating on in-depth understanding, as it allows researchers to select “information-rich cases from which one can learn a great deal about the issues of central importance to the purpose of the research” (ibid: 46). This purposive sampling method was complemented by using a snowball sampling, i.e. each time an interview was carried out, participants were asked if they were able to suggest other possible candidates to be interviewed within their social/professional network (Warren, 2002; Thompson, 2010). Snowball sampling proved to be an effective strategy to expand the network of contacts, given that the publishing industry tends to be a very close-knit professional community, especially in a small market such as the Dutch one.



The main targets of the sampling were 1) acquisition editors at Dutch publishing houses with lists that included a significant number of translations from English; 2) literary agents that sold English-language rights to Dutch publishing companies; 3) booksellers (in particular buyers for English-language books); and 4) English to Dutch translators. Participants were approached via email by the researcher (the email template used is included in Appendix 1, p. 367). The contact details of the first few participants were mostly retrieved online, for example by using the email addresses or contact forms available on public websites. In addition, some participants were recruited via a publishing professional with whom the researcher had a professional connection.

The size of the sample was considered fluid and the number of participants was defined by the quality and richness of the data obtained, rather than by predetermined numerical requirements. In particular, theoretical saturation was used as a guiding principle for determining the sample size (Glaser & Strauss, 1967; Beitin, 2012). In grounded theory, theoretical saturation has been defined as “the point in data collection when no additional issues or insights emerge from data and all relevant conceptual categories have been identified, explored, and exhausted” (Hennink, et al., 2017: 592). In practice, when the interviewing process reaches a state of saturation, the researcher begins to realize that interviews have stopped generating new knowledge and are not leading to innovative insights or new perspectives (Johnson & Rowlands, 2012). As a general rule, in in-depth interview projects the learning curve is steeper at the beginning of the process when the researcher accumulates a stock of new knowledge quite fast (Johnson, 2002). After this explorative stage, interviews become more focused on validating the knowledge acquired and investigating

specific issues before the data reaches the saturation point (Johnson & Rowlands, 2012).

In total, 42 interviews were conducted over a period of approximately one year and eight months (from September 2015 to April 2017). Of these interviews, 5 were conducted via email, 7 via Skype, 5 via telephone, and 25 face-to-face. Face-to-face interviews were always the preferred option; however, whenever participants expressed a preference for other modalities, their request was accommodated. In cases where travelling to the participant was not possible, Skype or phone interviews were proposed. The large majority of the face-to-face interviews were conducted in company offices or in other public spaces, mostly cafes or libraries. In the case of free-lance professionals, some interviews were conducted in the participants' homes. Lastly, four face-to-face interviews were conducted during international industry fairs (the London International Book Fair and the Frankfurter Buchmesse); in these circumstances, due to the participants' busy schedules, interviews could not run longer than 30 minutes.<sup>45</sup> In total, the interview recordings amounted to 1,232 minutes, with interviews lasting on average 33 minutes.

At the start of each interview, participants were informed that they could remain anonymous if they wished to. If anything confidential or sensitive was disclosed during the interview, informants were reassured that those parts would be treated

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<sup>45</sup> Most publishers and agents attending these international book fairs have fully booked schedules. Meetings are usually planned in 30-minute increments and it is not uncommon for them to have back-to-back meetings for the whole day (Johnson, n.d.).

as off-record ones, and would not be included in the data analysis. As pointed out by Thompson – who also employed this strategy in his analysis of the Anglo-American trade book market – “assurances about anonymity and confidentiality were an essential part of building trust in a relationship where the richness and the quality of the communication is directly dependent on the extent to which the interviewee trusts the interviewer” (Thompson, 2010: 407). Not all participants requested to remain anonymous; nevertheless, since a number asked for anonymity, the decision was taken to anonymize all the data for consistency. Thus, all interviewees’ names and references to the organizations they were part of (including mention of specific authors and books which would give away the name of the organization) have been omitted. Below is a full-list of interviewees by region of activity and by profession:

- 1 sales representative employed by a large Anglo-American publishing conglomerate;
- 1 ex-marketing/PR manager employed by a large Anglo-American publishing conglomerate;
- 10 English-Dutch translators;
- 1 free-lance copyeditor with experience working on joint translation projects;
- 14 editors/acquisition editors at medium/large Dutch publishing companies;
- 1 senior figure within one of the Dutch publishing trade organizations;
- 1 CEO of a large Dutch publishing group;
- 3 Dutch booksellers;

- 1 senior literary critic working for a national newspapers;
- 1 senior figure at a large e-book retailing company;
- 1 buyer of English-language titles at a Dutch distribution company;
- 4 literary agents selling translation rights into European countries (including to the Netherlands);
- 2 US-based publishing consultants;
- 1 senior figure at a large distribution company.

### 3.7 Interview protocol, transcription and analysis

The selected method of data collection was semi-structured interviews with open-ended questions. In practice, this approach consisted of drafting a list of questions or topics ahead of the interview to guide the discussion; this guide was mostly intended as a checklist to ensure that all the relevant issues were being covered during the interview, but could be modified to accommodate spontaneous deviations (Patton, 2002). This approach allowed the researcher to follow up on new and unexpected trajectories that arose during the conversation, or enable her to ask for clarifications or further explanations to participants in cases where this was deemed necessary (ibid). One of the main advantages of semi-structured interviews is their flexibility, since they are “sufficiently structured to address specific dimensions of your research question while also leaving space for study participants to offer new meanings to the topic of the study” (Galletta, 2013: 2). As noted by Thompson, unexpected digressions initiated by informants are usually very productive ground for the researcher who should therefore welcome and follow up on them:

Sometimes things came up in an interview that I had not thought about in advance, perhaps didn't even know existed; part of the skill of a good interviewer is to be able to see the importance of these unanticipated revelations, to put aside your preconceptions and, on the spur of the moment, find a way to follow up those fresh openings (Thompson, 2010: 408).

The list of interview questions used was not standardized across the whole sample, but was tailored specifically to interviewees' professions and their organization. Three different sets of interview questions were used to guide the discussion, one for publishers, one for translators, one for literary agents. These lists are included in Appendix 3, pp. 369-370.

The interview protocol consisted of explaining the purpose of the research project, asking if the interviewer had any doubts or concerns, discussing anonymity and confidentiality issues, and then proceeding to the interview questions.

Once interviews had been recorded, they were transcribed by the researcher with the help of an online transcription tool.<sup>46</sup> As noted by Bird, transcription is an interpretative act in itself and is therefore a key part of the data analysis process (Bird, 2005). In approaching the transcription process, the researcher sought to strike a balance between efficiency and accuracy by omitting some parts of the recordings that were deemed not necessary (Lapadat & Lindsay, 1999). As noted by Bird, this course of action implies a certain degree of flexibility and reflectivity

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<sup>46</sup> [www.transcribe.wreally.com](http://www.transcribe.wreally.com)

on the part of the researcher which needs to ask themselves “what constitutes a ‘useful transcription’” for their specific research purposes (Bird, 2005: 235). As such, some parts of the conversation that did not pertain to the research topic were omitted from the transcripts.<sup>47</sup>

As noted by Bird, reproducing a real-life conversation, with all its nuances, meaning and multidimensionality, in written format is a challenging task (ibid). Research methodologies such as conversation analysis (CA) and discourse analysis (DA) concentrate exclusively on reporting the qualities of the speech (e.g. intonation, rising or falling tone, pauses and breaks in speech rhythm, and so on) (Bird, 2005). In CA and DA, transcripts are therefore centred on the characteristics of the speech which are reported by use of transcription conventions and notations developed within these fields (ibid).

Once transcripts were completed they were sent back to each respondent for verification. This process, defined by Poland as “member checking”, is particularly valuable to the researcher as “it allows for the gathering of additional information, permits respondents to validate or clarify the intended meaning behind certain statements, or comment on the overall adequacy of the interview” (Poland, 2002: 644).

The transcribed interviews were then read closely in search of recurring themes that could generate a list of relevant codes. An initial coding of the data was

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<sup>47</sup> The omitted parts consist mostly of the small talk between the researcher and the interviewee that took place at the start or the end of the interview.

conducted manually in parallel with the data collection (Charmaz, 2017). During this initial phase interviews were analysed segment by segment; the coding remained as closed as possible to the text and the codes assigned were simple and descriptive. An example of how initial coding was done is provided below.

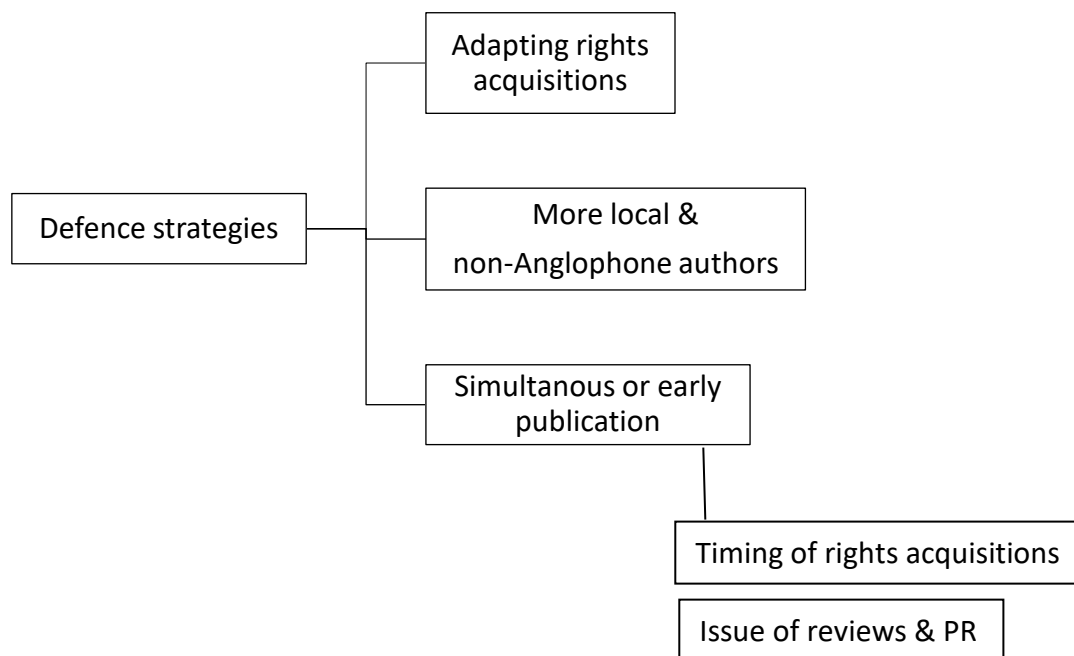
Excerpt from transcript	Initial codes
We read the book and we decide how we're going to translate, how we're dividing the book into parts. There are all kinds of situations and possibilities. Then we send each other our work while it's in progress so that we know the tone of each other's work and can adapt to that and can change things. When a translation is finished we correct each other's work before it goes to the publisher.	Dividing the work; assigning parts
	Constant communication; harmonizing style all along
	Correcting each other's parts

When it comes back from the editor we also read each other work's again and also when it comes back from the galleys. All in all, it's not less work because you also have to check the other person's work. It's more work for less money, but it's a very positive experience. I hardly ever had a bad experience in co-translating a book. It's always been very instructive for me and I hope also for the other person.	Many rounds of corrections
	It does not save time; very labour intensive
	It is more work and paid less
	Co-translation is a positive experience; instructive.

Initial coding resulted in an extensive list of emerging codes, which were then tested against other interviews and further refined. The information gathered in the field was immediately applied and tested in the subsequent interviews (for instance, by prompting a refinement of the research questions or by guiding the

recruitment of new participants that could shed light on specific issues that emerged in previous interviews).

The second phase of the data analysis consisted of a further refinement of the initial codes (focused coding). During this phase, the most recurring and significant themes emerging from the initial coding were identified; these themes were then organized into categories and sub-categories. An example of how codes referring to the defence strategies employed by Dutch publishers to cope with the competition of English language editions were categorized is provided below.



The adoption of broader conceptual codes allowed the identification of common threads among participants' accounts. Once an interview was coded, the focused categories that emerged were tested on previously coded material to check whether the codes would work. By doing so, codes kept being refined and became more and more broad and sharp. By the end of this process the resulting codes could be employed to categorize the entire dataset. An overview of the final focused codes used to analyze the data is provided in Appendix 4, pp. 371-372.



Focused coding was carried out with the help of the qualitative research software Nvivo. This programme, similarly to other Qualitative Data Analysis Software (QDAS) software, enables researchers to code, write notes or memos on the transcript, perform word searches, and make graphic displays (Kvale & Brinkmann, 2015).

The data is presented in Chapters 6 and 7 in the form of an interview report articulated according to the main conceptual categories that emerged from the coding process. The report draws on interview quotations to “give the reader an impression of the interview content, [...] the personal interaction of the interview conversation, and [...] exemplify the material used for the researcher’s analysis” (Kvale & Brinkmann, 2015: 313). The interview report is followed by a discussion in which the key findings and concepts developed from the study are analyzed.

### 3.8 Reliability, validity and generalizability

Although issues of reliability, validity and generalizability have been addressed throughout the chapter, they are briefly summarized again here for reference.

Reliability is defined by Robson as “the stability or consistency with which we measure something” (Robson, 2011: 85). Among the most commonly mentioned threats to reliability are participants’ and/or researchers’ errors or biases (ibid). In quantitative research designs, reliability is usually achieved by employing standardized research instruments such as tests and scales; in these circumstances, a research will be considered reliable if the instrument used provides consistent results (ibid). However, reliability in qualitative research is more difficult to measure due to the use of non-standardized methods of data collection, which prevents the employment of formal reliability tests (ibid). A way

to minimize the risk of obtaining unreliable results in qualitative research designs consists in preventing equipment failures (e.g. in the recording equipment), or avoiding environment interferences during the data collection process, as well as transcript errors (ibid). More broadly, in order to demonstrate that the research is reliable a researcher has to show that they have been “thorough, careful and honest in carrying out the research” (ibid: 159). One way of achieving this is via audit trail, i.e. “by keeping a full record of your activities while carrying out the study. This would include your raw data (transcripts of interviews, field notes, etc.), your research journal, and details of your data analysis” (ibid: 159). In addition, another way of ensuring reliability in qualitative data analysis is through intercoder agreements, i.e. multiple researchers code the same data and then agree on a common coding strategy by developing a codebook of codes (ibid). Reliability in this research project is ensured by keeping a transparent and detailed record of the research activities (audit trail), including interviews recordings, transcripts and field notes, as well as by asking participants to approve the final transcript (member checking).

Validity in quantitative research refers to the accuracy of the results, that is to say that a research is considered valid if the findings “capture the real state of affairs” – in other words, if they capture the truth about the phenomenon under investigation (Robson, 2011: 85). As seen earlier, interpretive/constructivist paradigms do not believe in the existence of universal truths and in the idea that there is only one possible (and correct) interpretation of a given event (Janesick, 2000). Many qualitative researchers have therefore rejected the use of positivist terminology such as reliability and validity; as such, alternative terms that are more fitting to define the “trustworthiness” of qualitative designs have been

proposed, such as “credibility, authenticity, transferability, and dependability and confirmability” (Creswell, 2013: 246). In order to ensure validation in qualitative research designs Creswell suggests that researchers employ “accepted strategies to document the ‘accuracy’ of their studies”, which can be defined as “validation strategies” (ibid: 250). Some of these strategies include: defining researcher bias from the outset of the research process; member checking; prolonged engagement in the field; triangulation; reliance of external audits; peer-review or debriefing; and negative case studies (Lincoln & Guba, 1985; Creswell, 2013).

Creswell suggests that qualitative researchers employ at least two of these validation strategies in their studies (ibid).

For the purpose of this research, the two validation strategies employed were triangulation and member checking. The former was achieved by interviewing participants who performed different roles within the same publishing market (e.g. acquisition editors, booksellers, translators, etc. in the Netherlands) that are therefore providing different perspectives on the same phenomenon. The accuracy of the research findings was therefore established by comparing perspectives on the same phenomenon from participants operating in different fields and in different roles. Member checking was instead achieved by submitting interview transcripts to participants for approval (cf. section 3.7).

Maxwell distinguishes between two types of generalizability: internal and external (Maxwell, 2005). The former “refers to the generalizability of conclusion within the setting or group studied”, while the latter “refers to its generalizability beyond that setting or group” (ibid: 115). According to Maxwell, internal generalizability is essential in qualitative research to ensure the validity of the

conclusions reached by the study, whereas external generalizability is in many cases not considered a key issue in qualitative research (ibid). As seen in section 3.3.2, achieving external generalizability is not essential in this study due to the fact that different publishing markets tend to be characterized by distinctive features and logics (Thompson, 2005). Findings emerging from this research are mostly pertinent to the research field analyzed (the Netherlands) and cannot be automatically extended to other publishing fields. However, it is hoped that the results of this study will be employed as a starting point and as a term of comparison for further research on the phenomenon of English-language reading in other non-Anglophone publishing fields.

### 3.9 Ethical issues

When carrying out an inquiry, researchers need to evaluate the ethical issues that might surface during the data collection and data analysis processes (Creswell, 2013). The ways in which ethical issues have been addressed in this research have been discussed in different parts of the chapter, but they will be summarized here for clarification.

To begin with, in conducting this study the researcher adhered to the code of ethical practice of Edinburgh Napier University. The Research Integrity Approval Form was approved by the School of Arts and Creative Industries Research Integrity Committee.

When approaching participants, a detailed explanation of the rationale and aim of the research was provided and researchers were encouraged to ask further information or clarifications in case they had any doubts about the nature of the

study. Thus, their participation in the study was voluntary and based on “full and open information” (Christians, 2000: 138-139).

Before interviews, permission to record the conversation was always obtained. Moreover, participants were reassured that the material would be treated with confidentiality and that the data could be anonymized.

Before beginning the field work, a consent form was drafted in which the purpose of the participant’s involvement was outlined and the conditions for participation were explained (see Appendix 2, p. 368). As noted by Crow et al., the principle of informed consent means that “prospective participants in research are provided with information about the project [...] that is sufficiently full and accessible for their decision about whether to take part to be considered informed”; in addition it also “requires that people in possession of this information consent freely to participation and have the opportunity to decline to take part or to withdraw from the study” (Crow et al. 2006: 83).<sup>48</sup>

After conducting the first set of interviews it appeared clear that participants were reluctant to sign a consent form before they could see a copy of the interview transcript since they were afraid that sensitive information regarding the

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<sup>48</sup> In the consent form participants were asked to confirm that they understood the purpose of the research; that they were aware they could ask for further information from the researcher if they felt the level of information was not satisfactory; that they were aware that they could withdraw from the study at any point without consequences; in this case, the data collected from them would be destroyed by the researcher; that they could ask for any personal detail that could identify them to be omitted from the study (anonymity). Participants were asked to indicate whether they wanted to take part in the research under these conditions and could then indicate how they wanted the material to be quoted in the thesis and in any publication ensuing from the thesis (they could choose between three options: 1) the material could be quoted and attributed to them; 2) the material could be quoted but not attributed to them (anonymous); 3) the material could be used but not quoted and not attributed to them.

companies they worked for could emerge during the conversation. It was therefore decided to postpone signing the form until interviewees could review the transcripts. Copies of the consent form were sent to participants along with a copy of the interview transcript. Nevertheless, it became apparent that printing the form, signing it, scanning and emailing it back to the researcher was considered as a time-consuming inconvenience by participants; as a matter of fact, only very few respondents sent back a signed copy of the consent form, while most of them simply stated that they consented to the use of the material in their reply email. It was therefore decided to forgo the signing of the consent form and instead take written confirmation (via email) as a way of giving consent to the use of the material. As claimed by Crow et al., the issue of informed consent is often a complex issue which researchers need to address with a “degree of flexibility according to the characteristics of specific research contexts” (Crow et al., 2006: 95). In the context of this research project, despite the fact that the consent form was not signed by all participant, the conditions for obtaining informed consent from participants have been fully met (i.e. participants have been sufficiently informed about the purpose of the study and the conditions for participation).

Lastly, during the data analysis process all data has been anonymized for consistency, although a good number of participants agreed that quotations could be attributed to them personally (i.e. they did not ask for anonymity). All the interviewees’ and company’s names have been omitted from the thesis and will be omitted from the future publications deriving from this study.

For the duration of the PhD, the audio recordings and the transcripts were backed-up and stored in a secure drive to which only the researcher had access. As mandated by Edinburgh Napier University’s Research Data Policy, at the end

of the research project research data (in the form of anonymous transcripts) will be stored using a University approved system and made available for re-use (upon request). This is in line with the funder policy (Edinburgh Napier University), as well as with RCUK policy.

### 3.10 A note on cross-language interviewing

To conclude this chapter, it is worth reflecting briefly on some of the issues presented by the international nature of this inquiry, which involved different national contexts – the UK, the US and the Netherlands – and two linguistic regions. What is more, the researcher is originally Italian (therefore a non-native English speaker), which adds a further layer of complexity to the interview interaction (Patton, 2002).

The language used to conduct all the interviews was English, which means that the data collection was carried out in a language that was not the researcher's first language. For Dutch respondents, interviews were conducted in a second language for both the interviewees and the interviewer.

According to Cortazzi et al., when interviewees are not native speakers of the language employed in the interviews this can affect the process in various ways, e.g. "participants who converse freely on social topics can feel constrained discussing more complex or technical topics; degrees of meaning and expression can be sacrificed in the trade-off between participants' desire to express complex thoughts or experience and a need to simplify language in feasible expression" (Cortazzi et al., 2011: 509)

In the case of interviews of Dutch publishing professionals, both researcher and participants were second language speakers of English. In this case, both might

have experienced the problems outlined above, e.g. feeling restricted when discussing complex and technical topics or being forced to use a simplified language (ibid).

Given the high level of English proficiency of the respondents and of the interviewer and the fact that using an interpreter was not possible due to budget limitations, conducting the interviews in English was deemed to be the best choice. Most Dutch interviewees used English on a daily basis in their professional life and being interviewed in this language arguably did not constitute an obstacle for them and did not hinder the overall quality of the data. In case linguistic issues related to the grammar or to the vocabulary choices of respondents were detected during the transcription process, those issues were flagged to participants who then clarified the intended meaning during the transcript checking process. When syntactic transfers or other ‘Dunglish’ forms which did not hinder the comprehension were encountered, these were transcribed verbatim.<sup>49</sup> Given the research questions of this thesis, attention to linguistic features and nuances, such as grammatical forms and lexicon, was not considered to be crucial for the research.

### 3.11 Summary

This chapter presented the various methodological and method-related approaches available to social researchers and articulated the rationale for the choices made in this study. As explained throughout this chapter, the present

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<sup>49</sup> For an overview of the typical features of Dutch English, also known as *Dunglish*, see: Edwards, 2016.



research consists of a mixed method study which includes both statistical and qualitative data. Statistical analysis was employed to provide background information on the size of the market for English-language exports to Europe and for providing an historical overview of the revenues of English-language sales in the Netherlands. On the other hand, qualitative data is derived using a qualitative methodology that loosely relies on grounded theory and case study research. The case study focused on the phenomenon of English-language reading in the Dutch contexts; as already seen, the Netherlands has been chosen for being a particularly representative case to illustrate the issue under investigation. The method adopted for collecting data consists of in-depth expert interviews with members of the publishing industry in the Netherlands, as well as in other countries (i.e. US and UK). This method has been selected for being the most suitable for the purpose of this thesis, i.e. that of gathering in-depth qualitative insight into the practices and attitudes of Dutch publishing professionals.

The thesis now presents the empirical findings of the research. More specifically, Chapter 4 and 5 showcase the quantitative data emerging from the statistical analysis of export sales of English-languages books in Europe and of import sales in the Netherlands between 1976 and 2018. Chapter 6 and 7 report and discuss the findings of the qualitative interviews with publishing professionals.

## Chapter 4: British and American exports in Europe today. Presentation and analysis of the available statistical evidence

### 4.0 Introduction

The data presented in this chapter documents the flow of exports from the two leading exporters of English-language books, the UK and the USA, to various world destinations, including the area that is the focus of this research, Europe and, more specifically, the Netherlands. By doing so, this chapter (together with Chapter 5) provides an insight into the size of the market for English-language books in Europe and helps better contextualize the phenomenon under study.

This data, collected respectively by the British and American publishers' associations, is the main evidence to verify the claims that: 1) there is a conspicuous market for English-language books in continental Europe; and 2) that this market is growing, which is what is hypothesized by various scholarly and industry sources (Kovač & Wischenbart, 2009a; 2009b; Kovač, 2014; Craighill, 2013; 2015; McCleery, 2015; see Chapter 2, section 2.4).

For details regarding the data collection methods used by the UK and US publishers' associations refer to Chapter 3, section 3.2.1.

The statistical evidence on English-language exports in Europe is presented in two different sections, one accounting for British exports and one for American exports. It is worth noting that, whilst these data provide a unique insight into

UK and US export performances, comparing the two sets of data is problematic, due to a series of caveats which are illustrated at the end of this section.

#### 4.1 The UK export market

The figures showcased below focus specifically on the export activities of UK publishers and are extrapolated from two sources: the *PA Statistics Yearbooks* published by the UK Publishers' Association (Publishers Association, 2005; 2009; 2013; 2014; 2015; 2017); and a report published by the Publishers' Association based on HM Revenue and Customs (HMRC) data (Publishers Association, 2015b) (cf. section 3.2.1).

The data is presented in two separate sub-sections, one dedicated to the Statistical Yearbooks and one dedicated to the HMRC data.

##### 4.1.1 PA Statistics Yearbooks export data (2001-2017)

Although the following tables and figures are based on the PA Statistics Yearbook reports, the structure and the presentation of the data has been adapted for greater suitability to this thesis. For instance, all the figures relative to the period 2001-2017, which were originally spread over six reports, have been gathered together. To facilitate the data analysis, calculations have been added to indicate growth percentages in some cases. Furthermore, in order to make the section more straightforward, the data hereby presented mostly focusses on trade books (whenever possible) and on European exports, therefore leaving aside the other book categories and export destinations.

	<b>Total £m</b>	<b>Physical £m</b>	<b>Digital £m</b>
<b>2001</b>	-	852	-
<b>2002</b>	-	852	-
<b>2003</b>	-	894	-
<b>2004</b>	-	909	-
<b>2005</b>	-	1,021	-
<b>2006</b>	-	1,024	-
<b>2007</b>	-	1,132	-
<b>2008</b>	-	1,162	-
<b>2009</b>	-	1,223	-
<b>2010</b>	-	1,312	-
<b>2011</b>	-	1,286	-
<b>2012</b>	-	1,317	-
<b>2013</b>	1,466	1,255	211
<b>2014</b>	1,460	1,231	229
<b>2015</b>	1,420	1,195	225
<b>2016</b>	1,495	1,256	240
<b>2017</b>	1,598	1,359	239
<b>% growth</b>			
<b>2001/2017</b>	-	60%	-
<b>2005/2017</b>	-	33%	-
<b>2010/2017</b>	-	4%	-
<b>2013/2017</b>	9%	8%	13%
<b>2015/2017</b>	13%	14%	6%

Table 11: Total physical and digital export sales 2001-2017 (net invoiced value) (Source: Publishing Association, 2005; 2009; 2013; 2017).

Table 11 provides an overview of the net value of all British physical exports for the entire period under consideration (2001-2017) and of digital exports from 2013 and 2017 (there is no recording of digital export sales prior to 2013). Overall, the revenues from exported titles have grown significantly between 2001 and 2017 – going from £ 852 million in 2001, to almost £1.6 billion in 2017 –, with physical sales increasing by 60%. In 2005, revenues surpassed the £1 billion

threshold for the first time.<sup>50</sup> The growth trend continued in the following years, with a significant increase in 2013 with over £1,4 billion of revenues (of which £1.2 billion for physical exports and £211 million for digital). Overall revenues (including both physical and digital sales) decreased in 2015, but then increased again in 2016 and 2017 – reaching an all-time peak in 2017. Closer observations of the data show that the peak reported in 2013 is a result of the inclusion of digital sales for the first time. During the last five years, physical and digital exports followed different patterns, with the former undergoing a period of decline between 2013 and 2015, to then rise again in 2016 and 2017, and the latter reporting a constant growth (albeit with a marginal decline in 2017).

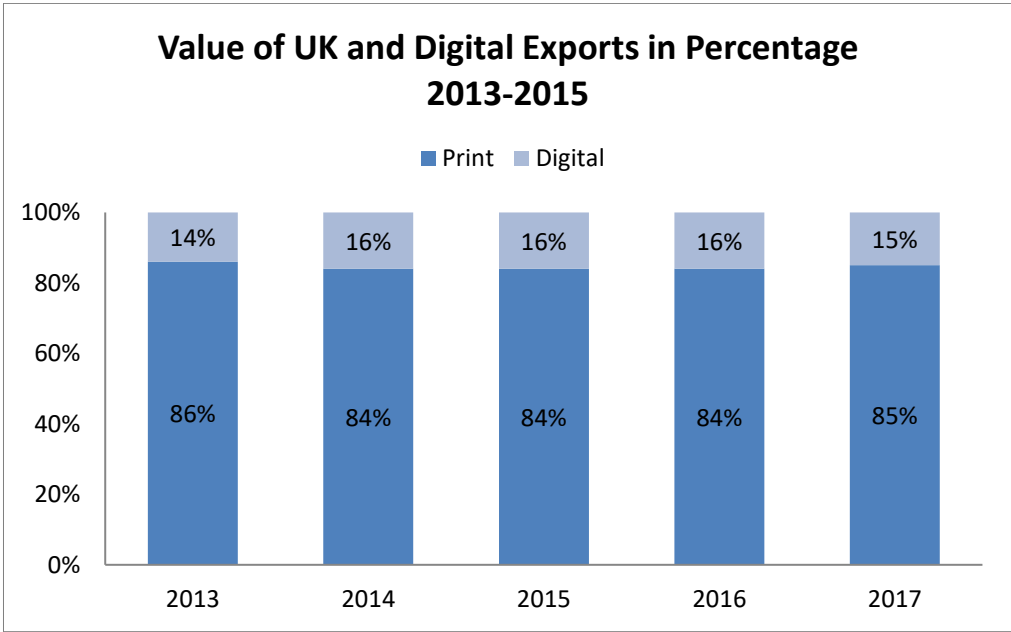


Figure 2: Share of net invoiced value of print and digital exports 2013-2017 (source: Publishers Association, 2017).

<sup>50</sup> This can probably be attributed to the inclusion of the results of the 2005 benchmark exercise which expanded the sample of surveyed publishers, therefore virtually including the totality of UK export sales (cf. 3.2.1).

Figure 2 illustrates the ratio of physical and digital export revenues, which is heavily skewed in favour of the former. In particular, print exports represent around three quarters of the total revenues, while digital accounted for around 15% of exports throughout the period under consideration.<sup>51</sup>

	<b>Total Trade m £</b>	<b>Total Export m £</b>	<b>Trade in %</b>	<b>Fiction m £</b>	<b>NF/ reference m £</b>	<b>Children's m £</b>
<b>2001</b>	353	852	41%	127	155	71
<b>2002</b>	352	852	41%	138	150	64
<b>2003</b>	387	894	43%	135	161	91
<b>2004</b>	354	909	39%	142	149	63
<b>2005</b>	408	1,021	40%	125	184	99
<b>2006</b>	384	1,024	38%	124	188	71
<b>2007</b>	459	1,132	41%	140	198	121
<b>2008</b>	433	1,162	37%	142	204	87
<b>2009</b>	458	1,223	37%	163	200	95
<b>2010</b>	460	1,312	35%	162	210	88
<b>2011</b>	446	1,286	35%	146	216	84
<b>2012</b>	459	1,317	35%	161	221	77
<b>2013</b>	411	1,255	33%	125	207	79
<b>2014</b>	417	1,231	34%	117	198	102
<b>2015</b>	412	1,195	34%	116	214	82
<b>2016</b>	462	1,256	37%	115	235	112
<b>2017</b>	489	1,359	36%	126	261	102

Table 12: Value of physical exports of trade categories (incl. fiction, non-fiction and reference, and children's books 2001-2017 (Sources: Publishers Association, 2001; 2006; 2009; 2013; 2015; 2017).

PASM breaks down sales figures into seven broad categories, namely: fiction, non-fiction and reference, children's literature, school, English-language

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<sup>51</sup> While both the UK and US publishing associations keep track of digital exports in their annual statistics, it is important to stress that these figures are incomplete as they only account for 'traditionally published' digital books, thus leaving out altogether self-published titles and contents that are available to download for free.

teaching (ELT), and academic/professional. Table 12 provides an account of the value of physical trade exports taken as a whole and also broken down into sub-categories (fiction, non-fiction and reference, and children's literature). The table also includes the percentage that trade categories represent vis-à-vis all the other categories.

As can be observed in Table 12, the value of physical trade exports grew from £353 million in 2001 to £408 million in 2005 and then remained stably over the £400 million threshold between 2005 and 2015 (except for 2006), with peaks of around £460 million in 2007, 2009, 2010, 2012 and 2016. Between 2012 and 2015 trade exports underwent a progressive decline – from £459 million in 2012 to £412 million in 2015; however, the revenues started to grow again in 2016 and 2017. 2017 represented a record year for trade exports, with revenues of £489 million. However, if the percentage share represented by trade categories taken as a whole is considered, this shows that the value has slowly declined, from being 41% of all exports in 2001, to being 37% in 2007, 35% from 2010 through to 2015, 37% in 2016 and 36% in 2017.

Taking into account single sub-categories shows that non-fiction represents the best-performing segment, followed by fiction and then by children's titles (Table 12). As the table shows, non-fiction and reference works experienced a notable growth between 2001 and 2017, increasing from £155 million in 2001 to £261 million in 2017. Fiction experienced buoyant results between 2007 and 2012, with peaks in 2009, 2010 and 2012, but declined considerably over the last three years (going from £161 million in 2012 to £126 million in 2017). Lastly, children's literature showcased a rather inconsistent pattern, with sales constantly oscillating year by year. In 2007, children's exports reached an absolute peak of

£121 million; it can be tentatively speculated (although this cannot be proven with the available data) that this result might be directly linked to the success in export markets of the last volume of the Harry Potter series (*Harry Potter and the Deathly Hallows*) which was published in the summer of 2007. 2016 represents another peak year, with £112 million revenues.

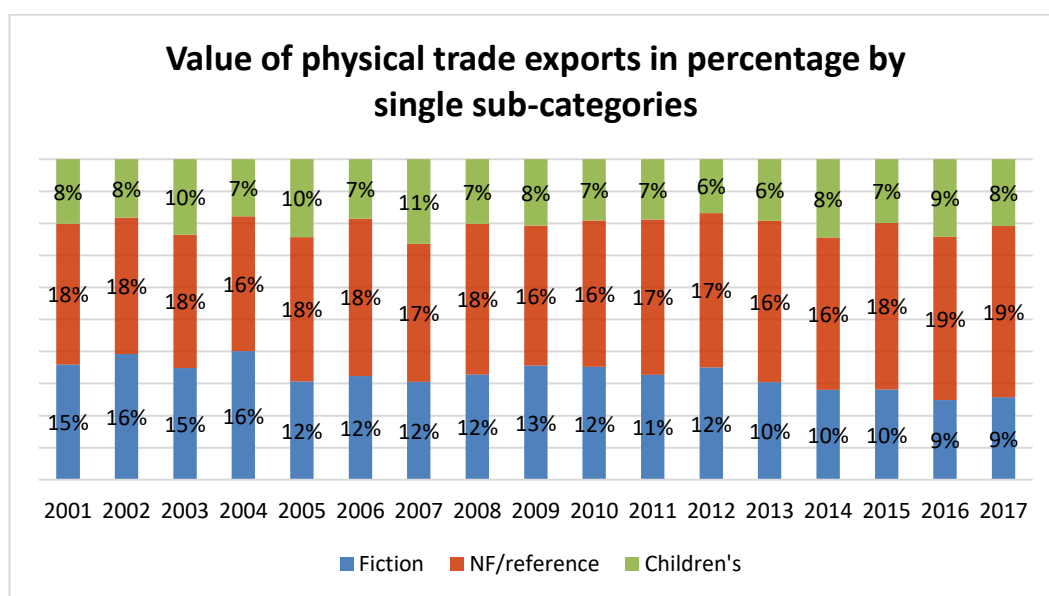


Figure 3: Value share in percentage of physical trade exports by single sub-categories (Fiction, Non-fiction and reference, and Children's books) (2001-2017). (Source: Publishers Association, 2001;2006; 2009; 2013; 2015; 2017).

If attention is focused on the share percentage represented by single trade categories (Figure 3), it can be seen that non-fiction and reference accounts steadily for 16-17% of total physical export revenues, with peaks of 18% in 2005, 2006, 2008 and 2015, and 19% in 2016 and 2017. Fiction account for 15-16% between 2001 and 2005, while between 2005 and 2012 it represented around 12% of total export revenues; its share declined to 9-10% over the last five years. Lastly, the share of children's literature oscillated between 8-7% over the entire period, with the some peak years: namely, 2003 and 2005 (10%), 2007 (11%) and 2016 (9%); the lowest share for this category was instead recorded in 2012 and 2013 (6%).



	<b>Total Export £ m</b>	<b>Trade %</b>	<b>Total £m</b>	<b>Fiction £m</b>	<b>NF Reference £m</b>	<b>Children's £m</b>
<b>2013</b>	211	36%	77	54	19	4
<b>2014</b>	229	34%	77	53	18	6
<b>2015</b>	225	36%	80	56	19	5
<b>2016</b>	240	33%	80	55	20	5
<b>2017</b>	239	36%	85	57	23	5
<b>2013/ 2015</b>	-		10%	6%	21%	25%

Table 13: Net Value of digital exports by category 2013-2017 (Source: Publishers Association , 2017).

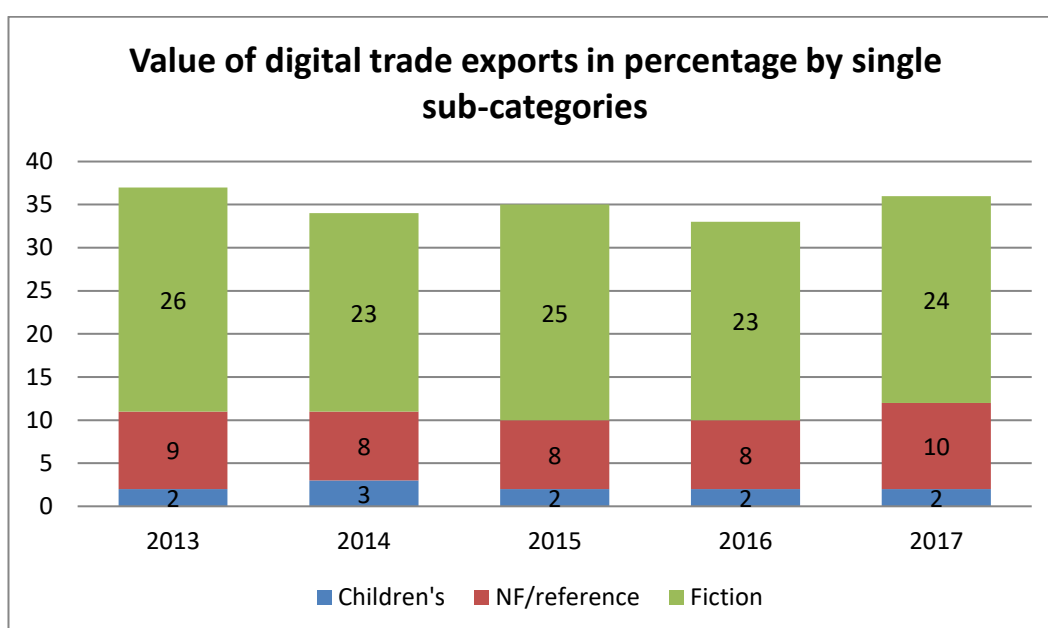


Figure 4: Value share in percentage of digital trade exports by single sub-categories (Fiction, Non-fiction and reference, and Children's books) 2013-2017 (Source: Publishers Association, 2017).

Table 13 and Figure 4 showcase the revenues of trade digital exports and the percentage share they represent compared to all other categories. As already mentioned, the PA started collecting data on digital exports only in 2013; as such, information on digital exports is only relative to the last five years (2013-2017). As already seen, electronic exports represent around the 15% of the total UK export market and their overall turnover amounted to £211 million in 2013, £229 million in 2014, and £ 225 million in 2015, £ 240 million in 2016 and £ 239 million in 2017 (Table 11 and Figure 2). If a closer look is focused on the net value

of digital exports for trade categories, an increase between 2013 and 2017 (+10%) can be seen, with trade exports accounting for £85 million of revenues in 2017, up from £77 million in 2013 and 2014 (Table 13). Trade digital exports correspond roughly to 1/3 of the total (35%), thus roughly matching the value share of physical trade exports during the same period, i.e. 2013-2017 (cf. Table 12 and Table 13).

If this percentage is broken down into single sub-categories and this information is then compared with physical exports, it can be seen that fiction – and not non-fiction and reference – is by far the most popular category for digital exports, accounting for an average 25% of all digital exports between 2013 and 2017 (corresponding to £53 million on average) – as compared to the 9-10% represented by fiction physical exports between 2013 and 2017. Non-fiction and reference is the second most popular category, representing a share of around 8% of digital exports revenues (as compared to the 17-18% it represents for physical exports); while children's literature only accounts for 2% of digital exports (as compared to 6-7-8% for physical exports) (cf. Figure 3 and Figure 4).

	<b>Total £m</b>	<b>Europe £m</b>	<b>M East/ N Africa £m</b>	<b>Africa Sub-Sahara £m</b>	<b>E &amp; S Asia £m</b>	<b>Australasia £m</b>	<b>North America £m</b>	<b>Other Americas £m</b>	<b>Unspecified.</b>
<b>2001</b>	852	329	61	56	141	85	128	42	11
<b>2002</b>	852	309	73	60	153	95	114	36	13
<b>2003</b>	894	371	67	57	134	102	108	43	11
<b>2004</b>	909	372	74	74	128	104	101	44	12
<b>2005</b>	1021	420	83	88	145	112	115	50	8
<b>2006</b>	1024	418	94	78	150	106	122	50	7
<b>2007</b>	1132	468	103	97	165	121	122	50	5
<b>2008</b>	1162	458	118	104	164	132	128	51	6
<b>2009</b>	1223	489	141	102	167	140	132	50	3
<b>2010</b>	1312	500	163	117	178	136	157	58	3
<b>2011</b>	1286	488	171	107	184	128	144	61	3
<b>2012</b>	1317	513	166	93	190	140	147	64	4
<b>2013</b>	1255	486	178	87	193	115	132	62	3
<b>2014</b>	1231	456	175	78	201	116	138	63	4
<b>2015</b>	1195	436	188	74	208	102	113	70	5
<b>2016</b>	1256	434	185	73	229	104	135	89	7
<b>2017</b>	1359	489	187	80	248	119	121	111	5
<b>% growth</b>									
<b>2001/2017</b>	60%	49%	207%	43%	76%	40%	-5%	164%	-55%

Table 14: Net value of physical book exports by region 2001-2015 (sources: Publishers Association, 2001;2006; 2009; 2013; 2015; 2017).

Table 14 details the revenues of physical UK exports by region of destination from 2001 to 2015 (there is no correspondent information regarding digital exports). In Table 14, it is important to stress that, in contrast to Tables 12 and 13 and Figures 3 and 4, this data includes all categories and not only trade. These figures, as they are presented in the Statistics Yearbooks, do not allow us to cross-reference categories with regions – thus meaning that it is impossible to know the specific value of trade titles being exported to Europe. In terms of the subject of thesis, in order to know how many English-language trade books are currently sold in the Netherlands, we rely entirely on the sales statistics gathered by the research company Gfk (cf. section 5.3).

As can be observed in Table 14, the revenues of almost all regions have grown between 2001 and 2017 – the only exception being North America, which reported a decrease of 5% between 2001 and 2017. Europe is by far the most important export destination for UK publishers, followed in order by East and South Asia; the Middle East and North Africa (which surpassed North America to occupy third position from 2009); North America; Australasia; Africa; and lastly Central and South America.

The long-term trends show that Europe has experienced conspicuous growth over the last 16 years, as it went from a turnover of £329 million in 2001 to £489 million in 2017 (+60%). From 2001 to 2012, exports to Europe have been increasing steadily, going from £329 million in 2001, to £420 million in 2005, reaching £500 million in 2010, to then experience a record turnover of £513 million in 2012. Conversely, revenues declined sharply in between 2013 and 2016 – going from £513 million in 2012 to £434 million in 2016. In 2017 revenues grew again to reach £489. The recent decline in European sales has been offset by

significant growth in other areas, namely the Middle East, East and South Asia and Latin America.

