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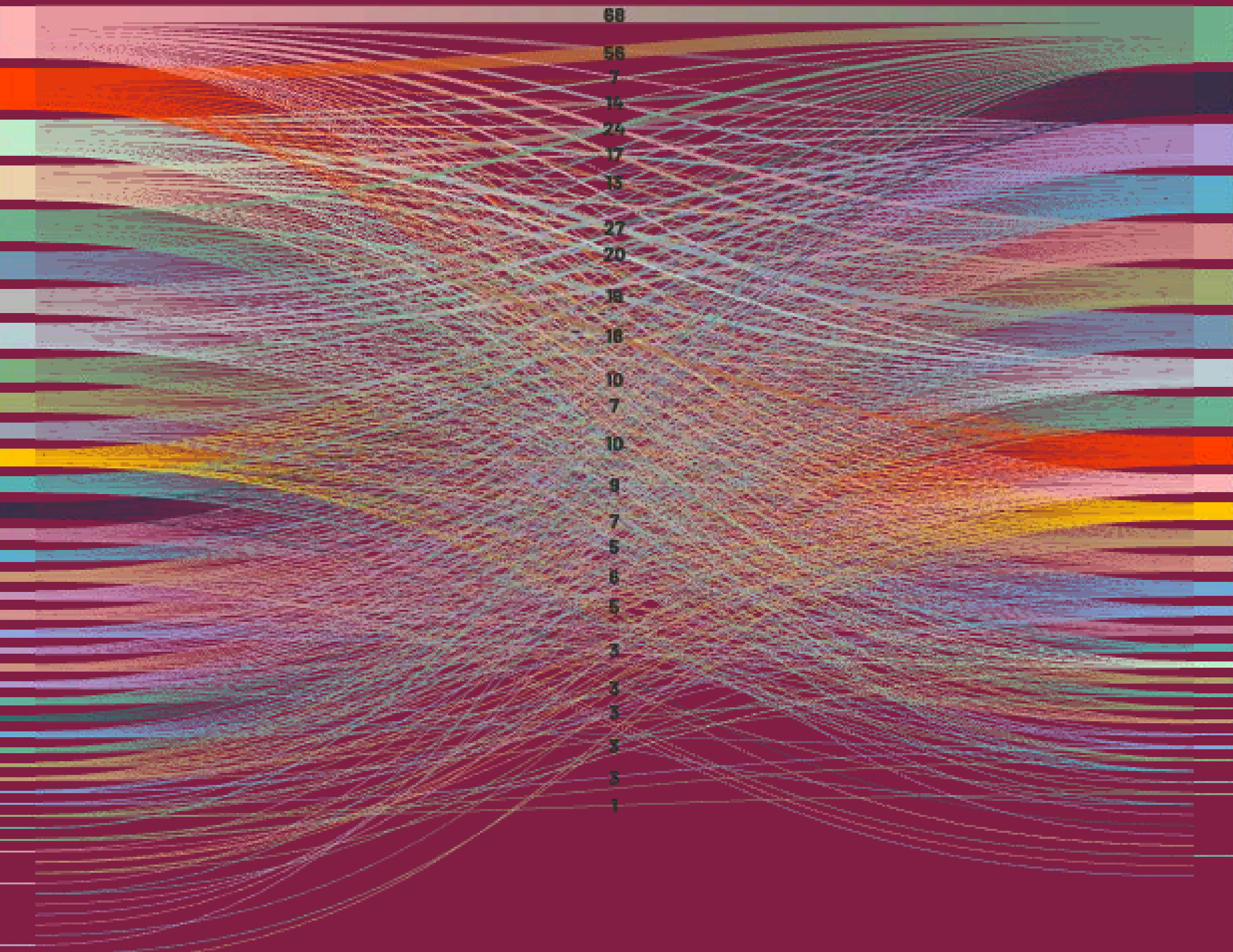

# Books in Translation

## Trends and Transformations in the European Publishing Market

WRITTEN BY MIHA KOVAČ,
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**Books in Translation:**
**Trends and Transformations in the European Publishing Market**

*A Thinkpub Report*

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# Executive Summary

## ThinkPub “Books in Translation” Report

Books in Translation provides a structured monitoring and evaluation of how translated books are produced, managed, distributed, and marketed across selected European book markets, with a strategic focus on smaller book markets and small- and mid-size publishing actors, which represent the backbone of European cultural and linguistic diversity in translation. The report responds directly to the lack of centralised European translation statistics following the discontinuation of UNESCO’s Index Translationum by assembling and critically comparing national library data, publishing-industry statistics, EU funding data, and platform-based market evidence.

The empirical core of the report dwells on data from 10 countries and regions, combining seven national case studies based on library data (Spain and Catalonia, Sweden, Slovenia, Bulgaria, Croatia, and Austria) with comparative publishing-industry data from major European markets (Germany, France, Italy, Poland, Spain, and Austria). The findings confirm that in small linguistic markets (below 10 million speakers), translations are a structural necessity rather than a supplement, accounting for 20–40% of annual book production, while large markets remain largely dominated by domestic originals. This structural dependency directly shapes publisher acquisition strategies, marketing investment models, and risk management in small markets.

A central monitored trend is the extreme concentration of translation flows around English as a source language, which constitutes 50–70% of all translations in most European markets. At the same time, direct translations between smaller European languages remain marginal, revealing a persistent centre–periphery imbalance in European cultural exchange. A partial disruption of this hierarchy is observable only in the rapid growth of Japanese literature and manga translations, driven by youth-oriented digital consumption and platform-led distribution models.

From a management and marketing perspective, the report documents a decisive shift in the professional role of literary translators. Translators increasingly operate as scouts, cultural mediators, market initiators, promoters, and export facilitators, particularly in small markets where publishers lack international scouting capacity.

Translation success is shown to depend less on spontaneous market demand and increasingly on translator networks, literary agents, festivals, book promotion agencies, and publicly funded export infrastructures. This marks a structural transformation of translation from a purely linguistic service into a hybrid cultural economic profession.

The report also evaluates the growing weight of non-traditional publishing and distribution models, which now reshape how translations are marketed and monetised:

- Self-publishing platforms (Amazon KDP, Wattpad, Yuewen/China Literature),
- Subscription-based audiobook and audio-streaming services (Storytel, Audible, Spotify),
- Direct-to-consumer and hybrid publishing models.

These systems operate largely outside classical trade statistics, yet already generate revenues comparable to major traditional publishing groups. Their expansion is transforming rights management, marketing visibility, pricing strategies, and international circulation, especially for authors and translators working beyond established publishing infrastructures. Several case signals show that self-publishing authors increasingly initiate and finance their own translations, shifting financial and promotional risk away from publishers.

A dedicated monitoring block analyses the adoption of digital and AI-based tools in translation, publishing, and marketing, with specific attention to small-language ecosystems. While large academic publishers are already deploying large-scale AI translation and content-enhancement systems, small markets face high investment barriers, data scarcity, and linguistic vulnerability. Experimental results confirm that machine translation currently performs unevenly across language pairs and remains structurally unreliable for complex literary texts and peripheral languages. The introduction of AI Kindle Translate for self-publishing (English–Spanish, German–English) is identified as a market-shifting development likely to further strengthen large-language dominance rather than reduce inequality.

The final analytical section evaluates the effectiveness and sustainability of public translation policies at national and EU levels. While translation funding volumes are increasing overall, the report identifies strong asymmetries in strategic coherence, long-term commitment, and 2 export efficiency between countries. Smaller markets remain structurally dependent on public support for outbound translations, with major disparities observable, for example, between Slovenia and Bulgaria. Changes in EU funding priorities—such as the reconfiguration of the European Union Prize for Literature within translation grants—are shown to have direct measurable effects on language balances and author visibility.

“Books in Translation” serves as a core analytical foundation for ThinkPub’s professional training programme and as a primary content asset for the ThinkPub Library of Digital Learning Objects. It delivers:

- evidence-based market intelligence on translation management and marketing;
- strategic insights for small and mid-size publishers;
- applied knowledge for translators as market actors;
- policy-relevant evaluation tools for public authorities;
- forward-looking assessment of digital and AI-driven transformation.

Through its integrated analysis of production, funding, market management, digitalisation, and professional role transformation, the report positions translation as a strategic infrastructure for European cultural diversity, democratic access to knowledge, and sustainable publishing ecosystems.

“Books in Translation” builds on a series of earlier research papers, branded as “Diversity Reports”, which were initiated and coordinated by Miha Kovač, Rüdiger Wischenbart, and Yana Genova, and published in 6 iterations between 2008 and 2020 by the Austrian non-profit association “Verein für kulturelle Transfers - Cultural Transfers”. (www.culturaltransfers.org)

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We acknowledge with appreciation the support of the Slovenian Book Agency (JAK), who organised the presentation of the draft version of this report at the 2025 Frankfurt Book Fair and the support of Next Page Foundation who invited us to present this report at the 2025 Thinking Literature in Translation conference in Bulgaria.

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# Introduction

**BY MIHA KOVAČ**

The purpose of this report is to provide a comprehensive overview of the current state of European trade book publishing, with a focus on the translation landscape. Following the decision by UNESCO to discontinue the publication of the Index Translationum, a lack of a centralised database has resulted in the absence of reliable statistics on the number of translated books and the most prevalent languages of translation. As will be outlined in this report, the data on book production is collected by national libraries, publishing associations and publishing industry data collection companies. This is a particular concern given that data is often compiled using different methodological approaches and is only available in local languages.

With the support of our European colleagues and the use of translation software, we were able to gather comprehensive data on smaller and larger European book markets. The data originate from a variety of sources, which can make cross-comparisons challenging. Therefore, the findings should not be regarded as an exact measurement of the state of affairs on EU book markets. However, the overall picture that we have developed provides a solid representation of trends and developments across the book translation markets of Europe.

During the course of our work on the report, we discovered that changes in EU translation trends are closely related to technological and social changes. In the first chapter, we therefore discuss the textual and narrative formats that have evolved over the past twenty years. We also outline which formats we consider to be part of the book universe and, as such, relevant for the report. In the second and third chapters, we analyse book production and – where data is available – consumption in a set of European book markets, with a special emphasis on markets with smaller numbers of speakers. Our research indicates that the percentage of translations is higher in markets with smaller numbers of speakers. We also discovered that translations between smaller European languages, such as an and Slovenian, are almost non-existent, and that sales of English-language books are growing across continental Europe. We also used Eurostat data on EU language proficiency to estimate the potential volume of the English book market in continental Europe.

These findings, which are discussed in more detail in Chapter Five, have recently become part of a broader public debate. This was not unexpected for the authors of this report, as we had previously identified these trends in the earlier "Diversity Report" series which analyzed European translation markets in several editions between 2008 and 2020. Given that more than half of all translations are from English, this trend has the potential to significantly reduce translation markets.

We assumed that human-assisted machine translations might help balance these processes to some extent. We conducted a series of experiments that demonstrated the hypothesis that, in certain linguistic contexts, machine translation systems can perform as well as average human translators. However, in scenarios involving languages with minimal cultural overlap and consequently a limited number of direct translations, the reliability of machine translation systems is compromised, particularly when dealing with more complex texts.

In light of this, it was not surprising when in early November 2025, Amazon announced the release of the AI Kindle Translate tool, an AI-powered tool that will translate between English and Spanish, and from German to English. Due to copyright restrictions, the tool will be available exclusively to self-publishing authors and will not, in accordance with our experiments, be available for languages with a smaller number of speakers (and training documents).

Similarly, in February 2026, Harper Collins France has confirmed partnership with Fluent Planet, a Bordeaux-based communications agency, to integrate artificial intelligence into their translation services. This collaboration aims to counter declining sales for the Harlequin "Azur" series in the French market. By optimizing workflows and cutting costs, the publisher seeks to maintain its low price point of €4.99. Fluent Planet’s translation process involves putting texts through “automatic translation” software and recruiting freelancers to post-edit the machine output in French. The initiative has sparked significant pushback from professional bodies, reigniting the debate over technological efficiency versus human creativity.

It should be noted, however, that this report was written in the third year of widespread AI use. This suggests that translation machine capabilities will improve in the future, potentially adding more languages and significantly altering the current AI and translation landscape. The Report concludes with an overview of translation support schemes as they exist in the EU, and a set of recommendations on how to improve them.

# CHAPTER 1

# WHAT IS A BOOK?

BY MIHA KOVAČ
AND RÜDIGER WISCHENBART

In this concise introductory chapter, we will briefly analyse dilemmas related to understanding of what constitutes a book, and on this basis, outline the objects that are the focus of this report.