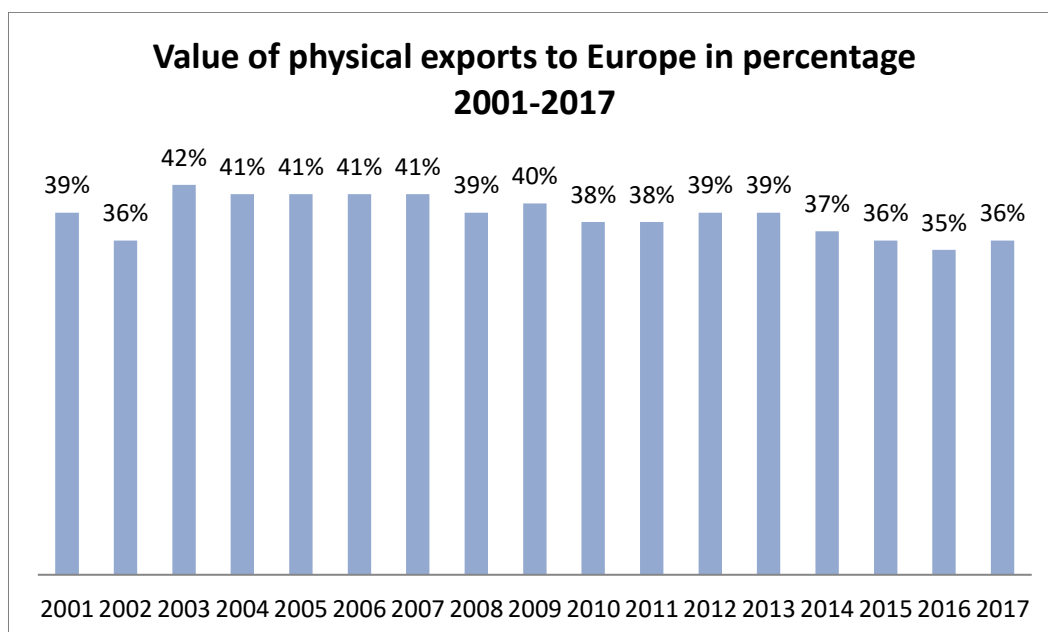


Figure 5: Net value of physical exports to Europe in percentage 2001-2017 (Sources: Publishers Association, 2001;2006; 2009; 2013; 2015; 2017).

Figure 5 provides an overview of the percentage share represented by physical exports to Europe vis-à-vis all other regions. In 2001 Europe accounted for 39% of UK exports, but this then declined to 36% and increased again, reaching a peak of 42% in 2003. Over the following six years (2003-2009), the share remained mostly stable (on average around 40%) and then started to decline again around 2010. In 2016 and 2017, Europe accounted respectively for 35% and 36% of exports.

The way the PA Statistical Yearbooks data are presented do not make it possible to gather country-specific information – therefore it is not possible to rely on these figures to quantify the value and volume of British exports to the Netherlands. For this, it is instead useful to consider the data collected by HM Revenue & Customs which are presented in the next section (4.1.2).

#### 4.1.2 HMRC data on single destinations of UK exports

In addition to the Publishing Association Statistics Yearbook data, further information on British exports can be gathered from a report published by the UK Publishing Association in 2015 (Publishers Associations, 2015b). The data in this report provides an insight into the single destinations of UK exports (i.e. by country) for the period 2010-2014, something that is missing in the PA Statistics Yearbooks analyzed above, which only group export destinations by regions (cf. Table 14). For more information on the this report and the caveats is presents cf. section 3.2.1.1.

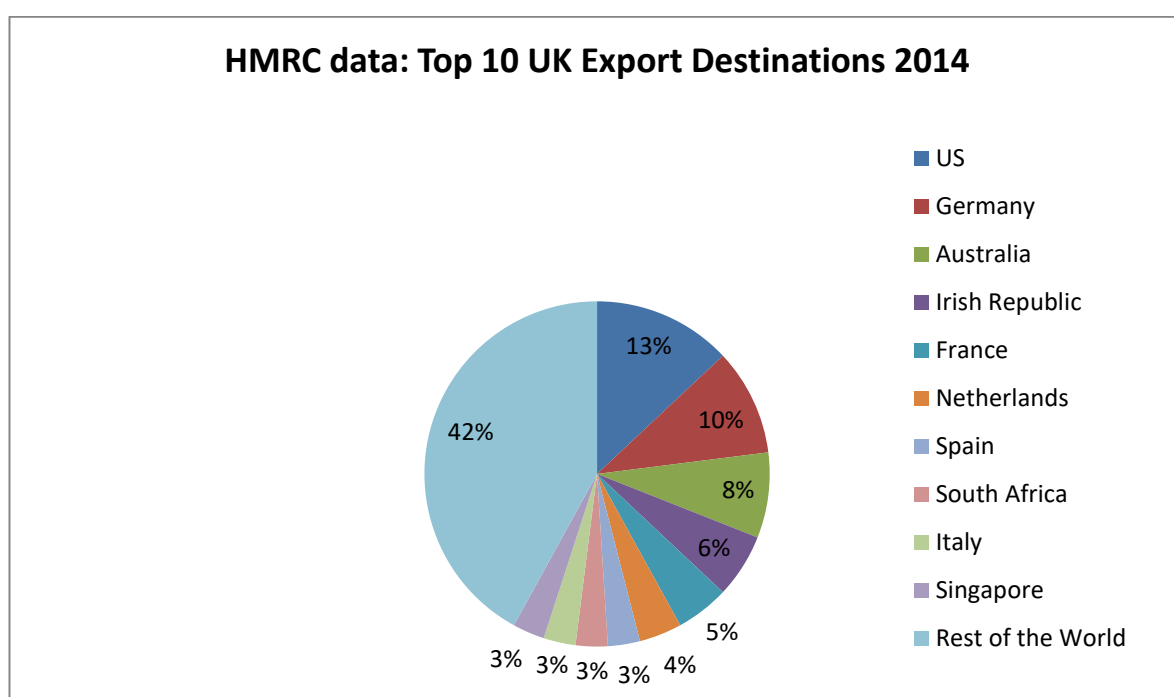


Figure 6: Top 10 single destinations for UK exports in 2014 (Source: Publishers Association, 2015b).

The pie chart in Figure 6 provides an overview of the top-10 single destinations for UK book exports in 2014. Unfortunately, the data only covers one year as the report they are extrapolated from only includes information on the year preceding its publication (i.e. 2014).

As can be observed in Figure 6, a variety of non-Anglophone European countries feature in the top-10 list. Predictably, the US is the most popular destination, accounting for 13% of British export revenues in 2014. The second largest receiver of UK exports is Germany, which accounted 10% in 2014. Other continental European countries featured in the top-10 are France (5%), as well as the Netherlands, Spain and Italy, all accounting for 4% of export revenues (cf. Figure 6).

	<b>2010 (£m)</b>	<b>2011 (£m)</b>	<b>2012 (£m)</b>	<b>2013 (£m)</b>	<b>2014 (£m)</b>	<b>Growth in %</b>
<b>Germany</b>	147,9	156,9	183,2	184,4	186,4	26%
<b>Irish Republic</b>	139,8	131,3	123,4	110,9	114,2	-18%
<b>France</b>	69,3	69,5	75,8	81,5	91,4	32%
<b>Netherlands</b>	74,4	75,9	70,3	71,1	75,2	1%
<b>Spain</b>	59,8	67,1	52,5	46,3	58,6	-2%
<b>Italy</b>	48,0	46,1	45,1	45	49,4	3%
<b>Sweden</b>	40,6	41,8	39,4	38,9	37,3	-8%
<b>Poland</b>	24,6	22,9	22,5	22,9	29	18%
<b>Belgium</b>	38,3	35,1	35,5	33,2	28,7	-25%
<b>Denmark</b>	26,5	29,7	31,3	30,5	28,3	7%
<b>Norway</b>	25,9	26,9	26,0	25,2	25,2	-3%
<b>Greece</b>	26	24,8	22,1	22	22,6	-13%
<b>Switzerland</b>	20,7	20,5	20,1	19	20	-3%
<b>Finland</b>	12,8	11,9	10,8	10,1	10,6	-17%
<b>Czech Republic</b>	9,7	10,3	11,3	9,5	9,7	0%
<b>Austria</b>	15	8,6	7,6	8	9,6	-36%
<b>Slovenia</b>	6,5	8,8	8,4	8,7	8,8	35%
<b>Portugal</b>	11,2	10	8,7	9	8,2	-27%
<b>Malta</b>	6,5	5,8	6,8	7,4	8,1	25%
<b>Hungary</b>	7	6,5	5,4	4,9	4,8	-31%
<b>Luxemburg</b>	4,6	4,3	6,6	4,8	4,5	-2%

Table 15: Value of Top 20 European export destinations 2011-2014 (Source: Publishers Association, 2015b). Growth rate calculated after rounding.

Table 15 contains more detailed information on revenues by country between 2010 and 2014. Although the PA report presents a very long list of destination

countries, the data reproduced in Table 15 has been selected to represent only the top-20 European export destinations (for the full list of countries refer to Publishers Association, 2015b).

Germany accounts for the highest value of export revenues and exports to Germany increased significantly (by +26%), going from £148 million in 2010 to £186 million in 2014. France is the second export destination among European non-Anglophone countries and it also underwent a period of growth (+32%), going from £69 million in 2010 to £91 million in 2014. The third European receiver of British exports is the Netherlands, which however underwent only a modest growth during the period under consideration (+1%) – going from £74 million in 2010, to £75 million in 2014. In order, the list continues with Spain (-2%), Italy (+3%), Sweden (-8%), Poland (+18%), Belgium (-25%), Denmark (+7%), Norway (-3%), Greece -13%), Switzerland (-3%), Finland (-17%), Czech Republic (no change), Austria (-36%), Slovenia (+35%), Portugal (-27%), Malta (+25%), Hungary (-31%) and Luxemburg (-2%).

Although this data is most likely inflated due to the inclusion of items that cannot be strictly classified as books, it provides us with an idea of the rough size of the market for British exports in each single European country. Predictably, the largest countries (Germany, France, Italy and Poland) feature in the top positions of the list. However, it is interesting to note how smaller countries, such as the Netherlands, Sweden, Belgium and Denmark also represent a large source of revenue for UK exports.

An interesting consideration to make is that, while the amount of UK exports does not seem particularly high when contrasted with the total turnover of the largest European markets (e.g. in 2014: Germany € 9.32 billion, France € 2,51 billion,



Italy € 2,6 billion, Spain € 2,19 billion), the UK turnover in smaller countries – like the Netherlands and Sweden (respectively £75 million and £37 million in 2014) – is quite significant if compared to the overall value of the domestic book markets (€ 467 million for the Netherlands and € 181.6 million for Sweden in 2014).<sup>52</sup> It is worth noting though that comparison with Dutch and Swedish data should be taken with due caution since the statistics on domestic turnover for both countries only take into account trade categories, while UK HMRC export figures encompass all categories. Data on Germany, France, Italy and Spain instead include all categories.

#### 4.1.3 Summary of UK data

By analyzing the export statistics of British publishers during the period 2001-2017 we can conclude that:

- The market for UK exports grew by 60% over the full period under analysis (2001-2017). The highest turnover was registered in 2017 when the value of UK exports amounted to nearly £1.6 billion.
- Since 2013, when digital sales started being recorded, they have been progressively growing. However, e-books still represent only a small percentage of the overall export market (around 15%). On the other hand, physical exports are still the dominant format and account for around 85% of the export market.

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<sup>52</sup> Sources: Associazione Italiana Editori (2015), Börsenverein des Deutschen Buchhandels (2016), Frankfurter Buchmesse (2015a; 2015b; 2016), KVB (2017).

- Trade categories are not the most important source of export revenues as they account only for around the 35% of the market. Among trade categories non-fiction is the strongest segment for physical exports, while fiction is the leading for digital ones.
- Europe is by far the main destination for physical British exports. Over the period under consideration (2001-2017) the revenues from European exports increased by 49%. However, exports to the Europe declined in the last few years. The market share of European exports oscillated between a minimum of 35% to a maximum of 42% over the last 15 years. During the last three years the share has been declining and it corresponded to 36% in 2017.
- According to HMRC data, the second largest single destination for British exports in 2014 was Germany (10%). Other important European non-Anglophone destinations were France (5%), the Netherlands (4%), Spain (3%) and Italy (3%).
- As highlighted by the HMRC reports, the turnover of British exports in the Netherlands has remained stable between 2010 and 2014 (+1%), with revenues amounting to 75£ in 2014. Further statistical evidence presented in Chapter 5 will provide a better understanding of the sales patterns of trade English-language books over a longer period of time.

Overall, the high turnovers achieved by UK publishers in the Netherlands suggest that British books are relatively popular among Dutch readers. In terms of the subject of this thesis, the UK export statistics hereby presented show that the market for English-language books in continental Europe is large and appears to

be expanding further; in turn, this trend can be expected to increase the pressure on local-language publishers to compete with imported products.

## 4.2 The US export market

Figures related to the export of US trade publishers covering the period 2012-2015 were kindly provided by the American Association of Publishers.<sup>53</sup> The data included in this section is based on the 2013 and 2015 *Export Sales of US Trade Books Publishers* reports, respectively accounting for the 2012-2013 and 2014-2015 figures (Association of American Publishers, 2013; 2015).<sup>54</sup> Differently from UK statistics, these datasets only record trade categories – meaning that they are more directly relevant to the focus of this thesis. Incidentally, this also makes UK and US data more difficult to compare (there are more details on this at the end of this section).

The *Export Sales of US Trade Book Publishers* reports from which the figures presented below are extrapolated are based upon data from BookStats. For detailed information on the data collection method employed refer to Chapter 3, section 3.2.1.

As was the case for UK data, the tables and figures presented here are not always an identical reproduction of the AAP reports. In many cases, new calculations about growth percentages have been added and most of the tables and figures have been re-designed and re-elaborated in order to combine the results of both

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<sup>53</sup> Permission to reproduce the data has been cleared by the American Association of Publishers.

<sup>54</sup> Free access to the data relative to 2016, 2017 and 2018 was requested, but the AAP did not grant this request.

reports. Furthermore, given that the focus of the present research is on exports to European countries, the figures have been adapted in order to provide a more focused overview of the European situation, thus leaving aside other world regions.

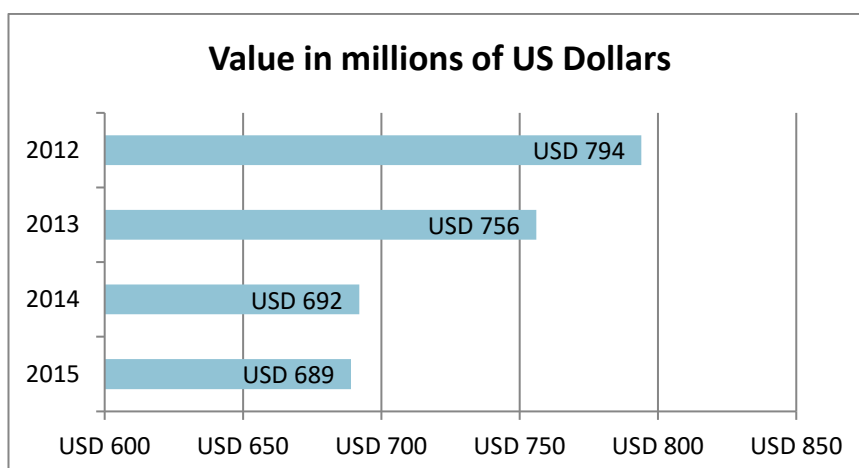


Figure 7: Turnover of US physical and digital trade exports 2012-2015 (Source: Association of American Publishers, 2013; 2015).

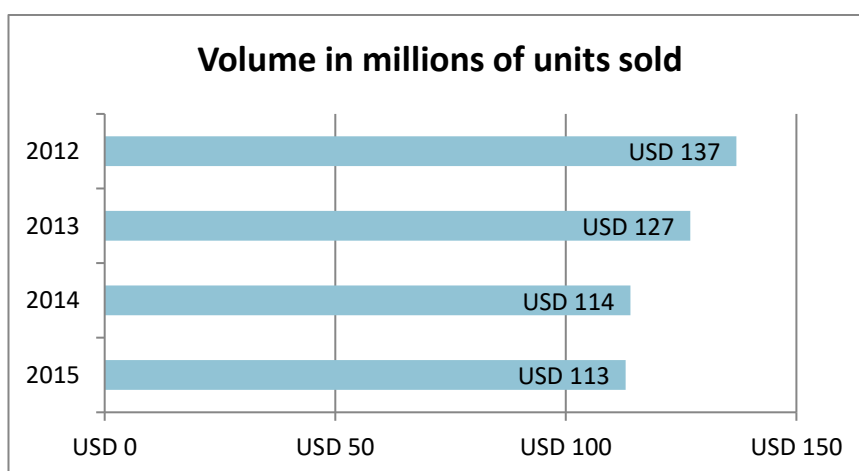


Figure 8: US physical and digital trade exports by unit sold 2012-2015 (Source: Association of American Publishers, 2013; 2015).

As shown in Figure 7 and Figure 8, the total value and volume of US trade exports (including physical and digital exports) has decreased sharply between 2012 and 2015; the value in US dollars has declined from \$794 million in 2012 to \$689 million in 2015 (-13%), while units sold have dropped from 137 to 113 million in 2015 (-17%).

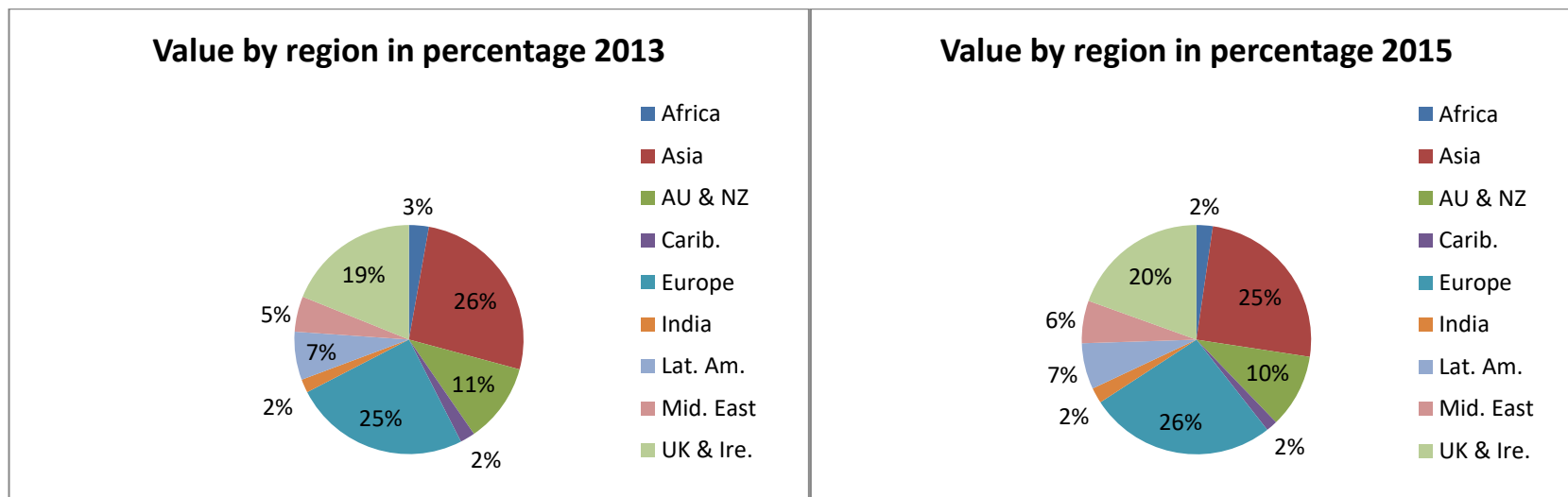


Figure 9: Value of US physical and digital exports by destination in percentage for years 2013 and 2015 excluding Canada (Source: Association of American Publishers, 2013; 2015).

Export to Europe 2012-2015												
	2012			2013			2014			2015		
	Digital	Print	Total	Digital	Print	Total	Digital	Print	Total	Digital	Print	Total
<b>Value</b>	15,078,799	73,328,337	88,407,136	19,202,158	69,437,361	88,639,518	20,250,720	77,069,211	97,319,931	20,866,018	73,052,925	93,918,943
<b>Units</b>	2,386,644	11,864,013	14,250,657	4,544,367	9,204,225	13,748,592	2,895,043	9,971,578	12,866,621	3,253,225	9,645,400	12,898,625

Table 16: Value and volume of US physical and digital exports to Europe 2012-2015 (Source: Association of American Publishers, 2013; 2015).

<b>Revenues of US export to Europe in %</b>				
	2012	2013	2014	2015
<b>Europe</b>	88,407,136	88,639,518	97,319,931	93,918,943
<b>Total</b>	794,114,578	755,972,239	692,100,432	689,376,670
<b>%</b>	11.1%	11.7%	14.1%	13.6%

Table 17: Value in percentage of US exports to Europe as compared to total exports (incl. Canada) (Source: Association of American Publishers 2013; 2015).

As far as destinations of exports are concerned, Canada is the leading receiver of US print and digital exports, accounting for 54% of US export revenues – this means that Canada alone accounts for more revenue than all other regions taken together (AAP, 2013 and 2015). Since Canada would dominate the chart entirely, it has been excluded from Figure 9, which provides an overview of the value share represented by all other export regions.<sup>55</sup>

From Figure 9, it can be seen that Asia and Europe are the second and third leading destinations for US exports in terms of value (after Canada), followed by the other two Anglophone areas, namely the UK and Ireland, and Australia and New Zealand. In 2013, Asia was the second destination, accounting for 26% of US export revenues, while in 2015 this declined slightly to 25% – therefore leaving the second position to Europe. In 2013, European exports accounted for 25%, and in 2015 they grew to represent 26% of US exports. The UK and Ireland represented 19% of revenues in 2013 and 20% in 2015, and Australia and New Zealand accounted for 11% in 2013 and 10% in 2015. Then in order we find Latin

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<sup>55</sup> The two charts in Figure 8 are an exact reproduction of the AAP reports; therefore, the choice of excluding Canada from them has been made by the AAP.

America (7% in 2013 and 2015), the Middle East (5% in 2013 and 6% in 2015), and Africa, the Caribbean and India (accounting for around 2% in both years).

The exact percentage represented by Europe's revenue (this time including Canada) is reported in Table 17. In total, Europe accounted for 11.1% of US export value in 2012, 11.7% in 2013, to the then raise to 14.1% in 2014 and to 13.6% in 2015.

Table 16 provides a detailed overview of the value and volume of physical and digital US trade exports to Europe. As can be seen, the total value of US exports to Europe grew continually during the period 2012-2015 – going from \$ 88.4 million in 2012, to \$ 88.6 million in 2013, \$ 97.3 million in 2014 and \$ 93.9 million in 2015, therefore signifying an overall increase of around 6%. On the other hand, perhaps surprisingly given the overall increase in sales, the volume of units sold to Europe has declined during the same period, going from 14,2 million of units in 2012, to 12,9 million in 2015 (-9%).

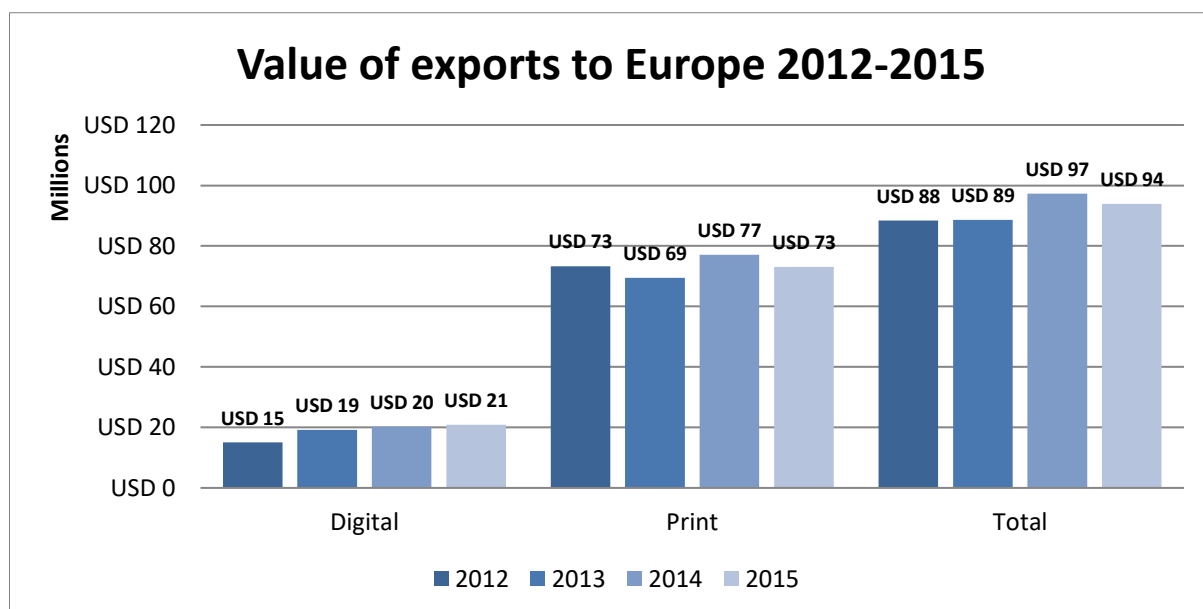


Figure 10: Value of US exports to Europe 2012-2014 (Source: Association of American Publishers, 2013; 2015).

With a closer look at the trends of print and digital exports, it can be seen from Table 16 and, more clearly, from Figure 10, that print exports to Europe have remained relatively stable overall – accounting for \$ 73.3 million in 2012, \$ 69.4 million in 2013, then reaching a peak of \$77 million in 2014 to then return to \$ 73 million in 2015. On the other hand, digital exports grew steadily over the four years, going from \$15 million to \$ 21 million in 2015 (+38%).

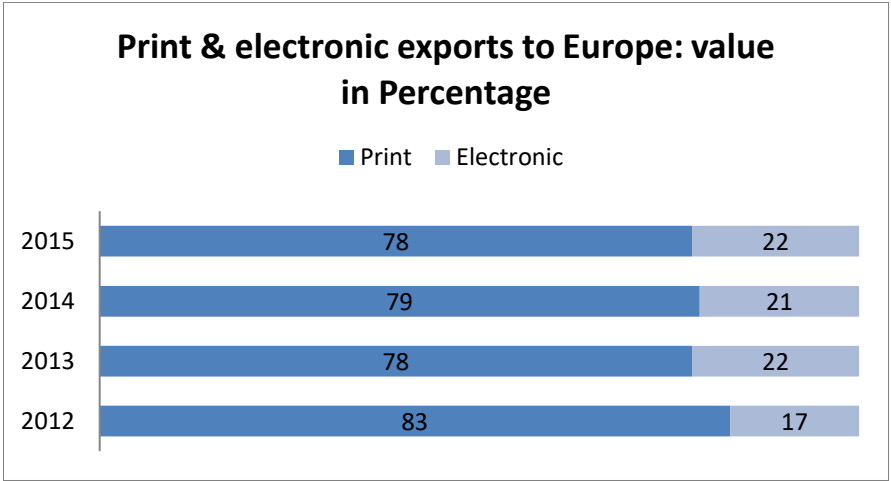


Figure 11: US print and electronic exports to Europe by value in percentage 2012-2015 (Source: Association of American Publishers, 2013; 2015).

In Europe, the ratio of digital exports vis-à-vis print ones increased steadily between 2012 and 2015, going from 17% to 22 % in value. Concomitantly, the share of print revenue declined, going from 83% in 2012 to 78% in 2015 (Figure 11).



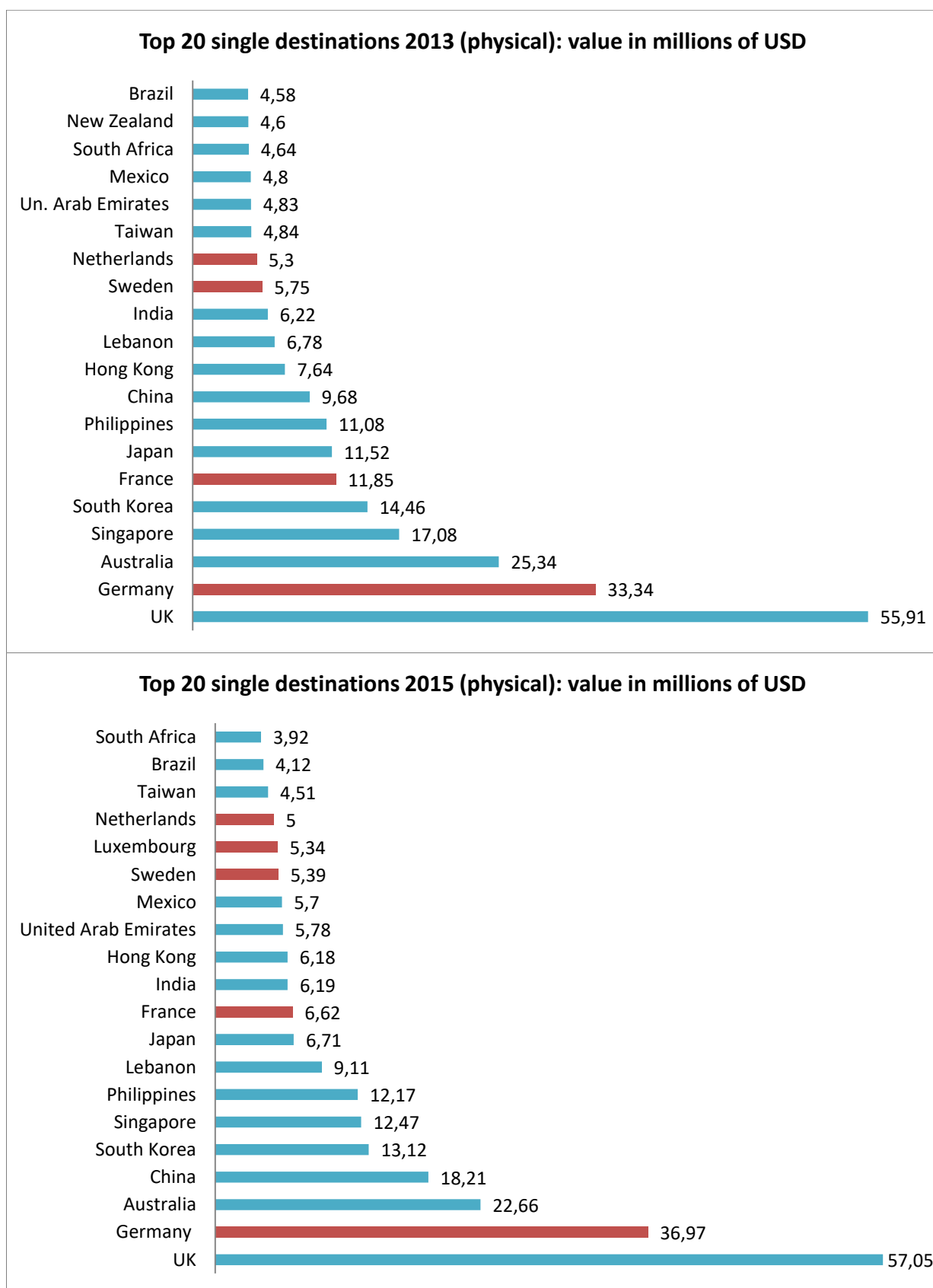


Figure 12: Revenues of top 20 export destinations for US physical exports in 2013 and 2015. Non-Anglophone European countries highlighted in red (Source: Association of American Publishers, 2013; 2015).

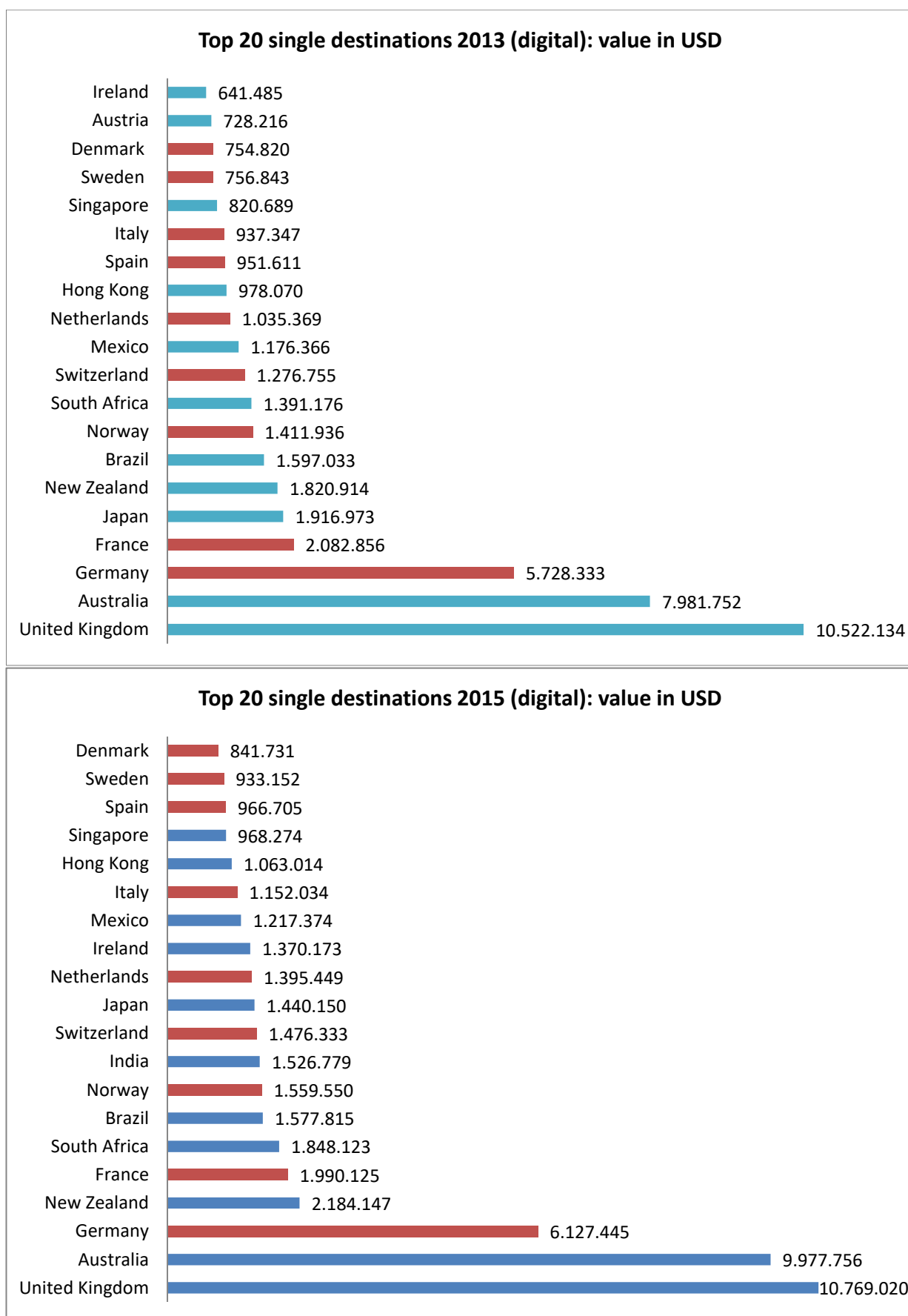


Figure 13: Revenues of top 20 export destinations for US digital exports in 2013 and 2015. Non-Anglophone European countries highlighted in red (Source: Association of American Publishers, 2013; 2015).

Figure 12 provides information on the top-20 single destinations for US trade physical goods in 2013 and 2015, again excluding Canada. In both years, the UK was the second largest single destination (after Canada), accounting for \$ 56 million in 2013 and \$57 million in 2015. Among the European countries featured in the list are Germany, France, Sweden, the Netherlands and Luxemburg. Overall, Germany is the fourth single destination for US exports, receiving \$33 million worth of physical US exports in 2013 and \$37 million in 2015 – therefore showcasing a conspicuous growth. Conversely, physical exports to France underwent a notable decline, going from \$12 million in 2013 to \$7 million in 2015. Sweden remained relatively stable over the period under consideration and accounted for \$5.7 million in 2013 and \$5.4 million in 2015. Similarly the Netherlands experienced only a minor decline, going from \$5.3 million in 2013 to \$5 million in 2015. Luxemburg entered the top-20 only in 2015 accounting for as much as \$5.3 million – a high amount if compared to the size of the market and to the population (Figure 12). The reason for such a large flow of exports to Luxembourg is connected with the fact that Luxembourg is the heart of the operations of Amazon in Europe. As a result, the validity of the data regarding exports to other countries in Europe could be compromised, given that such a large amount are recorded as being exported to Luxembourg, despite them possibly having a different onward destination.

Figure 13 details the top-20 destinations for US digital exports in 2013 and 2015. As many as 10 non-Anglophone European countries are included in the list in 2013; and 9 in 2015 (excluding the UK and Ireland). As was the case with physical exports, Germany is the most important destination in Europe – and the fourth destination worldwide–, growing from \$5.7 million in 2013 to \$ 6.1 in 2015.

France comes right after Germany in the top-20, with around \$2 million of revenues in both 2013 and 2015. The list continues with Norway (\$1.4 million in 2013 and \$1.6 million in 2015), Switzerland (\$1.3 million in 2013 and \$1.5 million in 2015), the Netherlands (\$1 million in 2013 and \$1.4 million in 2015), Italy (\$ 937.347 in 2013 and \$1.1 in 2015) and Spain, Sweden, Denmark (all with revenues inferior to \$ 1 million in both years).

	<b>2013</b>	<b>2015</b>	<b>Growth in %</b>
<b>Print</b>			
<b>Germany</b>	33,345,878	36,963,276	10,8%
<b>France</b>	11,854,259	6,617,701	-44,2%
<b>Sweden</b>	5,746,418	5,387,593	-6,2%
<b>Netherlands</b>	5,302,841	5,005,086	-5,6%
<b>Electronic</b>			
<b>Germany</b>	5,728,333	6,127,445	7,0%
<b>France</b>	2,082,856	1,990,125	-4,5%
<b>Norway</b>	1,411,936	1,559,550	10,5%
<b>Switzerland</b>	1,276,755	1,476,333	15,6%
<b>Netherlands</b>	1,035,369	1,395,449	34,8%
<b>Spain</b>	951,611	966,705	1,6%
<b>Italy</b>	937,347	1,152,034	22,9%
<b>Sweden</b>	756,843	933,152	23,3%
<b>Denmark</b>	754,820	841,731	11,5%

Table 18: Growth between in percentage for print and digital revenues for the leading single destinations in continental Europe between 2013 and 2015 (Source: Association of American Publishers, 2013; 2015).

	<b>Total 2013</b>	<b>Total 2015</b>	<b>Growth in %</b>
<b>Germany</b>	39,074,211	43,090,721	10,3%
<b>France</b>	13,937,115	8,607,826	-38,2%
<b>Sweden</b>	6,503,261	6,320,745	-2,8%
<b>Netherlands</b>	6,338,210	6,400,535	1,0%

Table 19: Total export revenues (print + digital) into leading single destinations in continental European and growth percentages between 2013 and 2015 (Source: Association of American Publishers, 2013; 2015).

Table 18 provides a summary of the revenues of physical and digital exports in European non-Anglophone countries, and also provides information on the growth percentages between 2013 and 2015. As can be observed, revenues for

physical exports increased by 11% in Germany, while they decreased significantly in France (-44%), and more moderately in Sweden and the Netherlands (-6%). On the other hand, revenues for digital exports grew in all European destinations, except for France (-4%). The highest growth has been reported in the Netherlands (+35%), followed by Italy and Sweden (both +23%).

In total, as summarized in Table 19, if both print and electronic exports are considered, Germany received over \$43 million-worth of US trade books in 2015, up +10% on 2013. France, which was the second largest receiver of US exports, imported US books for the value of \$8.6 million (down by -38% on 2013), while exports to Sweden and the Netherlands were worth respectively \$6.3 million in 2015 (-3% on 2013) and \$6.4 million (+1% on 2013) (Table 19). The total amount of exports (including print and digital sales) cannot be calculated for other European single destinations as the AAP reports only provide information on physical revenues for the above mentioned four markets – i.e. Germany, France, Sweden and the Netherlands –, since they are the only European countries to be featured in the top-20 lists.

#### 4.2.1 Summary of US data

Based on the data showcased in section 4.2 it can be concluded that:

- The overall value and volume of US trade exports declined sharply between 2012 and 2015 – with revenues plunging by over \$ 100 million (-13%).
- Conversely, exports to Europe recorded a positive trend. Physical revenues remained relatively stable between 2012 and 2015 – with a peak of \$97 million in 2013. Over the four-year period under examination, digital

exports grew constantly – from \$15 million in 2012 to almost \$21 million in 2015. Overall Europe represented 11-12% of US export revenues in 2012/2013 and the 14% in 2014/2015, thus showing growth in US exports (cf. Campbell & Jones, 2012).

- The ratio of digital and physical exports to Europe shifted between 2012 and 2015 – with digital representing 17% in 2012 and 22% in 2015.
- Among the top-20 single destinations for American physical and digital exports are featured various European non-Anglophone countries. The largest destination of exports in Europe was by far Germany (for both physical and digital exports); overall in 2015 Germany accounted for as much as \$ 43 million revenues for US publishers. The next countries to be featured in the list reported more modest revenues, with France accounting for \$ 8 million, and the Netherlands and Sweden for \$ 6 million in 2015, including both digital and physical exports.
- As far as the focus of this thesis is concerned, US export sales to the Netherlands grew slightly between 2012 and 2015 (from \$6,3 million to \$6,4 million). The negative trend registered by print sales -5,6% (going from 5,3\$ million in 2012 to 5,0\$ million in 2015), was offset by electronic sales which instead increased by +10,5% (going from 1,4\$ million in 2012 to 1,6\$ million in 2015). Overall, American exports to the Netherlands increased by +1% in the period under consideration. If the value of US trade exports (i.e. \$6.4 in 2015) are compared to the total value of the Dutch trade book market in the same year (i.e. € 467 million) – it can be seen that American trade exports represent only a very low proportion of the overall book market (roughly 1.3%).

### 4.3 Conclusions: what data is available and what is missing

This chapter addressed research question:

*What is the value of American and British exports to Europe and in particular to the Netherlands? What data is available and what is missing?*

By showcasing the available export statistics on British and American export sales, this quantitative analysis demonstrates that export sales are a huge business for Anglophone publishers, and Europe is one of the leading destinations for both American and British publishers.

The key findings of this statistical analysis are:

- UK exports to Europe grew significantly during the last 17 years (by over +60%) – although they underwent a period of decline in the last 3 years. Overall, Europe accounts for more than 1/3 of British exports (around 40% on average throughout the period under consideration 2001-2017).
- Revenues of American exports to Europe increased in more recent years, contrasting the overall negative trend experienced by US exports as a total. However, exports to Europe accounted for around 25% of all American export trade turnovers, which is considerably less than the share Europe represents for British publishers. US exports to the Netherlands accounted for \$6.3 million in 2013 and \$6.4 million in 2015 (including both physical and digital exports), thus showcasing a growth of 1% over the period under consideration.

As for the sub-question ‘*What data is available and what is missing?*’, this chapter highlighted several shortcomings and caveats that partly raise questions regarding the value of the data.

Due to dissimilarities in the data collection methodologies, UK and US statistics present us with fundamentally different information. Remarkably, the UK data provides us with less specific information concerning the focus of this research, namely trade exports to European countries. This is due to the fact that – unlike the AAP reports (US) which focus exclusively on trade categories – the PA reports (UK) include all categories. Although the PA reports do break down total export revenues by category – therefore specifying the overall revenues of trade exports as opposed to those of other categories –, this information is not cross-referenced with regional categories. Therefore, while US data provides information on the quantity of trade titles exported to Europe and its turnover, the data on British exports to Europe is not specific to the trade sector, but instead refers to all book categories (including educational publishing, i.e. academic publishing, ELT, and school textbooks) (cf. Table 14).

In addition, UK data on single export destinations (HMRC data) does not isolate trade exports. In practice this means that the data about single European export destinations includes all book categories (cf. Table 15). For what concerns the Netherlands specifically, although we know that the value of English-language books being exported to the Netherlands between 2010 and 2014 amounted to about £75 million per year, this value is not particularly revealing for the purpose of this thesis since it includes all book categories (including educational publishing, professional publishing, etc.) and is not only limited to trade exports. On the other hand, the data available for the US is immediately relevant to the research of this thesis as it provides information on trade categories and on single export destinations. However, US data covers only a short period of time (2011-2015), thus preventing a long-term overview of trends.



Another key issue lies in the fact that British and American data are collected in different ways and cannot be directly compared; this means that the data does not indicate which country is the leading exporter of English-language books to Europe, and ultimately this prevents us from establishing a meaningful comparison between the size of the UK and US trade export businesses in Europe. The only comparison that can be drawn between the two datasets regards the total turnover of trade categories for the period 2012-2015 (the only years for which US statistics have been provided by the Association of American Publishers) (Table 20). When observing these figures it has to be borne in mind that they refer to trade exports to all world regions and are therefore not specifically to Europe.

	<b>Physical Trade</b>		<b>Digital Trade</b>		<b>Total Trade</b>	
	UK	US	UK	US	UK	US
<b>2012</b>	GBP 459	USD 697	N/A	USD 95	N/A	USD 794
<b>2013</b>	GBP 423	USD 648	GBP 76	USD 108	GBP 499	USD 756
<b>2014</b>	GBP 427	USD 582	GBP 76	USD 110	GBP 503	USD 692
<b>2015</b>	GBP 419	USD 590	GBP 77	USD 100	GBP 496	USD 689

Table 20: Comparison of UK and US trade export value (2012-2015) (sources: Publishers Association, 2013; 2015; Association of American Publishers, 2013; 2015).

The comparison in Table 20 highlights that, after conversion, the total revenues of UK and US trade exports are generally similar in recent years, both for what concerns physical and digital turnover. Unfortunately, this conclusion does not really improve our understanding of the power relations of American and British publishers in continental Europe or in the Netherlands.

To sum up, the overview of the available quantitative data regarding UK and US export activities in Europe confirmed what the literature on this subject has hypothesized, namely that there is a significant market for Anglophone books in continental Europe. However, British data does not allow us to assess the specific value of trade exports to Europe, nor does it provide information on the amount

of trade books exported by country of destination. Conversely, the US data concentrates specifically on trade exports and provides information on country of destination, but it only covers a short period of time – therefore it does not provide a long-term overview of trends.

In order to get a more precise assessment of the value of English-language trade books in the Netherlands – the focus of this research – and in order to obtain a long-term overview of trends, further statistical information focused specifically on the Dutch book market was gathered and is presented in Chapter 5. This data helps reveal a clearer understanding of the size of the market for English-language books in the Netherlands and to benchmark this data with the size of the market for Dutch-language books over a period of approximately 40 years (1976-2018).<sup>56</sup>

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<sup>56</sup> Although with gaps in the data in 1994 and between 2000 and 2007.

## Chapter 5: English-language books in the Netherlands: presentation and analysis of the available statistics, 1976-2018

### 5.0 Introduction

Chapter 2 (section 2.3.1) showed that English-language books were already in demand in the Netherlands during the eighteenth and nineteenth centuries, both in translation and in the original language (van der Weel, 2000; 2006). The popularity of English-language originals in the Dutch book market is evidenced by the progressive increase in sales of English originals and by the appearance of wholesalers specializing exclusively in the import of English-language titles (van der Weel, 2000).

Moving on to the contemporary situation, Chapter 4 provided a broad overview of the phenomenon of English-language reading in Europe today and presented the available statistics regarding UK and US exports to the Netherlands. Section 4.1.2 highlighted that British exports to the Netherlands represented around 4% of all British export turnover in 2014, amounting to over £75 million (including all book categories). US data, in contrast, estimated the value of American trade exports to the Netherlands to be around \$6 million in both 2013 and 2015 (Chapter 4, section 4.2).

This chapter presents statistical findings providing a broad overview of how the market for foreign-language texts developed over five decades in the Netherlands (from 1976-2018), therefore answering the following research questions:

*What market share do English-language export editions represent in the Dutch contemporary trade book market? How does this data compare to the market share of Dutch-language editions?*

Answering these questions will help contextualize the phenomenon of English-language reading in the Netherlands, thus providing a more complete background to understand the circumstances in which Dutch publishers are operating.

As seen in Chapter 3, the statistical evidence presented here has been gathered mainly from two sources and will be arranged in two sections, each covering a different time period:

- 1976-2000: Stichting Speurwerk's *Speurwerk Boeken Omnibus* reports
- 2007-2015: Gfk's annual reports and KVB data

For details about the original sources and the data collection method employed refer to Chapter 3 (section 3.2.2).

## 5.1 1976-2000: Stichting Speurwerk's *Speurwerk Boeken Omnibus* reports

This section presents historical data regarding the market share of foreign-language editions in the Netherlands during the period 1976-2000 (with a gap in

1994).<sup>57</sup> These statistics were collected by the research company Stichting Speurwerk (hereafter SS) on behalf of the Royal Netherlands Book Trade Association (KVB). The data presented in this section covers the sales of trade titles by language for the period 1976-2000 in share percentage (both in terms of revenues and units sold). The actual value of book sales in Dutch guilders is not included in this overview for consistency reasons, given that the SS reports did not provide this information for the whole length of the examined period.

As already anticipated in Chapter 3, since the statistical overview spans such an extended period of time, SS altered the data collection methodology over the years, thus determining discrepancies in the way the data is presented in reports and consequently in this overview (cf. section 3.2.2 on this).

The SS statistics are presented in the form of charts below. Figure 14 provides an overview of trends with regard to the turnover of Dutch-language originals, translations and foreign-language titles for the period 1976-1993. Figure 15 then provides a more detailed overview of trends in the foreign-language segment, by separating English-language revenue from the revenues of all other foreign languages. Figure 16 instead presents Dutch-language (including translations) and all foreign languages revenues during the period 1995-2000. Figure 17, 18 and 19, provide the same information concerning the volume of sales, rather than value.

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<sup>57</sup> Figures relative to 1994 are missing as the reports relative this year could not be retrieved in the Stichting Speurwerk archive (SS).

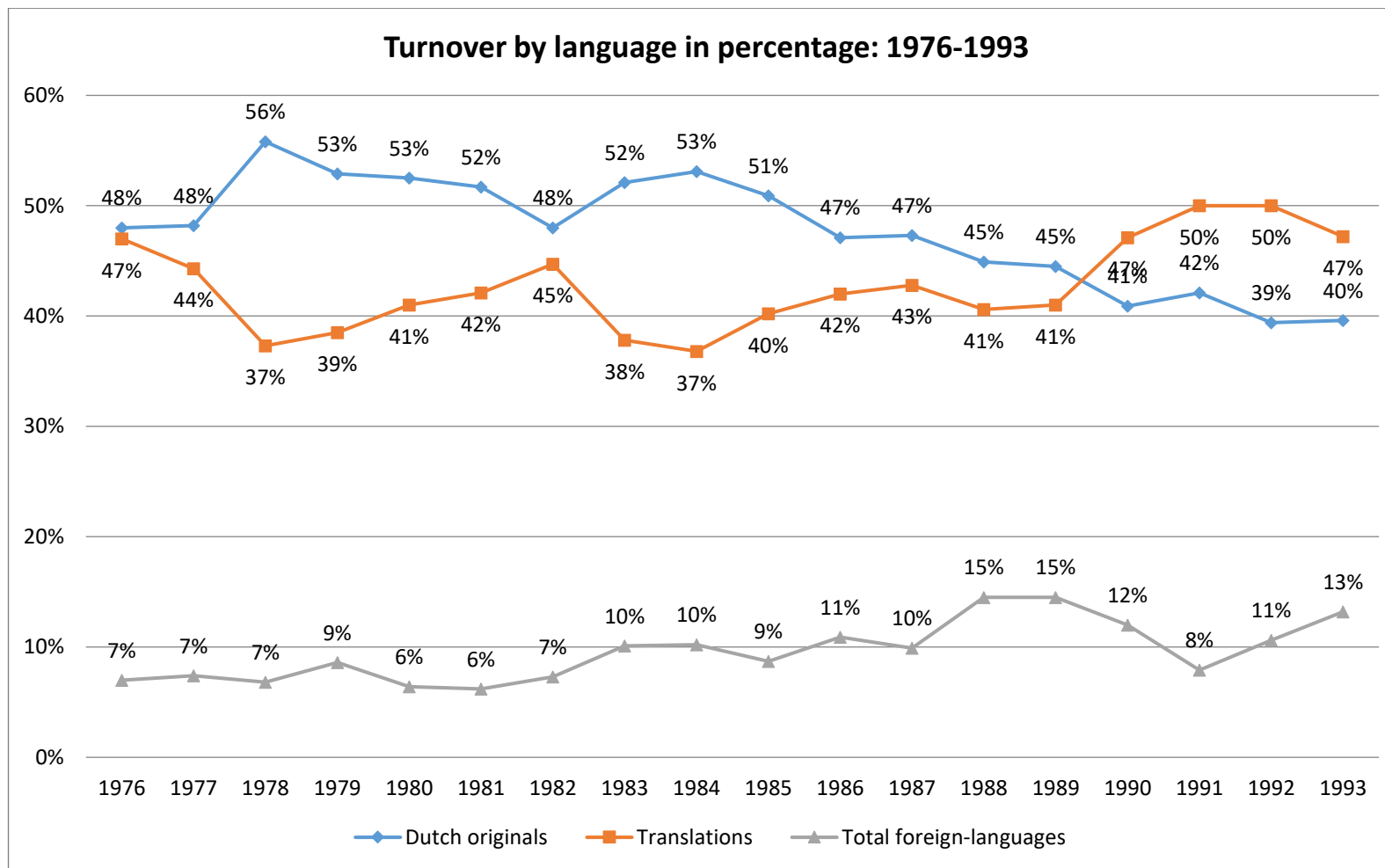


Figure 14: Turnover of trade book sales by language in percentage for the period 1976-1993 (Source: Stichting Speurwerk archive, Bijzondere Collecties, University of Amsterdam).

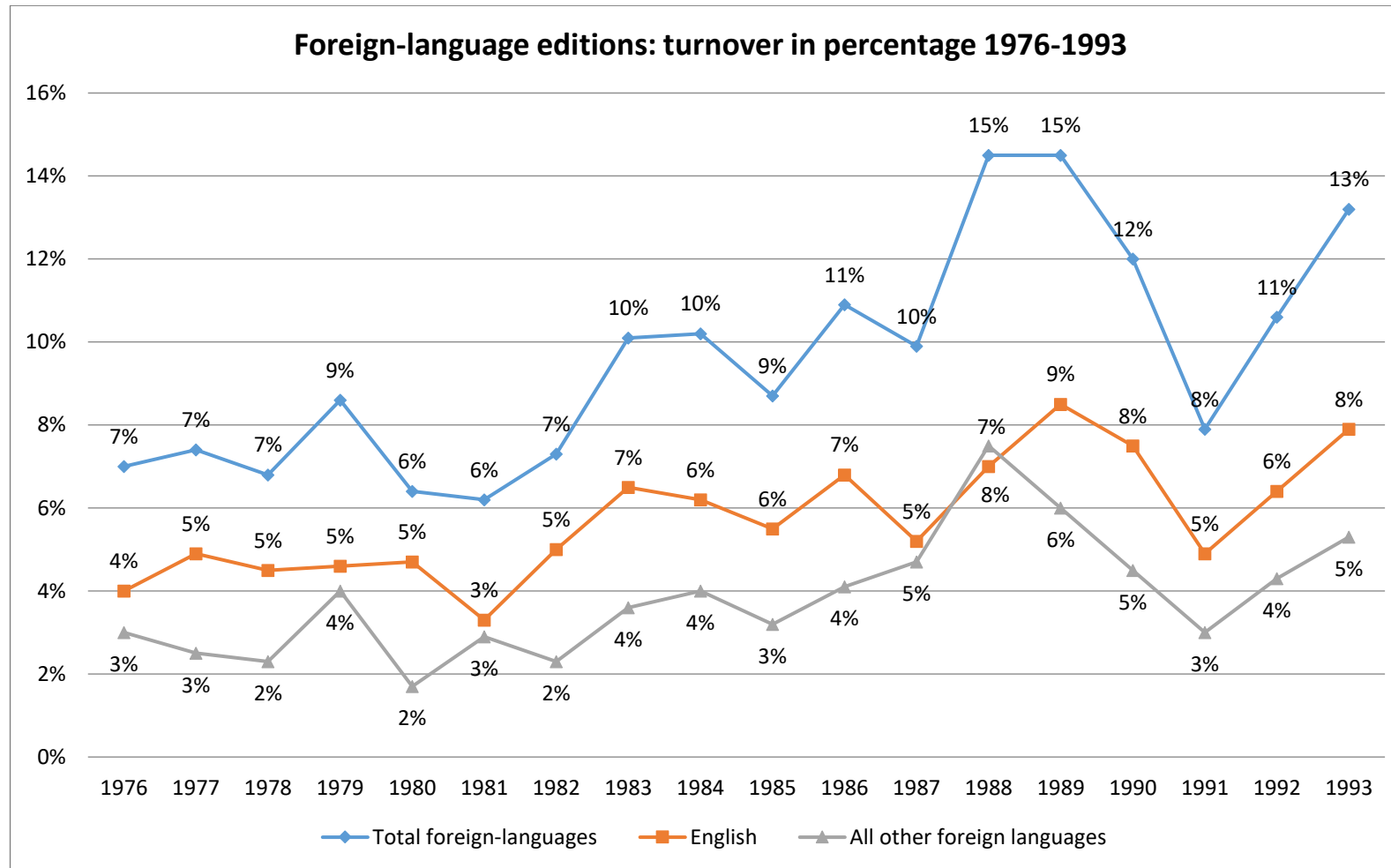


Figure 15: Turnover of foreign-language trade books in percentage for the period 1976-1993 (Source: Stichting Speurwerk archive, Bijzondere Collecties, University of Amsterdam).

Figure 14 shows that at the end of the 1970s, the ratio between Dutch-language originals and translations was almost even, with Dutch-originals accounting for 48% of revenues and translations for 47%. In the following years, Dutch-originals experienced a surge, reaching a peak in 1978 (56% Dutch-language originals and 37% translations). During the same period, foreign-language titles remained quite stable around 7%, with a peak in 1979 of 9%. At the beginning of the 1980s, the percentage share of Dutch-language originals started to diminish; in 1982 the ratio between Dutch titles and translations was again almost even (48% Dutch originals and 45% translations). After this, Dutch-language originals started to grow again, and translations to decrease. Dutch-language originals revenue reached a peak again in 1984 when they accounted for 53% of revenues, while translations accounted for 37% of revenues. Quite significantly, foreign-language titles also underwent a period of growth at the start of the 1980s and surpassed the 10% threshold for the first time in 1983. From 1984, Dutch-originals began a slow but steady process of decline, while on the other hand translation started a steady process of growth. 1990 is the first year in which translations overtook Dutch-originals (respectively 47% and 41% of revenues), thus becoming the most popular category. The share represented by foreign-language revenues continued to grow at the end of the 1980s, reaching a peak of 15% in 1988/89. During the first part of the 1990s, the decline of Dutch-originals continued, accompanied by a slow growth of translation revenues. By comparison, foreign-language titles experienced a stark decline in 1991 (8%), but rose again to 13% in 1993.

Figure 15 shows in more detail the developments in the foreign-language category, including the revenues of English-language books. English-language books are the most popular in the foreign-language category, as they constantly



outperformed all other languages taken together (with the exception of 1989 when the category ‘all other languages’ accounted for 8% of revenue and English-language books for 7%). The share represented by English-language revenues increased from approximately 4-5% in the late 1970s and early 1980s, to 6-7% throughout the 1980s. It then reached a peak of 8-9% in 1989/1990, to then decrease to 5-6% in 1992 and 1993 and grow again to 8% in 1993.

The revenues of all other languages remained rather stable throughout the period (between 2-4%), with the exception of the end of the 1980s, when they passed the 5% threshold for the first time – reaching a peak of 7% in 1988. The percentage then decreased again to 3% in 1991, to then rise to 5% in 1993 (a similar pattern to that of English-language revenues).

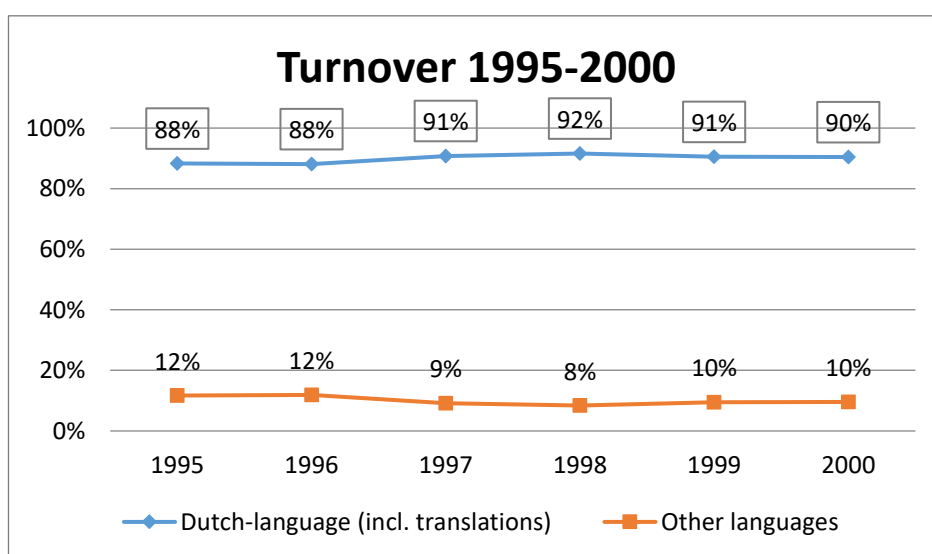


Figure 16: Turnover by language in percentage for the period 1995-2000. (Source: Stichting Speurwerk archive, Bijzondere Collecties, University of Amsterdam).

Figure 16 shows that overall Dutch-language titles (including Dutch-language originals and translations) underwent a period of slight growth between 1995 and 2000, with a peak of 91-92% of revenues in 1997-1998-1999. As a consequence of the growth of Dutch-language titles, revenues of foreign language books declined slightly from 12% in 1995, to 8% in 1998 and to 10% in 2000.

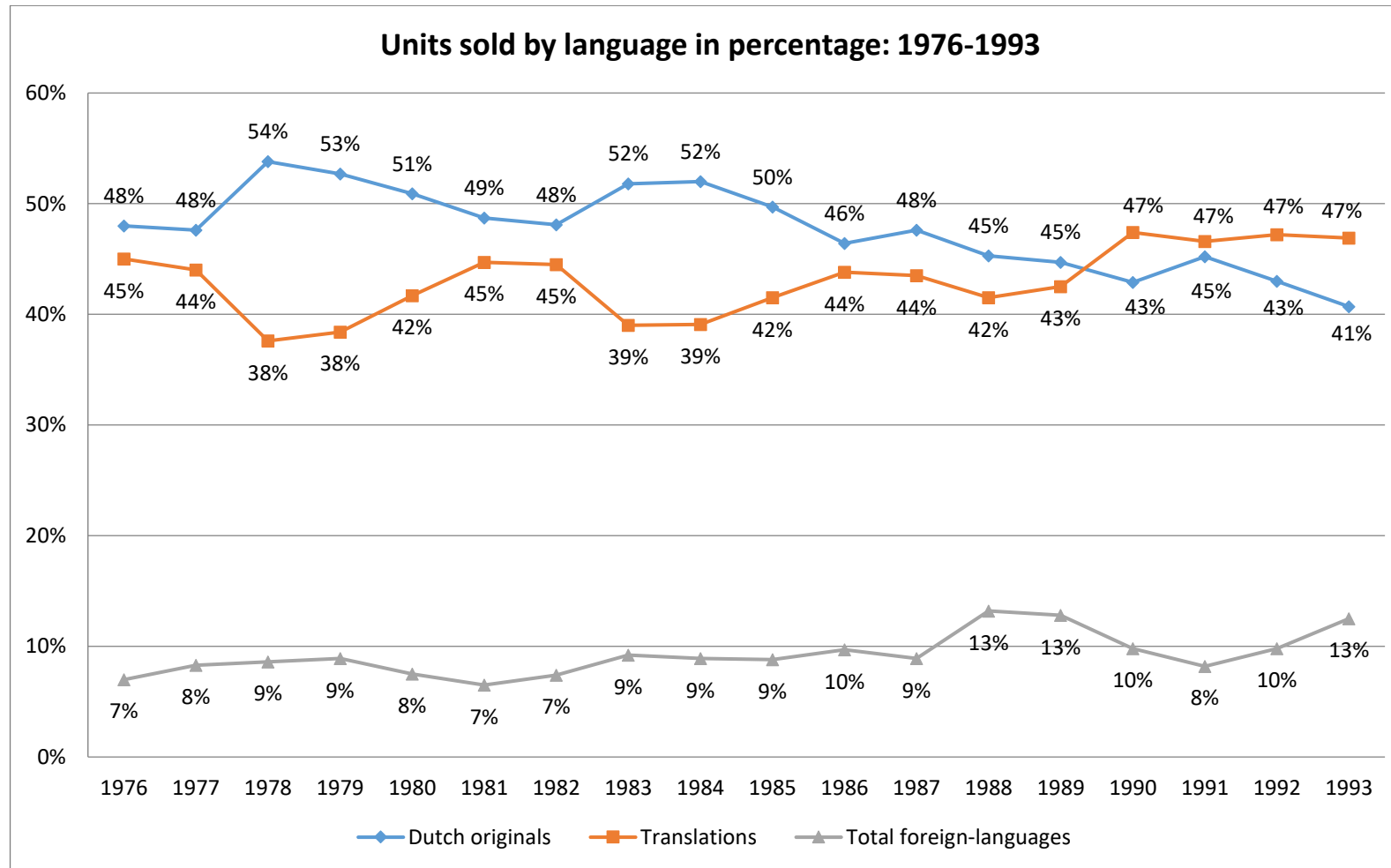


Figure 17: Units of trade book sold by language in percentage for the period 1976-1993. (Source: Stichting Spoorwerk archive, Bijzondere Collecties, University of Amsterdam).

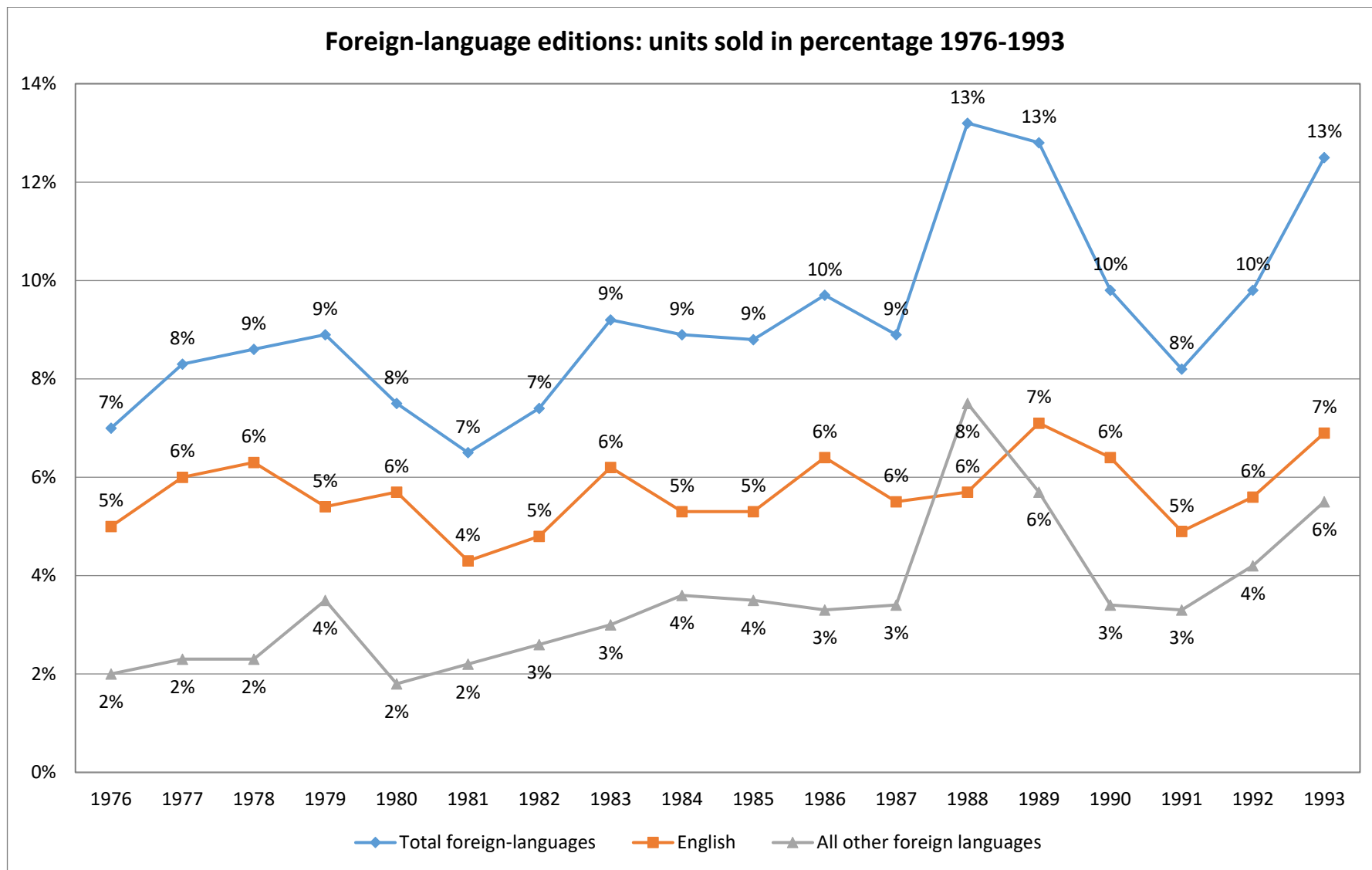


Figure 18: Units of foreign-language trade books sold in percentage for the period 1976-1993 (Source: Stichting Spoorwerk archive, Bijzondere Collecties, University of Amsterdam).

Similar patterns to the ones described for revenues apply if the volume of English-language sales is considered. Figure 17 shows that at the end of the 1970s Dutch-originals accounted for 48% of units sold, while translations accounted for 45%. The share of Dutch-originals experienced a significant rise between 1979 and 1980 (peaking in 1978 with 54% of sales volume), to then decline to 48-49% in 1981-1982 and then grow again to 52% in 1983-1984. From this moment onwards, Dutch-language originals steadily declined, reaching their lowest point in 1993 at 41%. In contrast, the volume of sales for translations underwent a steady period of growth from the mid-1980s; in 1989 translations became the most sold category (47%), therefore outperforming Dutch-language originals (43%).

Regarding foreign-language sales (Figure 18), the volume of these grew modestly during the 1970s and mid-1980s – oscillating between 7 and 9% throughout this period. In 1986, foreign language sales reached 10% for the first time and in 1988 and 1989 saw a peak of 13%. As can be seen in Figure 18, this peak is due to the rise of the ‘all other languages’ category in 1988 and 1989. The volume of sales of foreign language books then declined slightly between 1990 and 1992, to then rise again to 13% in 1993 – in tandem with a peak of both English and all other languages.

As already seen for revenues, English was the most popular category in terms of unit sold. The value English-language books represented oscillated between 5-6% across the period under consideration, with a peak of 7% in 1988 and also 1993.

All other languages remained mostly stable throughout the first decade under examination, with percentage shares oscillating between 2-4% between 1976 and 1987. In 1988-1989 this category experienced a surge (reaching 8% in 1988 and

6% in 1989). The share then decreased to 3% in 1990-1991 and then grew again to 6% in 1993.

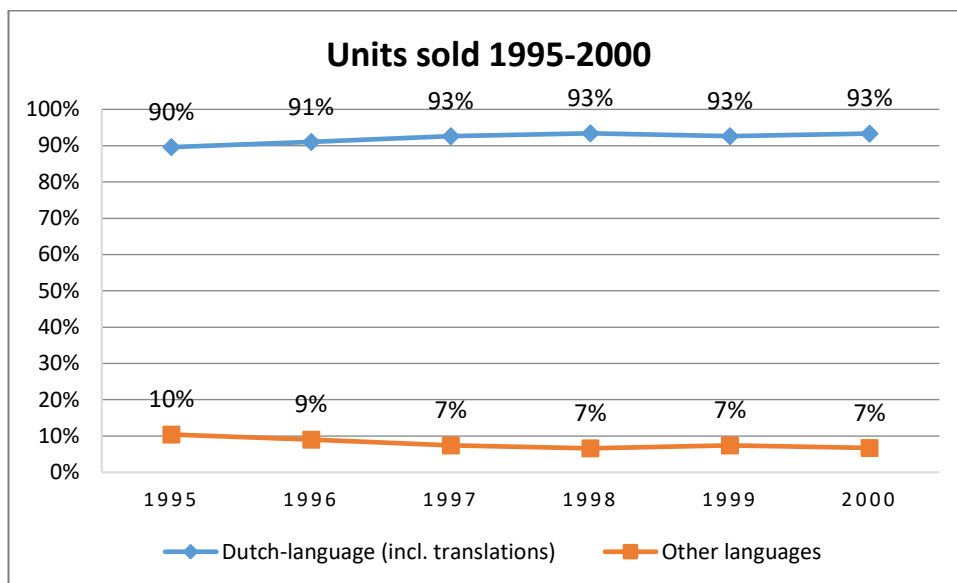


Figure 19: Units sold by language in percentage for the period 1995-2000 (Source: Stichting Speurwerk archive, Bijzondere Collecties, University of Amsterdam).

The volume of Dutch-language sales (counting both Dutch originals and translations) increased modestly during the period 1995-2000, going from 90% to 93%. On the other hand, the share of foreign language sales declined from 10% to 7% over the same period.

In terms of this thesis's research question, the data presented above shows that between 1976 and 2000 books in English were popular in the Netherlands, and that English was clearly the most popular foreign language among Dutch readers. In addition, the SS data shows that during the period under consideration the popularity of English-language trade books has increased significantly. In 1976, when SS began collecting information of foreign-language sales, English-language books accounted for 4% of the value and 5% of the volume of the Dutch book market; over the following years, the value and volume of English-language sales rose, reaching a peak of 8-9% in 1989-1990. Between 1995 and 2000 the

specific value and volume represented by English-language books is no longer reported in the SS reports, since all foreign books are counted under the same category.

Another notable trend emerging from the figures presented in this section is the ratio between Dutch original titles and translated ones. From 1976 to 1990, Dutch-language original books were the most popular category in the Netherlands; however, starting from 1990 this trend reversed, with translations becoming the most popular category, both in terms of value (Figure 15) and units sold (Figure 18). This comparison can no longer be tracked between 1995 and 2000 since the data does not distinguish between Dutch-originals and translations.

## 5.2 The Dutch trade book market today: an overview of recent trends

Before moving on to the presentation of the data obtained from GfK, it is useful to provide an overview of the current state of the Dutch trade book market in order to better contextualize GfK's data on foreign-language sales.

Overall, the Dutch-language book market at present caters to a population of 17.2 million in the Netherlands and 6.5 million Flemish speakers in the Flanders region of Belgium (data relative to 2018) (Centraal Bureau voor de Statistiek, 2019; Statbel, 2019). However, given that the focus of this thesis is the Netherlands, the quantitative evidence presented in this section (and throughout the chapter) refers to the Dutch book market and does not include the Flanders one.

With regard to their reading habits, Dutch readers were found to be the second most avid readers in Europe (after Sweden), with over 86% of the population

reading at least one book in 2013 (the European average was 68%). In 2018, 81% of the Dutch population older than 13 read at least one book (KVB, 2019a; Stichting Lezing, 2019). However, as in other countries, the Dutch have been dedicating progressively less time to reading books, magazines and newspapers, while the amount of time spent reading online material has grown. In the last sixty years the average amount of hours spent reading books decreased by over 60%, going from 2.4 hours per week in 1955 to 0.8 hours per week in 2016 (for more information on this cf. Wennekers, Huysmans and De Haan, 2018).

The Dutch book market underwent a period of decline after the 2008 economic crisis, which led to a considerable shrinking of the market (Franssen, 2012). The market turnover declined steadily between 2009 and 2014 (Frankfurter Buchmesse, 2015a), and only started to grow again from 2015. Over the last four years, the market recovered and has experienced notable growth (+8% between 2014 and 2018). In 2018, the overall turnover of the trade market amounted to € 541 million, up from € 530 million in 2017 (Figure 14). The number of units sold also went down significantly during this period of crisis (by 8 million units between 2012 and 2014), but started to rise again in 2015. The number of units sold amounted to 41 million over the last three years (2016, 2017 and 2018). (Figures 20 and 21).

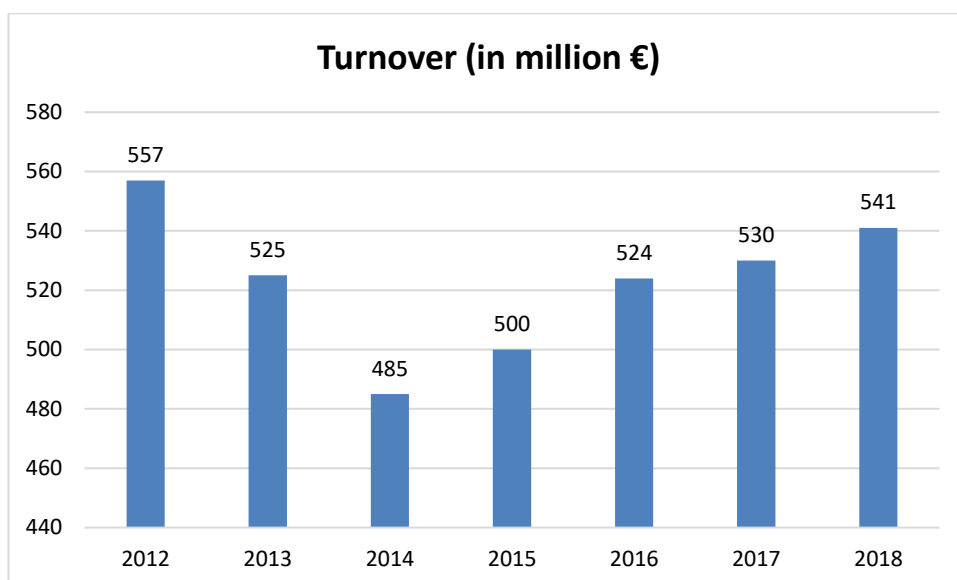


Figure 20: Turnover in millions of Euro, 2012-2017 (Source: KVB, 2019b).

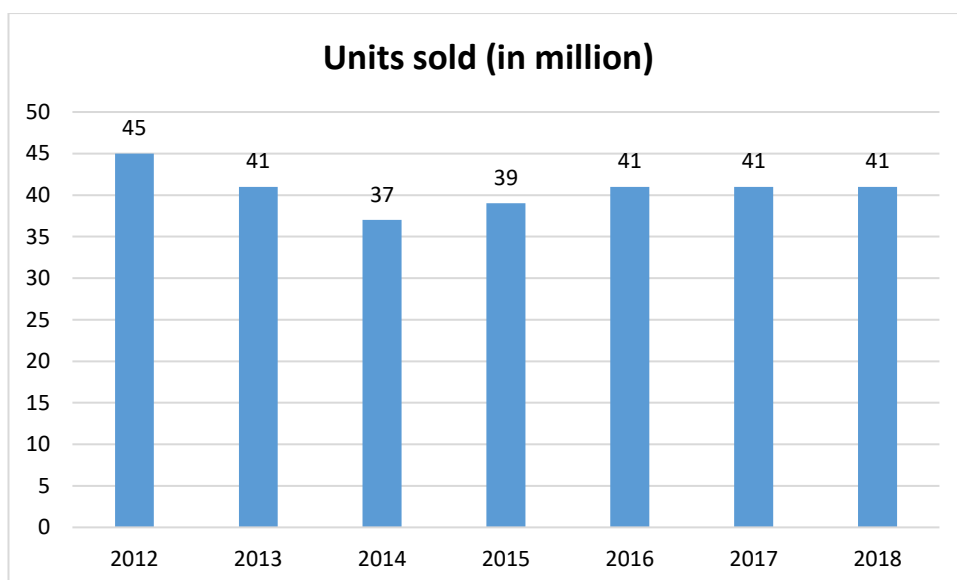


Figure 21: Units sold in the Netherlands (in millions), 2012-2017 (Source: KVB, 2019B).

According to CB data, 27,586 new titles (ISBNs) were introduced in the Netherlands in 2018 – of which 14,631 were physical trade books (CB, 2019). In 2013 the number of new titles amounted to 29,302 (ibid) (cf. Figure 22).



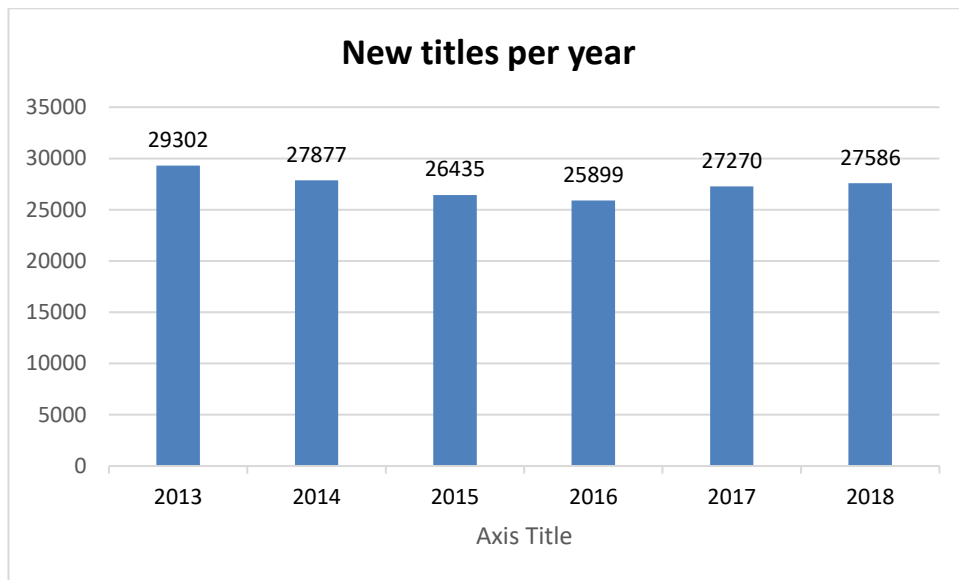


Figure 22: Overall number of new titles (ISBNs) per year 2013-2018 (incl. physical and digital books, print on demand, as well as trade, academic and school book categories) (Source: CB, 2019).

As seen in section 5.1, translations accounted for around 40-50% of the Dutch literary production between 1976 and 1993 (cf. 5.1). Heilbron instead estimated that 30% of Dutch books were translations in 2000, with the share of translations in the prose category being much higher (70%) (Heilbron, 2008).

In the Netherlands, the digital book market has grown steadily over the last few years, with e-books accounting for 7.6% of units sold and 5.3% of turnovers in 2018, as opposed to 2.4% of units and 3% of turnover in 2012 (Figure 23 and 24).

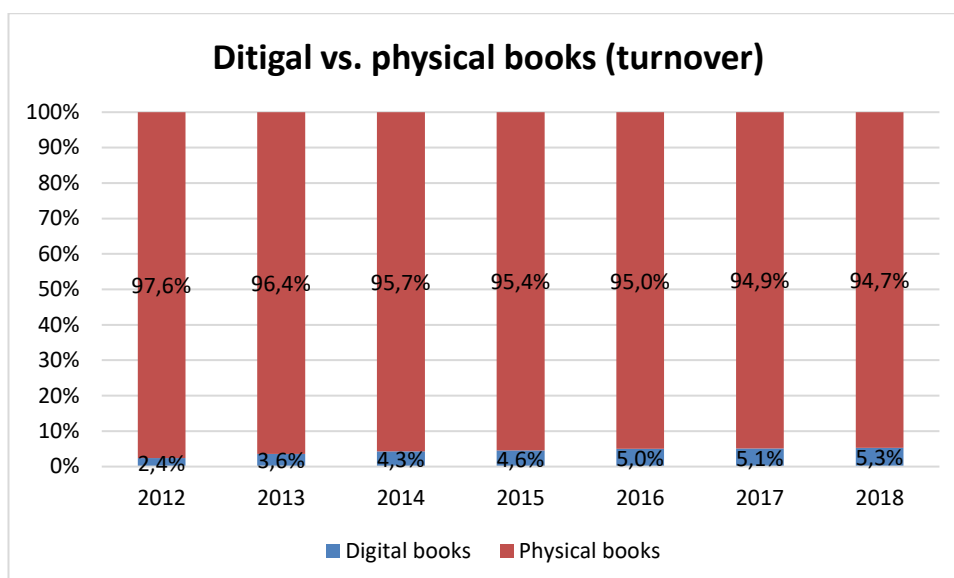


Figure 23: Turnover of digital books and physical books in percentage, 2012-2017 (Source: KVB, 2019b).

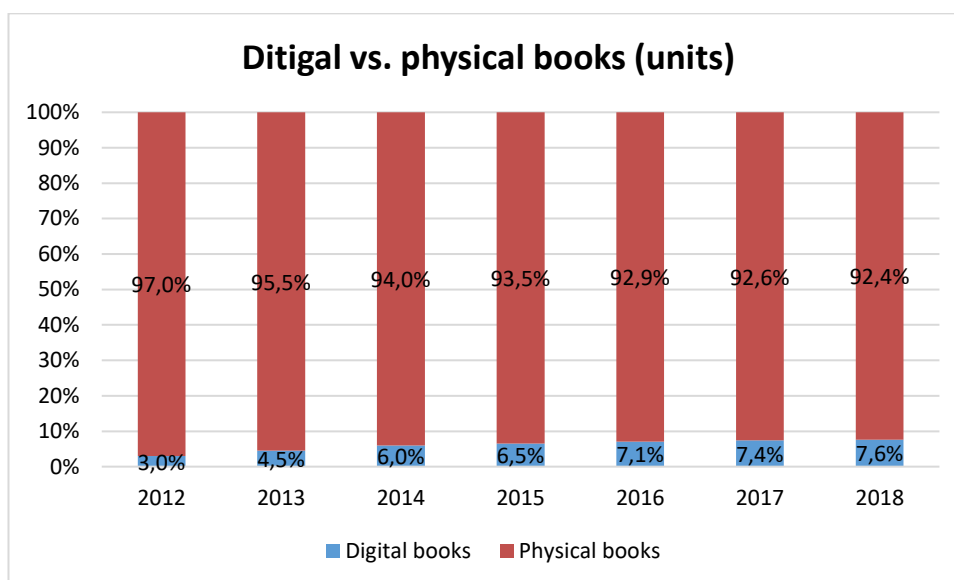


Figure 24: Units sold of digital books and physical books in percentage, 2012-2017 (Source: KVB, 2019b).

In terms of book categories, fiction accounted for 34% of units sold and 37% of turnover in 2018, down from 38% (units) and 39% (turnover) in 2014. Non-fiction as a whole (including informative and leisure non-fiction) represented 29% of units sold and 40% of turnover in 2018, whereas it represented 33% (units) and 40% (turnover) in 2014. Lastly, Children's books grew from 24% in

2014 to 27% in 2018 (units) and from 17% in 2014 to 19% in 2018 (turnover) (Figures 25 and 26).

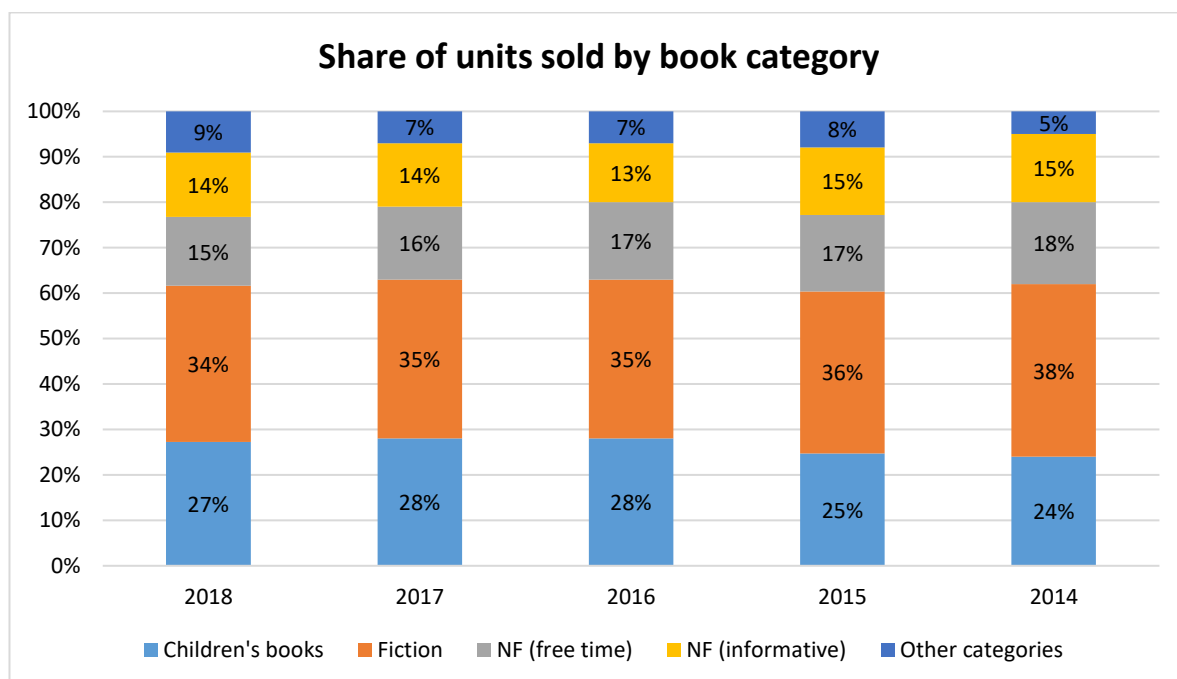


Figure 25: Share of units sold by book category, 2012-2017 (Source: KVB, 2019b).

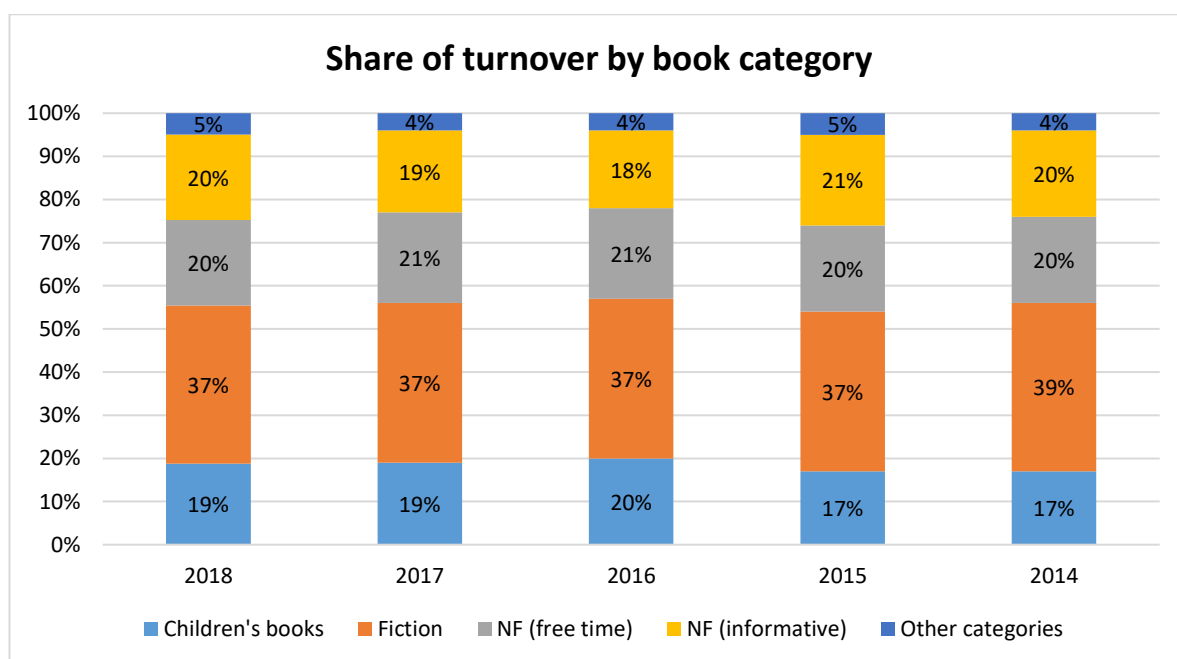


Figure 26: Share of turnover by book category, 2012-2017 (Source: KVB, 2019b).