**Definitions of the book in the pre-digital era.**

Prior to the advent of digital technology, definitions of the book centred on its physical form. In 1965, UNESCO provided a definition of a book as a **"non-periodical printed publication of at least 49 pages, exclusive of the cover pages, published in the country and made available to the public."** The description 'non-periodical' excludes voluminous magazines and journals such as 'National Geographic Magazine' from the realm of books. These publications may have the same appearance as a book, but they are published at regular intervals.

In the decades that followed, advancements in printing technology enabled the production of thinner books, particularly in the realm of children's publishing. This development led to the emergence of colourful books with less than 49 pages. It is interesting to note that the Unesco definition did not take these changes into account, but the American Postal Service (USPS) followed suit by describing a book as an object that meets the following criteria:

- Contains at least 8 printed pages.
- Consists wholly of reading matter or scholarly bibliography, or reading matter with incidental blank notation spaces.
- Contains no advertising, except for incidental announcements of books. This consists exclusively of reading material or scholarly bibliography, or reading material accompanied by incidental blank notation spaces.

This description does not include the non-periodical nature of the book, although the book's non-periodicity is implicit. In the USA, for instance, there were almost no magazines, journals or newspapers that did not contain advertisements. Furthermore, USPS employed different descriptions (and mail tariffs) for periodicals.

These two definitions/descriptions fail to take into account the medium of the book. The answer to this question is to be found in the necessity for such a definition: In addition to its involvement in book statistics, UNESCO's decision to define a book was driven by its extensive engagement in book support policies, particularly in developing countries. Similarly, USPS required the definition of the book because postal rates for books were significantly lower than rates for other post deliveries.

The key factor in UNESCO's decision to implement book support policies and USPS's decision to offer reduced delivery fees for books was the perception of books as the primary medium of culture and learning during that period. Therefore, the decision to support both public access to books and book production was made in the belief that this would lead to easier and smoother access to knowledge, education and culture. Aside from financial assistance for the publication and distribution of books, as previously outlined, the most pervasive forms of public book support are public libraries, fixed prices and a reduced VAT rate for books.

In summary, book support policies were established with the recognition that books are a vital instrument in education and culture. To allocate this support effectively, it was necessary to define what constitutes a book.

Furthermore, books were primarily regarded as a reading medium. For instance, the French tax authorities explicitly exclude publications with predominantly video content and audible music from the realm of books. As per the UNESCO definition, reading can be considered implicit. The USPS definition, on the other hand, classifies reading as explicit.

It is evident that many books do not serve as conduits of culture and knowledge. Throughout history, a significant number of these publications have been vehicles for bias, bigotry, propaganda, false information, and intellectual deficiency. However, following a series of debates in various countries, the consensus emerged that it would be more efficient to grant special status to all books (in terms of lower taxes, postage, fixed prices, etc.) rather than establishing a dedicated body to determine which books would qualify for such support. It was anticipated that the process of evaluating all published books would be time-consuming, costly, disorderly, and potentially ineffective, and might lead to the emergence of new forms of censorship. Therefore, it was decided to grant a special status to all published books.

In such an environment, books were easily identifiable as such due to their standardisation. Each published book was assigned a standard number (ISBN or CIP), which made them easily distinguishable from other media products and enabled smooth integration within the publishing, bookselling and library ecosystems.

**What is a book in the era of screens?**

On this basis, a robust and stable book landscape evolved throughout the 20th century. However, this landscape subsequently came crumbling down with the digitisation that took place at the turn of the century. A series of changes has gradually led to a re-evaluation of the fundamental components of the pre-digital book definitions and descriptions.

In electronic books, the concept of pages as we understand it in traditional books, on smartphones, tablets and dedicated reading devices, no longer applies. The size of the font can be changed at will, thus eliminating the fixed text pages that are characteristic of printed books. It is evident that most e-books are also available in print format. However, a significant proportion of these publications are exclusively available in digital format, which makes it challenging to ascertain the total number of pages. When reading such books on a digital platform, such as Amazon or Kobo, we are aware of their bookish nature because of the platform on which we read them.

This means that a digital bookselling and publishing business model is now an integral part of the definition of a book. This is because it closely resembles lending libraries from the 19th and 20th centuries. Furthermore, self-publishing platforms such as Amazon’s Kindle Direct Publishing (KDP), Wattpad or "China Literature" on Yuewen.com have become a part of the publishing business too. Authors can choose to make their books available on multiple platforms and can even add translations of these self-published items.

The recent rise in popularity of digital audiobooks provoked to similar concerns. Audiobooks were initially simply spoken versions of printed titles, and thus were dealt with as any other format of a book. As the audiobook sector has grown, and technical tools have become available to produce audio titles at low cost, notably those created digitally, entirely new audio platforms have been developed. These platforms blur the lines between what has traditionally been considered a book, and there are now many new platforms that bring oral narrations to various audiences.

A Tonie box, for instance, brings stories directly to the attention of young children. However, it is challenging to categorise the original, private goodnight story as a 'book' in the conventional sense. Concurrently, there has been a notable proliferation of original, commercially produced stories for the Tonie box, which undoubtedly constitute a sub-segment of the audiobook market. A platform such as Storytel gives rise to similar questions, once more due to its expanding amount of "original" audio-content made commercially available to various target audiences.

What is the most effective approach for managing the continuous influx of Webtoons from the new parent company of Wattpad, a self-publishing service initially designed for communities creating fan fiction? Additionally, how should we handle Mangas that reach smartphones, predominantly used by younger demographics, with illustrated and serialised stories incorporating elements from television series, magazines, podcasts, and talk radio?

Consequently, a complex controversy has emerged: Original audio series such as those produced and distributed under the Storytel brand are generally regarded as a component of the bookselling and publishing ecosystem. However, their informational architecture is unrelated to that of books. In this case, which takes precedence: the characteristics of the platform or the architecture?

A similar dilemma arises in relation to the narrations that are presented to children via the Tonies. It is clear that they are involved in the storytelling industry, but the physical Tonie figurines that serve as cases for the digital chip are distinctly different from what constitutes a book. All of these narrations can be readily converted into a printed book of 49+ pages, complete with two covers, for release to the public.

The book's availability to the public is a key factor in its definition. Provided that a written document is stored in an individual's personal digital or physical files and has not been published on a public platform, it is not accessible to the general public.

Consequently, it falls outside the scope of our current debate on the definition of a book. When considering the matter at hand, it is important to determine whether Tonies and Storytel series should be regarded as a pioneering innovation in the realm of publishing, or as a refinement of traditional book publishing. From a biological standpoint, do they constitute a new species, or merely a significant adaptation of the book that occurred in order to adapt to the new media environment?

The rule that a book must be published in a country meanwhile became opaque, or at least unclear. For instance, if an author were to write a book in English in Ljubljana and publish it for global distribution on the Kobo, Wattpad or Amazon's Kindle Direct platform, what country would it be published in? Is it the country where the author is based, and from where the content of the book is uploaded? Is the country where the company operating the platform has its main office? Or the country where the servers hosting the book are based?

It should be noted that the location of a book's origin is not irrelevant. The European Union has gained a strong reputation for leading the way in certain types of regulation, which may, or may not, be subsequently followed in other territories as well. This was the case with the GDPR, or "General Data Protection Regulation".

Furthermore, it is important to note that the flows of authors' and consumers' usage and metadata, as generated by a published title, are also relevant in this context. TikTok is the most prominent example of a marketing platform that is particularly effective for certain types of narration. The Chinese-owned platform is the subject of high-level intergovernmental deliberations between the US and Chinese authorities. These discussions are about a possible acquisition of the US-based parts of the venture by an American entity.

It should be noted that censorship regimes are in place in several countries, including the People's Republic of China, the Russian Federation, the Kingdom of Saudi Arabia, and the United States of America. In the latter case, various rules are in place for the importation of publications, with some sets of publications being banned from entering the country or not being acquired by public institutions.

In all these cases, however, the challenges associated with implementing restrictions by governments are increasingly compounded by globalisation and prevailing trade practices. To illustrate this point, consider the following example: private customers could, and probably still can, order titles banned in Saudi Arabia from online book retail platforms, and get them delivered in closed private packages in their country.

Despite the complexities addressed in this chapter, defining the book remains essential, primarily due to several pragmatic considerations.

It is imperative that all individuals involved in the book industry understand the economic metrics, particularly during periods of significant transformation. As we will demonstrate in this report, the majority of available data on book markets is notably deficient in terms of coverage of significant market segments.

It is evident that significant sections of the self-publishing sector are not accurately reflected in prevailing market statistics. Until 2015, the number of ISBNs issued by Bowker for the US was approximately 500,000 per year. This figure rose sharply to 4.5 million in 2019, and has since stabilized between 2 and 2.5 million. According to an estimate by Bowker and the US trade magazine Publishers Weekly, less than one quarter of these are traditionally published titles from publishers.

It is challenging to assess the sales and readership figures of non-traditional titles. A key indicator of the market segment's substantial scope is the number of annual payouts to small presses and self-published authors, as reported by Amazon for its Kindle Direct Publishing platform. This figure has increased from 301 million US$ in 2019 to 575 million US$ in 2023.

It is estimated that Amazon's revenue from its publishing services places it roughly half way between the two largest traditional publishing operations worldwide. These are Penguin Random House (4.2 billion US$ in 2023), a division of the Bertelsmann media corporation, and the French Hachette Group (2.7 billion US$ in 2023), which is now owned by the media group of Vivendi.

Yuewen China Literature, the Chinese equivalent of a market leader for self-publishing and related publishing services, reported revenues of 1 billion US dollars for 2023. As one would expect, definitions of what constitutes a book vary considerably even within the European Union, reflecting a country's cultural identity more than its economic regulatory system.

In Germany, for instance, the Value Added Tax Act focuses on "cultural achievements" (or "kulturelle Leistungen") to implement a reduced value added tax rate for many types of cultural goods, including theatre, concerts, museums, movies, books and periodicals. The Act states that otherwise, unjustifiable price increases would result.

In France, a book is subject to a reduced VAT rate if it meets the criteria of being "a printed collection, illustrated or not, published under a title, whose purpose is to reproduce a work of the mind of one or more authors for the purposes of teaching, disseminating ideas and culture." This applies to printed books, e-books and audiobooks. For the latter, the audiobook must provide a reading of a work whose content essentially reproduces the same textual information as a printed book. To summarise, the French definition always indirectly refers to the printed version of a book. In the case of an audiobook, which was added to be eligible for the reduced VAT in 2020, the definition refers to it being read by a human voice. This highlights the difficulties of defining books in times of rapid digital innovation.

In Sweden, the term "book" is defined as a "publicly available written work that has one or more authors, a title under which it is published and is intended to be distributed as an independent product". Books are not limited to content that is promotional, and may include brochures, newspapers, magazines and similar printed publications, provided that the content of the book is not exclusively promotional. Sweden has a strong market for digital books, including audiobooks, with more than half of all books sold being purchased through subscription services. This highlights the challenges that the book industry may face in the future.

In Great Britain, the tax authorities adopted a similar approach to those in Sweden and France, collating books comprising newspapers, magazines and journals, adding pragmatically: "In many cases, it will be clear whether or not the supply of an e-publication qualifies for the zero-rating by considering its characteristics and purpose, without carrying out a detailed assessment." The importance of "editorial control" as a qualifier for zero VAT must also be emphasised. The legal guidance includes a comprehensive list of items that are to be distinguished between "zero-rated" (e.g. advertising leaflets, annuals, antique maps, or astronomical charts) and "standard-rated" (e.g. account books, albums, announcement cards, or appointment cards). It is interesting to note that "autograph albums (uncompleted)" are classified as "standard-rated", while "autograph books (completed)" are considered "zero-rated".

The reduced VAT rates vary widely, ranging from zero percent in Great Britain to 10 percent in Austria, with France at 5.5 percent, Sweden at 6 percent, and Germany at 7 percent.

From the perspective of both authors and readers, a more practical, albeit more individualistic,range of approaches might exist, full of nuances between "I only read printed books" and the radically agnostic stance of "Digital is just a format. The content is of the utmost importance. If you put a book in a glass of water, I'll drink the book", as the Angolan writer José Eduardo Agualusa said at the Book 2.0 – O Futuro dos Livros conference in Lisbon, Portugal, in September 2025.

(Original quote: *“O digital é apenas um formato. É o conteúdo que importa. Se colocarem um livro em um copo de água, eu vou beber o livro.”* Reported by Carlo Carrenho for this report.)