The average price of a book in the Netherlands was € 13.4 in 2018. Prices have been rising steadily since 2012, when the average price was € 12.3 (Figure 27).

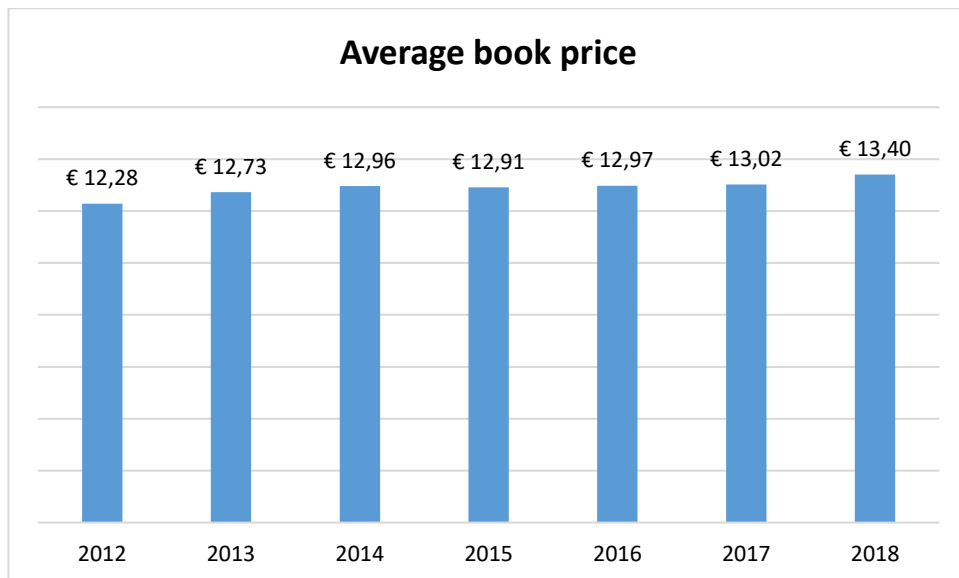


Figure 27: Average book price in the Netherlands, 2012-2017 (Source: KVB, 2019b).

According to KVB's monitor on book producers, there are around 4,000 publishers active in the Dutch market, including publishers that produced only one book per year (incl. self-publishing). However, out of these 4,000, 39 publishers were responsible for 75% of the market turnover and 53% of the titles produced in the Netherlands in 2017. If we divide the publishers active in the Netherlands in four categories based on turnover and book production, it provides a clearer insight into the power relations between Dutch book producers (cf. Figure 28) (KVB, 2018).

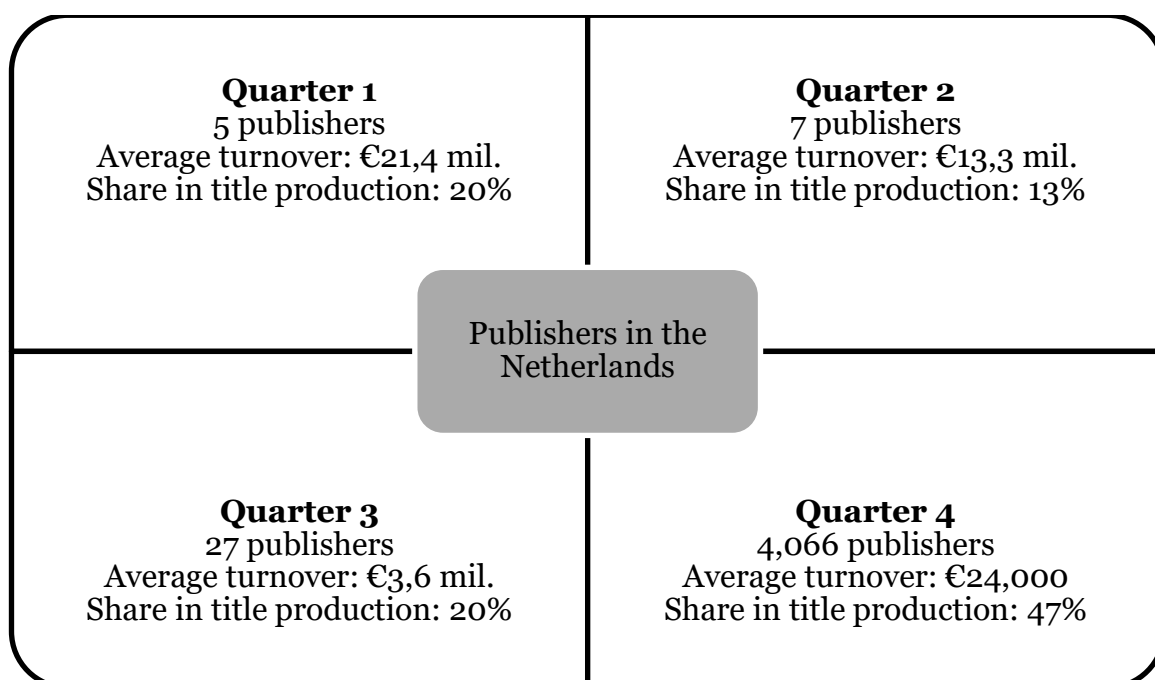


Figure 28: Publishers active in the Netherlands in 2017 categorized by revenue and title production (Reproduced from: KVB, 2018).

In 2017, the five largest publishers (quarter one) were responsible for one quarter of the overall market turnover (€ 21,4 million) and for 20% of the titles produced. The seven companies belonging to the second quarter instead accounted for a turnover of €13,3 million and 13% of book produced. The twenty-seven companies in third quarter has a turnover of €3,6 million turnover and were responsible for 20% of books produced (Figure 28). Lastly, the remaining 4,066 publishers active accounted only for €24,000 in turnover, even though they produced 47% of new titles (Figure 28).

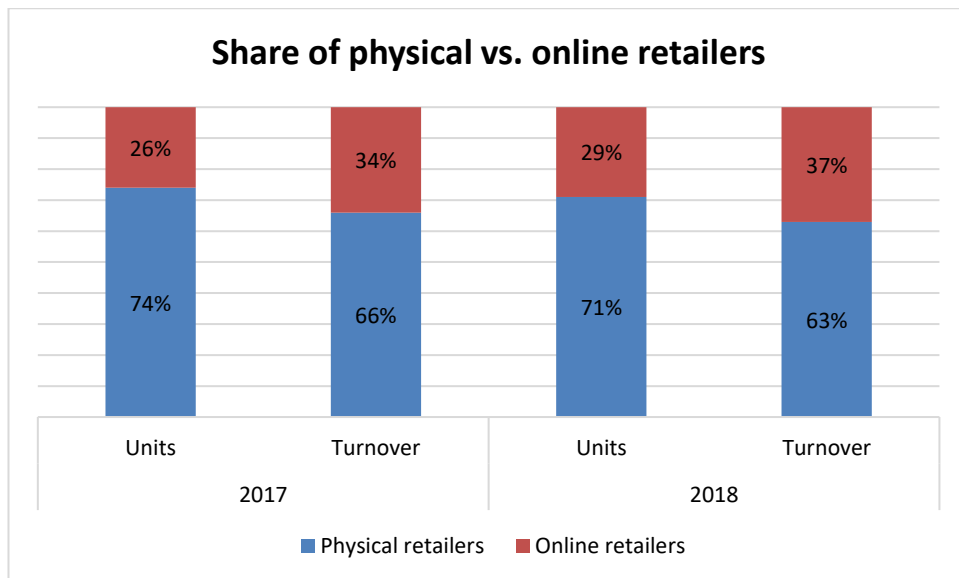


Figure 29: Share represented by physical versus online retailers, 2017-2018 (Source: KVB, 2019c).

As for sales channels, physical book stores accounted for 71% of units sold and 63% of turnover in 2018, while online bookshops accounted for 29% of units sold and 37% of turnover in the same year. In 2017, physical stores accounted for 74% of units sold and 66% of turnover, whereas online stores represented 26% of units sold and 34% of turnover (Figure 29). These figures were not available previous to 2017 (KVB, 2019c).

The discussion will now move to showcase the available statistics on foreign-language and English-language reading in the Netherlands over the period 2007-2018.

### 5.3 2007-2018: Gfk statistics on English-language physical sales

The overall market share represented by foreign-language books in the Netherlands is available on the Dutch publishing Association's website for the period 2012-2018 (cf. Figures 30 and 31). However, as opposed to the figures provided by Gfk, these statistics (which are presented in Figures 30 and 31 below)

do not differentiate between book categories and between English and all other languages.

Overall, the revenues of foreign-language book sales registered a strong positive trend between 2012 and 2017, growing by 1% each year – from 9% in 2012 to 15% in 2018. At present, foreign-language books account for around one sixth of revenues in the Dutch book market. In terms of units, foreign-language sales went from accounting for 7% in 2012 to 12% in 2018 (Figure 30 and 31).

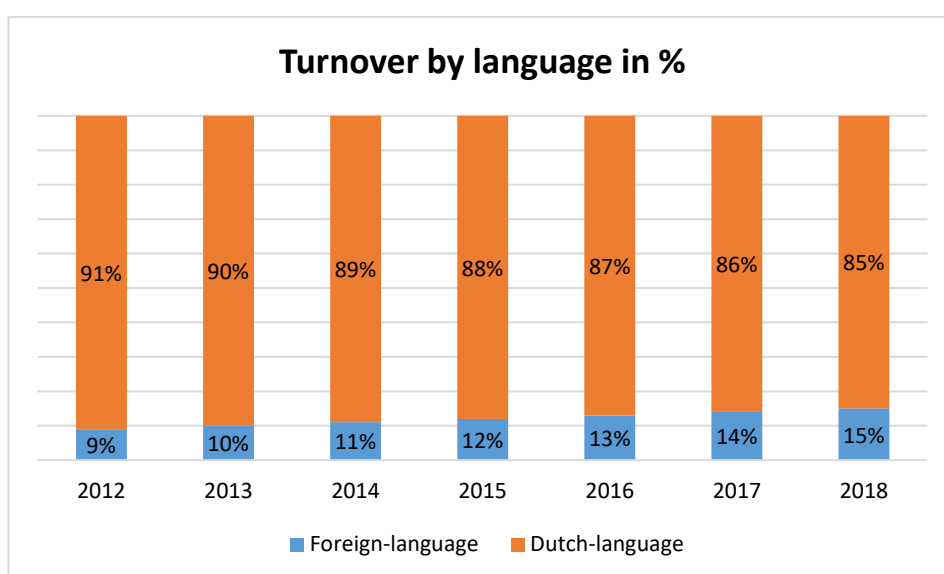


Figure 30: Turnover by language in percentage, 2012-2018 (Source: KVB, 2019b).

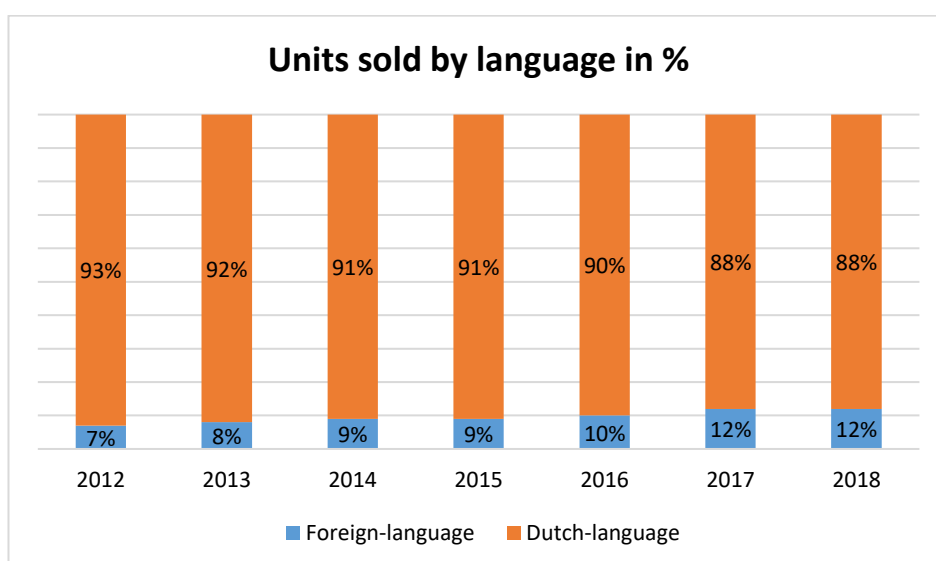


Figure 31: Units sold by language in percentage 2012-2018 (Source: KVB, 2019b).

The discussion will now consider the data on book sales by language and by category referring to the period 2007-2018, which were obtained from Gfk; the data is displayed in Tables 21, 22 and 23 and in Figures 32 and 33 below. For further details concerning the data collection method and the coverage of Gfk's panel see Chapter 3 (section 3.2.2).

The categories used by Gfk to classify languages are 'Dutch-language', 'English-language' and 'other languages', while the book categories employed are those of 'fiction', 'non-fiction' and 'children's literature'. The statistics presented in this section showcase the percentage that each language represents for each of the three categories, although the absolute value and volume of sales (i.e. the Euro value and the number of units sold) have not been disclosed by Gfk.

Fiction Units				Fiction Value			
Year	English	Others	Dutch	Year	English	Others	Dutch
<b>2007</b>	4,8%	0,1%	95,1%	<b>2007</b>	4,9%	0,1%	95,0%
<b>2008</b>	5,0%	0,2%	94,8%	<b>2008</b>	4,9%	0,2%	95,0%
<b>2009</b>	5,6%	0,2%	94,2%	<b>2009</b>	5,2%	0,2%	94,6%
<b>2010</b>	7,0%	0,3%	92,8%	<b>2010</b>	6,5%	0,3%	93,3%
<b>2011</b>	6,5%	0,4%	93,1%	<b>2011</b>	6,3%	0,4%	93,3%
<b>2012</b>	6,7%	0,4%	92,9%	<b>2012</b>	7,0%	0,5%	92,6%
<b>2013</b>	7,6%	0,5%	91,9%	<b>2013</b>	7,7%	0,6%	91,7%
<b>2014</b>	8,1%	0,6%	91,3%	<b>2014</b>	8,2%	0,7%	91,2%
<b>2015</b>	8,2%	0,5%	91,3%	<b>2015</b>	8,8%	0,5%	90,7%
<b>2016</b>	9,6%	0,5%	89,9%	<b>2016</b>	10,2%	0,5%	89,2%
<b>2017</b>	10,4%	0,5%	89,1%	<b>2017</b>	10,3%	0,5%	89,2%
<b>2018</b>	10,9%	0,5%	88,6%	<b>2018</b>	10,6%	0,5%	88,8%

Table 21: Sales by language for physical fiction titles in percentage (units and value) 2007-2018 (Source: KVB-SMB/GfK).



Children's books Units				Children's books Value			
Year	English	Others	Dutch	Year	English	Others	Dutch
2007	3,0%	0,0%	97,0%	2007	5,8%	0,0%	94,2%
2008	1,5%	0,1%	98,5%	2008	2,2%	0,1%	97,7%
2009	2,2%	0,1%	97,8%	2009	3,1%	0,1%	96,8%
2010	2,5%	0,3%	97,2%	2010	3,3%	0,2%	96,5%
2011	2,2%	0,3%	97,5%	2011	3,0%	0,3%	96,7%
2012	2,4%	0,3%	97,3%	2012	3,5%	0,3%	96,3%
2013	2,3%	0,3%	97,4%	2013	3,3%	0,3%	96,4%
2014	3,5%	0,4%	96,0%	2014	5,3%	0,4%	94,3%
2015	3,5%	0,4%	96,1%	2015	5,3%	0,4%	94,3%
2016	3,3%	0,3%	96,5%	2016	5,0%	0,3%	94,7%
2017	4,2%	0,3%	95,5%	2017	5,8%	0,3%	93,9%
2018	4,1%	0,3%	95,6%	2018	5,5%	0,4%	94,1%

Table 22: Sales by language for physical children's titles in percentage (units and turnover) 2007-2018 (Source: KVB-SMB/GfK).

Non-fiction Units				Non-fiction Value			
Year	English	Others	Dutch	Year	English	Others	Dutch
2007	6,2%	0,6%	93,3%	2007	9,3%	0,8%	90,0%
2008	7,8%	0,8%	91,5%	2008	10,4%	1,1%	88,5%
2009	9,1%	0,7%	90,2%	2009	11,5%	0,9%	87,6%
2010	10,5%	0,9%	88,6%	2010	12,6%	1,1%	86,3%
2011	9,6%	1,3%	89,1%	2011	12,2%	1,7%	86,2%
2012	8,6%	1,2%	90,2%	2012	11,4%	1,5%	87,1%
2013	9,8%	1,3%	88,9%	2013	12,3%	1,7%	86,1%
2014	10,9%	1,3%	87,9%	2014	13,6%	1,7%	84,7%
2015	11,5%	1,1%	87,3%	2015	14,6%	1,5%	83,9%
2016	13,8%	1,2%	85,0%	2016	16,9%	1,6%	81,5%
2017	15,9%	1,2%	82,9%	2017	17,8%	1,4%	80,8%
2018	18,6%	1,1%	80,3%	2018	20,4%	1,3%	78,3%

Table 23: Sales by language for physical non-fiction titles in percentage (units and turnover) 2007-2018 (Source: KVB-SMB/GfK).

As Table 21 shows, sales of English-language fiction titles increased significantly during the period under examination, with units rising from 4.8% in 2007 to 10.9% in 2018, and turnover from 4.9% in 2007 to 10.6% in 2018. Sales of fiction in other foreign languages in contrast saw only modest growth (from 0.1% in

2007 to 0.5% in 2018 both in terms of units sold and value). On the other hand, the share of Dutch-language fiction titles decreased sharply – going from 95.1% in 2007 to 88.6% in 2018 in terms of units and from 95% in 2007 to 88.8% in 2018 in terms of units sold.

If attention is focused on children's literature (Table 22), it can be observed that the percentage represented by English-language sales remained generally stable between 2007 and 2018, with a slight increase in terms of units sold (from 3% in 2007 to 4.1% in 2018) and a slight decrease in terms of turnover (from 5.8% in 2015 to 5.5% in 2018). In 2007, the value of English-language children's books amounted to 5.8%; this high figure could be the result of the success of the last book in the Harry Potter series, which was very popular in the original language in many markets (cf. Gunelius, 2008), although this cannot be confirmed with the available data. In 2008 the share represented by English-language titles dropped to 2.2 % and then rose again progressively over the following years to reach 5.3% in 2015. Other foreign languages reported a modest growth (from 0% to 0.3% for units sold and to 0.4% for value), whilst Dutch-language titles remained relatively stable – going from 97% in 2007 to 95.6% in 2018 (units) and from 94.2% in 2007 to 94.1% in 2018 (value).

Lastly, as shown in Table 23, sales of non-fiction English-language titles saw a significant growth between 2007 and 2015– even higher than that of fiction. In terms of units sold, English-language books rose threefold from 6.2% in 2007 to 18.6% in 2018. Revenue instead doubled, going from 9.3% in 2007 to 20.4% in 2018. Again the growth experienced by other foreign languages was more modest (from 0.6% to 1.1 % for units and from 0.8% to 1.3% for turnover). In contrast, Dutch-language non-fiction titles experienced a stark decline, going from 93.3%

in 2007 to 80.3% in 2018 (units) and from 90% to 78.3% for what concerns turnover. As for fiction, the margin gained by English-language books is gained through an erosion of the Dutch-language non-fiction market.

If we compare the three categories, non-fiction is clearly the most popular category in English, followed by fiction and by children's literature – both in terms of units sold and turnover achieved (Figure 32). On the other hand, the decline of Dutch-language titles is much more pronounced in the non-fiction and fiction categories (Figure 33).

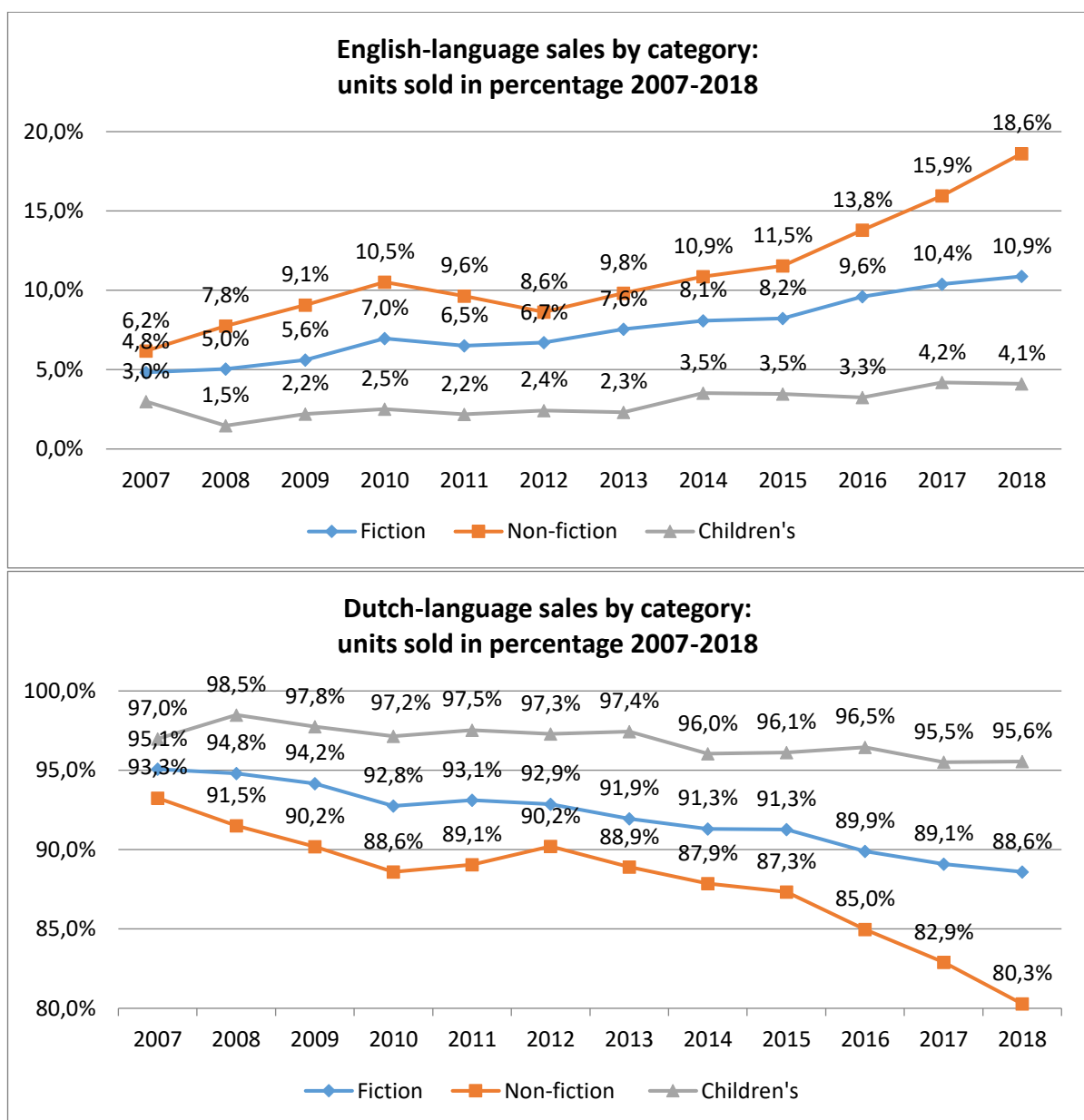


Figure 32: English-language and Dutch-language sales by category 2007-2018: units share (Source: KVB-SMB/GfK).

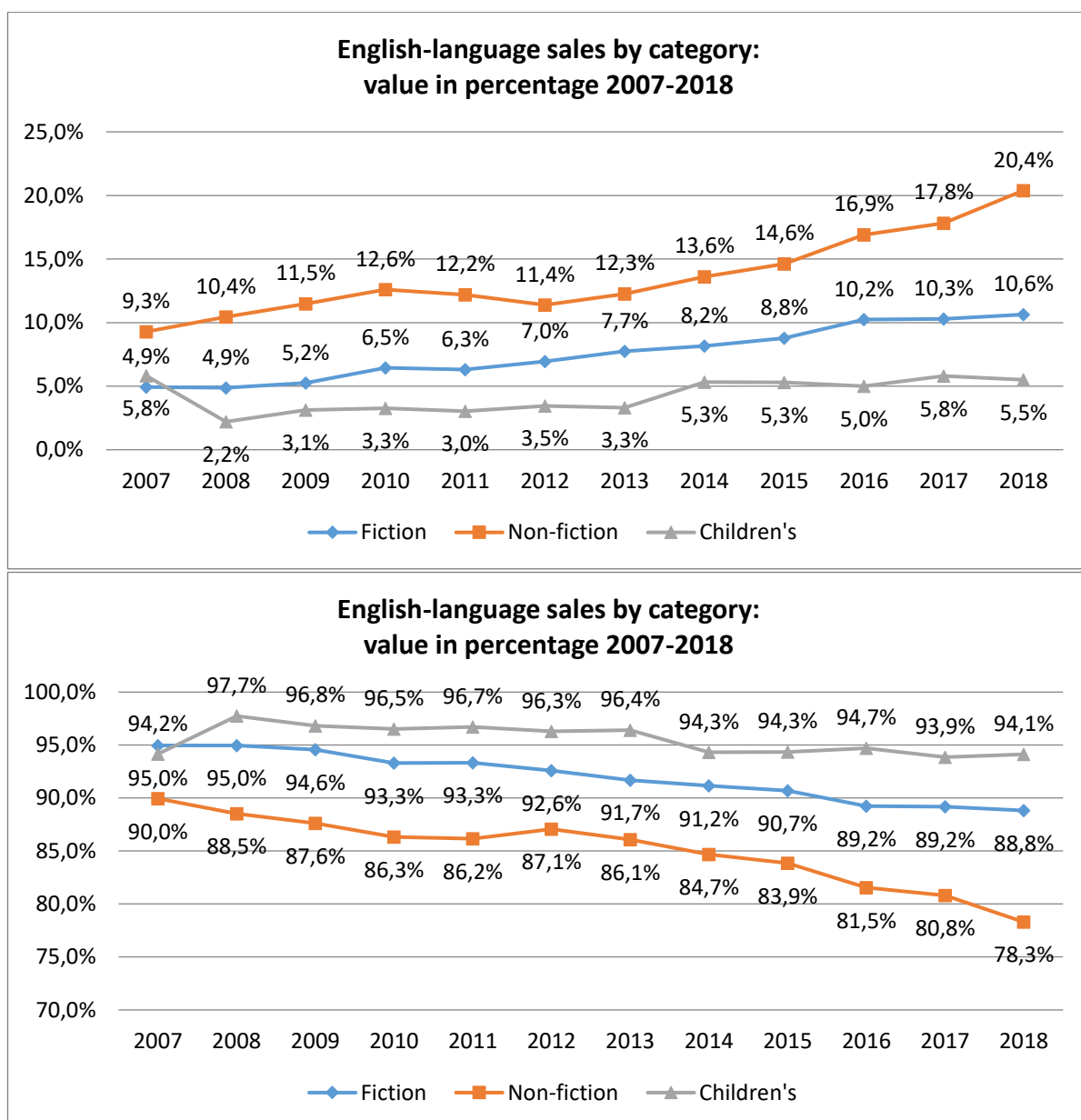


Figure 33: English-language and Dutch-language sales by category 2007-2018: share in value (Source: KVB-SMB/GfK).

To sum up, GfK data clearly showcases a growth trend for English-language titles, especially in the non-fiction and fiction categories – with units and turnover rising almost twofold and threefold between 2007 and 2018. In particular, the value of English-language non-fiction titles grew from 9.3% to 20.4% between 2007 and 2018, while fiction rose from 4.9% in 2007 to 10.6% in 2018. In terms of the research questions of the thesis, the statistical evidence presented in this section indicates that sales of English-language titles grew between 2007 and

2018, and progressively eroded the market share of Dutch-language titles in the non-fiction and fiction categories, thus confirming that sales of English-language titles have risen in the Netherlands over the last decade.

## 5.4 Gfk consumer reports

This section presents the findings of two recent consumer research reports published by Gfk in 2016, 2017 and 2018 concerning consumers' habits with regard to foreign-language books (measurement 37 in July 2016, measurement 41 in June 2017 and measurement 45 in June 2018; Gfk, 2016; 2017;2018).<sup>58</sup> The findings of Gfk's market research are publicly available on KVB's website. The results of these studies are summarized in this chapter as they help us better contextualize the statistics showcased in section 5.3 above and the qualitative findings in Chapter 6 and 7.

Gfk's consumer surveys found that:

- Over one third of the surveyed Dutch readers declared to have bought at least one foreign-language book (respectively 34% of participants in 2016 37% in 2017 and 40% in 2018).

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<sup>58</sup> In addition to monitoring book sales, Gfk regularly surveys consumers regarding their book reading, buying and lending behaviours. These studies are commissioned by KVB and Stichting Marktonderzoek Boekenvak (SMB), in partnership with the Koninklijke Boekverkopersbond (KBb; the Royal Association of Booksellers), the Groep Algemene Uitgevers van het Nederlands Uitgeversverbond (GAU; the trade publishers group within Dutch Publishers Association), Stichting Collectieve Propaganda van het Nederlandse Boek (CPNB; Foundation for the Promotion of the Dutch Book), Koninklijke Bibliotheek (Royal Library) and the Stichting Lezen (Readers Foundation). Reports available at: <https://www.kvbboekwerk.nl/consumentenonderzoek/consumentenonderzoek>.

- The percentage is higher for those readers who prefer digital books, with 49% of e-book readers and 54% of e-book buyers declaring to have bought at least one book in English in June 2017.
- English-language books are by far the most commonly bought foreign-language titles, with 38% of respondents declaring to buy books in English, 12% in German, 6% in French and 8% in other languages (June 2018). In June 2016, the share of English was 32% (German: 10%, French: 5%, other languages: 6%).
- Men and highly educated individuals buy English books more often than women and individuals with middle levels of education attainment.
- Highly educated individuals indicated they prefer reading books in the language they are originally written.

In addition, the Gfk studies asked participants about the most common reasons for choosing foreign-language books. Respondents indicated that the three most important motivations are: the fact that books are not available in Dutch translation (38% in 2016; 36% in 2017; 30% in 2018); the fact that they prefer to read books in the original language (38% in 2016; 28% in 2017; 31% in 2018); and the fact that they want to improve or learn a foreign language (n/a in 2016; 31% in 2017; 34% in 2018). For a full overview of all the motivations see Figure 34 below.

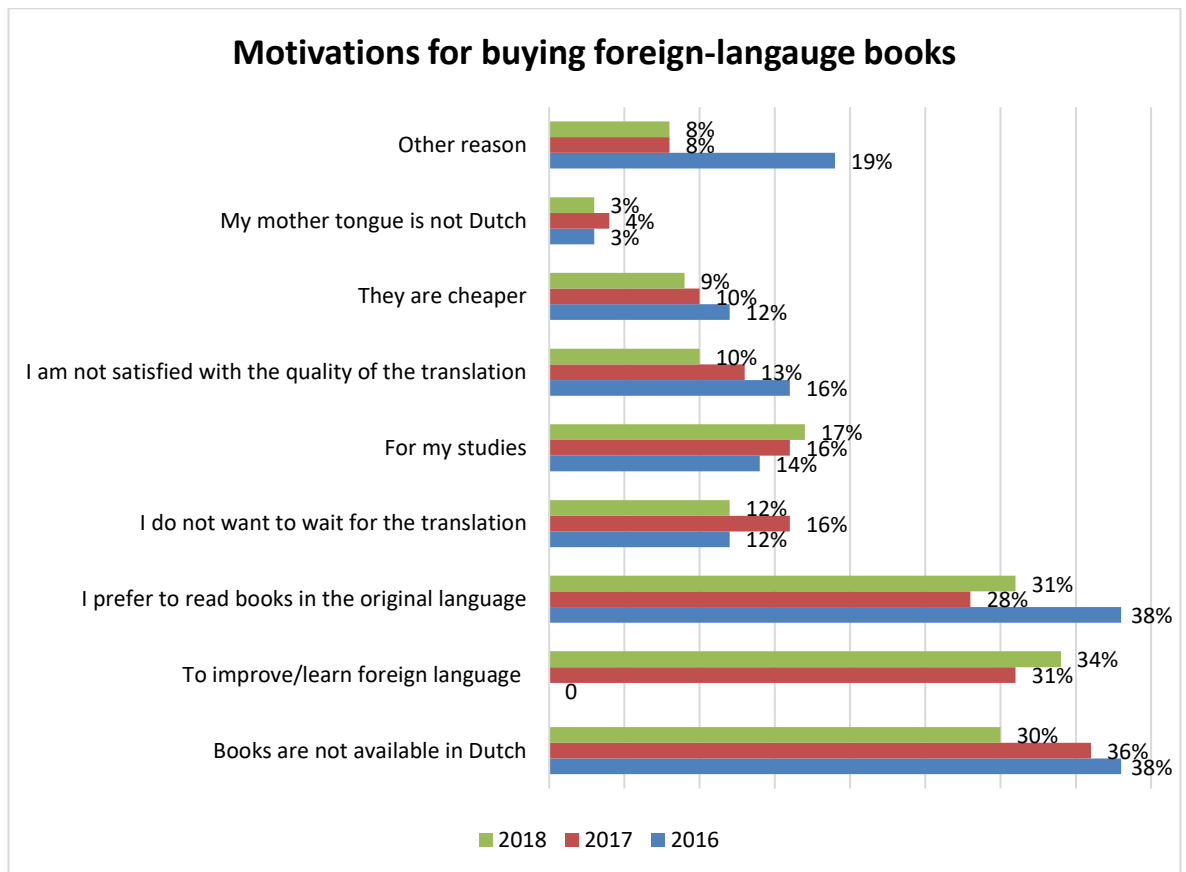


Figure 34: Most common reasons for buying foreign-language books. Surveyed years 2016, 2017 and 2018 (Source: GfK, 2016; 2017; 2018. Translation from Dutch mine).

The survey also asked participants to indicate the genres that they bought more often in a foreign-language. The top-10 of the most commonly bought genres in a foreign-language were as follows: (in order) crime fiction, literary novels, fantasy books, travel books, history, school books, popular science books, biographies and autobiographies, cookbooks, romance books. A full overview of genres preferences with the relative percentage is available in Figure 35 below.



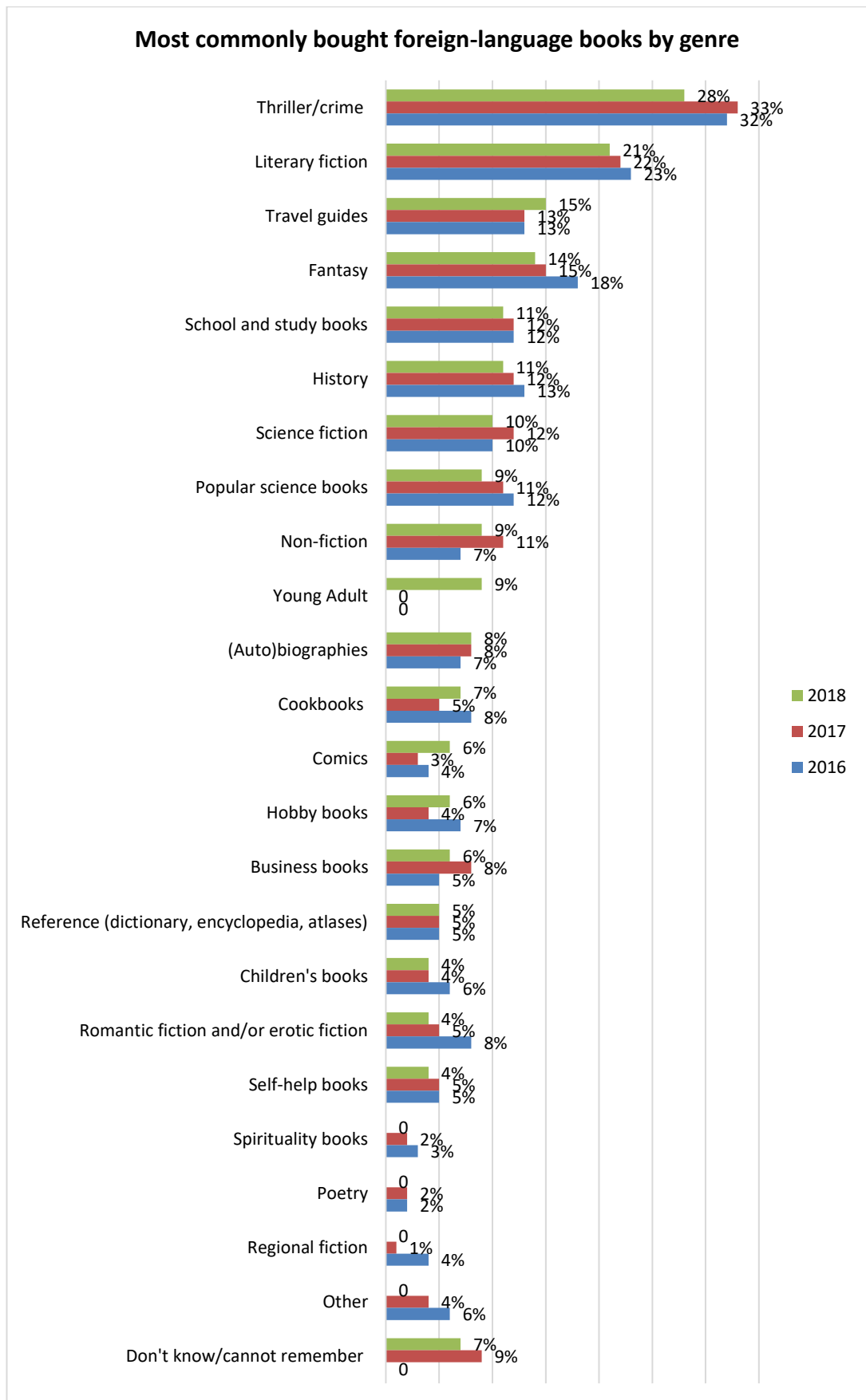


Figure 35: Most commonly bought foreign-language books by genre. Surveyed years 2016, 2017 and 2018 (Source: GfK, 2016; 2017, 2018. Translation from Dutch mine).

These consumer reports by Gfk are the only available source of information on consumers' preferences with regard to buying and reading foreign-language books. These statistics are particularly valuable for the purposes of this thesis since they shed light on the motivations that lead consumers to choose foreign-language books, as well as provide an indication of what genres are commonly consumed in foreign languages. According to this data, 40% of surveyed consumers bought a foreign-language book in 2018, with English-language titles being by far the most popular (38% of respondents declared to read in English in 2018). In addition, Gfk's research proves that highly educated consumers are more likely to read foreign language books and that the most common reasons for reading foreign-language books are: lack of availability of the book in Dutch; preference for reading books in their original language; and willingness on the part of readers' to improve their linguistic skills. Lastly, the data shows that among the most commonly read genre in English are crime novels and thrillers, literary novels, travel guides and fantasy books. In terms of the subject of this thesis, publishers working with these specific genres and sub-genres can be expected to be more concerned by the competition of English-language titles. Which book categories were considered more subject to be consumed in English is an issue which was discussed abundantly in interviews with Dutch publishing professionals; this aspect will be dealt with in Chapter 6 (cf. especially sections 6.1 and 6.2).

## 5.5 Summary

This chapter provided an overview of the market share represented by foreign-language books – and more specifically by English-language books – in the Netherlands over the last five decades (1976-2018 – with interruptions in 1994

and between 2000 and 2007). The sources employed to gather this information were the *Speurwerk Boeken Omnibus* reports by Stichting Speurwerk for the period 1976-2000 and GfK's data for the period 2007-2015. As explained in Chapter 3, the two sources used different methodologies; on the one hand, Stichting Speurwerk's data collection method consisted in weekly representative sample surveys in Dutch households, while for the other GfK collects book sales from a panel of retailers outlets across the country.

In terms of the research question addressed by this chapter, Stichting Speurwerk data showed that English-language books were already popular in the mid-1970s when information of foreign-language sales started to be recorded by SS; at that time, English books accounted for around 4% of the annual turnover in the Dutch book market. Over the course of the following 20 years the value of the English-language book market slowly rose to 8-9% (with peaks in 1989 and 1990).

According to GfK's most recent figures, the overall value of all foreign-language books in the Netherlands in 2017 amounted to 15% of the total trade book market turnover in 2018, up from 9% in 2012 (KVB, 2018b; cf. Figures 30 and 31).

The data provided by GfK and analyzed in section 5.3 reveals a more detailed overview of trends in three different book categories, i.e. fiction, non-fiction and children's literature. These statistics demonstrate that significant differences exist between these three categories, as English books proved to be more popular in the non-fiction category, followed by fiction and then lastly by children's titles. Non-fiction and fiction saw a significant increase in turnover for English-language books, going respectively from 9% in 2007 to almost 15% in 2015 (non-fiction) and from 5% in 2007 to 10% in 2015 (fiction). The rise experienced by

English-language books corresponded to a notable decline in the value and volume of Dutch-language sales in the non-fiction and fiction categories.

Lastly, section 5.4 presented the findings of two market research studies by Gfk in which the book buying habits of Dutch consumers are described with regard to foreign-language books purchases. The research showed that one out of three respondents bought foreign-language books and that English is the most commonly read language (by 38% of respondents in 2018). Gfk consumer research also described the three most common reasons for reading books in a foreign language; namely, the lack of titles in Dutch, the preference for reading books in the original language and readers' desire to improve their language skills (Gfk, 2016; 2017; 2018). These results will prove valuable to analyze and corroborate the findings emerging from the qualitative interviews with Dutch publishing professionals (Chapter 6).

To sum up, the statistical overview provided in this chapter confirms the claim that English-language books in the Netherlands represent a significant market share of the total trade book market and that the proportion of English-language books being sold has grown consistently during the period under investigation, increasing from a turnover of 4% in 1976 to 15% in 2018 (KVB, 2019b). With regard to the topic of this study, the quantitative analysis presented in this chapter showed that the Netherlands has seen a significant and consistent rise in the amount of books being bought in English over the last 40 years. In turn, this means that Dutch publishers have increasingly been put under pressure by the competition of English-language editions. The strategies they developed to adapt to and cope with this issue will be examined in depth in Chapter 6 and Chapter 7.

## Chapter 6: The effects of the competition of English-language editions on Dutch-language publishing

### 6.0 Introduction

This chapter presents the data from 30 semi-structured interviews with publishing professionals working for Dutch publishing firms, booksellers, literary agents and other professional figures that are operating within the Dutch literary field. For more information on the sample and on the methodology employed to conduct the interviews see Chapter 3 (sections 3.6 and 3.7).

The interviews addressed the following research questions:

- *To what extent Dutch publishers perceive the competition of English-language titles as a threat?*
- *If so, what strategies do Dutch publishers adopt to avoid losing readers to imported editions?*
- *What consequences do these strategies have on publishing practices, especially with regard to the publication of translations from English into Dutch?*

The findings are presented in sections 6.1 to 6.6 and then discussed in section 6.7. The analysis addressed Dutch publishing professionals' perceptions of English-language editions to establish to what extent they perceive them as a threat (6.1); the risk factors that determine whether a specific book is considered more or less at risk of being consumed in English according to interviewees (6.2 and sub-sections); how simultaneous publication influences Dutch publishers' publication practices (6.3); the issue of price competition between English-language and

Dutch-language editions (6.4); how YA publishers are coping with the competition of English-language editions (6.5); and, lastly, how the increasing focus of local and non-Anglophone books is related to the competition of English-language books (6.6). The data in this chapter therefore provides an in-depth insight into the circumstances under which Dutch publishers operate, the challenges they face in relation to the competition of English-language editions and the mechanisms they adopted in order to cope with this situation. These findings enrich and complement the quantitative data presented in Chapter 4 and Chapter 5 by exploring the consequences of English-language book consumptions on Dutch publishing professionals and by documenting their perceptions and attitudes in response to this phenomenon.

## 6.1 Dutch publishers' perceptions on the role of English-language editions in the Netherlands

When asked about the role of English-language titles in the Dutch-language publishing market, interviewed editors demonstrated to have rather different takes on whether – and up to what point – English-language editions represent a source of concern to them.

Some interviewees downplayed the role of English-language editions in the Dutch market and stated that, although they are aware that some readers consume books in English, this does not concern them too much. For instance, this acquisition editor acknowledged the existence of a group of Dutch consumers that read original editions, but explained that they do not consider this as a real problem:

I think there will always be a group of people reading in English, but it's such a small group. There are also people that read certain books in

English and others in Dutch so it's not really a defined group and it depends on the kind of books and on the kind of authors. I think it's better to focus on how to make our books as appealing as possible to Dutch readers, rather than worrying about what happens if they read in English. I don't worry that much about it.

Another acquisition editor echoed this view and claimed that the word “threat” might be an exaggeration – although they admitted to take into account the issue of competition when deciding about the date of publication of a book:

It's something [the competition of English-language editions] we definitely think about when we are thinking about the timing. I don't know if we see it as a threat – it's a big word.

Similarly, another acquisition editor explained that they do not consider English-language books as a real source of concern, as long as they can publish Dutch editions simultaneously to original editions:

It [the competition of English-language editions] doesn't concern us, but we're looking at it. It is a threat in case we can't publish simultaneously.

According to an acquisition editor, in most cases the quantity of English-language books being sold was rather low if compared to the sales of the Dutch-language version of the same title. However, this editor admitted that for some books the competition of English titles was a “huge problem”:

Normally it's not a problem at all... those who say that it is a problem they're not looking at the numbers. I can check the numbers, how much an import edition sells and normally it's a couple of hundreds while we sell

thousands. If we sell 10,000, they – Van Ditmar and those guys <sup>59</sup> – might sell 800, so that's not a problem. But for a few books it's a huge problem.