Since 1964, we have been aware of the notion that the medium is also the message, as articulated by Marshall McLuhan. Research has demonstrated that the perception of the same content varies depending on whether it is read on a screen or a paper, or whether it is experienced as an audio narration or a filmed version. It is reasonable to hypothesise that the reading component of the "book bottle" is the specific feature that justifies the lower, or even zero, VAT on books, as permitted by the European Commission in 2022.

In this report, we analyse the decisions made by tax authorities regarding the definition of a book, and the extent and impact of translations in this area. However, where data allows, we endeavour to provide a more comprehensive view of the contemporary reading landscape by incorporating other textual and narrative media that are not currently within the remit of book tax authorities and some book analysts.

# CHAPTER 2

# SMALL COUNTRIES, BIG TRANSLATIONS AND BIG STATS PROBLEMS

BY MIHA KOVAČ
AND ANJA KAMENARIČ

# 2.1 An Overview of the Translation Landscape

**BY MIHA KOVAČ**

In Europe's smallest book markets, where the number of speakers is fewer than ten million, translations are not a niche product. They are structural in nature: in markets where publishing turnover is insufficient to sustain a diverse pool of local authors who could meet the diverse needs of readers, as is the case in larger markets, this is an effective way to ensure that shelves remain well-stocked and to broaden the range of genres. Consequently, small markets tend to be more cosmopolitan in comparison to larger markets.

The following hypothesis is put forward: In smaller European markets, with a population of less than 10 million, translations account for more than 20% of annual book production.

We had one further hypothesis that we wanted to test: namely, that sales of translations account for more than 20% of the entire publishing turnover in markets with small numbers of speakers. However, we were unable to acquire data that would indicate the ratio between sales of translations and sales of originals for the markets that we analysed.

In order to maintain comparability, we primarily rely on national bibliography statistics (obtained from national libraries via legal deposit) and utilise trade or statistics bureau series and publishers' statistics as context when available. Please note that legal-deposit data are subject to change, as late deposits and catalogue corrections are received over time. For this reason, we decided to examine the years 2018 and 2021, where possible, as we assumed that the data for these two years is more or less final. Where possible, we also included 2024 for comparison; however, the data must be viewed with caution, as most libraries are just finishing their intake period. Trade portals frequently freeze to a yearly snapshot, so backfills may never be visible there (table 1). Any discrepancies in reported figures arise from differences in counting. Some countries include only books, others all monographic publications. Data sources and methods vary. The details for each country are listed below.

As we shall see, there are also other reasons why sources differ. It is vital to understand these differences if we are to gain a full appreciation of the translation landscape in smaller markets.

**TABLE 1**

PUBLISHED TITLES AND TRANSLATIONS BY COUNTRY AND YEAR (BY SOURCE)

| Country | Year | Source basis | Published titles (total) | Translations (titles) | Share of translations (%) |
|---|---|---|---|---|---|
| Latvia | 2018 | National library | 2,161 | 578 | 26.7 |
| Latvia | 2021 | National library | 2,108 | 556 | 26.4 |
| Latvia | 2024 | National library | 2,194 | 680 | 31 |
| Lithuania | 2019 | National library | 3,479 | 1,235 | 35.5 |
| Lithuania | 2021 | National library | 3,477 | 1,499 | 43.1 |
| Lithuania | 2024 | National library | 3,046 | 1,251 | 41.1 |
| Finland | 2021 | National library (NLF) | 8,366 | 1,646 | 19.7 |
| Finland | 2021 | Trade portal (FPA) — printed books | 4,261 | n/a | n/a |
| Iceland | 2018 | National library & Statistics Iceland — books & booklets | 1,927 (printed) | 483 | 25.1 |
| Iceland | 2021 | National library | 1,319 (printed) | 458 | 34.7 |

| Country | Year | Source basis | Published titles (total) | Translations (titles) | Share of translations (%) |
|---|---|---|---|---|---|
| Slovakia | 2018 | National bibliography (KULT 4-01) | 9,315 | 2,634 | 28.3 |
| Slovakia | 2021 | National bibliography (KULT 4-01) | 8,230 | 2,553 | 31 |
| Slovakia | 2024 | National bibliography (KULT 4-01) | 8,830 | 2,956 | 33.5 |
| Czechia | 2018 | National library | 30,742 | 13,192 | 42.9 |
| Czechia | 2021 | National library | 25,800 | 10,492 | 40.7 |
| Greece | 2019 | OSDEL report | 10,984 | 3,357 | 30.6 |
| Greece | 2023 | OSDEL report | 11,285 | 3,277 | 29 |
| Slovenia | 2018 | National library | 5,715 | 1,712 | 30 |
| Slovenia | 2021 | National library | 5,904 | 1,794 | 30.4 |
| Slovenia | 2024 | National library | 4,943 | 1487 | 30.1 |

| Country | Year | Source basis | Published titles (total) | Translations (titles) | Share of translations (%) |
|---|---|---|---|---|---|
| Bulgaria | 2018 | National Statistical Institute | 9,842 | 2,101 | 21.3 |
| Bulgaria | 2021 | National Statistical Institute | 11,700 | 2,703 | 23.1 |
| Bulgaria | 2024 | National Statistical Institute | 10,143 | 2,598 | 25.6 |
| Croatia | 2018 | National Library | 4,362 | 1,529 | 35.1 |
| Croatia | 2021 | National Library | 4,941 | 1,763 | 35.7 |
| Croatia | 2024 | National Library | 5,164 | 1,887 | 36.5 |

Please note that percentages are calculated as follows: translations ÷ total titles × 100. The Latvia and Lithuania totals comprise both original and translated elements within their respective national series. They also included data for books published in other languages. Finland: NLF row = legal deposit national output (printed books); FPA row = member-publisher trade output (printed book series). Please note that some FPA tables do not report translations as a single annual total, and therefore show 'not applicable' (n/a). Iceland: the Statistics Iceland series reports books and booklets based on the Icelandic National Bibliography. When aligned to the same scope, totals come close to the national library line for the same year. In the case of Slovakia, published title counts refer exclusively to books, while translation figures cover all translated non-periodical publications; consequently, the proportion of translated books is likely overstated. In the case of Bulgaria, the numbers cover both books and pamphlets. Czechia and Greece exceed the population threshold to a minor extent, but we have included them as a sample.

## 2.1.1 Reasons for the Discrepancy Between the Counts

National libraries endeavour to capture the full spectrum of publications within the country through legal deposit, encompassing commercial publishers, public bodies, non-governmental organisations, micro-presses, as well as doctoral theses and self-published works. Therefore, the number of published titles according to national libraries exceeds the number of books published with the intention of sale in trade book markets. Conversely, a significant proportion of reading materials published on self-publishing portals remain undetected by national libraries. This material is not as pertinent to our study, which mainly covers the years 2018-2021, as the current type of generative AI did not exist at the time to facilitate self-publishing authors in translating to languages with smaller audiences. Furthermore, they lacked a marketing arm to penetrate potential target markets. It should also be noted that many of these texts were written and read in English. These issues are discussed in Chapter 1 - What is a book and Chapter 5 - Global English and Continental Europe.

Conversely, trade portals monitor the release of content by member publishers. As stated in the technical note, the case in our sample where these differences are most clearly documented and transparent is Finland, where the number of published titles according to the National Library almost doubles the number of published titles according to the Publishers' Association data. We can hypothesise that trade figures predominantly reflect the sale of first editions. Library numbers, on the other hand, include subsequent editions as well as various titles from outside the traditional book publishing sector. These include doctoral theses and similar publications from organisations such as public and private NGOs.

## 2.1.2 The Ratio of Translation and the Pull of English

In the small-market cases we track, translations account for between a quarter and two-fifths of all titles: Latvia (26–31%), Lithuania (36–41%), Iceland (25–35%), Slovakia (28–33%), Czechia (43-41%), Greece (29-31%), Slovenia (30%), Bulgaria (21-25%). In 2021, Finland's rate was just under the general estimate of 19.7%. In cases where language details are available, English predominates in most translation flows.

**TABLE 2**

ENGLISH SHARE OF TRANSLATIONS

| Country | Year | English-source translations (titles) | All translations (titles) | English share of translations (%) |
|---|---|---|---|---|
| Finland | 2021 | 940 | 1,646 | 57.1 |
| Iceland | 2018 | 318 | 483 | 65.8 |
| Iceland | 2021 | 312 | 458 | 68.1 |
| Slovakia | 2018 | 1,650 | 2,634 | 62.6 |
| Slovakia | 2021 | 1,584 | 2,553 | 62 |
| Czechia | 2018 | 6,596 | 13,192 | 50 |
| Czechia | 2021 | 2,668 | 10,492 | 25.4 |
| Greece | 2019 | 1,137 | 3,357 | 33.9 |
| Greece | 2023 | 1,881 | 3,277 | 57.4 |
| Slovenia | 2018 | 935 | 1,712 | 54.6 |
| Slovenia | 2021 | 993 | 1,794 | 55.3 |
| Slovenia | 2024 | 776 | 1,487 | 51.5 |
| Bulgaria | 2018 | 1,113 | 2,101 | 53 |
| Bulgaria | 2021 | 1,522 | 2,703 | 56.3 |
| Bulgaria | 2024 | 1,333 | 2,598 | 51.3 |
| Croatia | 2018 | 1,240 | 1,529 | 45.3 |
| Croatia | 2021 | 1,185 | 1,763 | 47.1 |
| Croatia | 2024 | 1,014 | 1,887 | 52.3 |

According to data from the National Libraries, English consistently accounts for 50% to 75% of translations in smaller markets. However, Finland's data suggest that this may not be the case. According to the Finnish Publishers' Association, the number of published titles has increased, and according to the NFL, the number of translations has also increased. This means that the percentage of translations in Finnish book production has almost doubled and now exceeds 20%.

In this context, we must consider Finland's data as a clear warning sign regarding the complexity of our analysis. By taking the National Library's data on the number of yearly published titles as an indication of the number of book titles available to buy and read in the trade book market, we create an illusion that this number is higher than it actually is. Consequently, we have overlooked a key point: namely, that the percentage of English translations in trade book markets is higher than the percentage indicated by National Library data.

So, does the 20% rule hold?

Overall, the answer is affirmative. Using national bibliography totals for smaller European countries, translations achieve clearance of 20% in most cases and years, often by a significant margin. Furthermore, it is reasonable to assume that, when considering only books published for leisure reading, the percentage of English translations is likely to be somewhere between 30% and 50% across all small trade book markets.

But what are the origins of this English dominance? In order to gain a more comprehensive understanding of the scope of this question, it is first necessary to examine in greater detail the translation landscape of a selection of both large and small markets.

# 2.2 Five Case Studies: Translation Landscape According To National Library Data

**BY ANJA KAMENARIČ**

Notwithstanding these limitations, library data represents a valuable resource, offering a consistent, large-scale, and publicly accessible source for detailed, multi-year research into translated books. This makes it an ideal resource for the objectives of this research. All data is recorded with regard to physical books; however, due to library cataloguing, there are no differences between softcover and hardcover books, as this is not specified in most cases. Despite our focus on trade publishing, the data includes all monographic publications counted by libraries, i.e. textbooks, academic books, and additional material specific to the country's cataloguing, such as lyrics, colouring books, and technical reports. Please note that these are further specified with each country.

In the country-by-country sections of this report, each dataset is accompanied by a brief description of its source library or library network, along with the methods used to extract, clean, and analyse the records. Where necessary, we explain how translation-related information was identified, how inconsistencies were addressed, and how gaps in the records were handled to ensure comparability. This approach ensures that readers can understand both the strengths and the constraints of each dataset, as well as any adjustments made to harmonise the information across different countries.

This chapter will examine various small markets, as well as the library data set for one large market: Sweden. We have gathered library data for two large markets Spain and Sweden; however, Spain is examined in its own separate chapter, where we compare library data with publisher data. The large markets chosen serve as contrasting case studies: Spain represents a significant European market with a strong outward reach into Latin America, while Sweden demonstrates the dynamics of a smaller linguistic community within a larger European context, yet wielding considerable influence in international rights trading. For that reason, you can find the Spanish data in Chapter 4 – Two Systems, Two Outcomes: A comparison of Translation Data in Spain, and the publisher’s data for Sweden in Chapter 3.4.6 – Sweden: A Digression.

## 2.2.1 Sweden

In accordance with Swedish legislation, all publishers in Sweden are obligated to submit a copy of each book they publish to the National Library of Sweden. The National Library provided us with a file showing the total number of books published each year, as well as the number of books originally published in Swedish. They provided this by sending us the data via e-mail in a few different tables. The table in question was delivered on the 7th of January 2025 for the 2014 – 2023 data. The 2024 data was sent to us on the 20th of February 2026. For translated books, they provided a file listing all the languages from which the books were translated into Swedish. The list was structured to include a separate entry for each instance of a language being used.

The list includes all books that the National Library categorises as monographic publications. It should be noted that this category includes textless books, which are classified as picture books; lyrics, which are used for collections of texts in rare or extinct languages and dialects; colouring books; and teaching materials, which include textbooks and schoolbooks. Second editions or reprints were not separated. To analyse the data, the list was filtered by year, and the number of distinct languages was counted. While the files did not specify which books were multilingual, it was possible to infer this from the data. The number of languages listed exceeded the total number of translated books, meaning that certain books must have been translated from more than one language.

Following a thorough review of the collection, it has been determined that the most prevalent examples of such books are dictionaries, multilingual children's books and multilingual poetry collections. Given that Swedish is one of the languages from which the most books are translated, it is reasonable to infer that some of the published books are multilingual. Libraries categorise multilingual books as translated works, given that the text is typically written in one language and then translated into the others. According to the catalogue, these books are described as works in which the text is reproduced in parallel in two or more languages.

### 2.2.1.1 Book Production in Sweden

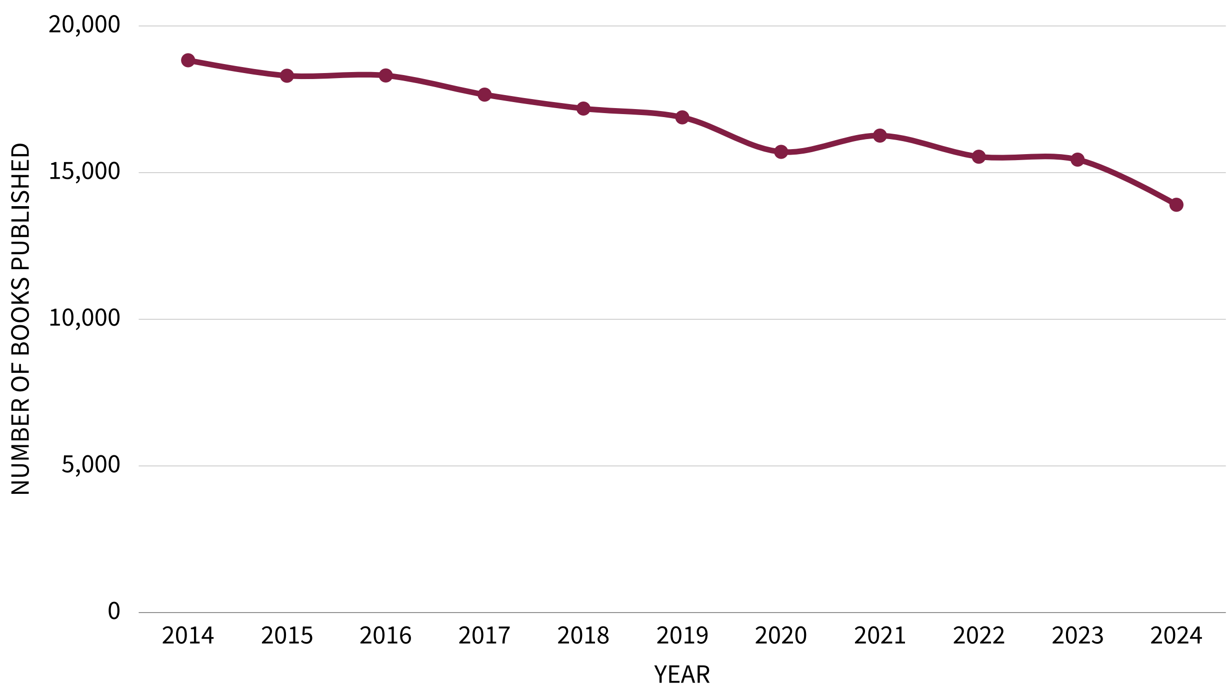
According to library data, the total number of books published in Swedish has declined notably over the past decade. In 2014, 18,830 titles were recorded, compared with just 13,904 in 2024, a decrease of almost 5,000 titles, or a little over 25%.

We can hypothesize, that the library has not catalogued every book yet; however, given the date, the number should be fairly accurate. The decline was gradual at first, but became more pronounced after 2017, with the lowest figure appearing in 2024. In recent years, the numbers have stabilised to a certain extent but remain well below the earlier levels. As previously stated, the data encompasses all books classified as monographic publications within the library, thereby ensuring a comprehensive representation beyond merely trade publishing.

There are several factors that may be contributing to this downward trend. Changes in publishing practices, shifts towards digital formats, and market consolidation could all contribute to a smaller number of titles being released in print. It is important to note that the data reflects only books recorded by the library system. It is possible that the lower figures observed in recent years may not fully reflect actual publishing activity. This is due to the possibility that some copies may not have been sent to the library, or that there have been delays in cataloguing and processing. While the data indicates a significant decrease in recorded output, the actual changes in the Swedish publishing landscape may not be as substantial as initially perceived.

**FIGURE 1**

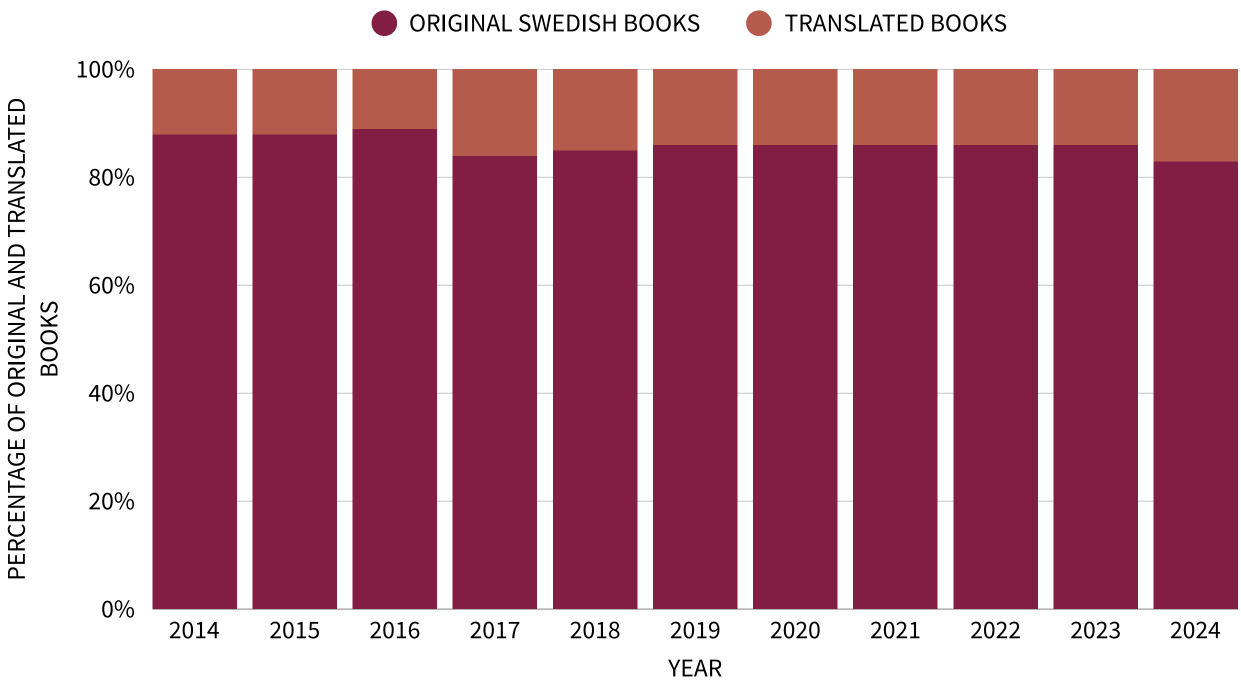
BOOK MARKET IN SWEDEN: ALL BOOKS PUBLISHED IN SWEDISH, 2014–2024



According to library data, Sweden's book publishing market between 2014 and 2024 was consistently dominated by original Swedish titles. During this period, original Swedish books accounted for approximately 83–89% of all published titles each year, while translations accounted for only 11–17%. These figures demonstrate a consistently stable trend, with only minor fluctuations from year to year. Though appears to be an increase in translation from 14% in 2023 to 17% in 2024. The overall stability indicates that Sweden's publishing industry maintains a strong focus on producing and promoting domestic authors, with translations representing a relatively small but growing share of the market.

**FIGURE 2**

BOOK MARKET IN SWEDEN: ORIGINALS VS. TRANSLATIONS, 2014–2024




## 2.2.1.2 Top 10 Source Languages for Translation

The data shows that a small number of source languages dominate, with English far surpassing all others. During the 2014–2024 period, English accounted for between 61% and 69% of all translated titles each year. While this share has gradually declined since its peak in 2016, English still accounts for nearly two-thirds of the translation market in 2024, reflecting its continued dominance in global publishing and the enduring demand for English-language literature in Sweden.

French has consistently ranked second, accounting for approximately 6–7% of translated titles on an annual basis. Norwegian and German follow closely, with each contributing approximately 4-6% of translations. Their consistent presence highlights Sweden's cultural and geographic proximity to its Nordic neighbour, as well as the robust tradition of German-language literature in the Swedish market. Danish also secures a consistent share of approximately 4% on an annual basis.

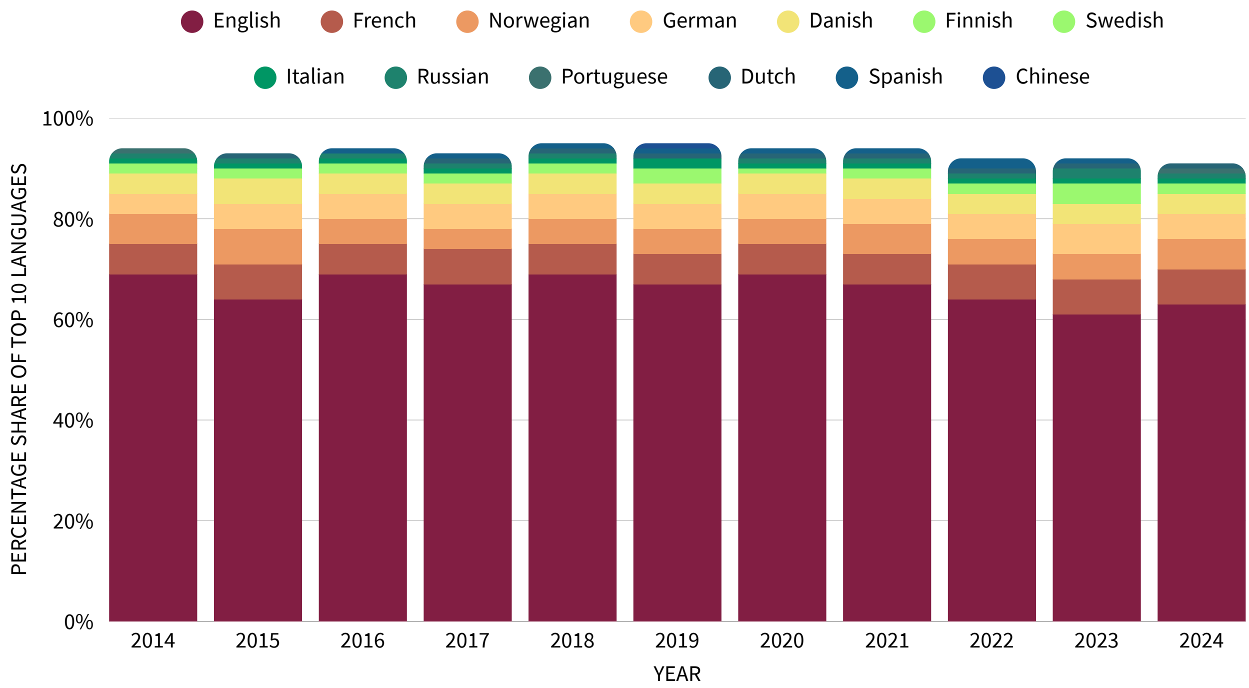
Finnish translations, although representing a smaller share overall, have shown notable variation, from just 1% in the early years to a significant increase in 2023, when they doubled to 4%, although they have since dropped back to 2% in 2024. This could be indicative of targeted publishing initiatives, anniversaries of prominent Finnish authors, or shifts in regional literary exchange.