Another acquisition editor claimed that, even though they were generally aware that some Dutch readers prefer to read in English, this did not usually weigh in on their decision to publish or not a translation. This same interviewee admitted immediately after that in some cases they did not buy the rights to some books because the risk of competition from the English edition was considered to be too high – a comment that is in direct contradiction to what stated before:

We know that there are certain books that people prefer to read in English, rather than in the translated version. [...] When I am buying [the translation rights to] a novel or a non-fiction work I usually don't take into account that people will read it in the original language. But certain books I decline because I think that people will read them in English.

On the other hand, various participants confirmed that they did consider English editions as a threat, as exemplified by the quotes below:

It has always concerned me. [American best-selling author] in his hey-day sold thousands and thousands of copies of the English-language edition and if we weren't there on time they would have sold many more copies and that would have come out directly from our sales. So, yes it is a problem!

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<sup>59</sup> Van Ditmar is the largest importer and wholesaler of English-language books in the Netherlands.



I definitely consider it [competition of English-language editions] a threat! I always try, at least, to be out at the same time as the English edition.

It's becoming more and more of a problem because [...] young people speak English quite well, they learn it in schools. [...] A lot of YA fans [...] will buy the book in English if it's coming out before the Dutch edition. It is a problem.

In YA we see a lot more competition from English because younger generations are more used to encompassing English in their Dutch lives. They are more likely to pick up a YA book in English, because it's cheaper, or available quicker, but also because it is considered higher status if you read in English.

It is important to stress that the last two comments came from editors that work with YA literature. As will be discussed further on in section 6.4, this market segment is particularly affected by the competition of English-language books.

Throughout the interviews, participants expressed opposing views with regard to a more general issue – namely whether the Dutch are actually as proficient in English as they are usually considered to be, which of course would reduce the threat posed by English-language editions. Some of the interviewees were rather skeptical regarding the average English skills of Dutch readers, while others – especially those involved with the YA market – appeared to be very concerned about the proliferating presence of English among Dutch youngsters (cf. section 1.3.1; e.g. Berns et al., 2007; Gerritsen et al., 2016; Edwards, 2016) (on the situation in the YA segment cf. 6.5).

One interviewed bookseller that had been in the English-language import business for almost four decades noted that in their view the language proficiency

of Dutch consumers was not as high as it used to be, even though the number of people that have a basic level of English has increased:

The language skills of people have decreased... there are more people speaking a sort of English. It's interesting to me that even some of the professionals are really not at home with English as they would have been 40 years ago.

Similarly, various acquisition editors also expressed doubts regarding the average English-language abilities of Dutch readers, as exemplified in the quotes below:

Although I think Dutch people are fluent in English, I also think that they're not fluent enough to only read books in English. [...] A translation can add a lot to your perception of the story and [...] of the style.

I know that the level of English for the average Dutch person is not that high. Their spoken abilities are quite good, they can go anywhere in the world and put on their accent and they'll be fine, but they aren't actually that fluent. Since we watch it on TV, we think we're good but as soon as you give them a book they start to struggle.

On the other hand, YA editors seemed convinced that Dutch youngsters were increasingly fluent in English, due to the internet (especially social media), gaming and TV/music entertainment:

Young generations all read in English; they follow English blogs, they follow English Instagram accounts, they even start writing they own Instagram account in English.

Given the specificity of the YA situation, this sub-genre is the object of closer attention in a separate section (6.5).

When asked whether they monitored sales of English-language editions on a regular basis, most of the interviewed publishers said that they did not. One acquisition editor explained that they usually relied on their ‘gut feeling’ in order to evaluate whether original editions represented a threat, but that they did not check English-language sales statistics systematically:

No [we do not monitor sales of English-language books], not systematically. It's an interesting suggestion to take a look at it. Usually it is more of a gut feeling, things you notice when you walk in a bookshop and you see a big stack of the imported edition of a book you also published and you think that this is not good news for your edition.

Other acquisition editors stated that they monitored this phenomenon only sporadically and only for their most successful authors:

Only with books which I think are at risk, like business books. Then in that case I'll check what they sell [NvZ].

The problem with English-language editions only occurs with few authors and so we occasionally monitor those authors. Not every year, just once every two years to see how things are going. For us the biggest problem is mainly with [name of two best-selling American authors].

One acquisition editor claimed that, since Gfk's figures tend to be incomplete and did not include all online purchases, they preferred not look at the figures. The editor added that one other way to check how the English-language editions of the titles they publish were doing in the Netherlands was to ask the original publishers for their sales figures in the Dutch market:

You can see something from Gfk, but not everything. Because we don't know [...] how truthful it is, I prefer not to look at it. Since a lot of sales are

made through Amazon you just don't know. Sometimes I ask rights people [the rights department at the original Anglophone publishing house]; they don't always give those figures, but sometimes, if I ask nicely and off the records, they'll give them to me.

Another editor instead said that they do monitor Gfk's general market figures, which often show that the best-selling companies in the Netherlands were Anglo-American publishers, thus proving that imported editions do constitute a threat:

We can look at the amount of books sold via a marketing research company (Gfk) [...]. If we look at the numbers, you can see which company is the biggest every single week and for months and months in a row export editions have been the best-selling companies. They have a huge long-tail of course, so all the backlist books, the classics published decades ago which are still selling, these are in the list as well. My list is a lot smaller of course. This is a sign of how important and how big English-language editions are.

To sum up, the data showed that not all (sub)genres and sectors were perceived to be equally affected by the competition of imported English-language editions. Depending on the area of the market interviewees operated in, their level of concern was more or less strong – with YA publishers appearing significantly more concerned than interviewees working in the adult publishing sector. Interviews also made it clear that their level of concern did not only depend on the genre or sub-genre of a title, but also on the timing of publication (i.e. whether the Dutch translation could be published simultaneously) and on the specific characteristics of the book. It also emerged that interviewed publishers tended not to monitor sales of English-language editions closely, which means that their perceptions concerning the role played by English-language editions in the Dutch market was often based on 'gut feeling' rather than being informed by statistics.

## 6.2 Assessing the risk of competition from English-language editions

As anticipated in section 6.1, various interviewees stated that they didn't perceive all books to be at risk of being read in English by Dutch readers.

One interviewee (already cited above) stated that, although they don't really consider English-language books as a threat, the competition of original editions is a "huge problem" for "a few books". Similarly, another interviewee claimed that they sometimes decided not to buy the translation rights to some specific titles since they "think that people will read them in English".

When deciding whether to acquire Dutch translation rights to a certain book, the risk posed by competing English-language editions was found to be an important element in editors' decisions. In this respect, one interviewee pointed out that in cases of books they consider at risk, the fear of competing original editions could discourage them from acquiring rights and translating these books. This interviewee defined this strategy as the "defensive approach":

I just don't [...] translate some books even though they are about subjects that I find very interesting. For instance, a book about pop-music... you know that people that enjoy American music will be able to read the book in English and will buy the English edition. I find it very courageous that a publisher is translating James McBride's book about James Brown, but I think that is going to be a tough sell. That's the defensive approach which consists of not translating at all.

In addition, as various other interviewees explained, when the rights to an Anglophone title are offered to editors just before the original publication or after – which means that simultaneous publication will not be possible – this weighs in on editorial decisions on whether to buy or not a certain title (cf. section 6.3).

The factors that publishers declared to take into account when assessing whether a title is at risk of competition from English-language editions assessments were varied: the level of popularity of an author, the degree of anticipation preceding the publication, the age of the target group, the genre, the subject matter of the book, the writer's style, whether a title belongs to the upmarket or commercial side of the spectrum.

When asked about how they predicted whether a book had the potential to be read in English, interviewees often mentioned examples or gave indirect indications of the factors/characteristics that guided their assessments.

However, their judgement seemed to be influenced mostly by intuition and insider knowledge, more than by explicit criteria. For instance, one acquisition editor explained that their assessments were mostly the result of hunch and experience, as well as of estimations of how much media attention they expected for a book (cf. 6.2.2):

It's mostly guesswork based on past experience and the amount of publicity we expect.

Another editor explained that they relied on 'gut feeling' and accumulated experience rather than on market figures, since the data emerging from market research could not capture the existing differences between individual titles:

It's definitely [...] more about gut feeling and experience than market research. Because [...] each book is different, and market research doesn't do each unique book justice.

One interviewee stated that they used market statistics to follow the overall trends in the market, but then relied on 'gut feeling' to assess individual titles:

We can see the market change through the numbers, and decide upon individual titles by experience and gut feeling.

Another editor reflected on the lack of statistics to guide publishers' choices – “there is sadly a dearth of actual market research and calculations in the book business” – and then explained that their assessments are based on trial-and-error and past experience:

Things are generally learned ‘the hard way’, through experience and through trial-and-error.

The types of books that publishers considered to be at risk of competition from English-language editions can be classified in three broad categories:

- Books considered at risk on account of their target audience;
- Hoped-for bestsellers, highly anticipated books and book series;
- Books with unique style features, personal narrative voice and other niche genres.

These categories will be analyzed in the sub-sections below (6.2.1 to 6.2.3).

### 6.2.1 Risk factors related to the target audience

The age of the target audience was considered to be a key indicator to evaluate the level of risk to which a title was exposed, according to several acquisition editors. One interviewee described this in the following way:

In a very broad generalization, I would say that the younger the target audience [...] the larger that risk becomes.

This view was shared by all interviewees operating in the YA sector, which agreed that YA books are at high risk of being read in English, mostly due to the high level of proficiency of young generations (De Bot et al., 2007; Berns et al., 2007; Gerritsen, et al. 2016; Edwards, 2016). The specificity of the situation in the YA sector will be analyzed more in depth in section 6.5.

In addition, interviewees found the level of education of the target audience to have an influence on readers' language choices. As remarked by various acquisition editors, books that belong to the more up-market, high-brow segment of the market – i.e. titles that tend to be consumed by educated readers – are more likely to be bought in the original language. The reason being that this group of readers was also perceived to be more likely to be proficient enough to read English without problems, as noted by one editor:

For the literary stuff sometimes we decide not to buy a book because we think that people will buy the English edition and not our edition, because it's a small group of readers that is very fluent in reading in English. But as soon as you go down the literary scale, the English edition sells fewer copies. [...] It has to do with education.

On the other hand, commercial titles were considered to be less likely to be read in English by a number of interviewees. For example, one acquisition editor working for a commercial company whose list featured mostly women's fiction titles stated that their target audience was not very likely to read in English:

In commercial women's fiction our readers are 35/40+ and are less likely to pick up an English book.



Furthermore, some interviewees claimed that in their opinion highly educated readers tended to prefer the original language also for a status reason, given that reading in English was generally regarded as an indication of high-status and as a bearer of cultural capital (Bourdieu, 1983). Interviewees repeatedly used the word “snobbish” to define this kind of attitude on the part of readers, and generally referred to this behaviour in a negatively critical way:

Highly educated people sometimes prefer to read in English, I think it’s a bit of a snobbish thing – to show that they can.

In fact, what you’re saying is “well, my English is good enough and I think quality is very important”... so it is a bit snobbish.

People want to impress others when reading the English one [edition].

To sum up, the interviewed editors found titles geared towards a young audience to be at high risk of competition from English-language editions. Furthermore, upmarket titles (whose target audience is generally highly educated) were also considered a genre at risk of competition by interviewed editors.

### 6.2.2 Hoped-for bestsellers, highly anticipated books and book series

Several interviewees considered “big books” to be the category more at risk (Thompson, 2010).<sup>60</sup>

Most interviewees found that the most common reason why Dutch readers decide to read in English is the fact that the book they want to read is not available in

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<sup>60</sup> Cf. Thompson, 2010, Chapter 5 for a definition of ‘big books’.

Dutch (yet) – either because the book's translation rights have not been acquired by any Dutch publisher or because the book is still in the process of being translated when the original edition is released. Therefore, in such circumstances, Dutch readers are faced with the decision to either buy the book in English or wait for the translation (in case there will be one).

According to several acquisition editors, titles that are more at risk to be bought in English due to availability and timing issues are best-sellers (or books that are expected to become best-sellers) by well-known authors – as this quotes exemplifies:

It all depends [assessment of risk] on how 'big' the author is or – in the case of a debut – how big we think she/he will become.

Thus, for books by established authors with a successful track-record, simultaneous or early publication was considered essential, as pointed out by these interviewees:

If an author is very famous (for instance JK Rowling, Dan Brown, that kind of level of 'famous') readers who hesitate between English and translation will be more likely choose the English original if they have to wait too long for the translation to appear, because the English original will make quite a splash and they will know it is available. A publication by a lesser known author will not have that draw, simply because unless people are actively looking for info on books by that author, they are far less likely to hear about it.

If there is a big hype around a book, those who are on the fence about whether they prefer Dutch or English will grab whichever edition is available sooner. That happens only with the big names.

If we speak about big books – books we know beforehand will reach a huge audience – we'll try to publish simultaneously. For big books I think timing is the most important reason to buy the English book.

If you have the new Paula Hawkins it needs to be published at the same time as the English. If you have the new Dan Brown it's the same. Harry Potter is a really good example. When the new Harry Potter came out in English everyone flocked to the stores.<sup>61</sup>

A UK-based literary agent that sells English-language rights into the Netherlands also commented on this issue:

When you have a very successful author who is regularly published in the Dutch language, particularly novelists perhaps writing a series [...] we know very well – and so does the Dutch publisher – that if we don't get the material out at the same time there will be a really substantial loss of sales [...]. So, in a funny way, I think the problem gets bigger the more successful the author is.

One interviewee stated that another factor that they took into account in order to evaluate the risk of competition for big books is the strategy being pursued by Anglophone publishers. As explained by this acquisition editor, the higher the sum the original publisher is investing on a book (in terms of the advance paid to the author), the higher the chance that the publisher will be exporting the book

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<sup>61</sup> The interviewee here refers to *Harry Potter and the Cursed Child Parts I and II*, by J. K. Rowling, John Tiffany and Jack Thorne. The English-language edition was released in a special rehearsal edition in July 2016 and later in a definitive collector's edition in July 2017 by the publishers Little, Brown and Company (internationally), Scholastic (in the US/Canada) and by Pottermore (in digital format). The Dutch translation of the rehearsal edition appeared in November 2016 and was published by Uitgeverij de Harmonie, while the definitive collector edition was published simultaneously with the English-language edition in July 2017.

aggressively abroad in order to recover the money invested. The interviewee added that this is particularly common for large publishing conglomerates which are known for being aggressive in export markets:

The biggest factor is how much money the UK publisher has paid for a book, and if it is Harper Collins or Penguin Random House – chances of them trying to recoup their investment by pushing the export edition in our market are quite high.

This statement relies on the assumption that “the more a publishing house ends up paying for a book, the bigger that book tends to be for the house concerned”, which in turn means that the publisher will get behind the book to turn it into a success – including promoting it in export territories (Thompson, 2010: 210)

To sum up, expected bestsellers and books by authors with a successful track-record who count on a loyal readership were considered to be at high-risk to be consumed in the original language – mostly because readers would be awaiting eagerly for the release of the new title and would buy whichever edition was published quickest.

### 6.2.3 Books with unique style features, personal narrative voice and other niche genres

As pointed out by one interviewed editor, one of the main reasons why Dutch readers read in English is often the intention of accessing the book in its original – and therefore more authentic – form (cf. 5.4):

If you're able to read a book in the language it was originally written in, you're closer [...] to what the author intended to write, creatively and artistically.

According to various participants, reading in the original language was preferred especially for books with peculiar style features, i.e. titles for which the quality of the writing and the author's style represented the main drawing points. Being the author's style unique and recognizable, translating such titles while leaving the linguistic nuances intact was perceived as being more challenging and this often drives readers to the original text, as explained by this editor:

When a book is really good in English and if it has a lot of humour, then you have to have a very good translator to get the same feeling and the same vibe as the English edition. That makes it better sometimes to read in the original language, so that you know what the author originally intended to say.

According to interviewees, books by authors with a distinct style or a very personal voice were a good case in point to illustrate this; some examples that were mentioned were books by popular American or British comedians or TV/web personalities, such as, for instance Tina Fey, Lena Dunham and Russell Brand. Artists' biographies and – to an even greater extent – autobiographies were also cited as an example of this. According to participants, autobiographies were particularly affected since fans tended to care about the authenticity of the narrator's voice and often find the mediation of a translator annoying, as this editor explained:

It depends so much on the translator, if she/he has the same tone. Especially with autobiographies you want to hear the voice of the artist.

Titles following this pattern that were mentioned by participants were for instance Keith Richards' memoir (*Life* by Keith Richards and James Fox, 2010) and more recently the biography of James Brown (*Kill 'em and Leave* by James

McBride, 2016). Various interviewees claimed that books whose subject was specific to the American or British culture were also a category at high risk of being read in English – e.g. non-fiction books about Anglo-American popular culture (e.g. pop-music, cinema, sport, etc). As argued by one interviewee, it was likely that the target audience for such titles were already quite familiar with English given their interest for Anglo-American cultural products:

Tina Fay has written a very funny book and it's really hard to get her tone of voice. The people that like her are highly educated people so I think they will read it in English. These funny American authors and comedians... they are very popular in the US [...] but there are not many publishers in the Netherlands that translate these books. [...] It's mostly because the language is hard to translate and because the people that like them usually watch the show in English, so they can read the book without translation.

Similar comments were also made by two other interviewees about the authorized biography of Steve Jobs (*Steve Jobs* by Walter Isaacson, 2011); this book was considered particularly likely to being read in English because of its subject matter. One interviewee explained that readers who are intrigued by a figure like Jobs are interested in American culture and therefore also likely to have a good level of English:

Especially with books like the biography of Steve Jobs... people that are interested in Steve Jobs read as easily in English as they do in Dutch. For other types of books we don't lose as much to the UK/US edition.

Within non-fiction titles, business books were mentioned as a sub-genre where the competition can be quite intense by one interviewee:

When I publish business books, I know that people that read business books most likely read also English because they are mostly highly educated. It's a bit of a niche, but a big niche. Business books [...] are the books with the biggest chance to be read in English among the titles I work with.

Another publisher claimed that they found competition to be intense in other niche genres, such as sci-fi and fantasy. One interviewee explained that their company decided to introduce the genre of Urban Fantasy in the Netherlands and experienced a high level of competition from English-language editions in this sub-genre:

In 2014 we decided to do a little experiment with our list. We started a new line to see if we could get post-YA readers who liked the fantasy YA [...] to keep reading fantasy, but the kind of fantasy set in an everyday world [realistic setting], so we tried to introduce Urban Fantasy to the Dutch market. That is a genre where we found a lot more competition from the English-language editions because that is a group of people that is way more used to reading in English.

In this case, as in the case of YA books, the high level of competition was found to be connected to the age factor discussed above (cf. also 6.5).

### 6.3 Simultaneous or early publication of Dutch translations

Interviewees unanimously agreed that, when Dutch translations were not out simultaneously with original English-language titles, this would risk compromising the sales of the Dutch edition given that some readers would not wait for the release of the translation and would buy the English-language edition instead. In order to avoid losing readers to competing English editions, Dutch publishers stated that they strove to publish translations on the same day as – or

as close as possible to – the release of the original edition. One marketing specialist described how the pressure of competing English editions influences Dutch publishers in the following way:

It [the competition of English-language books] affects their publishing in that they always want to publish at the same time as the English edition which makes it hard since they have to translate quite quickly. It does change their strategy in this way. They have this big production going really, really fast, instead of just taking the time to translate and make a beautiful book. They always want to be the first to publish, they even want to be the first to publish worldwide. So they have these exclusive deals with authors... for instance, the new Donna Tartt was published in Dutch before the English edition. They do try to get as much of the market before the English edition is out and I think that is how they show that English is a threat to them.

Various acquisition editors explained that, whenever they feel a book could be at risk of being read in English, they usually tried to publish the Dutch translation as soon as possible – as exemplified in the citations below:

If I think that a book has an audience that likes to read in English, I always try to publish the Dutch edition as quickly as possible, so that you don't have the time gap in which people have heard of the book, want to read it and then go for the American or British edition.

I [...] don't want people to say 'oh, but I don't want to wait for another month or two months, so I'll buy the English'.

If I expect a book to be extremely popular and if I think that it is going to draw people to the English edition, that makes me want to publish earlier.



Simultaneous publication was perceived by interviewees as not being as common in other markets where the English proficiency of readers is on average lower. One literary agent that sold rights into various European markets defined this practice as a “very significant feature of offering rights to Dutch publishers” (SE).

Several interviewees stated that it was not uncommon for Dutch publishers to release translations ahead of the English-language edition so that their edition could benefit from being the only one available in the market until the original version was out, as explained by one acquisition editor:

With best-selling authors [...] we try to publish simultaneously or sometimes, if possible, even a bit before. [...] For instance, with [best-selling British author] we had the premiere [...] If the Dutch edition is the only one in the market, it helps.

Another example of a title released in Dutch ahead of the original edition that was often mentioned during the interviews is *The Goldfinch* by Donna Tartt (the book was published a month ahead of the English-language release in August 2013 by the publisher De Bezige Bij). Although such practice is not the norm and happens relatively rarely, it is a key approach illustrating the desire of Dutch publishers to beat English original publications.

According to several acquisition editors, one of the main advantages of publishing simultaneously is that the Dutch edition can benefit from the attention generated by the original edition in Anglophone markets, as explained by this acquisition editor:

If something is in the New York Times, it's more likely to get picked up by Dutch newspapers. [...] It's very handy to move on the same train.

As explained by other acquisition editors, Dutch companies are particularly keen on synchronizing the release if they expect a substantial amount of publicity for the title coming from Anglophone media:

We know that Dutch newspapers and blogs will pick-up on that [publicity in original territory] and write about the book right then. That's the publicity you need but it's about the original edition, so we have to be there as well so that we can make the most of that publicity.

If there is a lot of international attention, there is a chance that national media will pick up on this and write about it. If this is the case, people who are interested might buy the English edition if there is no Dutch translation available.

I always try, at least, to be out at the same time as the English edition. If only for things like publicity... I mean, if a book has just been released in the UK and gets phenomenal reviews and a lot of media attention, you want to have your book out there as well.

The fact that the title is expected to be popular is itself also a good reason to publish early because then you get drawn into the slipstream of the international success which makes your publication more likely to be successful.

Concerning publicity and PR, various interviewees expressed concern about the fact that the Dutch press occasionally reviewed original-language editions rather than Dutch translations. The majority of interviewees which mentioned this issue found this practice particularly frustrating, even more so if the reviewer failed to mention the existence of a forthcoming Dutch edition, as observed by these two editors:

We published a book in February [...] and in November [of the previous year] there was a very nice review in De Volkskrant. I thought it was a pity, because maybe people would wait and buy the Dutch translation and it didn't even mention that we would translate it.

What does happen occasionally is that they review a book and they avoid to mention that there is also a Dutch edition available, which is quite annoying. Or they do review the Dutch edition and then they print the cover of the English edition, which is also very annoying.

Another acquisition editor commented on this issue by explaining an anecdote in which they compared the different review policies adopted by newspapers in the Netherlands and Germany:

I was talking to a German publisher [...] a book, asking when they [the German publisher] had published – because the book had been out for some time already – and I asked how much they did sell. And he said 'I haven't published yet', and I said 'Why?!'. And he said 'I'm not losing any of my readers to the English edition, German readers don't read in English'. And I said 'What about the papers? Hasn't it been reviewed several times already?' and he said 'No, the papers are asking me when I'm going to publish and they'll wait for my publication to review'. Dutch papers don't do that!

As pointed out by another acquisition editor, this practice creates other collateral problems regarding the recognizability of covers and titles:

If you're publishing after the original language and you have a very big book often they'll review the English one and they'll print the English cover and the English title, while you want the Dutch cover and the Dutch cover to get recognized. That's very irritating! [...] Sometimes it's direct translation [the title] but sometimes you change the title of a book because it sounds better. And people don't understand it's the same book. They see

that a book has a 5-star review but they don't know which book it is in Dutch! I don't know why but there's no loyalty between papers and publishers.

While most of the publishers agreed that they would rather have the press wait for translations, some also stressed that newspapers have to be completely independent from the commercial interests of publishing companies.

According to other interviewees, instead, since this practice has direct consequences on the Dutch publishing industry, Dutch media should consider more carefully the implications of their choices – as argued by one acquisition editor:

They [newspapers] have a different sense of independence. Their idea is that they review what they feel needs to be reviewed. They can make their choices, but they shouldn't underestimate the commercial influence that their reviews have. If reviews don't match up [with Dutch-language book releases], in the end there won't be any more books to review.

When asked about this specific issue and its newspaper policy, the editor of the book section at one of the leading Dutch newspapers explained that, as a general rule, they preferred to wait for translations unless there was a specific “journalistic urgency”. According to this journalist, the reasons to wait were mainly two: firstly, the large majority of readers preferred to read in Dutch; and secondly, reviews usually included comments on the quality of the translation. To illustrate what a “journalistic urgency” implied, this interviewee mentioned an example of a French book, therefore pointing out that this problem is not exclusive to English-language titles:

In the case of the novel *Soumission* by Michel Houellebecq we choose to go for [to review] the original because the book was not translated yet when it appeared and there was a lot of attention in France. Everyone wants to know when Houellebecq comes out with a new controversial book. In such cases, it's news and we don't wait for the translation.

Some interviewees demonstrated a more relaxed attitude towards this problem, noting that, since the importance of book reviews in newspapers had declined, the timing of reviews was not necessarily a problem. In fact, they explained that it could sometimes even be useful to have Dutch reviews ahead of the release of the translation as they could be used to promote the book, as noted by these two acquisition editors:

NRC [...] wrote a review of one of the books that I will publish soon [...].<sup>62</sup> They wrote a good review about it, but the book is not out yet here. It's not a big success in the US, so we don't need to publish so quickly but we believe it is going to be our big success this year. They have already written a very good review of the English-language edition and [...] we can use that. [...] We can say that the book has already been written about.

Sometimes they review the English edition before the Dutch edition is available. I used to think that was very annoying, but now I think it gives you a good quotation before your edition is published. It can be helpful. The influence of reviews is not that big to begin with, so you might as well use the quotation for your own cover. I am not sure that's a huge factor.

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<sup>62</sup> NRC Handelsblad is one of the most popular daily newspapers in the Netherlands.

One interviewed acquisition editor explained that, while being able to publish before the original edition was usually an advantage, there were also some drawbacks, especially if the translation was released months in advance – something that had happened recently to their company with a YA debut novel. In this case, the book became a best-seller, and having the world premiere had been greatly appreciated by readers – as the interviewee confirmed:

YA readers are telling us that they're happy with that and we also see that on social media. They are saying how great it is that they can read it for first in Dutch.

However, in this case advanced publication also involved some disadvantages as they could not use the original publisher's artwork and had to create their own cover art instead:

With [book title] [...] we designed our own cover because the UK and US covers were not ready yet when we needed it. I like our cover very much, but they did a wonderful work with the internal artwork, which we didn't know about.[...] If I had known, I would have done the same artwork on the inside.

The same publisher further elaborated on the drawbacks of early publication:

You lose something. Sometimes you don't know what the English publisher is doing; sometimes they [original Anglophone publishers] have wonderful marketing ideas. In order to market and promote the book it's also helpful if you can say that film rights have already been sold, or that foreign rights have been sold to many countries. [...] If you're very early you miss a little bit of information [...]. A few months ago when we published there weren't any reviews and there wasn't any press we could use.

As seen in section 6.2, for anticipated titles by well-known authors, releasing translations simultaneously to English-language originals was considered to be essential. However, various interviewees claimed that the opposite was generally true for works that were not expected to become immediate best-sellers, such as titles by debut authors, which did not count on an established readership. Various interviewees indicated that in these cases the general practice was that of scheduling the release of the Dutch edition after the original one, in the hope that the book would gather international media attention. As two editors explained, the publicity generated in the domestic territory could then be used to build a profile for the author/book in the Dutch market:

The other thing [strategy] is to wait: we don't plan the publication together [simultaneously] because we want to gather buzz, good reviews and quotes to make a big presentation here.

You usually want to publish a debut after the original because you want the press coverage. The New York Times might write about the book so we can put that in our catalogue. If it sells a lot of copies and it's in the best-seller list [in its domestic market], then you can say to booksellers that the book sells very well.

This latter interviewee further elaborated on this issue, by referring to one particular example of a best-selling debut novel that had been recently published by their company. Even though the translation rights were acquired in advance (i.e. when the manuscript was not completed – therefore leaving enough time to the Dutch publisher to organize simultaneous publication), the Dutch release was deliberately scheduled some months after the original edition for the reason explained above. However, this turned out to be a problem since the book in question became an unexpected international phenomenon immediately after

publication in the UK and the US and the buzz about this book spread very quickly to other countries, as the interviewee described:

Obviously, we didn't see that coming – nobody saw that coming. [...] It had already been out for 10 weeks [...] at #1 in the US and our edition wasn't out yet, since we had planned to publish in July. We must have lost a lot of sales in those few months so we moved the book up as quickly as we could and published in April, instead of July, to make sure that we didn't lose more sales to the original edition.

As the editor went on to explain, although many readers were most certainly lost to the English edition during the first weeks, there were also benefits to a situation like this – namely that sales of the original edition contributed to generate interest for the translation as well:

The positive side of having the English edition in the market was that there was a lot of buzz around the book. Booksellers were already selling the English edition quite nicely, so there was a positive vibe about our edition as well and when we moved the publication everyone was really happy. [...] When you know a book is going to sell you want to be right on time, but if you don't know because it's a debut, sometimes the English edition can have a very positive effect on the sales of your own edition. Obviously, with this book this was the case. It became such a phenomenon and a worldwide success that we could just hop on the train and ride along with the success that the UK and US were having.

Therefore, as this editor pointed out, the wide availability of English-language editions in the market and the fact that the Dutch audience is so responsive to the buzz generated for new titles in the Anglophone context, are not always purely disruptive factors for Dutch publishers. On the contrary, when a title becomes such an international phenomenon, the success of the original edition (abroad



and in the local market) can help raise the general profile of the book and therefore increase the sales of the translated edition as well:

You can look at it in two ways. You can either say “how many copies did we lose in those few months?” or you can say “how many copies did we win because we were able to take advantage of the success the book already had?” In this case we sold 200.000 copies of the book, so we were the winner. Obviously, when the next book by [name of the author] comes out I have to be certain that I will publish simultaneously to the UK and US editions.

This comment highlights the high level of complexity of the phenomenon under investigation, whereby the transnational and globalized nature of book circulation represents at the same time a threat to local publishers (due to the competition of English-language editions in their domestic market) and an opportunity (thanks to the international hype from the original territories that assists the promotion of their translated edition).

### 6.3.1 Issues regarding the practicalities of simultaneous publication

As described in section 6.3, simultaneous publication was perceived to be a very common practice for translations of Anglophone books. According to interviewees, in order to publish translations simultaneously or in advance of the original-language edition, Dutch publishers had adapted their publishing practices, especially with regard to their rights acquisition strategies.

As remarked by various interviewees, acquiring foreign rights well in advance is essential to give enough time to publishers to translate and release the title in time to match the original-language publication.

One acquisition editor explained that Dutch publishing companies are renowned for being particularly fast when it comes to acquiring and translating Anglophone titles:

When you look at catalogues of foreign publishers, Dutch publishers are most of the times among the first ones to buy the foreign rights. If a US publisher has a book that is going to be published worldwide one of the first territories to be bought will be the Netherlands, because we need to be fast and to publish simultaneously.

For languages other than English the competition of original editions was not perceived to be a problem by most interviewees, since few Dutch readers read in other foreign languages, as this acquisition editor noted:

The amount of people that read French and German is so small – it's less than 1% - , whereas English is 10-15% or more.

The observation made by this interviewee is amply confirmed by the quantitative evidence presented in Chapter 5, which shows that sales of books in languages other than English amounted to 1% or less of sales between 2007 and 2018 (see Chapter 5, Tables 21-23).

Interviewees stated that simultaneous publication was not a usual practice for languages other than English; as a consequence, acquiring foreign rights early was reported to be less common for other languages. In this respect, one editor explained that, as a general rule, foreign rights to English books were often bought in advance of the original-language publication, while rights to books from other languages were acquired after the original-language publication:

With other languages we hardly ever buy before they're published [...]. If we buy stuff [from other languages] before it's published [in the original territory], it's because it's the third or fourth title by someone that we have already published before. [...] You hardly ever buy from another language in advance. The large majority of the books that we buy far in advance of the publication are English-language ones.

Interviewees claimed that, if the rights to an Anglophone title were offered to them late (i.e. shortly before the original publication or after) – which meant that simultaneous publication will not be achievable –, this would weigh in on their choice of whether to buy or not a title. The impossibility of publishing simultaneously was not found to automatically hinder the acquisition of a book. However, in such cases, the publisher would evaluate whether it would be feasible to invest in the title despite the inevitable publication delay – as this acquisition editor and literary agent confirmed:

We take into account this problem. We can check how many books have been sold [in English in the Netherlands] already. We know that we will never sell to those people that have already bought the book in English. When we publish simultaneously, we aim to reach 100% of the market. Six months later we have to take into account that we [...] we'll reach maybe 80%. If the book can still be profitable, we can still do it.

When an editor is making an assessment about whether to buy something the timing is definitely a determining factor in their commercial calculation of how many copies they think they might be able to sell.

One interviewee provided the following example:

The autobiography of a famous footballer came out last week and I received the PDF on the day of the publication. I estimated that by the time I could have the book translated I would have been months and months

behind. Well, maybe this is not a good example because, even if I had the manuscript in time, probably I wouldn't have done this book. But there are books that we decide not to do because of that.

Two other acquisition editors stated that they tended to avoid buying the foreign rights for a book in case they could not release it simultaneously to the English-language edition:

If we are offered a book that is very close to the release date by an agent or a foreign publisher – for instance a month before it is released in the US – then there is no way we are going to translate it [in time to release it simultaneously]. In that case, it would be very problematic to publish the book. In a case like this, we would refrain from publishing the book.

I am really hesitant to buy anything that is already in the market or which I know I cannot publish simultaneously because I know that I am already behind. [...] For example, if heard about this new amazing manuscript to be published in March [...], I would be really hesitant to buy it because, by the time I publish it, it would be more or less August and I would have already lost a lot of the readers to the English edition.

In order to be able to publish simultaneously, various interviewees explained that it was a common practice to buy translation rights for English books on proposal or when only a part of the manuscript is available (cf. Thompson, 2010), as this editor explained:

You can buy titles that are still manuscripts, sometimes just a few chapters, sometimes only proposals. In these cases, they are available months before the original edition is published, so you usually can synchronize the publishing date.

As noted by the interviewee above, acquiring the foreign rights when the manuscript was not yet completed usually allowed enough time to organize the translation and publish simultaneously.

One interviewed editor claimed that in recent times the publication timelines of Anglophone publishers had become tighter, therefore making publishing translations simultaneously more challenging for Dutch companies:

Before, people [Anglophone publishers] used to shelf manuscripts for months so that they could get quotes [from the press], so that they could do a little bit more work, get the perfect cover, the perfect marketing campaign. Now, they get the book in and they publish it because they need to get back their investment and therefore we have less time to translate. It happens so many times that we get a book in September and the original publisher says that they are going to publish in November. There's no way we can translate in time in these cases and that has changed! It used to be that we always had at least 6 months to translate and now we have seen this window narrow down.

One interviewee claimed that Anglo-American publishers often shared manuscripts quite late, which made it more difficult for Dutch publishers to publish simultaneously:

International publishers [...] always share the manuscript only about a month or two before the publishing date because they have their revisions and everything. When we get the manuscript we still need to translate it and edit it, which will take us at least 3-4 months, so we are always late unless we get the manuscript earlier on in the process.

As implied by the interviewee quoted immediately above, receiving manuscripts early was essential for Dutch publishers. The same acquisition editor stated that,

as soon as they acquired the foreign rights to a book, they asked original publishers (or rights holder) to share the manuscript immediately so that they could start the translation, also when the manuscript was not final:

Every time I buy the rights I always tell them that I really need the manuscript. Some publishers are changing a bit and are sharing the manuscripts [...] when it's not in the final version. And then when the manuscript is final they will share it again if there are any changes. When I am really nagging them, they will share it.

Therefore, as illustrated by the quote above, Dutch translations were sometimes based on non-final manuscripts. Another acquisition editor explained that, once the final version of the manuscript became available, the original publisher or the rights holder (i.e. the literary agent) usually shared it with the Dutch publisher who, in turn, passes it on to the translator(s). When doing this, editors usually provided translators with a list of the changes that have occurred between the first and the latest version of the manuscript, so that they could apply the changes to the translation. As this editor explains, this process can be time consuming and can occasionally result in inaccuracies:

You hope that either the original publishing house has an editor that makes a list of the changes that have occurred or you just have your editor go through the first file to see if some things have changed and if you need to alter them in the translation. This means more work and also means an increased risk that some errors [...] and small discrepancies might occur between your translation and the original final proofs. However, that is usually at the level of words, not at the level of the plot line, so it's usually not a big problem.

The willingness of original publishers or rights holders to share non-final manuscripts in advance with Dutch publishers was considered a key factor to speed-up the translation process. Two acquisition editors claimed that, in their experience, Anglo-American rights holders (either literary agents or foreign rights managers) were usually collaborative in this respect:

In general, the agent understands what you need. They want their author to be as successful as possible and they will help you out with this [publishing simultaneously] because it is in their best interest as well.

Most of the UK/US rights people know that we are struggling with this problem here. They also know that for their authors it's better if the translation sells more than the export edition, because the author gets more royalties from the translated edition.

One literary agent confirmed that the royalties that authors obtained from selling translated editions were generally higher than for original-language editions. As such, this interviewee claimed that they always encouraged the authors that they represented to deliver material to foreign publishers early so that translations could be published simultaneously:

The royalties the author gets from the Dutch publisher are higher than the export royalties the author gets from the UK/US publisher. That's one of the reasons why we always encourage our authors to support their local publishers, particularly by delivering material in a timely fashion so that it's possible to get the book on sale at the same time [as the original edition].

As claimed by several interviewed acquisition editors, another common strategy to speed up the translation process was that of employing more than one translator to work on the same title.

Although having one translator was considered the preferred option, the majority of interviewees confirmed that it was common to employ multiple translators if the timing was tight or if a manuscript was particularly long:

What we always try to do is to have one translator doing the whole book, because that way you have one tone of voice and that's the easiest way. But sometimes the book has to be published simultaneously and we don't have enough time to only have one translator, so we ask a team of translators to work together. [...] If necessary we use 3 or 4 translators, but that doesn't happen that often.

Sometimes we get books in too late and it has to be translated in a month and you can't have one person translate 100.000 words. So then you get 4 people translating that.

The number of translators involved can vary depending on the circumstances – one of the editors interviewed mentioned a recent biography that their company published for which as many as five translators were employed.

As interviewees noted, on the one hand, by using multiple translators, the duration of the translation process could be reduced significantly; on the other hand, more editorial supervision was necessary to avoid stylistic inconsistencies. For this reason, various interviewees stated that they usually employed external proof-readers to check that the style of the translation was consistent throughout the book – as these acquisition editors explained:

Some people have their own style in translating. [...] At the end, we employ someone to really look at the text to make sure that it is not visible that multiple translators worked on it.



You definitely need an editor to oversee the whole thing because you don't want different styles. Of course a translator tries to mimic the style of the author but they are also going to have their own styles. You need to have the same tone. So yes, we do that [employ more translators to translated the same book], but then we check it extra carefully.

In these cases, we have an extra round of editing to make sure we have one tone of voice.

Thus, interviews revealed that the practice of translating from non-final manuscripts and that of group translations not only bore an influence on the publication strategies of Dutch publishers, but also on those of translators. Chapter 7 will be dedicated to examining more closely in what ways simultaneous publication influenced the translation process and the quality of translations according to literary translators.

#### 6.4 Price competition between English-language and Dutch-language editions

As seen in Chapter 2 (cf. section 2.4 and 2.5), price competition in export territories is influenced by a variety of factors, including the benefits of economies of scale (which applies to UK and US editions), differences in production costs, the effects of price regulation policies, the advent of internet bookselling, the influence of translation costs, currency exchange rates and the presence of low-priced export editions in the market. When comparing prices of Dutch and English-language editions, it is necessary to consider how all these issues come together in determining the price point of both editions.

The majority of Dutch editors interviewed claimed that English-language publishers held a privileged position when it came to prices. Nevertheless, since

there are no available statistics comparing the prices of local and imported editions, it is difficult to corroborate this statement with statistics.

According to interviewees, the factors that made it challenging for Dutch companies to compete with their Anglophone counterparts can be summarized as follows:

1) The scales of the two linguistic areas are substantially different. On the one hand there are Anglophone publishers in the US and in the UK, catering to a readership of respectively 320 and 65 million only in their domestic markets (not to mention the ever-growing number of readers in export markets); while on the other there are Dutch publishers, catering to a population of 21 million Dutch/Flemish speakers (including Belgium). Of course, this has a major influence on print-runs (the average print-run in the Netherlands being between 2.000 or 3.000 copies; Frankfurter Buchmesse, 2015a) and – consequently – on unit costs, which tend to be higher for Dutch publishers.

2) Dutch publishers – similarly to any other publisher dealing with translations – have to factor in translation costs.

3) In the Netherlands a fixed book price system (enforced by law) regulates prices of Dutch-language books, including translations into Dutch. However, the same regulation does not apply to imported editions, which can instead be discounted without restrictions by retailers (cf. section 2.5.2). It must be noted that Dutch-language books produced outside of the Netherlands (e.g. in Belgium) are considered foreign editions and as such are not subject to fixed book price regulations (for more information on FBP regulations and cross-border circulation within homogeneous linguistic areas see note 32, p. 90).

As summarized by one acquisition editor, these three factors often contribute to make Dutch editions more expensive than English editions:

We have the fixed book price in Holland, [...] translation cost and lower print-runs. All these things make our editions always a little bit more expensive. It can be cheaper for Dutch people to order on Amazon and have the book shipped to Holland than buying the Dutch edition.

Establishing in abstract terms whether English-language editions are cheaper or more expensive than Dutch ones is extremely challenging, mostly for two reasons. Firstly, while Dutch-language prices are pretty much stable due to the Fixed Book Price system<sup>63</sup>, prices of English-language titles vary greatly from one retailer to the other, due to the lack of any price regulation policy. Since Anglophone publishers are able to discount their titles as they see fit, different retailers will obtain different discounts and this, of course, will be reflected in the prices offered to consumers. As a consequence, the price of one specific English title on Bol.com (the main Dutch online retailer) could vary substantially across different retailers. In addition, given that cross-border online purchases are common in continental Europe (cf. 2.4), a comprehensive examination should also include a comparison of the prices offered by various foreign online retailers (e.g. Amazon.co.uk, Amazon.de, Amazon.com, Book Depository, etc.), to which Dutch customers can easily resort for buying books online.

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<sup>63</sup> Monitoring Dutch-language titles is not as challenging since retail prices tend to follow the price point set by publishers (the amount printed on the cover). A broad-spectrum quantitative analysis of prices in the Dutch book market for the period 1980-2009 has been carried out recently (see Franssen, 2015).

Furthermore, as stressed by various interviewees, when discussing prices we have to bear in mind another important factor that comes into play: the format of the edition. In the American and British markets it is customary that first editions are released first in hardback format and then in paperback a few months later (Thompson, 2010). In most of continental Europe however, including the Netherlands, the most common format for first editions is trade paperback (i.e. C format, 135 x 216 mm), which can be described as a soft cover version of a hardback edition – as explained by this interviewee:

The difference between the Anglophone market and here is that we don't have such a strong distinction between hardback and paperback... We don't do a hardback first and then the paperback a year later. We do hardback and paperback at the same time, or a paperback immediately.

As noted by one acquisition editor, the price point of English-language hardback first editions compared to local trade paperbacks tended to be equal, or slightly in favour of Dutch translations, as claimed by this acquisition editor:

Usually Dutch books are cheaper than UK versions because in the Netherlands we usually publish paperbacks instead of hard covers. That makes our editions cheaper.

However, when Anglophone publishers produce cheap paperback editions specifically aimed at export markets (export editions), the price correlation between the English-language edition and the Dutch one is likely reversed, with Dutch translations being more expensive than export editions:

Some books are produced as export editions, so you find them at airports and they have aggressive pricing. They are cheaper than the original edition back in the UK and they are cheaper than our edition.

The remainder of this section will analyze the perspective of Dutch publishers on export editions and pricing in order to establish to what extent the presence of cheaper editions is perceived as a threat.

One acquisition editor stated that in their opinion pricing did not weight on readers' decisions of what language to buy:

I don't think the price is the main reason to convince the readers. I think that they either want to read in English or in Dutch.

Two interviewees claimed that, when the price difference between the two edition was minimal (e.g. less than €5), this would not influence readers' decisions too much:

If someone is in a bookstore and sees the English edition for €10 and the Dutch version for €15, I don't think that's something they would base their decision on [...]. I think that people [...] already have in mind what language they want to read a book in.

If it's a couple of euros then I think the people will make the decision based on what they want to read.

However, another acquisition editor stated that, in case the difference was more substantial, price could become a determining factor in steering a readers' choices to purchase one language rather than the other. This interviewee used the case of a best-selling thriller in their list to illustrate this point. Although the title and the author in question are kept anonymous for reasons of ethics, details of the publication can be outlined to illustrate how different factors – in this case, release date and price – are intertwined with each other and can intervene to steer readers' choices. The title (by a major British author) was released in the UK in

September [year not specified] and in the Netherlands in the April of the following year. By the time the title was released in Dutch, the English-language edition had been out for seven months already and was therefore available for a heavily discounted price. According to the recollection of the editor interviewed, the English-language paperback was available in the Dutch market for around €10, while the Dutch first edition was priced €24.99. As noted by the publisher, sales of the English-language edition were higher than normal for this title (the imported version sold around 5.000 copies, according to the Dutch publisher). This example clearly illustrates that delayed publication can be a problem both on account of impatient readers that are reluctant to wait a few months for the translation, and also because it can result in substantial price differences that might in turn influence readers to buy the original edition.