The remaining languages in the top ten (Italian, Russian, Portuguese, Dutch, Spanish, and Chinese) generally account for 1% or less of total translations each year. Their relatively small shares may be indicative of niche publishing segments, specialised literary interests, or sporadic spikes linked to particular works or cultural events.

Collectively, the top ten source languages account for 93-95% of all translations into Swedish on an annual basis. This high level of concentration means that only a small proportion of translated literature comes from outside this core group. Although English's share is slowly declining, the dominance of a handful of European languages – along with the gradual emergence of others – suggests that the Swedish translation market remains both concentrated and influenced by long-standing cultural and linguistic ties. The minor fluctuations in shares suggest a potential slowdown in diversification, but the market's overall structure has remained remarkably stable over the past decade.

**FIGURE 3**

TOP 10 SOURCE LANGUAGES FOR TRANSLATIONS INTO SWEDISH, PER YEAR, 2014–2024




As mentioned previously, we have also acquired the publisher's data for Sweden, which you can read more about from the Chapter 3.4.6 – Sweden: A Digression. That data includes translations published between 2002 and 2014, while the library data covered books published from 2014 to 2023.

## 2.2.2 Slovenia

In contrast to large linguistic markets, small markets are defined by their limited readership base, narrower commercial margins, and greater reliance on translations to sustain a diverse publishing ecosystem. In this context, translation is not merely an additional activity but rather a fundamental structural necessity. Absent translation, readers in smaller linguistic communities would have access to a significantly limited body of world literature and knowledge production. Consequently, translated works frequently account for a significant portion, and in some cases even the majority, of the annual publishing output.

The dynamics of translation in small markets are therefore markedly different from those in large ones. Decisions about what to translate are shaped not only by commercial considerations but also by cultural policy, institutional support, and efforts to strengthen the visibility of the local language in the global sphere. Translation fulfils a dual role: it serves as a conduit for importing global cultural capital and as a means for exporting national or regional literature, often through targeted subsidies, literary prizes, or state-funded initiatives. Examining smaller markets, such as Slovenia, Bulgaria and the Catalan-speaking region, demonstrates the variety of strategies employed to balance linguistic identity with participation in global literary flows.

The following dataset was provided by the National and University Library of Slovenia, which also publishes annual statistics on book publishing. The datasets for the time period 2014 - 2023 were sent to us on the 24th of November 2024, the additional 2024 data was sent to us on the 16th of February of 2026. For the 2014 - 2023 period we received three different versions of the data. The exact subset used in the publishing statistics, the National University and Library of Slovenia unfiltered dataset and the Cobiss+ dataset.

In order to have comparable data, we formally requested that the data be exported in the same format used for the library’s end-of-year publisher statistics, which is the first dataset mentioned and the one we used. However, it should be noted that the figures do not fully align with those in the officially published statistics.

There are several factors that contribute to these discrepancies. It is crucial to note that the annual statistics are compiled with a fixed cut-off date, whereas the data received for some years was supplied much later, in some cases, nearly a decade after the original publication year. Consequently, our dataset includes titles that were delayed in submission or not initially sent to the Library but were subsequently added to its holdings at a later date.

With regard to the Slovenian data, the dataset contained all books published in various languages. We have filtered this list to retain only titles published in Slovenian, including multilingual books in which Slovenian is the primary language of publication. This is why Slovenian is also included among the "top languages" in the data. If Slovenian was listed merely as a secondary language, for example, when the first publication language was English and Slovenian was only an additional translation, the title was excluded from the count. These filtering steps were essential to ensure that the data accurately reflects books where Slovenian is the main publication language. In the original language column, there were examples where it listed more than one language, meaning that the book which was translated was originaly multilingual. For those, we counted each language separately for the final count of the top ten source languages.

The list includes all books that the National and University Library of Slovenia categorises as monographic publications. It should be noted that this includes textbooks, workbooks, academic books, instruction manuals, academic "collections", exhibition catalogues and technical reports, as they are included in publishers' end-of-year statistics. We employed the same methodology to ensure the integrity of the data and prevent any potential inconsistencies.

### 2.2.2.1 Book Production in Slovenia

Between 2014 and 2024, the number of books published in Slovenia remained relatively stable, fluctuating within a narrow range of between approximately 5,200 and 5,900 titles per year, although it had a drop in 2024 to 4,943 titles, which is the lowest figure reported for the examined period.

From 2014 to 2016, the total number of published books remained stable at just under 5,700 per year. A moderate increase followed in 2017, when output reached 5,901 titles. Following a slight decrease in 2018, the figure increased again in 2019, reaching close to the 2017 level.

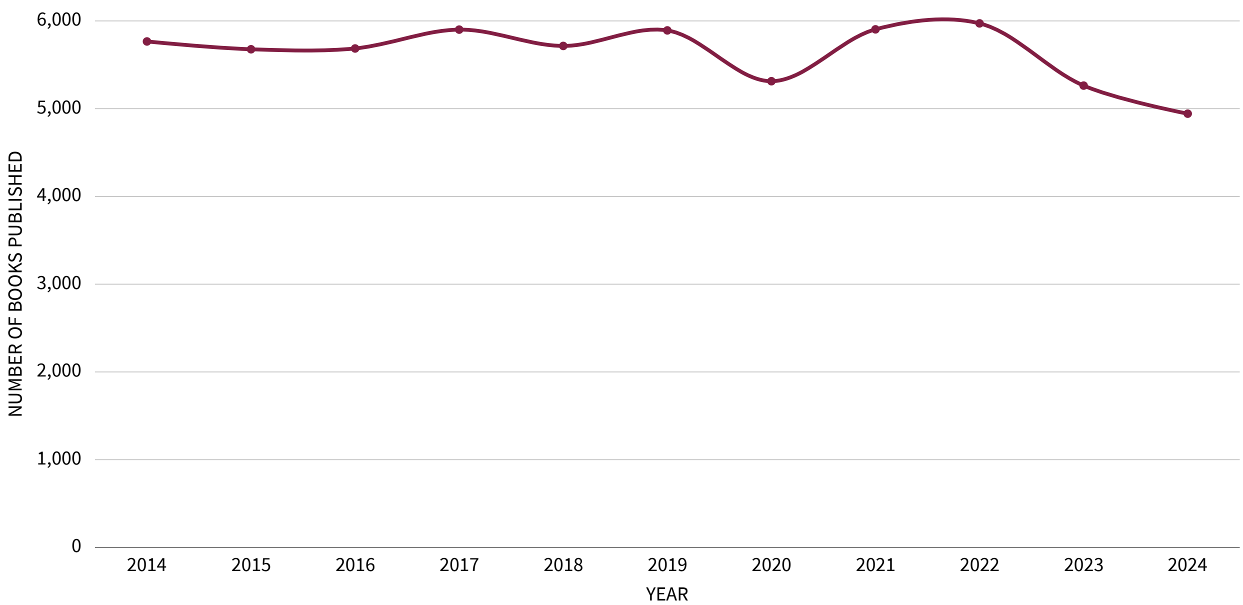
A more pronounced decrease took place in 2020, with just 5,313 books published, the second-lowest figure of the decade. This decline may be linked to the disruptions caused by the pandemic, which affected both production schedules and distribution channels. The market demonstrated a sharp rebound in 2021 and reached its peak in 2022, however, this recovery proved to be transient. In 2023, there was a significant decrease of over 700 titles compared to the previous year, and again another previously mentioned decrease in 2024.

The significant decrease might not exclusively indicate a genuine decline in publishing activity. While all publishers in Slovenia are legally obliged to submit copies of their books to the National and University Library, it is possible that not all 2024 titles had been delivered, processed, or catalogued by the time the dataset was compiled. In previous years, delayed submissions and retrospective updates have resulted in higher counts when the data was revisited later. It should be noted that the 2024 figure could increase once all outstanding titles have been accounted for. Caution should be exercised when interpreting the apparent decline.

As demonstrated by the end-of-year publishing statistics, the decline is not as significant. The data indicates that Slovenia's book publishing output has remained relatively stable over the past decade, with no discernible sustained growth trend and possible decrease. Year-on-year changes appear to reflect short-term influences such as production delays, market conditions or external disruptions rather than long-term structural shifts in the publishing sector.

**FIGURE 4**

BOOK MARKET IN SLOVENIA: ALL BOOKS PUBLISHED IN SLOVENIAN, 2014–2024




Over the eleven-year period from 2014 to 2024, the proportion of books originally published in Slovenian remained remarkably stable, consistently representing between 68% and 71% of total annual book output. Translated books accounted for the remaining 29–32% each year, with no significant changes in the balance between the two categories.

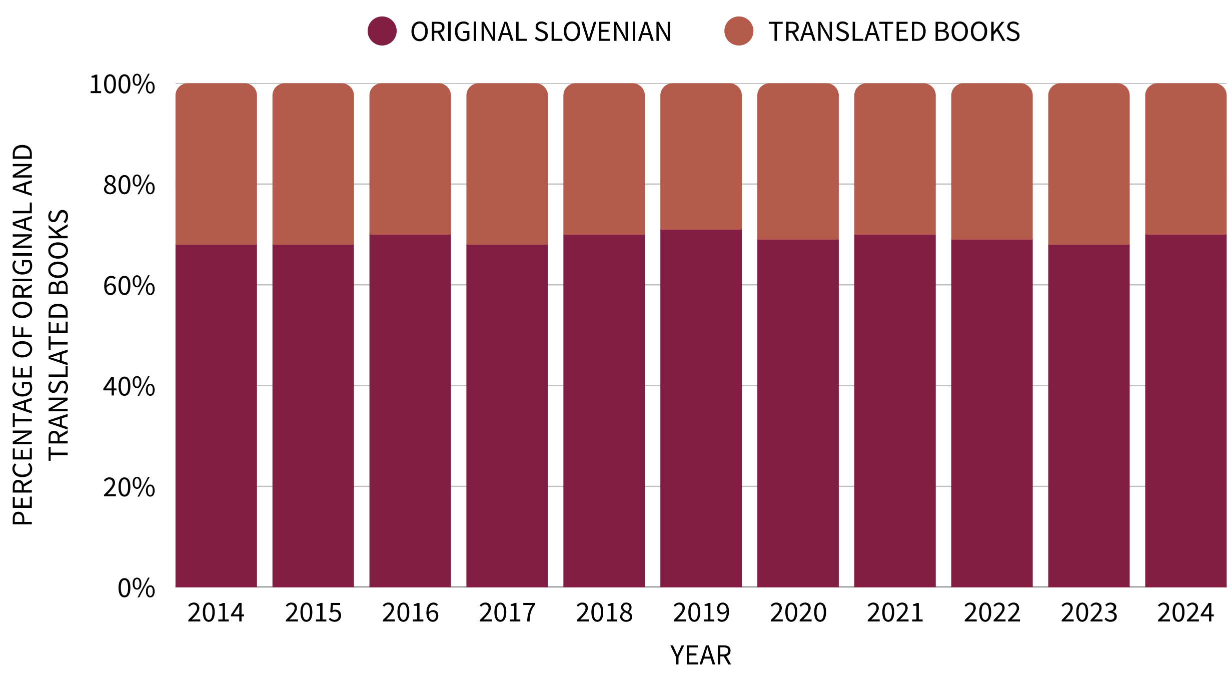
The highest percentage of original Slovenian titles was recorded in 2019, when they accounted for 71% of all publications. Conversely, the lowest percentage of Slovenian titles was recorded in 2014, 2015 and 2017, when it was 68%. The proportion of translations reached its lowest point in 2019 (29%). The last year of data gathered data 2024 shows a 70% to 30% ratio in favour of original Slovenian works.

This stability indicates that the Slovenian publishing market has successfully maintained a balanced ratio between domestic production and translated works. This stability in translation shares stands in contrast to the more volatile trends observed in some other countries, where they have been more influenced by market forces, policy changes, or cultural shifts.

However, as with total book counts, caution should be exercised when interpreting the 2024 figures. If, as suspected, not all titles for that year had been delivered to or processed by the National and University Library at the time of data extraction, the final distribution between original and translated works may shift slightly once the dataset is complete.

**FIGURE 5**

BOOK MARKET IN SLOVENIA: ORIGINALS VS. TRANSLATIONS, 2014–2024



#### 2.2.2.2 Top 10 Source Languages for Translation

The data sets provide insights into the distribution of the top source languages utilised for Slovenian translations between 2014 and 2023, along with their respective shares of the total translations each year. In 2019, two languages were tied for 10th place, with the same number. As a result, there are 11 languages listed for that year.

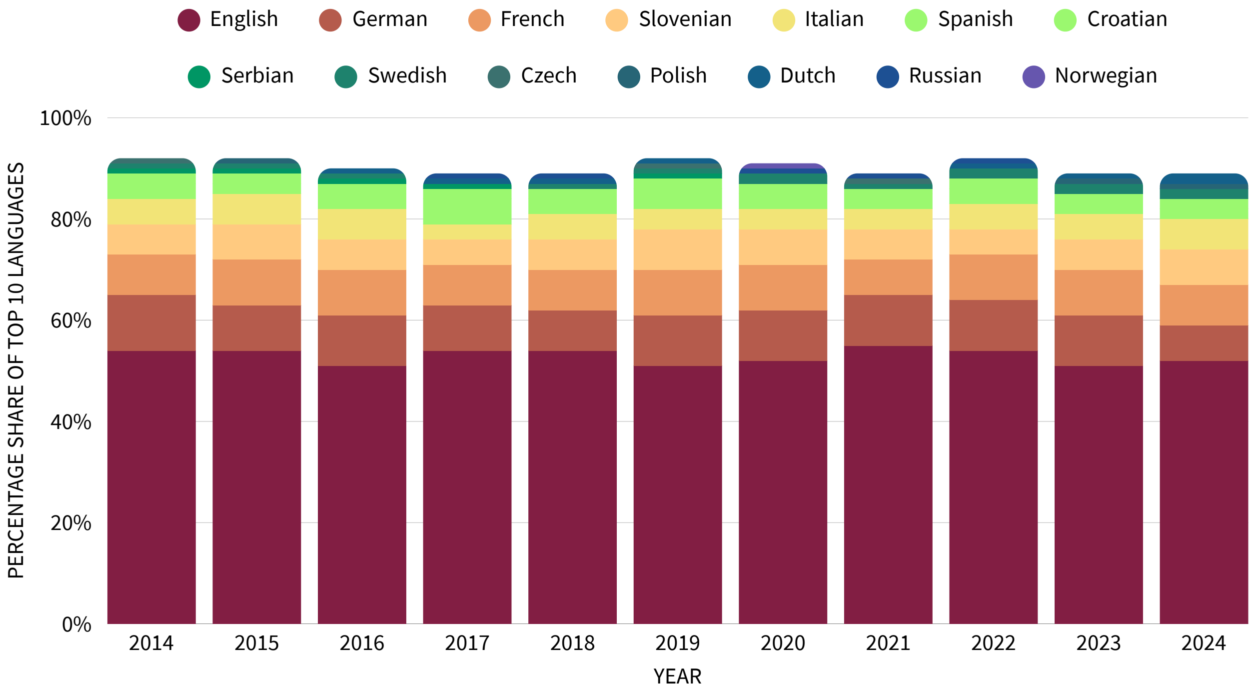
English consistently dominates, accounting for just over half of all translations each year, fluctuating slightly between 51% and 55%. German and French follow, with stable shares of around 8–11% and 7–9%, respectively, showing relatively minor variation over the decade. Slovenian is listed among the "source languages" with a percentage of 5–8%, which is likely to reflect bilingual or multilingual publications where Slovenian is one of the source languages. The majority of these were originally published by Slovenian publishers. It also includes works where only the foreword or commentary is written in Slovenian, though this is a rarity. It is used mostly in examples of Slovenian minority publishing in neighbouring countries.

Italian holds a steady 3–6%, while Spanish hovers around 2–5%, with a notable peak in 2017 (5%). South Slavic languages such as Croatian and Serbian continue to make a valuable contribution, though Serbian translations show a decline after 2020. Smaller shares are held by Swedish, Czech, Polish, Dutch, Russian, and Norwegian entities, with each contributing generally less than 1%.

The top 10 languages consistently account for between 90% and 93% of the market, indicating a high level of concentration in a small number of source languages, though that number decreased to 88% during 2024, indicating a small shift. The dominance of English reflects a common global trend, while the presence of regional languages such as German, Italian and Croatian highlights Slovenia's geographic and cultural connections. The persistence of Slovenian as a "source" also suggests the importance of domestic co-publications or translations between Slovenian editions.

**FIGURE 6**

TOP 10 SOURCE LANGUAGES FOR TRANSLATION INTO SLOVENIAN, PER YEAR, 2014–2024




## 2.2.3 Catalonia

Catalan is one of Spain's four official languages, alongside Castilian (or Spanish), Basque, and Galician. Barcelona, the capital of Catalonia, is home to several major publishing houses that serve regional Catalan audiences and Hispanic markets in Spain and the Americas. For this particular case study, we elected to conduct a five-year analysis.

Catalan is a Romance language primarily spoken in Catalonia, the Balearic Islands, Valencia (where it is known as Valencian), and parts of Aragon, as well as in the Principality of Andorra, the Roussillon region of France, and the city of Alghero in Sardinia. In Spain, Catalan is officially recognised alongside Spanish in Catalonia, the Balearic Islands, and the Valencian Community, as stipulated in the Spanish Constitution of 1978 and subsequent regional statutes of autonomy.

From a linguistic and cultural perspective, Catalan serves as a symbol of identity and a catalyst for regional cohesion. It is important to note that this medium is not only used for daily communication, but also as a vehicle for education, literature and mass media. The promotion of Catalan in the publishing sector has been central to maintaining linguistic vitality in the face of historical periods of suppression, particularly during the Franco dictatorship (1939–1975), when public use of Catalan was restricted. According to the Generalitat de Catalunya, the language enjoys extensive use in schools, regional administration, publishing and broadcasting, contributing to a vibrant literary tradition that spans centuries, from medieval works such as Ramon Llull's Blanquerna to contemporary bestsellers.

In recent decades, public institutions and cultural organisations, such as the Biblioteca de Catalunya and Institut Ramon Llull, have played a pivotal role in documenting, preserving, and promoting Catalan-language literature. Data from these institutions is essential for understanding both the historical evolution of Catalan publishing and its current position in a multilingual Spain. Beyond its cultural significance, the sustained production of works in Catalan supports linguistic normalisation policies aimed at ensuring the intergenerational transmission and everyday use of the language.

The Library of Catalonia (Biblioteca de Catalunya) has provided comprehensive datasets pertaining to the Catalan language. The first dataset was dispatched to us via e-mail on the 29th of April 2025, the second on the 17th of February 2026. The datasets were comprised of two primary components: first, a complete list of all books published in the Catalan language within the territorial scope of Catalonia; and second, a compilation of translations into Catalan from other languages.

The list of books originally published in Catalan has been derived from the legal deposit database, which serves as the official repository for all materials published in the region. The legal deposit system plays a vital role in safeguarding cultural and intellectual heritage. The data provides an authoritative record of bibliographic production in Catalan, making it a valuable resource for historical research and contemporary linguistic analysis.

The second component of the dataset consists of translations from other languages into Catalan. This list has been extracted from the catalogue of the Biblioteca de Catalunya. While it is possible that certain works may not yet be catalogued, it is anticipated that such omissions represent only a small fraction of the total translations produced. Collectively, these resources provide a solid foundation for conducting quantitative and qualitative research on Catalan-language publishing, translation patterns, and the evolving role of Catalan within the broader literary and cultural landscape.

The dataset predominantly comprises literary and non-fiction words that would fall under the umbrella of trade publishing; however, it does also include a small number of textbooks and instruction manuals. The collection includes both first editions and reprints.

### 2.2.3.1 Book Production in Catalonia

The dataset provided by the Biblioteca de Catalunya demonstrates a clear recovery trend following a sharp decline in 2020. This represents a decrease of approximately 13.2% from 2019 to 2020, which aligns with the disruptive impact of the pandemic on the publishing sector. During this period, the global and regional publishing industries encountered logistical challenges, reductions in retail activity, and delays in production.

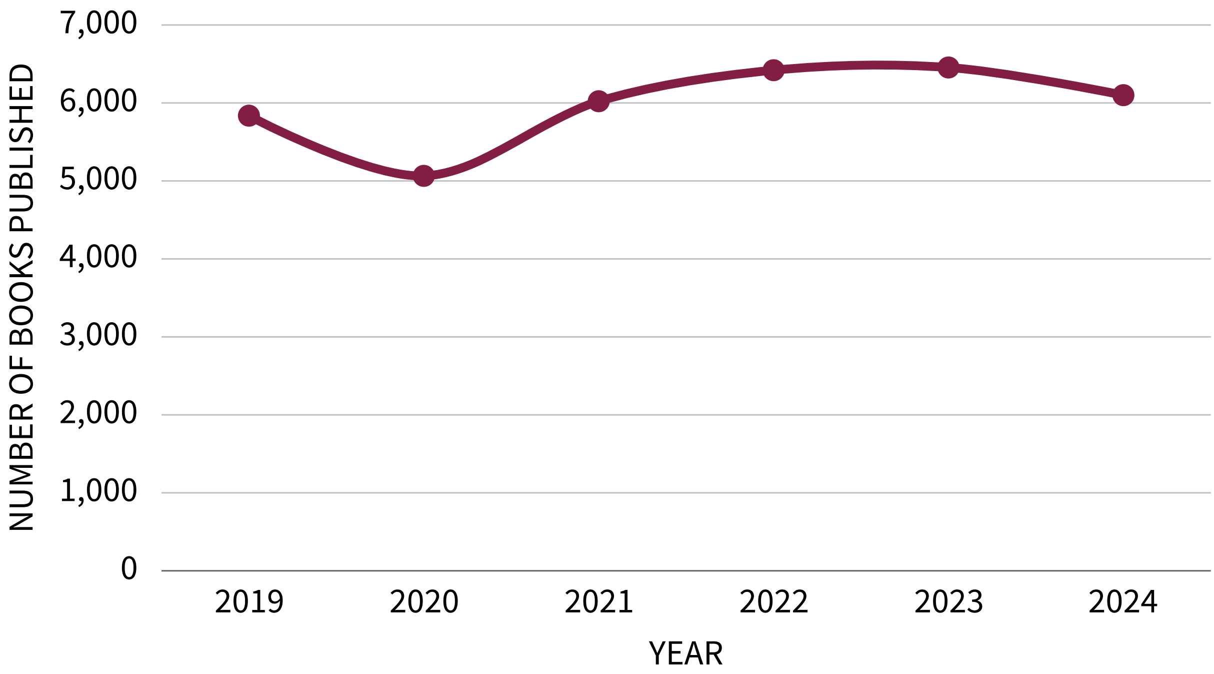
In 2021, the number of titles rebounded to 6,022, surpassing pre-pandemic levels. This represents an 18.9% increase on the previous year, indicating the resilience of the Catalan publishing industry and the effectiveness of adaptation strategies, including increased reliance on digital distribution, diversification of genres, and the reopening of cultural and educational institutions.

The upward trend continued in 2022 with 6,420 titles, marking a 6.6% increase from 2021, followed by a more modest growth of 0.5% in 2023 to 6,455 titles. In 2024 the trend shifted as only 6,100 books were published, indicating a slight drop. This may indicate a stabilisation of the market after a post-pandemic rebound, with production reaching a sustainable output level; however that will be confirmed by the publishing output in the following years.

From a cultural perspective, the increase in Catalan-language publications after 2020 underscores the language's continued vitality and the commitment of both publishers and authors to maintain a strong literary presence. The post-pandemic expansion is significant for language policy objectives in Catalonia, as an active and diverse publishing sector is a cornerstone of linguistic normalisation efforts and cultural transmission.