When asked whether the presence of cheap export editions in their domestic market felt unfair to them, interviewed Dutch publishers undisputedly agreed on condemning aggressive export strategies, remarking that it was especially unjust that Anglophone publishers were selling their export products for cheaper than they charged for the same product in their domestic markets, as two acquisition editors remarked:

Of course, they can publish their book in hardcover, but they shouldn't dump their export editions in my market [...] They sell cheap paperbacks and the same format is not even for sale in the UK. I can't compete!

Probably they're not meant to hurt Dutch publishers but it's such an obvious effect. If there's a cheap English edition, even cheaper than what you can buy in the UK or the US, competing with our edition while we have higher costs producing the book. It is annoying, yes.

As a few interviewees explained, given that the Netherlands was such a small player with limited negotiation leverage, taking a stand against the introduction of export editions in the market was unlikely to produce results. For instance, one participant claimed to have once tried (with no luck) to obtain a refund of the advance paid for the book, due to the fact that the original publisher was exporting their edition aggressively in the Dutch market:

I definitely tried. For instance, with authors like [name of best-selling American author] I'd say "please hold the export edition". [...] I tried to get part of my advance back because there were export editions on sale, but there's nothing you can do really.

Other interviewees, when discussing this issue, instead adopted a rather pragmatic approach, and acknowledged that the interests at stake for Anglophone companies are too high for them to renounce to export sales, as these two interviewees pointed out:

Once I tried to mention this, but the publisher is not always the rights holder. [...] Publishers understand the problem but they have their policy in mind and this is just one more way for them to make money and of course, just like anybody else in publishing, you look for ways to make a little bit of money. For them it's extra money, but for us this market is our basis. For them it's like: "okay, we can sell a little bit more in the Dutch market if we don't export just our expensive edition. Let's try and do that!"

In the end we are a very small country. If you have a big name [a popular author] you can imagine that a UK publisher pays a lot of money to publish a certain author and they want to earn back their investment and they are lucky enough that they can actually export their edition to so many countries. Who is going to renounce to that opportunity if they've paid millions to publish that book? Of course they are going to export! It's hard

to say for us “look it’s really important that you don’t export” [...] We are not important enough if compared to the UK and the US markets.

A similar sense of powerlessness emerged when acquisition editors were asked about their ability to compete on price with English-language editions. One interviewee explained that, even though they had recently tried to release a YA title for the same price as the original edition, they realized that Amazon had discounted the title after one week from release, thus making their efforts pointless:

We really tried to have the same retail price [same as English-language edition(s)], but within a week Amazon dropped the price so our edition was still the most expensive one and it was in that moment that we realized that it doesn't really matter. I really think it's very important to have realistic prices so that you can always explain to people that you're not getting rich from standard book prices.

Similarly, another publisher pointed out that the attempts to compete on price are most of the time fruitless and frustrating for Dutch companies – especially due to Amazon’s aggressive discount policy:

Recently I published a book about [name of TV series]. [...] It was an homage to the series, with gold foil, etc. and it costed 30 €, but Amazon discounted it to 15 €. There was no way that I could compete! [...] We can’t do that, because it isn’t allowed [due to the FBP] and because we don’t have the numbers to do that. Amazon doesn’t make its money on books... it makes its money on traffic. We don’t, we need to sell the books at the price we set otherwise we lose money.

Even though interviewees largely agreed that fixed prices made the pricing strategies of Dutch publishers less flexible, they also declared (basically



unanimously) to be in favour of the fixed book price system, since they felt that they would not be able to compete with Anglophone prices and aggressive discounts anyway due to the overall smaller scale of the publishing market in their country:

We can't play with prices in the way we sometimes would like. But I am a firm believer in the fixed book price.

Due to the effect of translation costs and lower print runs, matching the price of foreign titles was found to be extremely challenging by Dutch publishers; as such, this objective was admittedly not driving their pricing strategies.

Throughout the interviews, participants explained what principles they felt actually contributed to shape their price choice. Since the broader dynamics underlying price policies are beyond its scope, the present analysis is limited to discussing some of the evidence emerging from the interviews, which largely confirm the findings of a recent study on pricing strategies in the Dutch fiction market (Franssen, 2015).

As obvious as it might appear to be, when setting book prices, publishers' decisions are mostly influenced by the expenses they face for producing a title, including the cost of acquiring the rights, the costs of the translation and printing, as well as their overhead costs (Thompson, 2010; Greco et al, 2014; Franssen, 2015). As a consequence, the vast majority of interviewed editors explained that they were not influenced by the price of the competing English-language edition(s), but rather by the cost of the edition and its predicted sales:

Prices are more calculated on what we spend here than what the price in another country is. So if I am publishing a book I think how much I paid

for the manuscripts, how much the royalties are, what paper, what cover, what did the translation cost me. That makes the price of my book and I don't really compare it to the other prices in other countries.

Even when publishers were aware that the imported edition of the title they were translating would be cheaper (and this is not necessarily information that foreign publishers share ahead of the release), it was often impossible for them to adjust their prices to match Anglophone ones – as remarked by various interviewees:

We have translation costs which are, for a YA novel, between 4.000/6.000 €. The print run is totally different. Our first print runs are about 3.000 copies, whereas the US and UK are way higher, so if you have to divide all the cost over such a small print run, you will never be able to have the same pricing.

I can't publish a Dutch edition for 10 euros. It's not possible for me, so I stick to my own plan and hope that they [readers] won't buy the English edition.

A really big book, with the cost of translation which is high... you have to go up. You disregard what happens to the [price of the] other edition.

As noted above, translation increases the production costs of a title. One editor stressed that, especially when it came to translations, the length of the text (which has a direct influence on the translation cost) is the main factor determining the retail price of a title:

My price is determined mostly by my translation costs. Usually I go about this like this: I can sell a book *this thick* for *this amount* [italics mine].<sup>64</sup>

Another participant explained that long texts can be problematic since higher translation costs will in turn result in a higher retail price, which does not allow the title to be competitive vis-à-vis the imported edition:

Translation costs will be so high that the price of the book will be far higher than the original book. This might be a reason not to acquire big books.

It is important to note that for most participants, the costs they incurred to publish a book were not the only element determining their pricing. Market conventions were also felt to play a crucial role in this respect (cf. Franssen, 2015: 127-128; 132). Interviewees claimed that prices tended to be rather uniform in the Netherlands; in particular, one editor claimed that the choice was usually limited to a series of price points that were prevailing for a particular genre/format in the market and therefore recognizable to readers:

There are three prices in Holland: €19.95, €22.50 or €24.90. Usually it's not a long discussion... it's more like which one to choose.

Another element that was briefly discussed by some publishers is the role played by variable costs (mostly material elements like format and binding) in price setting decisions. Differently from what consumers commonly assume, printing

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<sup>64</sup> The interviewee did not quantify what 'this thick' and 'this amount' meant. The meaning of this remark is that, according to this editor, the thickness of a book is the most important factor to determine its price, given that the thickness is a direct consequence of the length of the text which in turn reflects the translation cost.

and binding are usually not the principal expenses publishers have to sustain for producing a book and they therefore tend not to be the determining factor for prices (Franssen, 2015). However, as demonstrated by Franssen, material and visual properties (thickness, format, binding, art work) do influence prices indirectly, in that they are used by publishers to justify prices to consumers.<sup>65</sup> In readers' minds, the material characteristics of a title are the main elements for judging the fairness of prices, i.e. readers tend to associate thicker, larger and more expensive-looking formats (e.g. hardbacks) to higher price and will therefore be willing to spend more for such books than, for instance, a slim paperback (ibid, 2015). Some of the interviewed acquisition editors confirmed Franssen's findings:

If we have a book of less than 300 pages you shouldn't price it much higher than €20 because otherwise people will think it's really expensive. When the book is bigger and you make it hardback then you can ask for €25.

When you're making a beautiful book with a nice hardback and extra things, then it can be a little more expensive.

Franssen's examination also highlighted that genre can have an indirect influence on price, as up-market literary titles tends to be produced in nicer formats and

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<sup>65</sup> One of the central findings of Franssen's analysis is that publishers tend to adjust the format specifications in order to control prices in a way which results understandable to consumers. Following this line of thought, higher costs can be translated into higher prices indirectly, by altering the material properties of the edition – for instance by typesetting the text in way that will make the volume look thicker, by printing it in hardback rather than in paperback format, or by adding flaps, embossing or other special effects to the cover's artwork – so as to justify a higher retail price to consumers' eyes (Franssen, 2015). Moreover, in order to recoup the expenses determined by translation costs, publishers tend to play with the format specifications in the same way described above (ibid: 130).

can therefore be priced higher than commercial genre literature (e.g. crime or romance) (ibid: 129-130). As one YA acquisition editor confirmed, the level of ‘commerciality’ of a title could determine the price through the mediation/adjustment of material properties:

All my YA are between €14.99 and the most expensive are €19. It's in between those prices and it depends on the book. If it's very commercial, I want to have a lower retail price. If it's very literary, targeted to real book lovers who are willing to spend some money, the price can be higher but then I will publish it in hardback. Usually we publish the more commercial books in trade paperback.

To sum up, this section demonstrated that, given the small size of the Dutch book market and the fact that Dutch publishers had to recoup the translation costs, they could not compete on price with English-language editions, especially if Anglo-American publishers exported their products aggressively (i.e. by producing low-cost special editions for export markets). Interviews demonstrated that Dutch publishers priced their products based on the cost they incurred for producing a book, as well as on the prevailing pricing strategies in the market and on readers’ price expectations in relation to the format and the genre, as also shown by Franssen (2015).

## 6.5 The case of Young Adult literature

As anticipated in sections 6.1 and 6.2, among the various publishers interviewed, those working with YA literature appeared to be the most worried by the growing popularity of English-language editions. However, this conclusion cannot be confirmed with statistical data since in Gfk’s figures YA sales are listed under the Children’s Literature category, where the competition of English texts can be

predicted to be very low or virtually non-existent (cf. 5.3). It can therefore be speculated that the share of Children's English-language sales in Gfk figures is originated almost exclusively within the YA sector (while the share represented by Dutch-language sales is relative to the Children's market as a whole) – therefore meaning that the amount of YA titles sold in English might be quite substantial. Due to the lack of any Young Adult-specific information on this matter, this hypothesis cannot but remain an educated guess. Thus, qualitative data is the most effective way to gather insight into the magnitude of the problems and the effects deriving from the competition of English-language editions.

According to interviewed YA editors, in order to explain why YA literature is so exposed to the erosion on the part of Anglophone texts, two factors need to be considered: 1) translations from English dominate this sector by a large margin; 2) the target audience is particularly familiar with English and therefore more open to reading in English than any other age-group (De Bot et al., 2007; Berns et al., 2007; Gerritsen, 2016; Edwards, 2016).

The share of translations from English in the YA sector was reported to be extremely high by interviewees, which according to them makes this segment more vulnerable to the competition. Although official statistics are not available, interviewed YA editors estimated that between 80% and 95% of their lists consisted of translations from English. As noted by one YA editor, publishers of adult genres are in a different position than YA ones since their lists usually included several Dutch-language originals. One editor observed that while adult publishers might lose a part of their translation sales to English-editions, they could still count on the full profits of Dutch authors which faced no competition:

There is a huge difference between YA publishing and publishing for adults, since there are many Dutch writers who write for adults. Adult publishing houses might lose readers to translated books, but they still have the income coming from their Dutch writers. In the YA field the most successful books are basically all translated.

The other factor determining the extra preoccupation of YA publishers was the fact that the English-language skills of younger readers were perceived to be on average very high, due to the fact that the Dutch educational system promotes English-language teaching from an early age (Bonnet, 2002; Edwards, 2016; cf. Chapter 1, section 1.3.1). As noted by one publisher “younger generations are more used to encompassing English in their Dutch lives”, which means that they are likely to use English outside of the classroom and in their everyday lives (Edwards, 2016; Gerritsen, 2016). One interviewee described their preoccupation about the high English skills of youngsters in the following way:

The English of the older generations was okay. They started learning English when they were 14 or 15, so their English is okay, it's basic and they speak it fine. But nowadays you can go to primary school and already have English classes. New generations will be raised speaking English from 7 and some schools start even earlier. In high school there are special fast-learning school programmes where you actually have more English classes than Dutch. You get all the subjects taught in English, so the older the young generations will get, the more they will be interested in English books.

One interviewee claimed that online interactions (through book-related blogs, vlogs and social media) represented the most common form of contact with English for young Dutch readers:

I think there are more than 30 book blogs in the Netherlands [that we work with to promote books]. Some of them only write in English. Their blog is about Dutch books – so they review Dutch books – but they do that in English [...]. Readers also follow many English blogs, Instagram [accounts], vlogs where they get to know about English titles. Many Dutch bloggers who blog in Dutch buy English books and then blog about them in English [MS].

According to interviewees, this frequent (active or passive) participation in English-language online readers' communities through social media and blogs, not only contributed to raising the linguistic skills of young readers, but also made them more receptive to the hype around new titles originating in Anglophone markets.

In addition, as noted by one interviewed YA editor, another reason that facilitates the consumption of YA titles in English is the fact that they are usually written in “a more accessible language”.

According to YA interviewees, the factors that made English-language editions attractive to young readers are largely those already discussed in previous sections, namely the fact that reading in English is generally considered a sign of higher status (cf. 6.2), the fact that translations are sometimes released later than original editions (cf. 6.3), and the fact that English books are often cheaper than Dutch books (cf. 6.4).

On the issue of reading in English being perceived as a sign of higher status, one YA publisher commented:



One of the other main reasons is that they [youngsters] think it's cool and they think it's nice to read the original language. [...] They think it's kind of cool to be able to show that you read in English only.

Another interviewee noted that the issue of pricing was another major motivation for YA readers to opt for original editions:

As soon as they get [...] to [the age of] 12, 13, 14 and realize the pricing of books... English books are always cheaper since they don't have the translation cost or anything.

As seen earlier, simultaneous publication is particularly important for book series, since readers will be often impatient to read the following instalment and will turn to whichever edition is available earlier. What makes this particular issue so pressing is the fact that serial publications are very popular in YA literature, more so than in other sectors. To illustrate this point, one participant described what happened to a popular American YA series whose translation rights were recently acquired by their company. The first two translated titles were released simultaneously to the English-language publication and both volumes performed well in terms of sales. However, the translation of the third instalment was delayed (due to reasons beyond the publisher's control) and the book was published later than the original edition, which led to a drop in sales for the Dutch edition compared to the previous books in the same trilogy – as this editor explained:

When the third book came out we saw that the amount of books we sold was lower than with the first and second books in the trilogy. I think half of the people bought it in English!

The same publisher explained that this was a frustrating circumstance since they felt they contributed to making this series and its author successful in the Dutch market, only to later have to resign a large chunk of the sales to the competition for reasons beyond their control. As this editor put it:

We really worked hard to make this series big in the Netherlands! [...] If I do all the effort in translating a book into Dutch, do all the marketing and people hear about the book because I put so much effort in this and then they buy the English title, then where is my share?

In response to these challenges, YA interviewees unanimously agreed that synchronizing the publication with original editions was crucial in this segment, especially with books by well-established YA authors or serial publications.

When asked about the strategies to avoid losing sales to English editions, one YA acquisition editor highlighted the importance of design and illustrations for winning young readers over:

We always try to add something special to our Dutch edition; we really pay attention to how our books look like. We want them to be as beautiful as the English ones, or even more beautiful. If readers are undecided on whether to buy the English or the Dutch edition, they will at least have something really special if they choose the Dutch.

Apart from publishing simultaneously and paying extra attention to the design of their publications – which were found to be common practices in adult publishing as well – two YA publishers described different solutions that they were experimenting with in order to address the issue of English-language competition. None of these practices were mentioned by adult publishers – a further confirmation that YA companies were indeed facing more pressure than

other trade sectors. It is important to stress, however, that such practices were not adopted systematically in the YA field, but were only implemented by two companies out of the four YA companies interviewed. These solutions consisted of:

- Setting up an import programme for books in English;
- Organizing a marketing campaign to encourage Dutch-language reading;

These strategies are described separately in the following sections (sections 6.5.1 and 6.5.2).

### 6.5.1 Import programme

The owner of a small YA company observed that, in their view, “the way publishers earn their money will have to change” in small linguistic areas such as the Netherlands, in order to cope with the increasing success of imported editions. The solution proposed by this company consisted of acquiring English-language stock from distributors and then re-selling it in the Netherlands through the usual distribution channels. According to this interviewee, this practice allowed Dutch publishers to participate, albeit marginally, in the profits generated by the original edition in the Dutch market. Such practice, which was defined by the interviewee as an ‘import programme’, was used exclusively for the books translated into Dutch by this specific company – therefore only in those cases for which the competition of English-language texts was directly impinging on the company’s sales performances. As noted by the interviewed publisher, the main drawback of this strategy is that the distribution of English-language titles in the Netherlands was carried out by many parties at the same time (Dutch and foreign distributors and wholesalers, online retailers, etc.). As a consequence, any

Dutch publisher wanting to sell English-language books in the Netherlands faced intense competition. The solution to this issue advocated by this publisher was for Anglophone publishers to grant exclusive distribution rights to Dutch publishers in the Dutch territory. In this way, Dutch translation rights for a title would be accompanied by the exclusive rights to import and distribute the English-language edition(s) in the Netherlands:

There are other parties also importing the English title, so my title is just a tiny share of all the English books available in the Netherlands. So our strategy was to be cheaper than anybody else, but that way you have to hand in so much margin of your income and it's just very difficult. If the English-language publishing houses would give exclusive import rights [...] then at least you're really sure that, if they buy the English book, it will be yours and not someone else's.

According to this interviewee, the implementation of a similar programme would bring benefits to original publishers, who could rely on the expertise of Dutch publishers in targeting their strategies to the local audience:

I think that the UK and US publishers will start to see that without the local publishers they cannot work. They need us, we know the community, we know what's going on, we know the booksellers, we know the distribution [...] A lot of their income is based on translation rights, so as soon as they start seeing that for us is [...] worthwhile to have translation rights plus the exclusive import rights for the English book then we can really set up something useful. [...] We would do all the marketing here, whereas if you just have importers and distribution companies they don't do any marketing at all and they don't have the community knowledge.

As already stated, this practice has only been implemented by this one company among the ones interviewed. However, an editor at another YA publishing house

was aware of this ‘import programme’ and also expressed interest for the idea, but only on condition that the import and distribution was done on an exclusive basis. Furthermore, a representative from the leading distribution and wholesaling company active in the Netherlands did confirm that some Dutch companies started adopting this ‘distribution’ strategy recently, but failed to provide more information on this practice.

Since this is a new development, it is difficult to establish how feasible the idea is – i.e. whether Anglophone publishers would be willing to set up an import programme on an exclusive basis –, and how many Dutch companies would actually be interested in joining this practice. It is therefore recommended that further research is undertaken in this direction.

#### 6.5.2 #IkLeesNLs campaign

A different attempt to tackle the issue of English-language reading among young readers is represented by a social media campaign, called Ik Lees Nederlands (the hashtag associated with the campaign is #IkLeesNLs) – i.e. “I read Dutch”.

Launched in August 2016 by two of the leading YA Dutch publishers in the Netherlands – Best of YA (an imprint of Unieboek Het Spectrum) and Blossom Books –, together with the YA organizations De Boek Pioniers and Celebrate Books and various bloggers, the campaign’s main aim was that of raising awareness of the importance of reading in Dutch. The initiative was not only intended as a way to celebrate the Dutch language, which according to the promoters of the campaign was often neglected by young readers, but also as a way to reflect on how the widespread practice of reading in English is harming the Dutch YA publishing sector. While avoiding condemning English-language

reading (a practice that is extremely common among the target audience), the campaign explained to young readers that a struggling YA market could ultimately result in less books being translated into Dutch and less events being organized with foreign YA authors. To quote the campaign's press release:

Thanks to this initiative, Diependaal [one of editors that orchestrated the campaign] hopes that readers realize that, if less and less Dutch books are being sold, events and visits of foreign authors to the Netherlands will no longer be supported. She also emphasizes how important it is for readers to read in their native language, since this makes for the best reader's experience ([Unieboekspectrum](#), 2017; translation mine).

To amplify the reach of the initiative, organizing publishers and participating bloggers invited the YA community to engage in the conversation online using the campaign's hashtag. The interactions that followed the campaign's launch provide an interesting insight into this phenomenon from the point of view of readers and bloggers, as exemplified by the following extracts extrapolated from two different YA blogs:

Blog extract 1:

I read much. Very much. Both in English and in Dutch. Although I like to buy cheap English books (and I certainly do!), I am trying to become more aware of Dutch editions. [...] I am glad to join the #IkLeesNLs campaign because I can contribute to the realization that, if everyone continues to switch [to English], it will happen more often that series will not be translated and that authors will not come to the Netherlands. It generally works like this: if an author is not published in Dutch, then he will not visit the Netherlands, no matter how many fans she/he has here (van Ruijven, E. 2016; translation mine).

## Blog extract 2:

Since I have been immersing myself in the book market more, I have started to notice how many books are translated into Dutch and I've realized that their sales support Dutch publishers. I honestly thought that this was true also when I bought an English book since I was buying it in the Netherlands. However, this is not the case and since I know this I don't buy English books anymore. Because, let's be honest, what feels better? To support an English publisher that controls an enormous amount of countries and therefore earns loads of money? Or a Dutch publisher like Best of YA or Blossom Books which can use the money to organize events for you like the YALfest and with whom you can keep in touch on social media? For me the choice was easily made. (Readinge, 2017; translation mine).<sup>66</sup>

Although this is only a small sample of the various blog posts and comments that the initiative elicited online, the opinions of these bloggers showcased above provide a valuable representation of the phenomenon of English-language reading from the perspective of YA readers. Evaluating whether this social media campaign was successful in raising awareness among YA readers and in changing their purchase habits lies beyond the scope of this analysis.

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<sup>66</sup> Best of YA and Blossom Books are two Dutch YA publishers. Best of YA is part of Uitgeverij Unieboek Het Spectrum, one of the largest publishing companies in the Dutch market. Blossom Books is an independent publishing company entirely dedicated to YA literature. YALfestNL is the largest YA literary festival in the Benelux area organized annually since 2016 by Best of YA and Blossom Books (Blossom Books, 2015; 2019; Best of YA, 2019).

In summary, this section has shown that interviewed YA editors found this segment to be the most affected by the competition of English-language editions in the Dutch book market due to various factors:

- Dutch YA lists rely heavily on Anglophone titles (80-95% of the interviewees lists were composed of translations from English);
- Dutch youngsters are increasingly proficient in English due to the emphasis on English-language training in the Dutch school system (Edwards, 2016) and due to their frequent online exposition to English;
- Serial publications are common in the YA sector, which makes the issue of simultaneous publication even more pressing than in adult publishing;
- Youngsters allegedly consider reading in English a sign of high-status;
- As in adult publishing, Dutch-language editions tend to be more expensive than original editions.

As far as defence strategies are concerned, given that book series are a common mode of publication in the YA sector, publishing YA titles simultaneously to the release of original editions was considered essential in order not to lose readers to the English-language editions. While this practice was found to be very common also in the adult sector (cf. 6.3), interviews with YA editors showed the existence of alternative ‘defence strategies’ that were specific to this sector, namely the creation of an import programme for English-language editions and the launch of an online marketing campaign to encourage youngsters to read in Dutch, rather than in English. In both cases, evaluating the effectiveness of these approaches is beyond the scope of this thesis. However, the mere fact that YA publishers resorted to these strategies is indicative of how the competition of English-language editions was considered a serious issue in this segment and how



profoundly it is affecting YA publisher's activities. In the context of this thesis, the innovative defence strategies described by these YA companies show that the landscape is constantly shifting and evolving, thus making the dynamics of the market difficult to pin down.

## 6.6 Focus on local authors and other languages

Various acquisition editors highlighted the existence of a new trend, whereby Dutch publishers were publishing less translations from English and concentrating more on local authors instead – as this interviewee pointed out:

The trend is that there is more Dutch and less international translated literature.

A similar remark was made by another acquisition editor, who also added that they were trying to publish more books from non-Anglophone countries:

We try to publish more homegrown talent and also to acquire rights from countries other than from the Anglo-Saxon territories.

Another editor claimed to be looking to translate books from languages other than English:

We are now looking into different markets. I am trying to find books from Italy and Spain, because nobody can read those languages.

In addition, several interviewees claimed to be focusing more on publishing Dutch-language authors. Two acquisition editors and one literary agent found that the interest for indigenous authors had increased if compared to the past, while the interest for Anglo-American authors had declined:

I think there is a trend where you see that people are focusing on things closer to home than they used to do. There was a trend towards internationalization in the 1970-80s.... then there was a lot of interest in international literature, more so than now. I think it's not the same as it was 30 years ago.

If you look at the bestsellers list now, as opposed to 10 years ago, you'll notice that a lot of the bestsellers now are Dutch, and a lot of them 10-15 years ago were the global bestsellers, like big thrillers originally in English [...] Even with thrillers: the best sold thrillers now in the Netherlands are those that take place here in Holland. Before it used to be New York, Chicago, but that doesn't happen anymore.

I have been selling rights to the Netherlands since about the year 2000 and I would say that over the last 16 years [...] publishers are acquiring fewer English-language authors' rights than they used to do. And it's also true to say that they're publishing more Dutch authors than they used to. [...] If you want to demonstrate this take the top ten bestseller list in non-fiction in 4/5 European markets [...] and look at those lists now, 6 months ago, a year ago, two years ago, five years ago and going back in time. What you'll see is a very steady decrease in the number of English-language books in the top ten.

One acquisition editor linked the increased focus on Dutch books to a cultural shift whereby readers prefer to read about things that are familiar to them:

I think people want to read more about what they know, so they know for sure that the money they spend is spent on something they are sure they'll like because they know it [...], they don't want to spend money on exotic stuff.

This view was reflected also by one literary agent who claimed that this focus on local cultural products is common to the whole of Europe and is not exclusive to literature:

My personal view is that there has been a colossal rise in parochialism in Europe and I think we see this politically as well. People are more interested in what's going on on their own doorstep.

According to this literary agent, the growing interest for local cultural products did not only affect the market for Anglo-American translations, but also meant a widespread decline of translations from other languages. This interviewee stated that, despite occasional peaks of popularity for books from certain languages (e.g. Scandinavian crime), on the whole European publishers' lists were less diverse, due to the fact that company operated in increasingly challenging economic circumstances:

I think that the number of languages being translated from in the various markets has decreased. The strange thing is that you can put that [decline of diversity in publishers' lists] alongside the massive rise of Swedish or Norwegian books being translated where they never were before. You can go back a bit further and see that there was a boom in translations from Spanish in 2004/2005. I think *The Shadow of the Wind* by Carlos Ruiz Zafón was one the titles in the vanguard of that. You get these trends maybe centred on a particular language, but the overall trend is that publishers are finding it harder to sustain a truly diverse translated list because of the more challenging economic circumstances in recent times.

One Dutch acquisition editor also established a specific link between the crisis that affected the Dutch book market (Franssen, 2012) and the decline of translations in favour of Dutch authors:

The market is struggling [...] so I think there're going to be less translations, and more Dutch authors.

One literary agent stated that in his opinion publishers in various markets had realized that fostering local authors could be more profitable for them, given that local authors were easier to market and were cheaper since there were no translation costs involved to publish them:

Publishers in Scandinavia, the Netherlands, etc. realized that it's a lot cheaper to foster local talents and to access all the benefits of having an author that lives in your country, they understood that it's easier to promote them. I would say that there has been a sort of cultural shift in entertainment that has been building up quite steadily in the last 15 years. You only have to look at the massive crime wave coming from the Nordic territories [...]. That is a very good example of publishers realizing that there's a huge wealth of local talent that hasn't been properly exploited up until recently.

Various acquisition editors agreed that one of the main drives behind this shift towards Dutch authors is the fact that they were easier to market, since they speak Dutch and are available to do promotional activities locally (e.g. TV shows, blogging, etc.) – as remarked by these two acquisition editors:

Because book sales aren't as high as they were, we find we have to look for new ways of marketing and lots of marketing is getting out there, people blogging, people being on television. If you don't blog in the language then you're losing a big part of your buyers.

It is simply easier to market and sell books from Dutch authors, because they are available for interviews. Since they are in the same cultural context, it's easier to get their message across.

Another acquisition editor explained that, when publishing Dutch authors, publishers felt more in control of their content since they had more freedom to organize promotional activities without having to abide to the specific contractual agreements made with the rights holder (e.g. the author's agent):

I think the idea nowadays is that the better you are in control of the content you publish, the more you can do with that. With translated fiction you have a very specific contract for very specific things you can do with that. [...] In a difficult market, you want to be able to do whatever you can. [...] For instance, you can have your author write a short story that goes with the novel. You can give away the e-book for certain audiences, which normally you cannot do when you have a contract with an agent. Well, you can but it takes more effort. I think that's one of the reason why [...] more publishers focus on Dutch authors.

In addition, various interviewees confirmed that another key drive behind this trend is the fact that publishing Dutch-language books is much cheaper than publishing translations, as this editor and literary agent explained:

It makes sense to say let's have that one author who writes in Dutch, publish that book which cost me almost nothing and let's see if we can turn it into a success. At least I don't have to spend €5,000 for the translation and I have the author present to do interviews.

Translation is expensive, you have to buy the rights, you have to be prepared to pay the author an advance and then find a translator and pay him or her. Before you even get a translated book out on sale, you're in for probably £10,000 of expenditure.

One interviewee added that cost considerations were especially pertinent to translations from English, since there are usually no subsidies in place to support

translations from English, whereas other languages frequently have translation subsidies that help foreign publishers cover the translation costs:

Translations are expensive, especially from English. Other languages have subsidies in place – not always but sometimes. For instance, if you translate something from Czech or Polish, there is usually the possibility of getting some subsidy. Most of the English-language market is a huge investment and you need much higher first print runs to be able to make money or even in order not to lose money.

According to one literary agent, although the competition of English-language editions reduces publishers' ability to profit from translations, this should not be regarded as the only drive behind the growth of local-language content in Europe. This agent used the example of Sweden to illustrate their take on this complex phenomenon. In their view, the recent boom of Scandinavian literature worldwide was linked to the fact that Swedish publishers saw their profits reduce progressively, due to a variety of different factors (including the economic crisis, the decline of book-clubs, the advent of internet bookselling, etc.). Publishing companies in Sweden therefore adapted their strategies by focusing on nurturing local talents (and then exporting them in other parts of the world) and by cutting back on translations from other languages:

It's a complex story, not a simple story of predation by the English language... that's a factor but that's not the determining factor. [...] There are a huge number of factors that came together: the economic downturn, combined with a general shrinking in the bookselling business in Sweden, the shift away from the paperback, the gradual decrease of book-clubs in Sweden [...]. The amount of money that Swedish publishers could afford to put into acquiring rights shrunk so their strategy has been to focus on the areas that they could make money from – that's to say, building

Swedish authors and other Nordic crime writers and then selling them to the rest of the world. That's where they have invested very, very heavily and made a lot of money; at the same time, they have cut back the number of commercial titles they have been publishing in translation.

Albeit focused on Scandinavia, this analysis sheds light on the motivations behind this widespread shift towards local authors in various European contexts and provides a valuable suggestion for future research into this phenomenon.

To sum up, the data indicated that publishers in the Netherlands have concentrated increasingly on publishing Dutch authors at the expense of translations. This shift towards local content was linked by interviewees to the fact that Dutch authors were considered easier to market and to the fact that publishing Dutch originals were cheaper since there were no translation costs involved.

## 6.7 Summary and discussion

As highlighted in the literature review, Craighill's PhD thesis and the ensuing publications are the only studies exploring European publishers' reactions to the competition of Anglophone original editions (Craighill, 2013; 2015; see section 2.3). According to Craighill's data, interviewed Swedish publishers recorded a growing difficulty in publishing translations from English since an increasing number of Swedish readers preferred to read in English (ibid). One interviewed publisher claimed that due to the competition of English original editions, Swedish publishers had ceased to publish genre literature such as fantasy fiction since they struggled to profit from these publications (Craighill, 2015).

Building on these findings and based on the data emerging from qualitative interviews with Dutch publishing professionals, the present study provided an

extensive review of how Dutch-language publishing professionals perceive the competition of English-language editions and how publishing companies have adapted their strategies in order to be able to cope with this issue.

With regard to the research question “To what extent Dutch publishers perceive the competition of English-language titles as a threat?” interviews showed that participants had different takes on the role of English-language editions. While some interviewees appeared highly concerned by the competition of English originals (e.g. YA publishers), others downplayed the role of imported editions, stating that the competition represented a problem only for “certain books”. Notably, most interviewed acquisition editors admitted that they did not monitor sales of English-language editions systematically; as such, their judgement on whether English-language editions represented a threat to their companies was mostly based on intuition and ‘gut feeling’ – as admitted by some interviewees.

As described by Greco et al. (2007) and Thompson (2010), publishers generally evaluate the commercial potential of a manuscript by contrasting the costs involved for producing the book to the book’s projected revenue, using a so-called profit and loss sheet (P&L). As showed by Franssen and Kuipers (2013), such calculations play an important role in Dutch editors’ translation rights acquisition choices (Franssen and Kuipers, 2013). Interviews in this study showed that Dutch acquisition editors routinely assessed (on a title-by-title basis) the level of risk posed by English-language originals when considering Anglophone manuscripts for acquisition. In case the risk was regarded as too high (i.e. if the competition could impinge on the commercial viability of the publication), editors could decide to reject manuscripts on this basis. The fear of competition from English-language editions was found to be an additional element that Dutch publishers’



factored in when evaluating the commercial viability of a manuscript. More specifically, this thesis demonstrates that the perceived risk of competition from English-language editions also plays an essential role in Dutch editors' rights acquisition decisions.

Although acquisition editors appeared confident about their ability to judge which manuscripts were at risk of being predated by the English editions, they were elusive when it came to specifying their evaluation criteria (Franssen, 2015). Assessments appeared to be based mostly on intuition, gut feeling and internalized knowledge of the field, rather than on explicit and quantitative grounded criteria. When asked to indicate which criteria they took into account to assess the risk of competition, acquisition editors mostly referred to circumstantial factors and examples, rather than definite criteria. The way interviewees described their assessments and their decision-making process supports Bourdieu's notion of 'feel for game' – i.e. an internalized knowledge of the logics of the field that social actors develop by participation in the field (Bourdieu and Johnson, 1993; Thompson, 2010).

The factors that interviewees took into account when evaluating whether a title would be at risk of suffering from the competition of English-language originals included: the age of the target group, the level of anticipation for the release and the level of popularity of an author, the book's genre or sub-genre, the subject matter, the style of the writing and whether a title belonged to the up-market or commercial spectrum of the market. According to interviewees, the following categories of books tended to be more subjected to the competition of English-language editions:

- Books aimed at a young target audience (e.g. YA literature);
- Books belonging to the up-market spectrum, whose target audience were highly educated readers;
- Specific niche sub-genres such as fantasy, sci-fi and business books;
- “Big books” around which there is “buzz” (Thompson, 2010), or highly anticipated books by established authors;
- Books with specific stylistic features (e.g. unique voice of the author) for which the mediation of a translator could be perceived by readers as diminishing the authenticity of the reading experience.

In terms of the second research question “what strategies do Dutch publishers adopt to avoid losing readers to imported editions?”, one defence mechanism consisted of adapting their rights acquisition practices by avoiding translations which were considered too risky. Another way in which the fear of competition from English-language originals influenced rights acquisition practices was by inducing Dutch publishers to buy the translation rights of Anglo-American books early on, so as to allow synchronized publication with original English-language editions.

Franssen described Dutch editors as being in a constant “hurry” when acquiring English-language translation rights (significantly more so than with manuscripts in other languages), due to the size and the speed of the Anglo-American market (Franssen, 2015: 99). As further noted by Franssen, when buying English-language manuscripts, Dutch editors rarely waited to see how a book did in the original territory; instead, they often bought Anglo-American translation rights early on (*ibid*). This thesis confirmed Franssen’s conclusions and supplemented them with an additional finding: not only Dutch editors bought English-language

manuscripts faster due to the speed and abundance of publications in the Anglophone market, but also because they needed to publish Dutch translations simultaneously to original editions in order to avoid losing readers to English-language editions.

As to defence mechanism, simultaneous or early publications was unquestionably perceived as the most tangible way in which the presence of imported editions influenced the publication strategies of Dutch publishers. Publishing Dutch translations simultaneously or in advance of original editions was considered essential by interviewees to avoid cannibalization from original editions, especially in case of highly anticipated books, books by established authors and book series – but less so for debut authors.

Synchronized publication was regarded as a necessity particularly for publicity and marketing reasons. According to interviewees, due to the transnational nature of the publishing market, the hype surrounding popular titles tended to spread quickly from the Anglo-American field to other markets. Therefore, in order to benefit from the hype generated in the original territory Dutch publishers strove to publish their translations simultaneously. This issue was found to be exacerbated by the fact that Dutch media often review English-language books upon release of the original edition, without waiting for the Dutch translation – therefore effectively assisting sales of English-language editions.

Publishing simultaneously was shown to bear a deep influence on various aspects of the publication process, from rights acquisitions (i.e. editors sometimes declining manuscripts in case they could not publish simultaneously), to publishing and translation practices. In order to publish simultaneously, Dutch publishers not only have to be quick in acquiring translation rights, but they also

have to translate rapidly. To do so, they often demand translators to use partial or non-final manuscripts as source texts, as well as employ teams of translators to accelerate the process. The effects that such practices have on the translation process and on the job of translators will be explored further in Chapter 7.

As YA publishers are the most affected by the competition of English-language editions, they appeared to be the ones employing the most creative defence strategies. In particular, one YA publishing company had started an import programme for English-language editions, with the aim to partake in the profits made by Anglo-American editions in the Dutch market. This development has been only partially described in this study and is not documented anywhere else. This novel solution to the issue of competition from English originals represents an interesting development and is certainly a promising avenue for future research into this subject.

Price discrepancies between English-language editions and Dutch translations was another key issue that often surfaced in interviews. Most interviewees acknowledged that the overall small size of the Dutch market (which results in lower print runs), the presence of low-priced Anglo-American export editions and the influence of fixed book price regulations for Dutch-language titles often contributed to make Dutch editions more expensive than their English-language equivalents. When readers' decisions of buying foreign-language editions were dictated by price, Dutch publishers felt that they had limited chances of influencing consumer behaviour, since they could not match the prices of English-language editions – mostly due their limited print runs (therefore resulting in higher unit costs for their titles) and to the fact that they had to factor in translation costs. This thesis confirmed what was found by Franssen, i.e. that

the main elements influencing Dutch-language price strategies were publishers' calculations of costs and sales projections (P&L), the price conventions present in the market and, finally, readers' expectations about book prices in relation to the format and the genre (Thompson, 2010; Greco et al. 2014; Franssen, 2015). Despite the widespread frustration of Dutch publishers for their inability to compete on price with English-language editions, this analysis showed that this issue did not alter their pricing strategies in a tangible way.

Lastly, some interviewees stated that they were increasingly publishing Dutch and non-Anglophone authors, instead of Anglo-American ones. The main drivers behind this shift according to interviewees were: 1) the fact that Dutch originals and non-Anglophone books were considered cheaper to publish (i.e. advances were generally lower and there were no translations costs involved); and 2) the fact that Dutch authors were found to be easier to promote, as they could participate in local promotional activities more easily than international authors. In addition, some interviewees claimed that readers were simply more attracted by local authors. This finding challenges the notion that the European book market is dominated by Anglo-American books and could be indicative of a trend change in the dynamics of book circulation in Europe (cf. section 2.1.1; Heilbron & Sapiro, 2007; Heilbron, 2008; Sapiro, 2008; 2010; 2014).

The fact that a growing number of Dutch readers preferred to read books in English was found to be one of the factors discouraging Dutch publishers from publishing Anglo-American authors, thus confirming Kovač & Wischenbart's hypothesis and Craighill's findings in Sweden that suggested a link between the decline of Anglophone translations and the growth of English-language reading among Europeans (cf. section 2.3; Craighill, 2013; 2015; Kovač & Wischenbart,

2009a; 2009b). However, this thesis also showed that the motivations behind this phenomenon were more complex and diverse. Interviewees linked their choice to publish more local and non-Anglophone literature to cost issues (local and non-Anglophone authors were found to be cheaper), as well as to issues related to publicity (local authors were considered easier to market to a Dutch audience). In addition, some interviewees established a direct link between the decline in translations from English and the crisis that invested the Dutch book market in the aftermath of the 2008 economic crisis, which in many cases forced Dutch publishers to cut their expenses (Franssen, 2012).

These conclusions can be said to have several implications for future research into translation flows and literary diversity in Europe. Firstly, further research should be devoted to documenting whether the decline of English translations described in this thesis can be verified with statistical data (e.g. by performing a quantitative analysis of publishers' catalogues and European sales charts throughout the past two/three decades). Secondly, further research should be dedicated to establish the motivations that are driving this (alleged) change in publishers' acquisition patterns in more detail.

## Chapter 7: Translating against time

### 7.0 Introduction

Interviews with publishers and other members of the Dutch publishing industry (cf. section 3.6 for information on the sample composition) indicated that releasing translations from English at the same time or in advance of the original edition is a common practice in the Dutch book market. As argued in section 6.4, simultaneous or early publication is used by Dutch publishers as a defence strategy in order to avoid losing readers to English-language editions and to minimize the effects of competition on Dutch publishing companies (see sections 6.4 and 6.4.1).

This pressure for simultaneous or early publication appears to be not only influencing publishers' strategies, but also translators' activities. Interviews with Dutch acquisition editors indicated that the main ways in which the rush for early or simultaneous publication affected the translation process was by reducing the time available for translating, thus placing high pressure on translators. In turn, tight deadlines have stimulated the practice of co-translation as a way to catalyze the translation process, and encourage publishers to begin the translation process early, often entailing the employment of non-final manuscripts as source texts.

These findings prompted an additional research question:

*How does the time pressure to achieve early or simultaneous publication affect the translation process from English to Dutch? Is this pressure affecting the quality of translations according to translators?*

In order to answer this question a set of interviews were conducted with ten literary translators and one free-lance editor with extensive experience in editing and proofreading translations and co-ordinating group translation projects (cf. section 3.6).

The presentation of the data resulting from interviews with translators will be organized into three sections exploring translators' perspectives on working under time pressure (7.1); exploring the issues that arise from using non-final manuscripts as source texts for the translations (7.2); and exploring the dynamics of co-translation (7.3). The data is then analyzed and discussed in section 7.4.

### 7.1 Translating under time pressure

Four translators out of ten felt that the time pressure for delivering translations has increased considerably over the period in which they have been active (three of the translators making these comments were senior ones, with 25-30 years of experience as literary translators). This is exemplified by their remarks below:

The pressure and the pace have increased enormously.

Pressure from publishers started only in the last few years. It's harder to do translations on my own now, but I prefer to do it on my own.

Things have changed dramatically [with respect to time pressure].

It has happened more often over the last few years that I had to translate with other colleagues because I think deadlines are tighter now.

Conversely, five interviewees claimed that since they started working as translators the time pressure for delivering translations has always been high and



they have not noticed a significant change in this respect – as this quote illustrates:

I think there has always been time pressure. I don't think it has changed a lot, to be honest.

A number of interviewees claimed that this time pressure is usually caused by the fact that Dutch publishers aim to achieve simultaneous publication with the original edition or by the fact that they aim to have the translation out before some promotional events (e.g. TV presentations, etc.) – as the following quotes exemplify:

Usually the argument is that publishers want to have the translation published simultaneously or very shortly after the publication of the original because they think that people will buy the original if the Dutch translation is not available.

Either they [the publisher] are trying to publish the book simultaneously or shortly after the English book or there is some event for which the book needs to be finished in time. Sometimes it's just that they have planned the book presentation and they hope it will be on TV.

For [name of best-selling American author] the publisher wanted the translation to be out sooner than the original. [...] There was a lot of pressure because the author was coming to Holland and everything had to be arranged [...] so the publishing date could not be changed.

Right now I finished a book that I was told should coincide with an exposition [...]. They wanted the book to be out at the same time [as the exposition] [...] [so] I had to rush that project.

Two interviewed translators linked the problem of increasing time pressure to another two issues; namely the length of books – which according to them has increased in recent years – and the fact that final manuscripts tend to be delivered later by original publishers/agents:

Translating a whole book on your own is becoming increasingly rare. Of course, that also has a lot to do with the fact that books seem to get thicker and thicker, 700 pages are no exception, and publishers usually want the translation within 3 months.

Manuscripts tend to arrive later and later and so they have to be split up between two or more translators to get a book out on time.

Two translators explained that in their view tight deadlines and high time pressure are a typical feature of translating bestselling authors:

With very successful authors there has always been pressure. I have been translating [best-selling American author] for 11 or 12 years now. At the beginning she was not famous so there was no pressure, but after a couple of years she became famous in the States, in Holland, everywhere. That's when the pressure started. Her translations involve a lot of pressure, she writes big books of 120,000 words at least. The last one was 150-14,000. I had to do it in three months, which is ridiculous.

I don't get it really often [translating under tight deadlines]. [...] The books that I do usually don't have to be put on the market in a hurry. They [the publisher] get the manuscript from America, for instance, and then we have enough time to do it. [...] I think it happens only with the very big authors that they do that [imposing tight deadlines].

In order to provide a concrete example of the time pressure involved in translating best-selling titles, one interviewee recalled the following anecdote in

which they criticized the fact that the publisher prioritized simultaneous publication over ensuring continuity in the choice of the translator:

I know of one translator who had translated a few books by an author, a well-known and successful one. [...] While the author was writing his new book, he had been conferring with this translator and when the book was finished they [the publisher] asked her if this translator could translate it. [...] She didn't have time at that point and she could only do it later. Then the job went to a different translator – I think that's really painful! The publishing companies value more having the book out in the shops early, than the continuity of working with the same translator.

One interviewee pointed out that projects carried out by one translator alone can also be affected by the issue of excessive time-pressure. This interviewee explained that they regularly translate an American best-selling author alone (i.e. not in a group of translators) and that, given the high anticipation for this specific author's new titles, these translations are performed with a high level of time-pressure so that the Dutch edition can be published simultaneously with the original one. This translator claimed that translating this author "means almost working 24/7 for a couple of months" and that usually the time that remains for reviewing the translation at the end is very limited. This author stated that in their opinion when the time pressure to deliver a translation is as high as in this case, the pressure risks having a negative impact on the quality of the translation:

I would say that generally working under pressure is not a good thing. It takes away from the quality because you don't have the time to contemplate your work. I like to put away a book for, let's say, a week and then read it again and think about sentences, how do I translate names in case of children's books...all kinds of things. But with [American best-selling author] there's no time.

Some interviewees – usually the ones that had been in the business for the longest and who were therefore more established – explained that they do not hesitate to turn down jobs if they felt the time given was not enough to ensure a high-quality translation.

If I really think I can't do it within the time that I am given I just don't to do it.

I can say no if the time is not enough [...] I'd rather say no to a job than do it in too much of hurry. I'm in a position that I can do this. [...] I'll get my pension in a few months' time so [...] I can make my own decisions and I'm not reluctant to say no to publishers.

Almost all interviewees said they relied on the subsidies awarded to literary translators by the Dutch Foundation for Literature.<sup>67</sup> One interviewee explained that the system for assigning these subsidies also had an important influence on their decision to take part or not in highly pressurized translation projects. Since these subsidies are awarded mostly based on the quality of previous works by the

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<sup>67</sup> Translators can apply to the Nederlands Letterenfonds (Dutch Foundation for Literature) to obtain extra funds for literary translations, in addition to the fee paid by the commissioning publisher. The scheme is open to all translators that have done at least one literary translation over the previous four years. When applying for a grant, the translator must have been offered a contract by the commissioning publisher and the contract must conform to the standard agreement (Modelcontract) defined by the Nederlands Uitgeversverbond (Dutch Publishing Association) and the Vereniging van Schrijvers en Vertalers (Writer and Translators Association). Each translator can apply for these funds up to four times every year (cf. De Vereniging van Letterkundigen, 2019). Applications are accepted or rejected mainly based on the quality of the source text and on the experience and track-record of the translator. If the application is approved, the amount of fund awarded will be calculated based on the length of the text and on the expertise of the translator (experienced translators receive a higher rate than beginners). In addition, applicants can request extra funds in case the source text is particularly demanding and requires an extra level of attention. Applications from groups of translators used to be accepted by the Letterenfonds; however, the foundation changed its policy regarding co-translations in 2015. Projects undertaken by more than two translators are no longer subsidised (Nederlands Letterenfonds, 2019).

applicants, any low-quality job can jeopardize a translator's credentials and therefore compromise their chances of receiving such subsidies in the future – as this quote explains:

You're as good as your last translation. For my income I depend 40% on subsidies – if I don't deliver quality, I don't get subsidies anymore. [...] They [the Netherlands Letternfonds] do check everything you do, so one bad hurried translation and you might seriously damage your reputation.

As implied by the statements above, interviewees saw a clear conflict between translating under high time pressure and delivering high-quality standards. This aspect will be further explored in section 7.3.2 in relation to co-translations.

## 7.2 Translating from non-final manuscripts

Interviews with translators confirmed that another way in which time-pressure affects the publication process of English translations is by urging translations to be started as soon as possible after the rights to a work have been acquired by the publisher. In practice this means that in order to speed up the translation process, translators are often asked to begin working on a project even if the manuscript in the original language has not been finalized yet, i.e. at a time when the copy-editing and proofreading have not yet been completed. According to the majority of interviewed translators this practice is quite common in the Dutch book market. Two interviewees described the practice of translating from non-final manuscripts as follows:

The perpetual hurry often makes it necessary to do so, with the irritating consequence that we constantly get new versions which we have to check against the work we have already done.

We usually get manuscripts which are still being edited and/or rewritten in the UK or US. In these cases there is extensive contact by mail with editors/publishers there, often with authors.

One translator remarked that the increasing incidence of this phenomenon is due mainly to the advent of emails and the internet, which facilitate the exchange of material between original publishers (or rights holders) and Dutch publishers:

That is something that happens more often these days than, let's say, 20 years ago. You get proofs, edited proofs, final proofs, non-final proofs [...] That's because of computers, digitization. It's easier to send off manuscripts through mail. It was less easy 15 years ago.

According to most interviewees, in many cases the changes occurring between the draft manuscript and the final one are minimal and therefore easily rectified by the translator – as the quote below exemplifies:

Usually it's almost the final stage when there are some changes coming but they're very minor. For instance, in the case of [title of book] there were roughly ten typos and words edited or deleted. So, very minor details.

Nevertheless, some translators explained that at times the process can be more complicated and time consuming. Two interviewees explained that the text of two books they worked on was substantially altered after they had already started translating. One translator reported an extreme case in which they and their partner had to translate the same book twice since the text had been completely changed by the author at a later stage:

It was a non-final manuscript and there was some hurry involved, so they told us to start with that manuscript. We were almost finished when the final manuscript arrived and it was completely different so we had to start

all over again. We got paid twice for that book because we had to do it all over again. But that was a special case because the father of the author died and she/he had to stop working and that's why it took so long for the final manuscript to arrive and that's why we had almost finished before it arrived.

Another translator described a similar circumstance in which the author decided to delete a specific character from their autobiography in the final manuscript, which meant that the translator had to revise the whole translation making sure that all mentions of this character were removed:

The author described some romance with someone and then it was very carefully removed out of the last manuscript. Apparently, that's because he didn't want to be mentioned in the book. Every last mention of that man was cut out from the book. That was funny! Otherwise it's nonsense really - it takes a lot of time to change stuff like that!

Various interviewees explained that when working on non-final manuscripts they often intervened directly in the copy-editing of the original-language manuscript by reporting to the author or the original publisher the mistakes and inaccuracies that they encountered while translating – as this participant noted:

Often I send lists of typos, incorrect information or suggestions. These are (mostly) welcomed [by authors or original publishers].

One interviewee who regularly translated a best-selling American writer (and who consequently developed a relationship of trust with this author over the years) stated that they usually received this author's manuscripts early on in the process, often when the manuscripts had not been copyedited by the original publisher. As noted by this interviewee, manuscripts often contain mistakes at

this stage, also at the level of the content. The interviewee explained that they often made a list of these mistakes and sent it to the author for consideration:

I usually get the manuscript when it goes to the editor or when the first editor in the original language has looked at it and there are still a lot of mistakes – also spelling mistakes, but I don't pay attention to spelling mistakes or grammatical mistakes. Sometimes there are mistakes like someone has been sitting down and on the next page she/he sits down again. Or someone wearing a white coat and in the next chapter she/he wears a blue coat – that kind of mistakes. [...] I usually make a list of these and send it to the author and she corrects them in the manuscript.

In the case of this specific best-selling author, the Dutch translator explained that they were one of the first people to read the original-language manuscript in the world, which is quite telling of how peculiar the Dutch situation is with regard to the time pressure for releasing translations from English early or simultaneously.

The examples provided so far of course portray rather exceptional circumstances, but they do illustrate how this practice can influence the translation process and, in some cases, even the copy-editing of the original-language text.

As described by interviewees, the usual procedure adopted in cases where a draft manuscript is used as the source of a translation is that as soon as the final proofs (or an updated version of the manuscript) are ready, they will be passed on to the Dutch publisher by the English-language publisher or the author's agent. At this point, the translator will be notified of the changes that occurred between the version they are working on and the final one. To do so, it is common practice for the publisher (either the original-language one or the Dutch one) to make a digital comparison of the two documents and provide a list of corrections to the



translator, which they will then proceed to apply to the translation. This process was explained by one interviewee as follows:

If a publisher knows that there is a more final version, they'll do a digital comparison of the two texts and they'll have a file that shows the differences and that file will go to the translator. That's the best way. The translator doesn't have to compare the final book to the translation, but they can see where the differences are and then change the translated text – hopefully before it goes to the copy editor.

As various interviewees noted, applying the corrections can be rather time consuming in cases where the changes are numerous – as seen in the example of the autobiography mentioned above.

Furthermore, since this process relies on the involvement of a variety of different agents, obstacles can at times arise at this stage. For instance, one interviewee pointed out that the presence of so many intermediaries causes delays, which result in translators being notified late about the changes:

That is sometimes a problem because, once the Dutch publisher has signed the contract, the British and the American publishers don't really bother keeping us updated on the various versions. [...] There are agents, sub-agents... There's a lot of delay in that process and that's the problem.

Another interviewee also mentioned that, although publishers usually provide translators with a list of changes, this list is often incomplete:

I find that many foreign publishers are very sloppy in sending us those corrections. They understand that you can't go through the entire manuscript again when you have a rushed job so they'll send you a list of where they have changed things. That list is never complete, ever! Then

you get the corrections back from the Dutch publisher after you have turned the whole work in [...] and there's always stuff in there saying: "My manuscript says this and that." "Oh, they have changed that too". (...) They [foreign publishers] just say "we've made a change here, write that down on the list" and then forget 5 or 6 changes in the middle.

As pointed out by interviewees, one possible consequence of the situation just described is that the translator could miss some of the changes and therefore the translation will not match the original in some parts – as this interviewee noted:

No doubt we occasionally miss a change or correction, no matter how meticulous we are.

One free-lance copyeditor explained that it is common for them to encounter differences between the Dutch text and the final English-language manuscript while copyediting translations:

The book that I've just sent back to the publisher today was obviously translated from an unfinished manuscript because sometimes I saw a sentence – and I had the book [the original edition], because by the time the job came to me the book was out – and I checked the sentence and it was not in the book. Or there was a sentence in the book which was not in the translation. Obviously, this was not just a careless translator – the translator had a different text from what was in the book.

As explained by the same interviewee, the copy-editor does not “compare every sentence to the original book” – nor does the translator. Thus, to avoid such mistakes or discrepancies, it is arguably essential the list of changes provided by the publisher to the translator is accurate and comprehensive, which asks an extra effort of publishers in order to ensure that the quality and accuracy of translations remains high despite the high time pressure.

### 7.3 Co-translations and their dynamics

Interviews confirmed that one of the most common consequences of working under tight deadlines is the fact that translation jobs often have to be split among more translators so that deadlines can be met to enable simultaneous or early publication. Most of the interviewed translators confirmed that this practice is very common in the Dutch publishing market. This is demonstrated by the fact that all ten interviewed translators had taken part at least in a few co-translations; in fact, many of them co-translated regularly, while some others co-translated exclusively – that is to say that they rarely translated a full book on their own.

Interviews revealed that time pressure is not the only reason why interviewees co-translate and that co-translations are in some cases not an imposition of publishers, but rather a voluntary choice of translators.

The dynamics of co-translations will be further described in the next two subsections – one describing the positive aspects of this practice according to interviewees (7.3.1) and one describing the negative aspects (7.3.2).

#### 7.3.1 Co-translations as a positive experience

Almost all translators interviewed did not regard co-translation as a negative experience *per se*; on the contrary, participants remarked that collaborating with colleagues is usually a fun, instructive and rewarding process. Positive remarks were most often associated with working in small groups – mostly in pairs –, as opposed to large groups, which instead tended to be perceived in a more negative light by interviewees (see section 7.3.2).

Interviews highlighted that pairs of translators that work together on a regular basis are a pretty common phenomenon in the Dutch literary field. A few

interviewed translators expressed a clear preference for working in tandem, rather than translating an entire book on their own. For instance, one interviewee explained that after working for the first part of their career alone, they were now translating with the same colleague most of time. In this case, the two translators are considered by publishers practically as one entity:

Me and my partner are seen as one translator. We have done so many books together now that publishers always come to us together and ask if "we" want a book. They don't ask if we want to do it with someone else.

Similarly, three other interviewees explained that they collaborate with other colleagues on a regular basis. In these cases, they did not consider co-translations as an imposition or a side effect of time-pressure, but instead as a voluntary choice. In all three cases, interviewees explained that they felt working with colleagues improves the quality of their work, as the citations below show:

I have two colleagues I work with regularly, but that has nothing to do with time pressure. It's a choice, it's good to work with someone else once in a while to test your own standards.

Occasionally I work with another translator and it's not because of time pressure, but because we like working together. We think that working together and checking each other's work and being critical of each other improves our work.

As one interviewee explained, there are no set rules for how teams of translators working on a co-translation are put together – they can be put together directly by the publisher, or can be organized by fellow translators:

Sometimes I'd like to work with a translator and I ask him or her if she has time and if not, then I find someone else. It's not always up to me. Sometimes it's the publisher who decides or suggests that I should work with someone. [...] Let's say a publishing house asks three translators if they want to do the job and one or two of them can't do it, but the third one can. The third one is on the team and asks other translators.

This stage of the process relies heavily on the trust relationships that translators establish with their colleagues over the years, as well as on the networks that are in place between publishers and translators.

Most interviewees agreed that when translators in the team know and trust each other, co-translations represent a valuable occasion for professional development, as well as enhancing the quality of the end-result. As pointed out by various interviewees, working in a team can be particularly useful when dealing with challenging source texts, or when a title requires a significant amount of background research – as exemplified by the quotes below:

Sometimes I work with colleagues I've known for ages – it's a constant learning process and we keep each other on our toes. Sometimes I work with exceptionally talented ex-students of mine to help them with the practical aspects of working for a publisher and to become known, so that they get their own commissions. That also keeps me up to date and up to scratch, I learn a lot from them. Generally speaking, translations get better when good, critical colleagues proofread and edit each other's parts of the book.

When it's a really difficult text and there is time pressure then I think it helps when you work with another translator. I think in the end the result is better than when I do it alone. You always have your blind spots and you don't always have the same amount of creativity. Sometimes it helps when

another translator sees your work and comments on that. I think in the end the result is better.

I like the companionship, to talk about the work you do together, to visit each other. But also, the quality gets much better I think. We read each other's work and we correct it, so there's an extra correction round.

I hardly ever had a bad experience in co-translating a book. It's always been very instructive for me and I hope also for the other person.

One interviewee recalled a recent translation project in which they co-translated with a colleague who was more expert on the specific topic of the book (American baseball) and the specific vocabulary associated with it. The translator noted that this saved them time and proved to be very helpful:

I've just done a novel [...] which had a lot of baseball references in it. In this case, working with someone else can save time because the other translator knew more about baseball than I did and did a lot of research for that book. We split the novel in the middle and in her half there was more technical baseball stuff, luckily. [...] This did save me a lot of time because baseball and sports in general are not my thing and it takes a lot of time to research that.

As noted by many interviewees, what is considered to make co-translations an enriching process is the fact that translators consult each other and frequently discuss issues related to the text.

Throughout the translation process and once translators have completed their respective parts, it is common practice to cross-check each other's translation in detail. The cross-editing part of the job consists mainly in polishing the text to eliminate stylistic and lexical differences, thus making the translation as

harmonious and homogeneous as possible. As explained by one translator, this process is usually very scrupulous:

We send each other our work while it's in progress so that we know the tone of each other's work and can adapt to that and can change things. When a translation is finished we correct each other's work before it goes to the publisher. When it comes back from the copy-editor, we read each other works again and also when it comes back in galley format.

As pointed out by two participants, this task is not always easy, as it involves negotiation and compromises between the translators:

During my last co-translation there were things that I mentioned to my co-translator. I said, for instance, that some parts sounded a bit childish as far as the style was concerned. I said that I would like to change them and the other translator agreed. Of course there is a conversation about style during the course of the whole process.

The part of editing someone else's text is hard. That's the most difficult part I think because you don't always agree. You have to convince another translator of the choices you make or why the choices he or she makes are not right in my opinion [...] It's usually about finding arguments and finding the best words as possible and the best sentence possible in that context. That takes up a lot of time.

As eloquently explained by another translator, the ability to be critical and also take in criticism is key at this stage:

You should not be afraid of criticism, the other one has a right to really cut into your translation and suggest things that he or she thinks are better in terms of style or whatever. For instance, two or three years ago I co-translated a YA book [...]; we were very critical of each other, not because we made mistakes, but because we wanted the style to be as close to each

other as possible. I've never had a co-translator that was so hard on me and so I was also hard on her/him. We were just weighing every sentence. [...] It became a beautiful book and we even won a prize with it. I can't put in words how harmonizing the style works, it's a matter of being deeply into the translation and being deeply into what the other one means, says and does and kind of bringing it together.

Most interviewees felt that co-translations usually enhance the quality of translations, rather than compromising it, given the meticulousness of the review process employed by translators. This is exemplified in the two quotes below:

If the translators read each other's work and comment on it, then it can improve the quality of the translation. I am sure of that.

When we work together with experienced and very competent colleagues who proofread each other's part of the translation and comment on each other's work... when that is the case, the translation actually profits.

In summary, this section has shown that co-translations are not always dictated by time pressure or tight deadlines. In fact, a number of interviewees said that they often chose to collaborate with colleagues voluntarily because they enjoyed the process and found it a rewarding and enriching experience that benefits the quality of translations through accurate review and cross-checking of each other's translation. Thus, the data demonstrates that co-translations are in many cases perceived in positive terms by translators and that they are not only regarded as a by-product of the rush for simultaneous publication.

### 7.3.2 Negative aspects of co-translating

As described in section 7.3.1, interviewees said that often they choose to co-translate with trusted colleagues as they enjoy the process and find the experience



rewarding. Nevertheless, translators' perception of co-translations appeared to be different in specific cases where the choice of collaborating with colleagues was dictated less by a voluntary choice and more by issues of urgency and time pressure imposed by the publisher. As noted by interviewees, one important difference that sets these more pressured projects apart is the fact that groups of translators tend to become larger depending on the urgency involved. Such projects, involving high levels of time pressure and larger groups of translators, tended to be experienced as a less rewarding and less pleasant experience in comparison to co-translations voluntarily undertaken in pairs or small groups.

One interviewee said that in their view there is a certain degree of resistance towards this 'pressured' way of working, especially from more senior translators:

There's a lot of resistance to this way of working from the older generation especially. They're strongly against it.

Negative comments from interviewees were most commonly associated with cases where the project was subject to tight deadlines and excessive time pressure. Such circumstances were described by a number of interviewees as negative experiences that could have an adverse bearing on the quality of the end-result. Translators explained that they tended to feel uncomfortable, especially when submitting a project for which they had not reviewed their colleagues' parts, as the following participants explained in relation to working in large groups:

In the case of pressured translations when 3 or 4 translators have to translate a book in 2 weeks [...] – in those cases they don't read each other's work. They can hardly discuss things with each other because there is no time. I think that detracts from the quality.

Three [translators] is already too much. I once did a book with seven or eight people. I worked together with my partner, we did one chapter [...] but I haven't read the chapters from the other people. I don't like that.

I had some beautiful co-operations and a few that went less well. For instance, this year I translated [title of book], and in this case the co-operation went wrong. We didn't have time to review each other's work and that's fatal, I think. I want to review the other translator and I also want the other person to review me.

That's what is affecting quality... if nobody reads each other's part – or if nobody actually reads anything in general, except for the *persklaarmaker*.<sup>68</sup>

Moreover, two interviewees explained that, as a general rule, the more participants who take part in a translation, the less closely involved the parties feel. As noted by this interviewee, the process in these cases can be rather 'anonymous', and participants find it harder to take ownership of the project:

I translated the book with five or six other translators – it was urgent. [...] In these cases it's very anonymous. You only have to do about 150 pages, you deliver your part and you don't see anything else until you get the book in the mail. In other occasions the bond between the translators is very tight, but the more translators there are, the looser the bond between the translators.

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<sup>68</sup> The *persklaarmaker* is the proofreader.

One interviewed translator pointed out that one further negative aspect of co-translations in larger groups is that keeping in touch with colleagues and finding common solutions can be quite time consuming, as this quote explains:

A lot of time is spent conferring with your colleagues. For instance, there was this book that I translated with two other translators; we had an email thread for the project and in the end we had around 3,000 emails in which we discussed matters related to the translation. Things like: how to translate certain words, etc. That takes up a lot of time! It's not just translating, there's a lot of editing and conferring with others.

Another point which was raised by interviewees is that, since co-translations involve such a close reading and cross-editing of other translators' parts, the time that is saved for translators is of scant significance when compared to the process of translating a text alone:

The amount of words you have to translate is less but you have to put more time into copy editing the translator you work with.

It doesn't go any faster because of the high standards we work with. We always read one another's work, we correct the translation again and again. You don't save any time when you work in pairs.

I think the only person that it saves time for is the copy editor, the one who corrects the book. Basically we have already done each other's editing, so I think it saves time for the editor.

We take a lot of time to read each other's work and to correct it and to discuss choices. I think it saves a bit of time, let's say we use three quarters of the time. We get paid less of course, because we each get half of the money. It's just the quality that improves, but not the time.

As mentioned in the quote immediately above, two other translators highlighted that even though they spent a considerable amount of time reviewing their colleagues' work, they were usually only paid for their part of the translation and not for the time spent editing the other's part – hence they earned only half of what they would be paid for doing a full book, even though co-translations normally do not take exactly half the time. As these participants pointed out, financial considerations can have a bearing on translators' feelings towards this practice, and on the frequency with which they are ready to accept joint projects:

If you have a novel of 100,000 words [...] you get paid for the 50,000 words you have to translate, but the other 50,000 that you have to edit or to read you don't get paid for. [...] In a sense, they [publishers] get a copy editing round for free because the translators are copy editing each other's work.

I wouldn't want to work with colleagues always because you earn half the money [and] it doesn't go much quicker.

As noted by one interviewee, the more translators that there are involved in a project, the more challenging co-ordinating a project is. In normal circumstances, the role of keeping in contact with other translators and checking on their progress tends to be fulfilled either by one translator who acts as a co-ordinator, or by in-house editors, as this interviewee explained:

It's easier in those cases if one takes the lead, if one translator supervises the style and everything else. Usually we stay in contact with the others so you can sort of discuss what you want to do with the style. You can ask the others what they would do with certain words and stuff like that. It's easier to have one taking the lead in that. I imagine that, the bigger the group gets, the more important that is. Maybe even having the editor to do that.

In this respect, one interviewee explained that whenever working on a group project they prefer to be in the lead and assume a co-ordinating role:

Six is the maximum I've worked with. This makes things a bit more complex organization-wise [...]. Usually I select the team and function as *primus inter pares*.

According to interviewees, for certain large group projects that have to be completed within a restricted time frame sometimes freelance editors are employed to supervise and coordinate translators throughout the duration of the process. As recalled by a freelance editor that fulfilled this role twice, their main function was that of acting as a sort of project manager and mediator between the translators, in addition to copy-editing the text:

The publishers really wanted the book out as soon as possible so they got four translators and they employed me to copy-edit the text while they were translating so that it could be finished really soon. The four translators and I were also in email contact, so that they could discuss things like what they were going to call things and so on. Later on, I started noticing style differences, but also other little things, for instance there was a key card and there are four different ways you can say it in Dutch. Obviously, it didn't really matter as long as everybody used the same word. My role became a bit more that of mediating between them as well. I would collect the problems and say: "I suggest we do this or that". We were in touch a lot during those few weeks when the book was translated.

When asked about the influence that working under such time-pressure has on the end-result, the same interviewee went on to explain that, if managed correctly, the quality standard of these projects can remain high despite the challenging circumstances:

I like the special atmosphere of these projects, when we all work together to make the translation very good even though we don't have much time. [...] We were not saying: "Okay, it has to be quick and people will buy it anyway, let's not make a good book".

As further explained by a number of interviewees, hiring an external editor to pay such close attention to the text and to co-ordinate the various translators is an extra cost for publishers and is therefore not very common. This procedure is mostly reserved for bestselling authors or for highly anticipated titles that are expected to become best-sellers and for which early publication is essential.

In summary, this section highlighted that when groups of translators were larger and the time assigned by the publisher to complete the translation was shorter, interviewees expressed less positive attitudes towards the practice of co-translation. In particular, when time pressure is high most interviewees concurred that this could have negative effects on the end-quality of translations. Some interviewees explained that the larger the group, the more detached they felt from the translation project. Moreover, another perceived negative effect mentioned was the fact that co-translating often means earning half the money and not being compensated for the amount of time spent cross-checking each other's part of the translation. Lastly, some interviewees claimed that coordinating larger groups of translators often proves quite challenging from an organizational point of view, which complicates the situation both from the point of view of translators and of the commissioning publishers that have to oversee the process.

## 7.4 Discussion

Interviews with translators and copy-editors supplemented and enhanced the data emerging from interviews with publishers and other agents operating in the Dutch publishing field (cf. Chapter 6) by further investigating the consequences that simultaneous or early publication of Anglo-American trade titles has on translation practices (cf. 6.3). To the author's knowledge, the only previous mention of this issue can be found in Flynn's survey of a group of Dutch poetry translators; in this study, two participants recognised that "the recent trend towards publishing the same work (usually novels) simultaneously in several languages has increased the pressure to meet deadlines" (Flynn, 2004: 277). However this phenomenon has not been explored further.

The findings presented in this chapter reveal that, according to Dutch translators, the translation process is heavily influenced by the pressure to release translations at the same time as original editions. Interviewees often found themselves working under tight deadlines and this bore an influence on the way the translation process was experienced by them, as well as on the perceived end-quality of translations. In addition, interviewees confirmed that the time pressure exerted by publishers resulted in the following consequences: 1) translators often have to employ non-final manuscripts as source texts; 2) translations often have to be performed collaboratively (i.e. in groups of two or more translators) in order to shorten the process and meet publishers' deadlines. These topics are further discussed in the sub-sections below (7.5.1 and 7.5.2). Overall, the fact that the rush for simultaneous or early publication bears such a profound impact on translation practices demonstrates how the phenomenon under investigation

impinges on different parts of the publication process and has ramifications on the activities of more actors than just publishers.

#### 7.4.1 Influence of external pressure

All interviewees reported that working under time pressure in order to meet publishers' deadlines is a common feature of their profession – although there was disagreement on whether or not the pressure imposed by publishers has increased in recent years.

This finding is in stark contrast to that reported by Jones's study on poetry translators, which instead reported a lack of external pressure, with translators claiming that "they could usually set their own deadlines, enabling them to work at their own pace and to submit the final manuscript only once they felt that further revision was pointless" (Jones, 2011c: 98). As noted by Flynn in his survey of Dutch poetry translators, the amount of time pressure exerted by commissioners is often related to the type of publication being published (Flynn, 2004). In particular, poetry translators claimed that "the pressure exerted when they translated poetry was less than with other types, such as prose" (ibid: 277). The fact that interviewees in this study worked regularly under high time pressure is a result of the fact that they translated prose – mostly belonging to the commercial spectrum (i.e. large-scale production) – as opposed to forms, such as poetry, which belong to the pole of small-scale production (Bourdieu, 1983). In this respect, interviewees stated that high time pressure is most often associated with translating established best-selling authors, since these titles have to be published simultaneously with the original-language edition – thus confirming the finding that Dutch publishers consider simultaneous publication essential for established authors and anticipated books (cf. Chapter 6).



Most interviewees showed negative attitudes towards working under excessive time pressure since they felt that ‘rushed’ jobs might result in lower quality translations due to the lack of time for revising the translation thoroughly. Some of the translators (the most established and experienced ones) explained that, if they felt that the time given by publishers was not sufficient to produce a high-quality translation, they did not hesitate to turn down jobs. One interviewee explained that turning down excessively pressured projects was a way to safeguard the quality of their portfolio, which was the main criterion being assessed by the Dutch Foundation for Literature for assigning translation subsidies.

As noted by interviewees, another side-effect of the pressure exerted by publishers in order to achieve simultaneous publication is that translators are often asked to use non-final manuscripts as source texts for their translations. By doing so, time is saved since translators can get a head start on the translation, while the original text is being finalized in the original language. Interviewees explained that, once they receive the final version of the source text, they implement the changes that occurred between the non-final version and the final one in their translation. To do so, they rely on publishers to provide them with a comprehensive list of the changes so that they can alter the translation accordingly. According to some translators, it is not uncommon for changes to be bypassed in these lists provided by publishers, which might cause divergences between the original text and the translation. In general, interviewees perceived the practice of working with non-final manuscript frustrating since the process of comparing different versions of the manuscript can be time-consuming and lead to inconsistencies between the source text and the translated one.

#### 7.4.2 Translators' perceptions of co-translations

All interviewees claimed to have at least some experience with collaborative translations; in fact, the majority of translators claimed to have extensive experience with this practice. Interviews revealed that most translators tended to consider co-translation as a by-product of the time pressure exerted by commissioning publishers to achieve simultaneous publication. Interviews therefore confirmed that *distributed co-translating* – i.e. when different translators translate different parts of a text – is often employed by literary prose translators in order to speed up the translation process and assure each other's quality (Buzelin, 2005).

Overall, co-translations were generally regarded as a valuable and instructive process provided that groups were not too large and that the time pressure involved was not excessive. In this respect, translators clearly differentiated between two types of co-translation scenarios: 1) projects in which they voluntarily decided to co-translate in small groups (usually in couples) since they enjoy collaborating with trusted colleagues and perceived co-translation to enhance the quality of the translation; and 2) projects in which collaboration was not a voluntary choice, but rather a demand from publishers in order to speed the translation process and meet deadlines for publication (usually involving larger groups and tight deadlines).

The first type of projects were described mostly in positive terms, since translators recognized the added value of collaboration with experienced colleagues and found such practice to be beneficial for the quality of the translation. According to interviewees, the main advantages of co-translation is that translators cross-check each other's work thoroughly and offer mutual

feedback (Jones, 2011c; Buzelin, 2005). In addition, another benefit mentioned by interviewees is the fact that co-translations allow translators to mutually support each other when dealing with difficult source texts (Jones, 2011c). Thus, if performed without excessive time pressure, co-translations were perceived to be a rewarding and edifying practice – “a constant learning process” as one translator put it. As interviewees highlighted, the key benefit of this practice is that it provides quality assurance since translators engage in critical reviews of each other’s work.

However, translators’ perceptions of co-translation were different in the second scenario, i.e. if co-translation was not a voluntary choice but an “imposition” from the publisher in order to achieve simultaneous publication.

In such cases, interviewees explained that deadlines tended to be quite tight and the number of participating translators larger (interviewees mentioned different group sizes, from three to a maximum of seven or eight translators working on the same title). Under these circumstances, co-translations were perceived to be a less fulfilling practice. According to interviewees, the main disadvantage of working under tight deadlines is that translators do not have enough time to cross check each other’s parts as thoroughly as they would want to do. Moreover, although translators felt that cross-checking each other’s part was an extremely constructive and beneficial practice, some interviewees complained about the fact that they usually do not get paid for this, despite this being a time consuming task. Interviewees explained that in most cases they got paid only for the part of the translation that they do, even though they spent a considerable amount of time editing and revising other translators’ parts.

Interviewees also noted that the larger the group of translators is, the looser the bond between them. As a result, when working in large groups they claimed to find it harder to take ownership of the translation and felt overall more detached from the project.

Another disadvantage of working in large groups according to interviewees is the fact that coordinating interactions between translators becomes more complex and time consuming. Interviewees reported that for projects which have to be finished within particularly restricted time frames publishers sometimes employ a coordinating editor whose role is that of supervising the project and acting as project manager and mediator among translators (in addition to also copy-editing the translation).

Overall, co-translation was found to be a very common practice among Dutch literary prose translators. When performed without excessive time pressure and in small groups of respected and trusted colleagues translators enjoyed collaborating and felt that critical feedback from their peers improved their work. On the other hand, when groups of translators were larger and co-translations were perceived as an ‘imposition’ of publishers in order to speed up the translation process, this practice was regarded with a more negative attitude by interviewees. The same negative attitude was expressed about working under excessive time pressure, i.e. interviewees felt that rushed jobs could lower the quality of the translation due to insufficient time for performing meticulous quality revision before submission (cf. 7.5.1).

## Chapter 8: Conclusion

### 8.0 Aims and objectives of the study

This study considered the effects of the rise of English on the local-language publishing industry in the Netherlands, which is one of the European countries with the highest average English proficiency in Europe (Edwards, 2016; Gerritsen et al., 2016). Although the growth of English as a L2 in Europe is a widely studied and debated sociolinguistic phenomenon (e.g. Berns, 1995; de Swaan, 2001; Jenkins et al., 2001; Modiano, 2009; Seidlhofer, 2011), the ramifications of this development on the reading habits of Europeans and consequently on the European publishing industry were still understudied and lacked empirical exploration. The aim of this thesis was to help fill this gap by exploring how widely, and in what manner(s), English-language proficiency affects the market dynamics of the Dutch-language trade publishing industry. In particular, the goal was to analyze the issue of competition between English-language and Dutch-language trade books in the Netherlands and explore how Dutch-language trade publishers perceived the competition of English-language originals in their domestic territory and whether they had developed any specific strategies to safeguard their interests and avoid losing readers to the English-language editions. By focusing on this issue the thesis aimed to provide information that could help raise Dutch publishing professionals' awareness of the overall effects of this phenomenon on their activities and strategies. In addition, this thesis also provides a framework for studying this phenomenon and the approaches that publishing professionals adopt to respond to it in other countries.

This thesis draws on Bourdieu's field theory as a key theoretical framework to make sense of the dynamics of the contemporary Dutch book market. In particular, it draws upon Thompson's use of Bourdieu's theory for analyzing the contemporary Anglo-American trade publishing industry (Thompson, 2010). The key benefits of applying field theory to the study of publishing dynamics are:

- Field theory encourages consideration of the interactions between agents in relational terms, by highlighting the high level of interdependency and interconnectedness of their actions. In the context of this thesis, this principle is exemplified by the fact that the practices, attitudes and decisions of Dutch publishers were heavily influenced by the actions of agents in another sub-field, i.e. Anglo-American publishers; in turn, the practices adopted by Dutch publishers were found to have important repercussions on those of other agents in the Dutch sub-field field, i.e. Dutch translators.
- In field theory, the mechanisms of social interactions – and therefore of cultural production – are understood in terms of power struggles between agents (or organizations); these struggles depend on the amount and the nature of the capital that each agent or organization possesses (i.e. economic and symbolic/cultural). The unbalanced competition between Anglo-American and Dutch publishers can ultimately be reconnected to the Bourdieusian notion of capital. This thesis shows how Anglo-American book producers are able to exploit their higher economic capital by benefiting from the economies of scale to outprice Dutch producers. In addition, interviews with Dutch publishers suggested that Anglo-American publishers also have an advantage in terms of symbolic capital,

as Dutch readers tend to associate reading in English with high prestige (symbolic capital).

- Field theory provides the theoretical tools to explain how the choices and actions of agents are often guided by a set of dispositions (the habitus) that can be defined as a sort of ‘feel for the game’ which is based on a set of shared and often unspoken rules and practices (Bourdieu, 1990b; Franssen, 2015). This thesis found that Dutch publishers’ rights acquisition decisions were often dictated by such unspoken dispositions, mostly based on publishers’ intuition and accumulated experiential knowledge of the field.
- Lastly, field theory supports the principle that each publishing field (or sub-field) works as an independent or semi-independent entity and is characterized by its own linguistic, economic, and cultural features, and by its own distinctive logic. This means that the practices adopted by Dutch publishers to cope with the phenomenon of competition of English-language editions are to be considered specific to the Dutch context and, as such, cannot be automatically be extended to other publishing fields (Thompson, 2010; on the notion of generalizability see also 3.32 and 3.9). However, it is hoped that the findings of this thesis can provide a framework to explore this phenomenon in other markets which are struggling with the same issues.

In order to provide a broad analysis of the issue of English-language reading, the thesis adopted a mixed methodology, consisting of both statistical quantitative and interview-gathered qualitative data.

In a quantitative vein, by carrying out a statistical analysis of: 1) the volume and value of export sales from the UK and US into non-Anglophone countries of Europe in recent years; 2) the volume and value of English-language sales in the Netherlands over the last 40 years (quantitative approach).

In a complementary qualitative vein, by carrying out in-depth semi-structured expert interviews with members of the Dutch trade publishing industry (qualitative approach). The qualitative part of the research was loosely based on grounded theory and case study approach (Charmaz 2010; Flyvbjerg, 2006).

The statistical analysis served to gather quantitative insights into the size of the phenomenon under study, which is largely absent in the literature (cf. Chapter 2), and to provide a broad contextualization for the thesis topic.

The objective of providing a quantitative overview of the size of the market for English-language trade exports in Europe and in the Netherlands could not be completely achieved due to a series of limitations in the way the data had been collected by the American and British publishers' associations (cf. Chapter 4). In particular, the British data did not provide specific information on trade exports by region or country of destination. Also, although the US figures did provide the required information (how many trade books were exported to Europe and the Netherlands), the data that could be obtained from the American Publishing Association only covered a restricted period of time (2011-2015), and therefore did not afford a long-term overview of trends. Nevertheless, the data demonstrated that the export revenues of English-language publishers are substantial, and that English-language editions are highly and tangibly popular in continental Europe.



The goal of obtaining a long-term overview of English-language sales in the Netherlands was successfully met by gathering the statistics collected by two research companies (Stichting Speurwerk and GfK) on behalf of the Royal Netherlands Book Trade Association (KVB) during the period 1976-2018 (with a gap in 1994 and between 2000 and 2007) and the results of recent consumers' research performed by GfK in 2016, 2017 and 2018. The findings that emerged, outlined in Chapter 5, will help various stakeholders active in the Dutch trade publishing field – especially publishers – gain a clearer understanding of the state of affairs in their domestic market. As a matter of fact, interviews with Dutch publishers highlighted that they often did not monitor sales statistics concerning competing English-language editions closely and instead relied on “gut feeling” when evaluating the role of English-language editions in the Dutch market (cf. 6.1). The statistics gathered in this thesis are able to provide Dutch publishing professionals with a broad and long-term overview of how English-language reading has developed in the Netherlands over the last five decades and will therefore enhance their understanding of this issue and assist their decision-making process. By gathering these statistics this study fills an existing gap in the literature and at the same time provides Dutch publishing professionals with accurate data to inform their assessments and to support their decision-making process.

The goal of examining Dutch publishing professionals' perceptions in relation to the issue of English-language reading and the strategies that Dutch publishers have adopted to cope with this issue was met by carrying out semi-structured interviews with 31 publishing professionals active in the Dutch trade book market, including acquisition editors, booksellers, literary agents and other

professional figures. In addition, the objective of investigating how the main defence strategy employed by Dutch publishers (i.e. simultaneous or early publication) affects translators' practices was achieved through interviews with 11 English-to-Dutch translators and one translation copy editor. The reliability and validity of the qualitative data was addressed by maintaining an accurate record of the research activities (including interview recordings and transcripts) and by submitting interview transcripts to each interviewee for approval (member checking). In addition, the validity and accuracy of the qualitative findings was enhanced by including in the study professional figures that operate in different areas of the Dutch publishing market (e.g. publishers, translators, literary agents, booksellers, etc.), as well as across multiple national fields. This plurality of perspectives afforded a more comprehensive and accurate understanding of the phenomenon studied.

The results of these interviews, outlined in Chapter 6 and Chapter 7, helped provide an understanding of the repercussions of English-language reading on the daily practices of Dutch publishing and translation professionals and of how different actors in the field are dealing with these issues. By bringing together the perspectives of a broad-range of professionals and comparing them to each other, it is hoped that the finding of this research will enhance Dutch publishing and translation professionals' knowledge and awareness of the ramifications of this phenomenon and will lay the foundations for self-reflection on this topic. In addition, these results could serve as a basis for further research into this subject, both in the Dutch context and in other publishing markets which are facing similar challenges.

## 8.1 Summary of findings and contribution to knowledge

The overall goal of this thesis was to investigate the extent and spread English-language reading in the Netherlands and also the concomitant repercussions of this phenomenon on the local-language trade publishing market. This overall goal was met by integrating statistical quantitative and interview based qualitative approaches. This helped both quantify and contextualize the issue of English-language reading in the Dutch market, as well as explore Dutch publishers' perceptions towards the competition of foreign editions and identify whether, and if so how, they alter their strategies in an attempt to respond to this issue.

The aim of the quantitative analysis was to provide a broad overview of the available statistics to document the scale of the phenomenon under investigation, with a special emphasis on how English-language reading has developed in the Netherlands over the last five decades (1976-2018). By gathering this information all in one place, this thesis took stock of what information is available and what is missing, and provided an overview of trends with regard to British and American export sales to continental Europe and English-language sales in Netherlands – therefore contributing to bridge the knowledge gap in the literature (cf. Chapter 2, section 2.4). The statistical analysis addressed the following research questions:

- 1) What is the value of American and British exports to Europe and in particular to the Netherlands? What data is available and what is missing?

- 2) What market share do English-language export editions represent in the Dutch contemporary trade book market? How does this data compare to the market share of Dutch-language editions?

In terms of the first research question, although UK figures did not provide directly relevant figures for the specific research question of this thesis (i.e. statistics on trade exports to the Netherlands) and US statistics only covered a short period of time (i.e. 2011-2015), the export data presented in Chapter 4 shows that export sales to continental Europe represent a significant source of income for British and American publishers. This suggests that English-language contents are in high demand in non-Anglophone areas of the world and that, as demonstrated by the growth of UK exports in the last 17 years, this demand is rapidly increasing – thus confirming what claimed by various publishing industry insiders (Jones, 2011a; PA; 2015). It can be argued that, as the English proficiency of Europeans continues to grow due to a bottom-up drive and to English-medium teaching at universities, the willingness of European consumers to read in English will increase further in the coming years.

As for the second research question, the quantitative data collected with regard to English-language sales in the Netherlands between 1976 and 2018 showed that sales of English-language books have grown steadily over the years. In the mid-70s, when the research company Stichting Speurwerk started to document statistics about foreign-language sales, English-language books were estimated to account for 4% of the annual revenues of the Dutch book market; in 1989-1990 the share had doubled to 8-9%. Gfk, the research company which collects statistics on the Dutch book market at present, estimated that 15% of revenues in 2018 were generated by sales of foreign-language editions (cf. section 5.3). Gfk

data showed that there are significant differences in terms of popularity of English-language editions across different book categories, with non-fiction being the category where Dutch-language editions suffer the competition of English-language originals the most. Between 2007 and 2018, sales of English-language non-fiction books rose two-fold in the Netherlands in terms of value (from 9% in 2007 to 20% in 2018) and three-fold in terms of units (from 6% in 2007 to 18% in 2018). English-language fiction sales went from 5% to just over 10% during the same period, both for what concerns units sold and turnover; while children's books experienced a more modest growth rate (cf. Tables 21, 22 and 23 for exact data).

The fact that English-language editions are highly popular in the Netherlands was further confirmed by the consumer research presented in section 5.4, which reported that one out of three Dutch consumers had bought at least one English-language book each year for the last three years (2016, 2017 and 2018).

Overall, the quantitative data presented in this thesis suggests that sales of English-language trade books have risen at a fast rate in the Netherlands in the last five decades. As the popularity of English-language books have grown, Dutch publishers have had to face the challenge of seeing their market share being eroded by competing Anglo-American editions, which has put them under significant pressure.

The aim of the qualitative part of the research was to investigate how Dutch publishing and translation professionals' have responded to this situation in an attempt to cope with this pressure, by surveying their attitudes towards the competition of English-language editions. In addition, the thesis aimed at understanding whether and how the growth of English-language reading in the

Netherlands is affecting the publishing and translation strategies in the Dutch book market. Interviews with Dutch publishing and translation professionals addressed the following research questions:

- 3) To what extent Dutch publishers perceive the competition of English-language titles as a threat?
- 4) What strategies do Dutch publishers adopt to avoid losing readers to imported editions?
- 5) What consequences do these strategies have on publishing and translation practices, especially with regard to the publication of translations from English into Dutch?

With regard to the third research question, this thesis found that Dutch publishers shared different levels of concern towards the phenomenon of competition from English-language editions: while some interviewees appeared significantly concerned by this issue, others minimized the risk posed by competing editions and stressed that they only considered certain books to be at risk of competition. The different attitudes showed by interviewees can mostly be ascribed to the area of the market where interviewees worked in, with publishers operating in the YA market appearing significantly more concerned by the competition of original editions than publishers operating in the adult publishing field. Most interviewed publishers did not monitor sales of English-language editions closely and instead relied on 'gut feeling' to evaluate whether English-editions posed a threat to their editions. Thus, this thesis found that most Dutch publishers did not base their assessments of the risk presented by competing Anglo-American editions on quantitative evidence, which means that their

acquisition decisions were mostly taken based on experience and intuition (cf. section 6.1).

This study determined that the risk posed by the competition of original editions was evaluated on a title-by-title basis by Dutch publishers. If a title was considered at risk of suffering the effects of the competition of English-language editions, Dutch publishers would take this into account when evaluating the book for acquisition and could decide not to acquire the rights because of this. Therefore, the fear of competition from English-language editions was shown to play an important role in informing and swaying Dutch editors' acquisition decisions. This finding sheds additional light on the decision-making process of Dutch editors and enhances our understanding of this process as compared to earlier studies on this subject which did not account for the role of the competition of English-language editions in the decision making process of Dutch acquisition editors (cf. Franssen and Kuipers, 2013; Franssen, 2015).

As already noted, the evaluation criteria used by Dutch publishers to make such assessments were admittedly based on intuition and internalized knowledge of the field – i.e. what Bourdieu defined as 'feel for the game' (Bourdieu, 1983; Thompson, 2010) – rather than on rational and specific factors.