**FIGURE 7**

BOOK MARKET IN CATALONIA: ALL BOOKS PUBLISHED IN CATALAN, 2019–2024



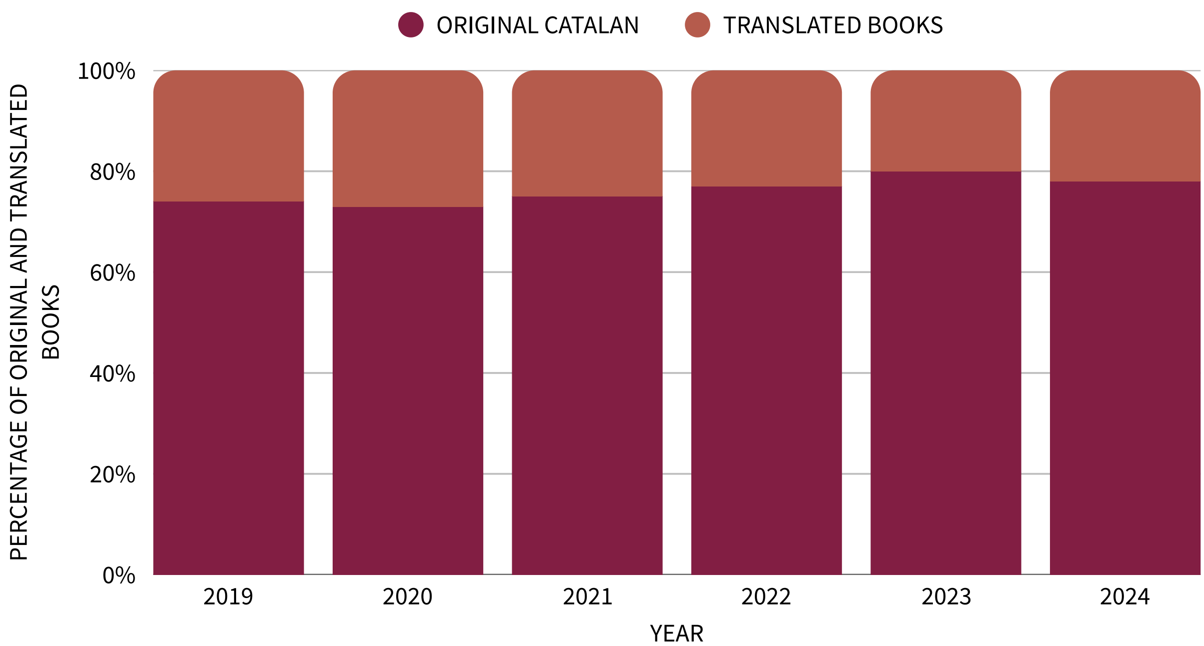

The Biblioteca de Catalunya has provided a dataset offering insight into the composition of Catalan-language publishing in Catalonia between 2019 and 2024, distinguishing between works originally authored in Catalan and those translated from other languages. The proportions indicate a gradual yet significant shift over the five-year period. In 2019, original works accounted for 74 percent of total Catalan-language publications, while translations represented 26 percent. The following year, 2020, saw a slight decrease in the share of original works to 73 per cent, accompanied by a corresponding increase in translations to 27 per cent. By 2021, there was a renewed shift in the balance, with original works reaching 75 percent and translations dropping to 25 percent. This upward trajectory continued in 2022, when original works reached 77 per cent, and culminated in 2023 with a record high of 80 per cent original. In 2024 the trend reverted as original production dropped to 78%.

The decline observed in 2020 can plausibly be attributed to the disruptions caused by the pandemic, which affected global and regional publishing industries alike. However, from 2021 onwards, the sector demonstrated clear signs of recovery, as evidenced by both quantitative growth and a renewed emphasis on original literary production in Catalan.

The progressive increase in the proportion of original works is of considerable cultural and sociolinguistic significance. From a literary perspective, the growing share of locally authored content suggests an increasingly dynamic creative environment in which Catalan serves not merely as a language of reception but as a primary vehicle of cultural expression. This aligns with the longstanding objectives of Catalan language policy, which prioritises the expansion and diversification of the literary corpus as a means of promoting linguistic normalisation and cultural prestige. It also reflects the resilience of Catalan authors and publishers in a multilingual literary marketplace, where linguistic choice intersects with market forces, audience preferences, and identity politics. As Woolard has observed, the vitality of a minority language depends not only on its use in everyday communication but also on its ability to generate high-prestige cultural products that affirm its legitimacy and desirability. Although, as seen by the slight drop of 2024 we will see if the trend of stabile growth of original works reinforces itself or if a new pattern is emerging.

**FIGURE 8**

BOOK MARKET IN CATALONIA: ORIGINALS VS. TRANSLATIONS, 2019–2024




## 2.2.3.2 Top 10 Source Languages for Translation

The distribution of source languages for translations into Catalan between 2019 and 2024 reveals both enduring hierarchies and subtle shifts within the translation market. In 2019, two languages were tied for 10th place, with the same number. As a result, there are 11 languages listed for that year. During this period, English maintained its dominance as the primary source language, accounting for between 32% and 35% of all translations on an annual basis. The stability of this share, with a modest increase to 35% in 2023 and then a decrease to 32% in 2024, reflects English's continued role as the principal vector of global literary and non-fiction content entering the Catalan publishing sphere.

Spanish consistently ranked second, with a steady increase from 26% in 2019 to 31% in 2024. This increase suggests a growing incorporation of works from the Spanish-language publishing market, which may be facilitated by geographical proximity, shared cultural contexts, and the presence of major Spanish publishers operating in Catalonia. Such an upward trend could also indicate the growing appeal of Spanish-language literature produced outside Spain, particularly from Latin America, which adds thematic diversity while maintaining linguistic accessibility for translators. We must also keep in mind that libraries often catalogue multiple language books as translations, which can play a role in the high Spanish percentage.

French ranked third, remaining relatively stable at 14% until 2021, before dropping to 12 % in 2022 and 2023 and then rising back to 13% in 2024. This slight decline may be indicative of shifting market demand or competition from other Romance-language sources. Italian followed, with a notable decrease from 10% in 2019 to just 4% by 2024. This represents the most significant decline among major source languages over the six-year period, potentially indicating reduced acquisition of Italian titles or changes in genre preferences that favour other linguistic markets.

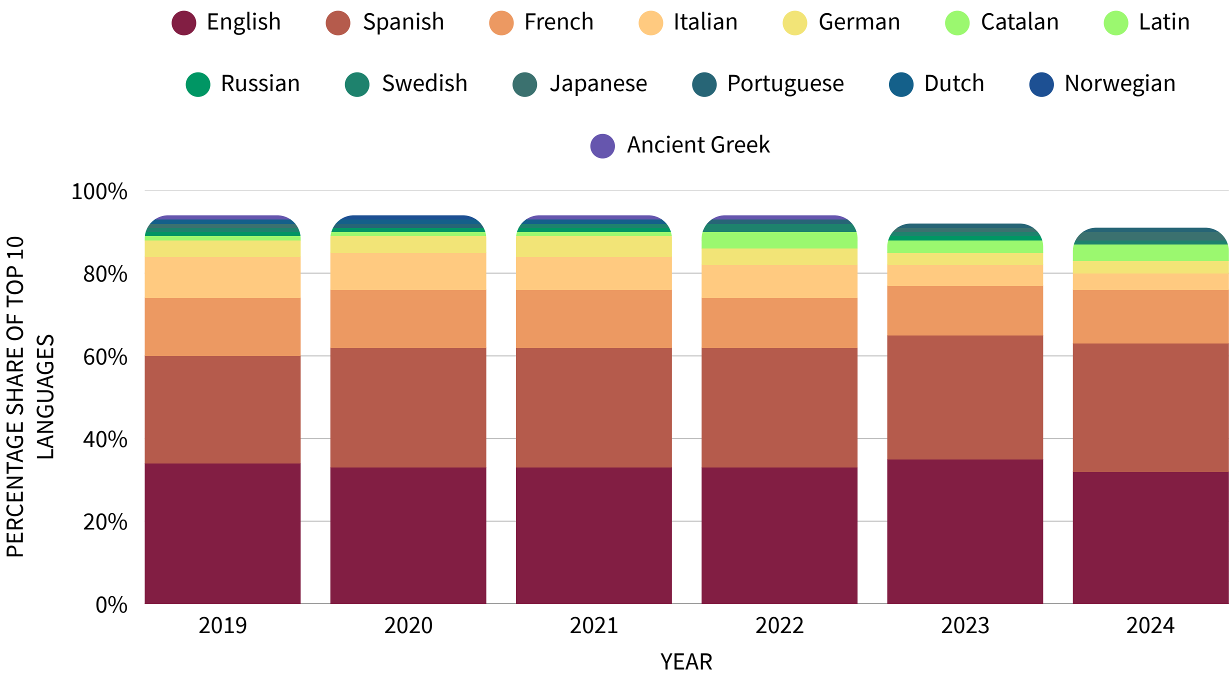
German, while never exceeding 5%, also experienced a downward trend, moving from 4% in 2019 to 3% in 2023 and 2024, suggesting a modest contraction in its contribution to the Catalan translation landscape. Meanwhile, Catalan itself emerged as a minor but noteworthy source language for translations into Catalan from 2022 onwards, accounting for 2% in both 2022 and 2023 and 3% in 2024. This phenomenon is likely indicative of the re-translation or adaptation of works from other Catalan varieties, or the translation from multilingual books or the way those were catalogued.

Smaller contributors such as Latin, Russian, Swedish, Japanese, Portuguese, Dutch, Norwegian, and Ancient Greek maintained marginal shares, with individual fluctuations rarely exceeding one percentage point, though Japanese did rise to 2% in 2024. Collectively, these languages play a significant role in promoting the diversification of translated literature.

The data on the top ten source languages indicates that they consistently accounted for the vast majority of translations, ranging from 92% to 95% over the six years. This concentration suggests a high degree of linguistic centralisation in the Catalan translation market, where a limited set of dominant source languages (chiefly English, Spanish, and French) provide most of the translated material. Overall, the most notable developments in this dataset are the stability of English's dominance, the gradual rise of Spanish, and the sharp decline of Italian.

**FIGURE 9**

TOP 10 SOURCE LANGUAGES FOR TRANSLATION INTO CATALAN, PER YEAR, 2019–2024




## 2.2.4 Bulgaria

The data for Bulgaria was obtained from the Book Publishing and Press reports published on an annual basis by the National Statistical Institute of the Republic of Bulgaria. These official statistical publications serve as the primary source of national-level information on the publishing sector, providing aggregated figures on book production, periodicals, and other printed materials.

In contrast to the more extensive datasets available for libraries, the information contained in these reports is comparatively limited in scope, offering a more restricted range of granular variables for in-depth analysis. Firstly, we must mention that the statistics that we used are listed as the titles published in the original language in which they were written (including in Bulgarian), meaning it's possible the total number is overinflated by books originally written in other languages and published in Bulgaria. Furthermore, changes in reporting practices have introduced certain challenges for longitudinal comparison. In 2022 the format of the reports was revised, resulting in reduced availability of data on the source languages of publication. Consequently, the data for the last three years lists only the top four source languages, while the previous years listed five or six of them.

### 2.2.4.1 Book Market in Bulgaria

According to the data from the Book Publishing and Press reports of the National Statistical Institute of the Republic of Bulgaria, the publishing sector in Bulgaria from 2014 to 2024 displays several notable patterns in terms of production volume and composition. Overall, there has been a general upward trend in total printed output between 2014 and 2024, peaking at 11,828 items in 2022, before declining to 10,143 in 2024. This growth is not linear, with fluctuations that suggest varying external influences, such as changes in demand, production capacity, or broader socio-economic conditions.

Books consistently account for the majority of publications, with annual figures ranging from 6,443 in 2014 to a peak of 10,544 in 2022. While pamphlets constitute a smaller proportion of the total output, they have demonstrated notable year-on-year fluctuations. For instance, there was a significant decrease in pamphlet production in 2019 (912 titles), followed by a substantial increase in subsequent years, reaching 1,793 in 2023 and then another drop to 1252 in 2024. This suggests that pamphlet publishing is more sensitive to short-term factors, potentially including political campaigns, public information initiatives, or shifts in educational and promotional materials.

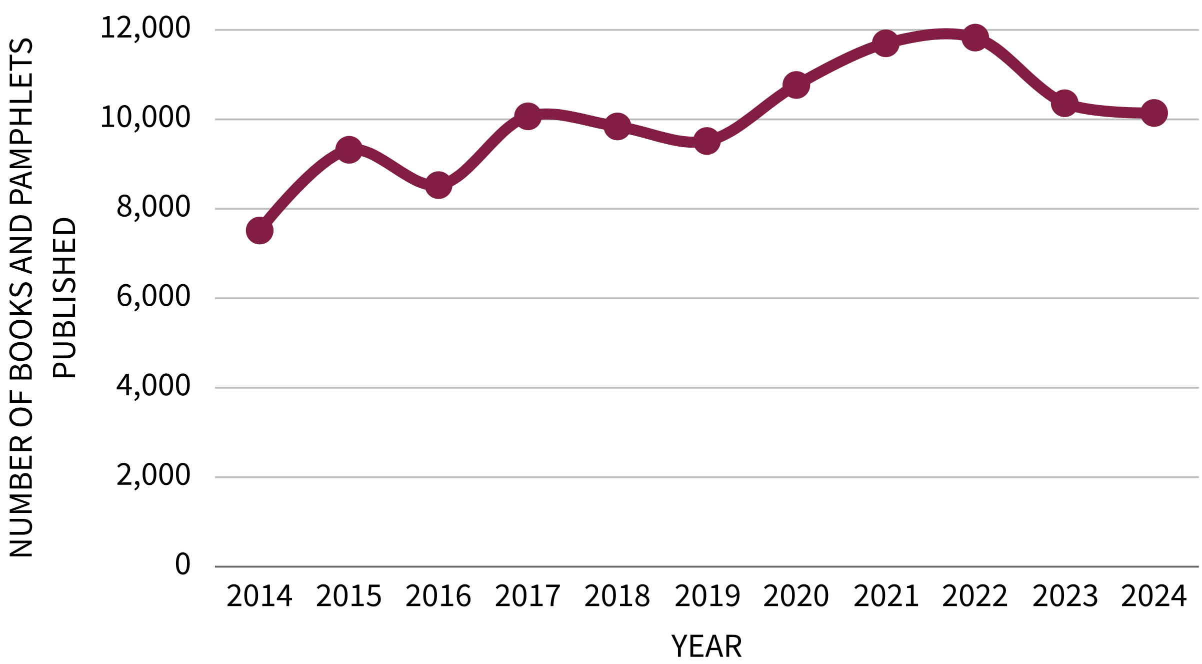
It is important to distinguish between books and pamphlets when analysing market structure. Books are typically longer and more substantial works, often intended for sustained readership and higher cultural or academic value. Pamphlets, on the other hand, tend to be shorter, more targeted, and often tied to specific events or purposes.