The key factors that were found to play a part in this evaluation phase were: the age of the target audience for the book, the genre or sub-genre, the level of popularity of the author, the anticipation surrounding the release of the book, the subject and the stylistic features of the book, and whether a book was up-market or not. Based on these loose criteria, the books that were considered more at risk were: books aimed at a young target group, up-market books, niche sub-genres,

highly anticipated books and books by famous authors, and books whose stylistics features represented the main drawing point for readers (cf. section 6.2).

In terms of the fourth and fifth research questions, this study found that the main way in which the competition of English-language editions affected the publication strategies of Dutch publishing companies was by compelling them to speed up the publication process so that Dutch translations could be published at the same time as original editions (or even earlier than originals in some cases). Thus, publishing translations simultaneously to English-language editions was found to be the key defence strategy that Dutch publishers employed to respond to the competition of original editions – especially in the case of books considered at risk of suffering from the competition of English-language originals, such as highly anticipated books, books by famous authors and books series. By releasing translations simultaneously or earlier than originals, Dutch publishers strived to avoid losing readers to English-language editions; in addition, by synchronizing the publication, they also hoped to tap on the international hype surrounding the book in order to promote their editions (cf. section 6.3).

This strategy was shown to have a series of repercussions on both the publication and translation processes of Dutch publishing and translation professionals as it imposed an acceleration of publication rhythms, which in turn was reflected on translation practices.

In terms of the effects that had on the publication strategies of Dutch publishers, simultaneous publication was firstly found to alter the rights acquisition practices of Dutch publishers by ‘rushing’ the acquisition of English-language rights. This finding confirms Franssen’s observation that rights to English-language books are generally bought quicker by Dutch publishers than rights to



any other languages (Franssen and Kuipers, 2013). This thesis improves our understanding of the motivations behind this ‘hurry’ to acquire rights to Anglophone rights, by showing that a key driver is the need to publish simultaneously to original editions to avoid the cannibalization of sales by competing original editions. Secondly, the need to publish simultaneously influenced the timing of translations which was found to affect heavily the practices of English to Dutch translators (cf. section 6.3).

With regard to the effects that competition with English-language originals have on translation practices, Chapter 7 showed that English to Dutch translators commonly worked under tight deadlines in order to meet the deadlines of their commissioners and allow them to release translations simultaneously to original editions. Working under such external pressure was generally met with resistance by translators as it was feared to lead to lower-quality translations given the limited time available for editing and revising the work. In addition, this thesis showed that the rush for simultaneous publication often means that translators are asked to begin translating using non-final manuscripts as source texts while the final manuscript is being finalized, in order to speed-up the process. This practice was regarded as onerous and cumbersome by interviewed translators, as it required them to compare different versions of the text to check for inconsistencies between the translation and the final text. In addition, this study showed that it is a common practice for Dutch translators to translate a book in pairs or in groups in order to expedite the translation process (i.e. the manuscript is split into parts and each translator is assigned a section to translate). Co-translation was perceived positively when translators did not have to work under excessive time-pressure and when groups of translators were small. Under such

circumstances, translators enjoyed collaborating since it allowed them to review each other's work which was perceived to improve the overall quality of the translation. However, when groups were larger and the external time-pressure imposed by the publisher was high, this way of working was met with resistance by translators, as they feared that working with such 'hurry' could be detrimental for the quality of the translation given that there was not enough time to review each other's work. Overall, the competition of English-language editions was found to have a deep effect on translation process by putting significant pressure on translators to ensure a quick turnaround for their work.

As noted above, interviews with YA publishers showed that this sector in particular is highly vulnerable to the competition of English-language originals and, as a consequence, publishers in this area appeared to be experimenting with new strategies to cope with this situation. Notably, one company had set up an import programme for English-language editions with the aim to distribute original editions of the titles they were translating in order to make some profit out of the sales of original editions. This finding reveals a novel and arguably significant development deserving of more attention in future research.

Another issue which was perceived to play a key role in the competition between Anglo-American books and Dutch ones were the price discrepancies between original and translated editions. Most interviewed Dutch publishing professionals complained that English-language export editions were cheaper compared to local-language ones, mostly due to the fact that:

- Dutch editions were published in small print sizes compared to English-language editions which were instead aimed at a global readership;

- The fact that for publishing translated editions Dutch publishers had to factor in translation costs;
- To the influence of fixed-price regulations which prohibit discounts on Dutch-language editions, but not on English-language ones (cf. sections 2.5.2 and 6.4).

Overall, Dutch publishers claimed that they could not compete on price with English-language export editions given the overall smaller size of the Dutch book market (whereas the global scale of Anglo-American publishing operations allowed English-language publishers to benefit from economies of scales) and given the fact that to produce translations they incurred in translation costs, which resulted in higher prices for Dutch editions. Notwithstanding the frustration expressed by Dutch publishers in relation to this issue, this thesis showed that having to compete with English-language editions did not bring Dutch publishers to alter their pricing strategies.

Another key finding emerging from this study is that Dutch publishers indicated that they were publishing more Dutch-language and non-Anglophone books than they used to do. This trend was attributed to a variety of factors, among which: 1) the fact that Dutch-language and non-Anglophone titles were cheaper to publish due to the absence of translation costs for Dutch books and to the lower cost of non-Anglophone translation rights; and 2) the fact that Dutch authors were considered easier to market, given their availability to take part in local promotional activities. Publishers made a connection between this trend and the 2008 economic crisis and its effects on the Dutch publishing market, which forced many publishers to cut down their expenses and reorganize their operations (Franssen, 2012). The competition of English-language editions was

mentioned as an additional driver in this shift towards local-language and non-Anglophone contents – however, this factor was not considered to be the decisive one by most interviewees.

These findings are in line with the trend described by Craighill in Sweden and by the 2009 *Diversity Report*, which showed that local and non-Anglophone authors featured prominently in European best-selling charts (Kovač & Wischenbart, 2009a; Craighill, 2015). The fact that Dutch publishers were increasingly concentrating their efforts in publishing local books or books from other languages challenges the idea that translations from English dominate European publishing markets and could be indicative of a shift in the dynamics of book circulation in Europe. While previous studies by Sapiro and Heilbron showed that translations from English dominate the translation market in most European countries, the qualitative data in this thesis suggests that Dutch publishers are instead deliberately translating less from English (cf. section 2.1.1; Heilbron & Sapiro, 2007; Heilbron, 2008; Sapiro, 2008; 2010; 2014). Although this research does not include a statistical analysis to confirm that the trend described by Sapiro and Heilbron is reversing, the data in this this thesis seems to suggest so. However, further quantitative evidence is needed to confirm this claim (cf. section 8.3 for recommendations on further research on this issue).

The present study confirmed what hypothesized by Kovač & Wischenbart and Craighill, namely that this decline in translations from English can be linked to the fact that an increasing number of European readers prefers to read in English, which in turn makes translations from English a less profitable business for European publishers (Kovač & Wischenbart, 2009b; Craighill, 2015). However, the data in this thesis also calls us to adopt a more prudent approach when

interpreting this findings and discourages us from considering the increase of English-language reading as the sole driver of the reported decline in translations from English. Other factors, such as cost issues and marketing appeared to be the key drivers behind this trend; as such, further research in this areas is needed to establish what factors are stimulating this shift.

Ultimately, if publishers in the Netherlands, and elsewhere, are facing the challenge of having to adapt to cope with an influx of English language editions in their domestic market, as this thesis reveals, there are a number of elements that various agents operating in the trade publishing fields should consider.

Firstly, statistics on the consumption of English-language books in the Netherlands could help inform and make Dutch acquisition editors' decisions more accurate and nuanced. Dutch publishers can rely on the figures collected by the market research institute GfK that provides statistics on the ratio of English-language sales and Dutch-language sales on a title-by-title basis. Dutch publishers can therefore check the amount of English-language copies sold of previous books by a certain author, or – in the case of debut authors without a publication track record – how many English-language books were sold of similar books in terms of genre and/or subject matter. This sort of information would allow Dutch editors to evaluate the exact risk posed by English-language editions, therefore supplementing the 'gut feeling' component in their assessments.

Secondly, this thesis demonstrates that pressure for simultaneous publication of English-language books impinges significantly on the activities of translators. Translators' resistance towards this way of working and their concerns that fast translations can be detrimental for the quality of the end-result should be taken seriously by Dutch publishers, given that below-standard translations could

seriously damage a publisher's reputation and therefore give a further competitive advantage to English-language editions.

Thirdly, the results of this thesis show that Dutch publishers' struggles with the competition of English-language editions bear important consequences also on rights holders that wish to sell Anglo-American translation rights to Dutch publishers (i.e. publishers' rights departments or literary agents). Rights holders should be aware of the importance of offering English-language rights to Dutch publishers early on, so as to allow Dutch companies to publish simultaneously. If rights holders fail to do so, the Dutch publisher will see their profits reduced, especially in the case of highly anticipated books which are likely to be read in English by Dutch readers – which could ultimately discourage them to acquire English-language translation rights in the long-run. In addition, rights holders should also recognize that aggressive export strategies on the part of Anglo-American publishers might drive Dutch publishers (and publishers operating in similar circumstances) away from Anglophone books and make them more inclined towards non-English or indigenous authors. On the other hand, Dutch publishers should consider whether reassessing their publishing strategies to reduce their dependence on Anglo-American content could be beneficial for them, especially considering the lower costs involved in publishing local-language authors or non-Anglophone ones (on account of lower advances and lower or null translation costs).

## 8.2 Study limitations

The present study has a national focus (the Netherlands), which makes the findings highly contextual to the Dutch trade publishing field and therefore not automatically generalizable to other national contexts. As such, this case study

has limited external generalizability (Maxwell, 2005). Context-dependency is arguably a typical characteristic of studies that fall within the realm of the social sciences (Gagnon, 2010). This is particularly true of studies investigating the dynamics of publishing, given that each publishing field works according to its own logics and dynamics (Thompson, 2005; 2010). As remarked earlier in the thesis and in this chapter, external generalizability was not considered to be the chief goal of this study. Nevertheless, it is hoped that this case study will serve as a blueprint and as a term of comparison for future investigations of the effects of English-language reading in other non-Anglophone publishing markets in Europe and further afield (Flyvberg, 2006).

Given the contemporary nature of the research topic, there is a lack of previous studies in this research area which made it more challenging to identify the research priorities and to define the scope of the research. However, this lack of prior studies can also be seen as an opportunity since it clearly demonstrates the value of the research and its necessity.

A further limitation of this thesis was time constraints, which did not allow enough time to follow-up on some key findings that emerged from the data. In particular, if time had allowed it, a more in-depth investigation of the 'import programme' described by one YA publisher would have been desirable given the element of novelty of this development. Similarly, more time could have been devoted to describing the motivations behind the shift towards local and non-Anglophone contents which was uncovered by the interviews with Dutch publishers. Besides, with more time at hand, the sample of interviewees could have been enlarged further. It must also be noted that the number of semi-structured interviews could have been higher if the publishing professionals

contacted would have been more responsive. Regrettably, many requests to participate in the study did not receive a reply, although this limitation was partially offset by using a snowball sampling technique (Warren, 2002). From one perspective this can be seen as a limitation, however it is arguable that any study targeting expert participants and senior personnel would face the same challenge in obtaining interview time (Christopoulos, 2007).

Lastly, the fact that the interviews were conducted between 2015-2017 makes the findings specific to the time of the data collection. A recent email exchange (February 2019) with one of the interviewees indicated that the Dutch publishing landscape might already have changed significantly since the time the data was collected, with the competition of English-language texts being even more intense now – as also shown by the market statistics in Chapter 5 (section 5.3):

The market is changing like crazy at the moment. Export editions are flooding the shops, and the big publishers in the UK are pushing their editions like crazy. Our acquisitions have changed accordingly, buying more from other languages. It's a very different world from when we last spoke.

This clearly points out to the difficulties of carrying out academic research in such a dynamic and evolving research environment. However, this also demonstrates the relevance and the value of the present research, which is the first study to address empirically this phenomenon that is affecting Dutch publishers so greatly. Despite the fact that the competition from English-language editions might have intensified in the years since the field work was conducted, the data emerging from this thesis provides a valuable account of how Dutch publishers are dealing with this issue, which in turn provides a basis for conducting future



research on this topic and for documenting how this phenomenon will develop further in the coming years.

### 8.3 Recommendations for future research

The findings emerging from this thesis highlight a series of possible avenues to be explored in future studies. These are:

- This study showed that Dutch publishers were increasingly focusing their efforts on publishing Dutch-language originals or translations from languages other than English at the expense of English-language contents. This development challenges the notion of the growing domination of Anglo-American literature in the European book market advanced by the sociology of translations approach (cf. section 2.1.1; Heilbron & Sapiro, 2007; Heilbron, 2008; Sapiro, 2008; 2010; 2014). In fact, this finding suggests that a trend change in the dynamics of European book circulation might be taking place, with less Anglo-American books being published in translation on account of their higher production costs, and the fact that local authors are easier to promote for local publishers and due to the growing competition of English-language editions. This shift towards non-Anglophone contents is deserving of more attention in future research. Building on the qualitative evidence presented in this thesis, it is recommended that a quantitative analysis of Dutch publishers' lists spanning an extended period of time (at least two decades) be conducted to evaluate whether a decline in the number of translations from English published by Dutch publishers can be observed. This analysis would add further substance to whether the trend identified through qualitative data can be supported with quantitative evidence. In terms of methodology, it

is recommended that Franssen's analysis of Dutch publishers' lists based on data from the Nederlandse Bibliografie Online of the Dutch Royal Library be used as a loose framework for this purpose (cf. Franssen, 2015b).<sup>69</sup> In addition, a qualitative investigation of this specific issue could shed additional light on the motivations that are driving this shift and could indicate what is the actual role played by the competition of English-language editions in encouraging this shift away from English translations. For conducting this qualitative analysis, it is recommended that semi-structured expert interviews be conducted with Dutch acquisition editors and literary agents in the Anglophone field. The same study could be performed in other European and non-European publishing markets to verify whether a shift has taken place as far as the share of translations from English is concerned.

- The same approach and research questions of this study could be extended to other publishing markets, such as other small European and non-European countries (e.g. Scandinavian countries or Eastern European countries) or larger countries (e.g. Germany), with high average English-language proficiency. By expanding the scope of the research geographically, the framework emerging from the present case study of the Dutch book market could be tested in other markets (Flyvberg, 2006).
- As seen in Chapter 2, the definition 'open market' applies to all the territories where Anglophone publishers can export their editions without

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<sup>69</sup> <http://www.kb.nl/nederlandsebibliografie>.

claiming exclusivity. Due to its non-exclusive nature, the European open market is a very crowded marketplace, characterized by a high-level of competition between English-language exporting publishers. The dynamics of competition between British and American publishers in the European open market are severely understudied (cf. section 2.5). As such, a promising alley for future research would be that of exploring the dynamics of export for British and American publishers and in particular how Anglo-American publishers compete between each other in the European open market. In order to realize a comprehensive study of this phenomenon, a mixed methodology combining quantitative and qualitative approaches appears to be the most suitable option. The quantitative approach should first determine who among British and American publishers is the largest exporter of books into continental Europe, in order to delineate the power relations between Anglo-American publishers in this area. The qualitative approach should instead provide an insider understanding of the approaches that different Anglo-American publishing conglomerates adopt to export their products to non-Anglophone European areas.

- Another promising path to improve our understanding of English-language reading would consist of investigating English-language leisure reading from the perspective of English L2 speakers. In particular, it is suggested that more attention be devoted to understanding what are the most important factors that drive non-native speakers to English-language texts (e.g. price, availability of translations, timing, etc.). Among other things, this information would benefit local-language publishers as it would allow them to identify with accuracy the motivations behind the

choice of reading in English and possibly adapt their publishing strategies to avoid losing readers to competing editions.

- Lastly, some of the findings of this thesis could be further expanded and built upon in the field of translation studies. In particular, it is recommended that the dynamics of group translations are further explored to establish how co-translators collaborate and what is the effect of translating in a collaborative setting on the text. In addition, the effects of working under significant time pressure should be investigated more in-depth.

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## Appendix

## Appendix 1: Email template for recruiting participants

Dear xx,

My name is Giulia Trentacosti and I am a PhD student in Publishing Studies at Edinburgh Napier University. [I have been given your contact details by xx - I recently interviewed xx and xx suggested to get in touch with you regarding my research].

My PhD project examines the consumption of English-language books in the Netherlands. Over the past few months, I have looked at the quantitative side of the phenomenon (i.e. how many foreign texts are sold in the Netherlands and how these figures are monitored).

In addition to this, I am also interviewing Dutch publishing professionals and translators to investigate how the competition with English-language originals influences the market for translated titles in the Netherlands.

I am writing to you to ask whether you would be willing to take part in my research and share your experiences with this issue. The interview would last maximum 1 hour and can be done in person, via Skype or telephone. Of course, should you decide to participate in the research, your name [and the name of your company] can remain completely anonymous if you wish.

I look forward to hearing back from you.

Best wishes,  
Giulia Trentacosti

PhD candidate  
Edinburgh Napier University  
Room C4, Merchiston Campus  
10 Colinton Road  
EH10 5DT, Edinburgh

## Appendix 2: Informed Consent Form

### School of Arts and Creative Industries (SACI)

**Student:** Giulia Trentacosti

**Title of the study:** *Multilingualism and publishing: The rise of English and its impact on European book consumption. A case study of the Dutch trade book market (working title).*

**Research overview:** The research aims to assess the impact that growing proficiency in English has on the European book market. It therefore investigates the consumption of English-language texts in non-Anglophone European countries, using the Netherlands as the main case study. The project sets out to investigate the dynamics of this phenomenon by: 1) evaluating its consequences on the Dutch publishing industry and assessing how Dutch firms are reacting to the competition of English-language books; 2) assessing how the phenomenon under study is influencing rights sales and translation practices; 3) providing information on the export strategies of Anglophone publishers and on the competition of American and British titles in the European open market.

- I confirm that I have read the research overview and that I understand the purpose of the study.
- I confirm that I had the opportunity to raise any questions with the researcher.
- I understand that my participation is voluntary and that I am free to withdraw from the project at any time without any consequences. If I exercise my right to withdraw and I don't want my data to be used, any data which have been collected from me will be destroyed.
- I understand that I can withdraw from the study any personal data (i.e. data that identify me personally) at any time.
- I consent to being a participant in the project  
YES ☐ NO ☐
- I consented to being audio recorded as part of the project  
YES ☐ NO ☐
- I have received a copy of the interview transcript and I have approved it  
YES ☐ NO ☐

I consent that (only select one of the three options):

- ☐ Material may be quoted in the research papers and PhD thesis of Giulia Trentacosti, and attributed to me.
- ☐ Material from this interview may be quoted in the research papers and PhD thesis Giulia Trentacosti, but I wish to remain anonymous.
- ☐ My comments are confidential, for the information of Giulia Trentacosti in the writing of her PhD thesis only and may not be quoted.

**Date:** [Click here to enter a date.](#)

X

Signature (electronic signature is accepted):



## Appendix 3: Template interview questions

### Literary agents

- Do you think that the process of selling English-language rights to countries like the Netherlands has changed since the time you started as a literary agent? If so, how has this changed?
- Are UK/US publishers actively and aggressively encouraging export sales in the European open market?
- Does the competition of English-language books influence your rights selling practices? If so, how?
- Which market do you think is more affected by this problem in Europe? Why?
- Dutch publishers during my interviews said that they generally try to publish simultaneously. Has it ever happened that you didn't sell a title or you had problems placing a title because publishing simultaneously was not possible?
- What can rights holders do to make sure Dutch publishers have the time to publish simultaneously?
- Do you think Dutch publishers (and more broadly European publishers) are more focused on local authors and/or non-Anglophone authors than before?
- How do you interpret this trend? What are the motivations driving it?

### Publishers

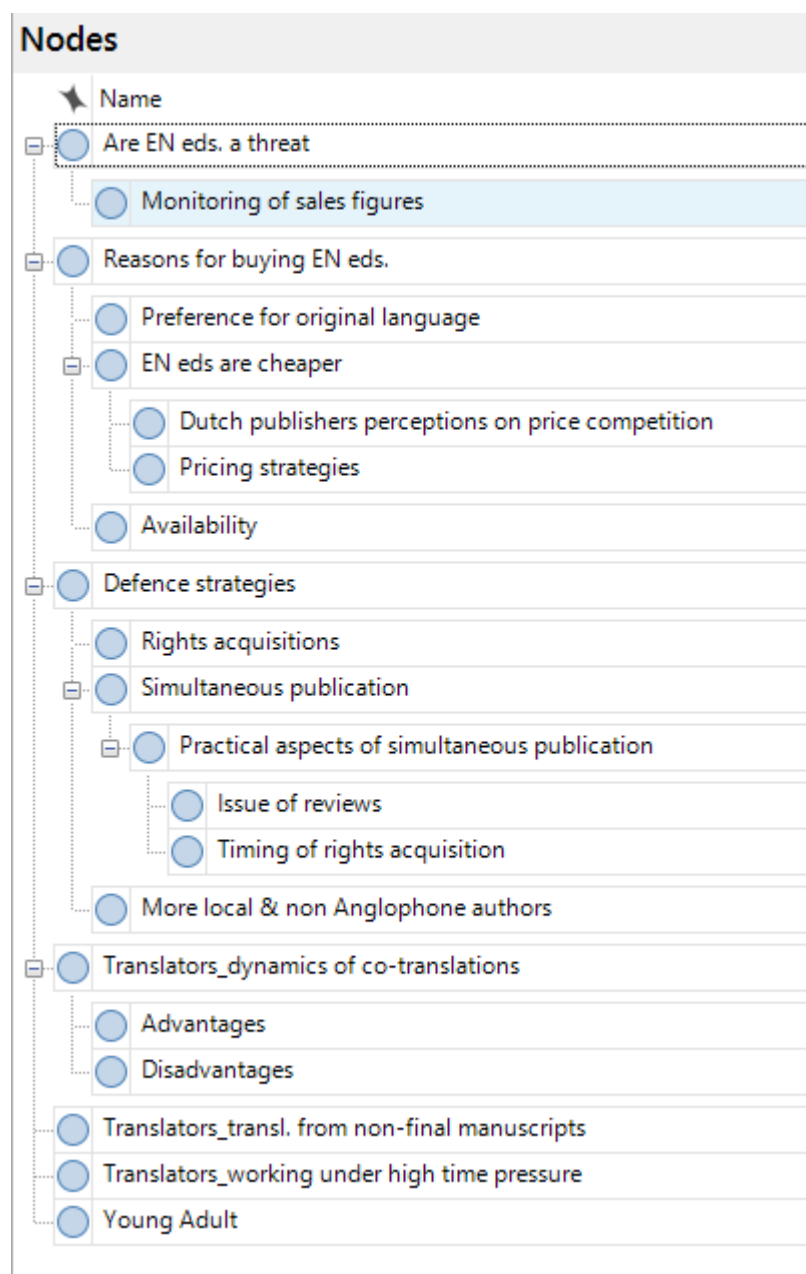
- Would you say that the competition of English-language books represents a threat to Dutch publishers (and more specifically to your company)? Is it in any way a cause of concern?
- For how long has this phenomenon existed among Dutch readers?
- Do you think it is stable, or have you instead noticed an increase or decrease of people reading in English?
- Which books are more at risk of being read in English according to you?
- How do you make such assessment?
- Does the competition of English-language titles influence your rights acquisition decisions? If so in what ways?
- Would you say that you orientate your publishing strategy according to the competition of English editions?
- For instance, do you strive to publish simultaneously to English-language editions? If so why?

- How do you manage to release translations at the same time as original editions?
- How does simultaneous publication influence your publication and translation practices?
- How important do you think the price is for readers when choosing between the English edition and the Dutch translation?
- When setting the prices for your titles, do you try to compete with the English-language edition?
- On average, what share of your list is translated from English?
- How important is this part of the list in terms of sales?
- Would you say that the number of books you translate from English has increased, decreased or stayed the same over the last few years?
- Would you say that you are publishing more local authors and authors writing in languages other than English recently?
- If so, why do you think such a change occurred?

## Translators

- How long have you been a literary translator for?
- Do you also translate literary works\* from other languages other than English?  
(\*also including non-fiction and young adult literature)
- Do you specialise in a particular genre? If so, which one?
- Would you say that the pressure to publish Dutch translations simultaneously to the original editions influence your activity as a translator? If so, could you describe in which ways?
- Do you think that the final quality of the translation is influenced by this phenomenon?
- Would you say that the pressure to publish translations simultaneously was the same when you started your career as a translator?
- Do you often use non-final manuscripts as sources for your translations? If so, how does this influence your work?
- Have you ever worked on the same book together with other translators? If so, how does this influence the translation process? Would you say you prefer to work on a title alone or with other colleagues?
- Only answer the following question if you also translate literary works from other languages: Is the pressure to publish simultaneously the same for other languages?

## Appendix 4: Examples of coding



Overview of nodes used for coding in Nvivo.

<Internals\ [redacted] \_rev> - § 2 references coded [8.46% Coverage]

Reference 1 - 4.28% Coverage

G: You said that publishing simultaneously is key. Does it mean that you never wait to see how a title does in the domestic market before buying the rights?

B: No, it's not that we never ever do it. It's only that we take into account this problem. We can check through GFK how many books have been sold [in English in the Netherlands] already. So we know that we will never sell to those people that have already bought the book in English. When we publish simultaneously we aim to reach the 100% of the market. Six months later we have to take into account that we will not reach that 100% anymore, we'll maybe reach 80%. If the book can still be profitable, we can still decide to do it. It's not that we never do it... but this way we will never sell as much as we do when we publish simultaneously.

Reference 2 - 4.18% Coverage

G: Has it ever happened that you have been discouraged to publish a book because of the competition?

B: Yes, it happens quite often. Sometimes the book has an embargo, because the author doesn't want the content to leak. I don't know why, but apparently football players think they're really important and think their books cannot be sent out before they are published. Last week, for example, the autobiography of Didier Drogba came out and I received the PDF on the day of the publication. So I estimated that by the time I could have the book translated I would have been months and months behind... maybe this is not a good example because, even if I had the manuscript in time, probably I wouldn't have done this book. But there are books that we decide not to do because of that.

<Internals\ [redacted] \_Final> - § 1 reference coded [1.25% Coverage]

Reference 1 - 1.25% Coverage

Sometimes we decide not to buy a book because we think that people will buy the English edition and not our edition, because it's a small group of readers that is very fluent in reading in English.

is no way we are going to translate it. In that case it would be very problematic to publish the book. In a case like this we would refrain from publishing the book.

<Internals\ [redacted] \_rev> - § 1 reference coded [1.71% Coverage]

Reference 1 - 1.71% Coverage

Do you think that the competition of English-language books will discourage Dutch publishers to publish translations from English in the long term?

It's already happening. We're not as focused on American or the UK as we used to be. So I think maybe a little bit less, but not really for that. It's more because people will request less.

<Internals\ [redacted] \_rev> - § 1 reference coded [1.69% Coverage]

Reference 1 - 1.69% Coverage

But certain books I decline because I think that people will read it in English. Certain comedians that are very English or very American, that have a certain style in their language, certain fantasy, YA books are being read in English rather than Dutch.

<Internals\ [redacted] > - § 1 reference coded [4.98% Coverage]

Reference 1 - 4.98% Coverage

[00:04:52] G: What do you do to avoid losing sales to the English-edition?

[00:04:52] B: First, I just don't try to translate some books even though they are about subjects that I found very interesting. For instance, a book about pop-music... you know that people that enjoy American music will be able to read the book in English and will buy the English edition. I find it very courageous that a publisher is translating James McBride's book about James Brown, but I think that is going to be a tough. That's the defensive approach which consists of not translating at all.

<Internals\ [redacted] \_rev> - § 1 reference coded [5.46% Coverage]

Reference 1 - 5.46% Coverage

[00:26:24] G: Does it happen that you don't buy a title because you know it's not worth

Example of exported Nvivo node (anonymized).

## Chapter 07

## Coding sketch

> Does the competition represent a threat?

→ DIFFERENT TAKES → same message ≠ genre ≠ age group ≠ subject ≠ level of concern

Not all books are likely to be read in Dutch.

ex.

YA  
sol. → look at different markets

HP → series more popular  
pricing  
A → YA series  
anticipated publication  
SE → more local authors  
publishing simultaneously

> Some readers choose EN for preference → Reading in original lang.

ex. MK

→ Which genres are more likely to differ from this?

ex. BM, NvZ, CS, BW, SM, CK, EL, SV

→ Some readers opt for EN because of availability

ex. BW, LM, TD

→ Solution simultaneous or advanced publication

ex. MvD, BM, NvZ, CK, FvT, SV

→ buy in advance LM

simultaneous publ. if not possible  
not buying rights. BW example

→ practicalities of publication

→ Reviews → MvD, SM, FvT, MK

→ agents help, international council NvZ

→ waiting to publish CK

→ More Dutch → less translations

ex. BM

→ good publication of book.  
BM, BW, LM,

Not translate at all  
BM, SD, SV

→ opinion

→ evaluate if it's  
worth buying rights.

BW.

Example of manual coding.



[00:00:12] A: Around 30 years.

[00:00:16] G: Do you also translate from other languages?

[00:00:17] A: No, just English.

[00:00:21] G: Is there a specific genre you specialise in?

[00:00:25] A: Literature and novels.

[00:00:29] G: Would you say that deadlines for translations have become shorter since you started working as a translator?

[00:00:34] A: No, I think there has always been time pressure. I don't think it has changed a lot, to be honest. *time pressure has not increased*

[00:00:50] G: Would you say that the fact that in some cases publishers want to publish simultaneously to original editions increases the pressure?

[00:01:06] A: I think I am very lucky that I mainly work for publishers who do understand that you need time to deliver quality. I can remember only one case recently when we had to split up the translation and do it in a group of 3 translators. *works in duos or alone*  
*Half of the times I work on my own, the other half of the times I work together with a colleague. But in these cases it doesn't go any faster because of the high standards we work with. We always read one another's work, we correct the translation again and again. You don't save any time when you work in pairs. But I don't think there's more pressure these days than 10 or 20 years ago.*

[00:02:20] G: Do you think that when there is pressure, that affects the quality?

[00:02:24] A: No, because if I really think I can't do it within the time that I am given I just don't do it. But that's a luxury. *→ saying no*  
*You know, you're as good as your last translation. For my income I depend 40% on subsidies. If I don't deliver quality, I don't get subsidies anymore.*

[00:03:04] G: Are the subsidies you mentioned the ones awarded by the Nederlands Letterenfonds?

[00:03:10] A: Yes.

[00:03:15] G: Can you apply for those subsidies more than once a year?

[00:03:19] A: Four times a year. They invest a lot, but they do check everything you do, so *Subsidies*  
*one bad hurried translation and you might seriously damage your reputation. This guarantees quality to some extent.*

[00:03:48] G: Do most of your colleagues apply for these subsidies?

[00:03:52] A: The people I know mainly translate literature so, yes, they do.

[00:04:01] G: Do you often have to use non final manuscripts?

1

Example of manual coding and sample transcript.

BM.

Interview date: 08/06/2016  
Interviewee: [REDACTED]  
Company: [REDACTED]  
Role: Non-fiction acquisition editor  
Anonymous:

[00:00:45] G: What percentage of your list is in translation from English?

[00:00:57] B: Between 20 and 30%. It used to be a little bit more than it is right now.

[00:01:02] G: Was the percentage different a few years ago?

[00:01:07] B: I think years ago translations were a bit more, close to 40% translated and 60% Dutch. A few years ago there were more publishing houses and then we merged. I used to work for [REDACTED] and now it's part of [REDACTED]. On of the other publishers did almost exclusively Dutch and that's one of the reasons the percentage changed a bit. But still, the trend is that there is more Dutch a less international translated literature. That is a trend that you can see.

Comment [G1]: Atlas? No, Veen

more Dutch less translations

[00:02:05] G: What are the reasons for this shift? Why are you looking to publish more Dutch authors?

[00:02:10] B: A couple of reasons. It is simply easier to market and sell books from Dutch authors, because they are available for interviews. Since they are in the same cultural context, it's easier to get their message across and also because translations are expensive especially from English. Other languages have subsidies in place (not always but sometimes). Most of the English-language market is a huge investment and you need much higher starting print runs to be able to start making money or even in order not to lose money.

local authors

[00:02:53] G: When you say that local authors are easier to market, I guess that was the case years ago too....

[00:03:01] B: No, I think it has been increasingly the case I think. I think there is a trend where you see that people are focusing on things closer to home than they used to do. Maybe not always, maybe it was like this in the 1950-60s, but I think the trend towards internationalisation in the 1970-80s.... then there was a lot of interest for international literature, more so than now. I think it's not the same as it was 30 years ago.

Local authors

I don't know if you have talked to the people at Meulenhoff. They had a huge Latin American library that did really well and there's not something similar to that. Well, Scandinavian thrillers, but that's another story.

[00:03:55] G: When you say that translations from English are more expensive can you expand on that? Is it just because of the lack of subsidies?

[00:04:05] B: That's just something that I thought of immediately: if you don't have the subsidies then translations are fixed. But if you translated something from the Czech or the Polish there is usually the possibility to get a bit of subsidies. Same if American or British publishers translate something from us we have our foundations and institutions that subsidy that. The US and the UK don't have that.

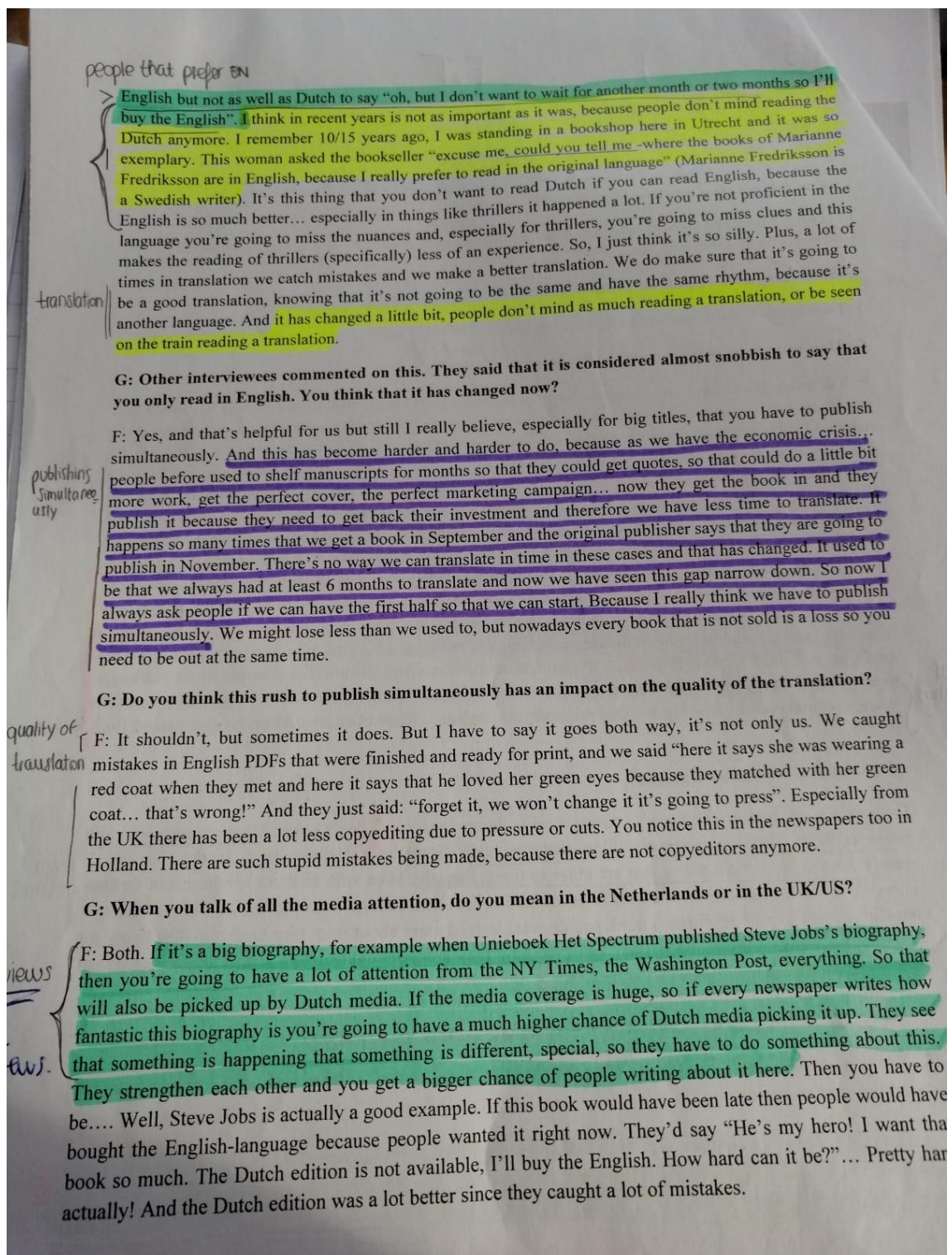
Local authors

[00:04:40] G: Do you consider the competition of English-language editions a problem when you are translating a book from English?

[00:04:45] B: It can be.

Example of manual coding and sample transcript.

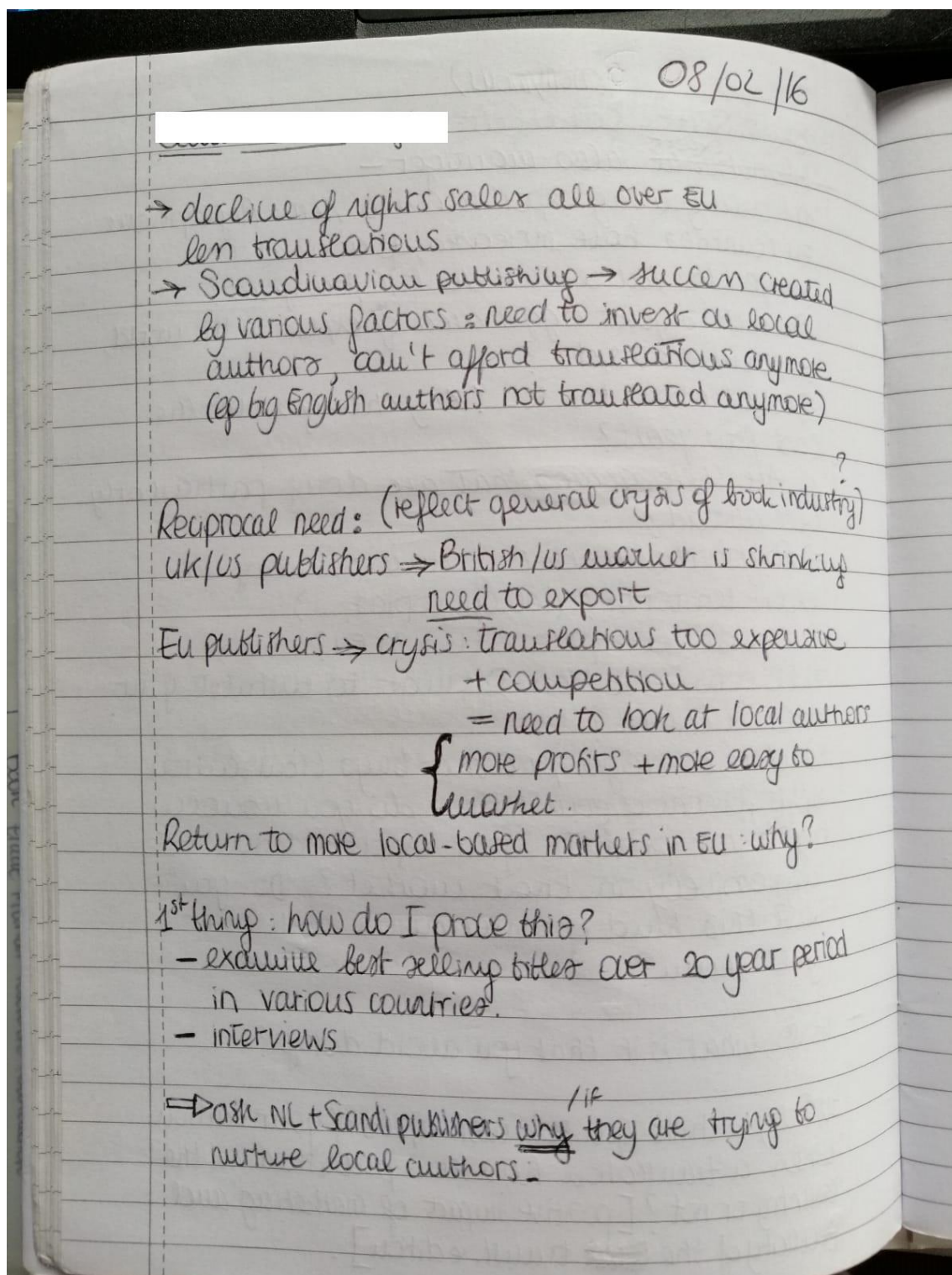




Example of manual coding and sample transcript.



## Appendix 5: Examples of field notes (anonymized)



Summary of key concepts emerged during one of the interview.

04/11/2014

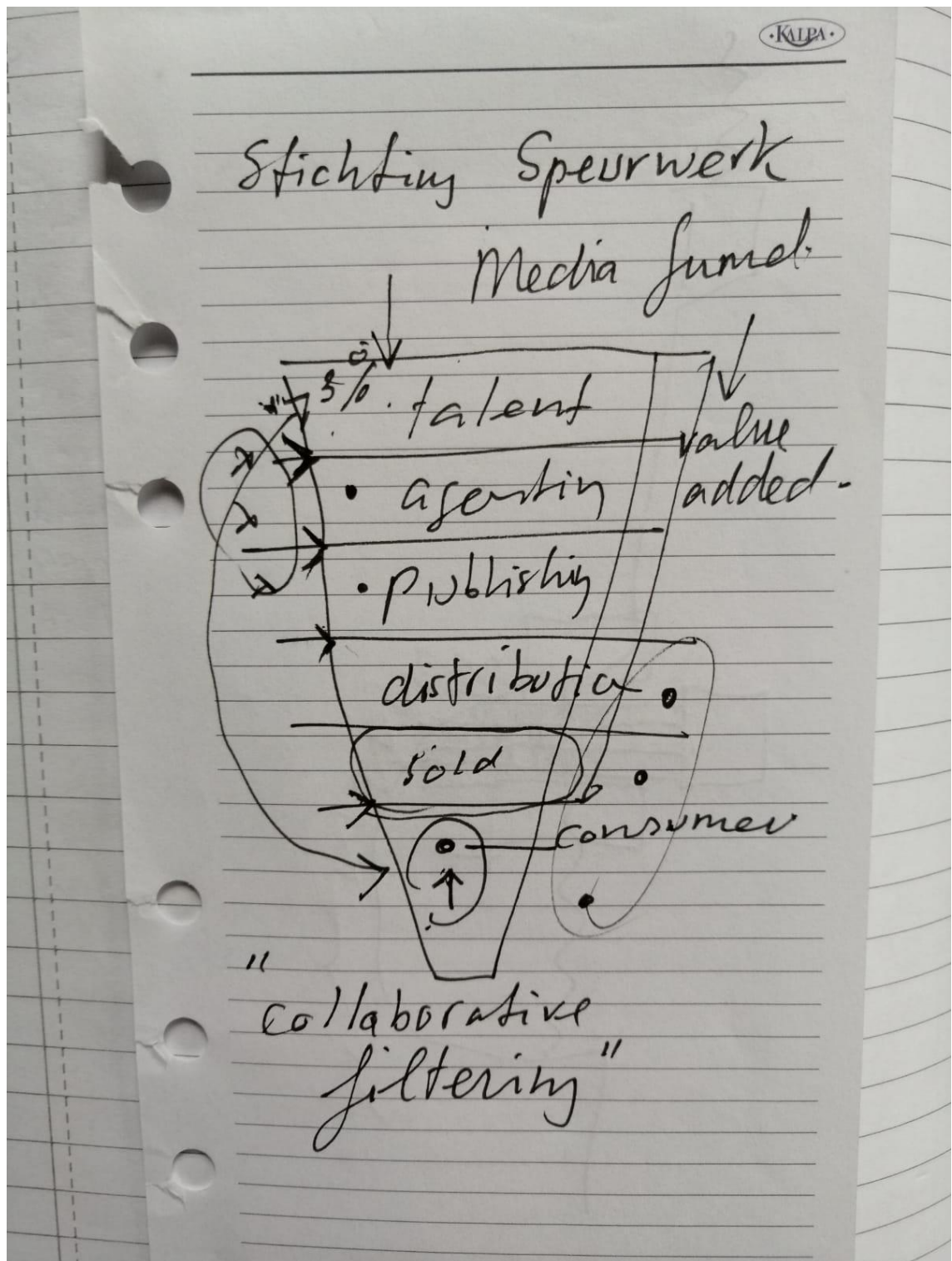
- 1- What percentage of your assortment is in EN and how much is Dutch?
- 2- Has the nr of EN-lang books <sup>EN-lang section expanded over years?</sup> increased/decreased/stayed the same over the years?
- 3- Are there more Dutch customers buying EN books or tourists & internationals?
- 4- Has the nr of people reading EN increased/decreased over the years? <sup>sales?</sup>
- 5- Why do you think D. readers prefer to read in EN?
- 6- What kind of books do better in EN?
- 7- Do you think price is one of the main <sup>factors to</sup> sales drivers for EN-lang books?
- 8- Do you think that when D. translations are out later Dutch publishers miss out on a lot of sales?
- 9- Do you stock many export editions? <sup>can you think of an example?</sup>
- 10- How do you decide between UK / US editions?

\* What genres are prevalent in EN?

- 11- Do you think that people that read in EN only read in EN, or do they mix also with Dutch depending on availability?
- 12- Do you work ~~with~~ exclusively with importers or do you also liaise with publishers directly?
- 13- How do you set your prices? Do they conform to Dutch prices or are they lower?

Interview questions preparation.





Drawing by one interviewee to illustrate one concept.