However, in the Bulgarian statistical context, the analysis of language patterns cannot isolate these categories because the data on the source language of publication is aggregated across both books and pamphlets. Please note that the term 'pamphlets' refers to publications with a maximum of 48 pages, while the term 'books' refers to publications with 49 pages or more.

This aggregation limits the ability to focus exclusively on books when examining linguistic trends, as the inclusion of pamphlets, whose language distribution may differ significantly from that of books, can obscure patterns that would otherwise be visible. Therefore, any linguistic analysis must be interpreted with caution, acknowledging the combined nature of the dataset and the distinct functional roles of the two publication types in the Bulgarian print ecosystem. However, it is not possible to remove the pamphlets from the statistical analysis, as this would entail the removal of a significant number of picture books, which play a vital role in the trade publishing sector.

**FIGURE 10**

BOOK MARKET IN BULGARIA: ALL BOOKS AND PAMPHLETS PUBLISHED IN ORIGINAL LANGUAGE, 2014–2024




The proportional distribution of original Bulgarian versus translated publications between 2014 and 2024 highlights both stability and periodic fluctuations in the composition of the publishing market. During the period under review, original Bulgarian works have consistently dominated, with their share ranging from a low of 70% (2016) to a high of 80% (2019). The remaining share, which is made up of translated publications, conversely varies between 20% and 30%. This indicates a relatively stable but significant role for foreign-language content in the Bulgarian publishing ecosystem.

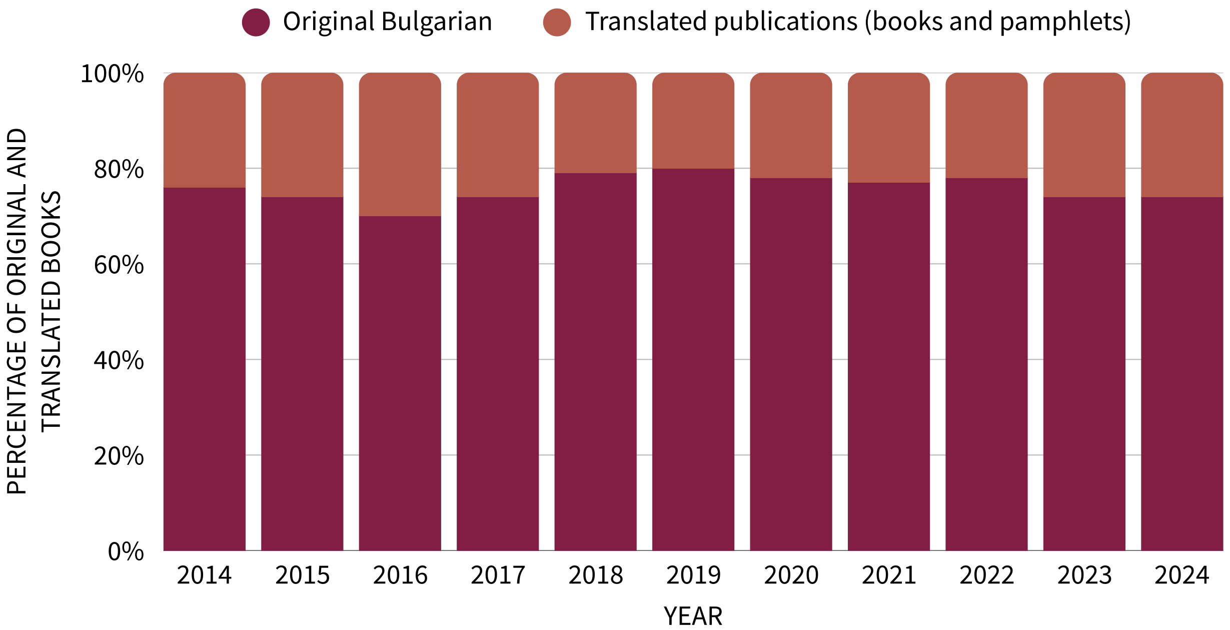
A more detailed examination of the timeline indicates several significant changes. From 2014 to 2016, there was a decline in the proportion of original Bulgarian works, from 76% to 70%, accompanied by a corresponding increase in translations. This could be indicative of a temporary expansion in the translation of foreign literature, driven by market demand, international publishing initiatives, or funding schemes for translation. However, from 2017 onwards, there has been a general recovery in the share of original Bulgarian works, reaching a peak of 80% in 2019, a year that in turn also saw one of the lowest proportions of translations. This suggests a particularly strong domestic publishing output that year, potentially linked to national literary campaigns, cultural events, or economic conditions that favoured local production.

From 2020 to 2022, the balance stabilises at around 77–78% for original works and 22–23% for translations, indicating a relatively mature equilibrium between domestic and foreign content. However, 2023 marked a notable shift, with the share of original Bulgarian publications dropping to 74% and translations rising back to 26%, which remained unchanged in 2024. This change is consistent with the overall contraction in total publications that year and may signal a combination of reduced local output and stable or increased import of translated works.

It is important to note that these proportions are calculated for the aggregated category of books and pamphlets and thus may not accurately represent the linguistic composition of books alone. Given that pamphlets are more likely to be produced in Bulgarian for local use, their inclusion may inflate the percentage of original-language works when compared to books in isolation. This aggregation limits the precision of conclusions about language trends within the book market specifically.

**FIGURE 11**

BOOK MARKET IN BULGARIA: ORIGINALS VS. TRANSLATIONS, 2014–2024




## 2.2.4.2 Top Source Languages for Translation

The data on the percentage distribution of translated publications by source language for 2014–2024 reveals clear and consistent trends in Bulgaria's translation landscape. English occupies a dominant position throughout the observed period. English-language originals account for between 48.2% (2020) and 58.4% (2015) of all translations, reflecting the central role of Anglophone literature in the Bulgarian market. Although there is some year-to-year variation, the data indicates a consistent reliance on English as the primary source for translated content. This is probably due to the global dominance of English-language publishing, the wide range of available titles, and its commercial appeal.

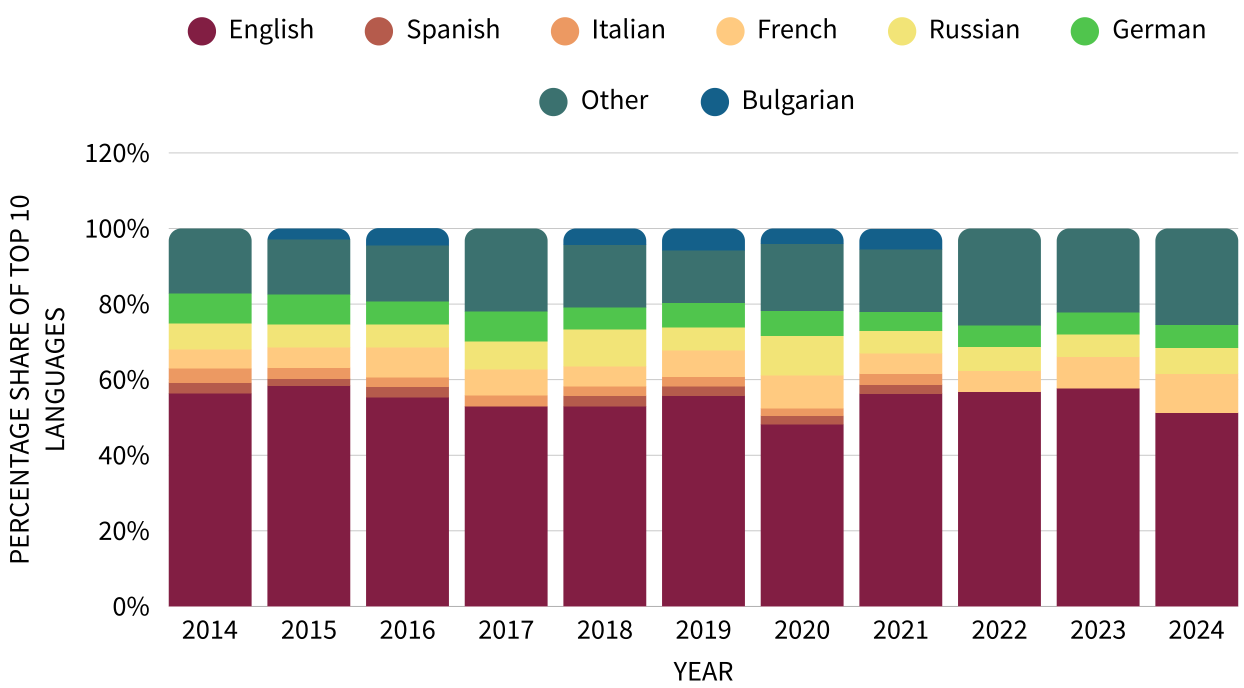
It is evident that other major source languages hold smaller shares, yet they also demonstrate significant variations. Russian shows a notable increase in 2018 (9.8%) and 2020 (10.4%), which may correspond to targeted publishing initiatives or market-specific interests during those years. According to the BiP catalogue, the Russian texts can be divided into three main categories: Russian classics, Russian thrillers/crime and Russian self-help & esoteric books. The latter issue pertains to the dissemination of Russian esotericism in Bulgaria during the 1980s. French reached a peak in 2024 (10.2%), while German steadily declined from 8.0% in

2014 to 5.1% in 2021, then increased again in 2024 (6.1%), possibly reflecting shifting demand or availability of translated titles. Spanish and Italian maintain relatively low but stable proportions (generally between 2–3%), indicating niche but consistent readerships. The "Other" category remains significant, with values as high as 25.5% in 2024, suggesting occasional surges in translations from less common source languages, potentially due to international cultural exchange programmes or special publishing projects. The significant increase in the period of 2022 to 2024, must also be attributed to the change in the report's structure, wherein only the top four source languages were listed, as opposed to the top six as seen in previous reports. This resulted in a greater number of languages being classified under the "Other" category.

It is worth noting that some years show small percentages under "Bulgarian" in the translation table, which likely reflects retranslation or adaptation of Bulgarian works into other languages within multilingual editions or bilingual publications.

**FIGURE 12**

TOP SOURCE LANGUAGES FOR TRANSLATION INTO BULGARIAN, PER YEAR, 2014–2023



## 2.2.5 Croatia

The Croatian datasets include translation information for all monographic publications recorded for the period 2014–2024. These figures encompass textbooks, workbooks, academic books, instruction manuals, academic collections, exhibition catalogues and doctoral thesis. The datasets were sent to us by e-mail on the 23rd and 24th of February 2026 in two separate files. One with the library statistics, which contained the number of all published books, as well as the number of translations and original titles. The second dataset included a list of languages and how many books were translated from them for each year.

In contrast to large linguistic markets, smaller markets such as Croatia operate within a limited readership base, narrower commercial margins, and a publishing environment that depends heavily on translation to ensure diversity and international connectivity. Like Slovenia, translation is not simply a supplementary activity but a structural component of the book sector. Without a sustained inflow of translated works, access to global literary production, academic knowledge, and international bestsellers would be considerably reduced. As the data demonstrates, translated titles consistently account for roughly one-third of annual book production, representing a stable and significant segment of the market, which has been steadily rising for the past decade.

The dynamics of translation in Croatia are shaped not only by market demand but also by cultural policy frameworks, regional linguistic proximity, and Croatia's position within broader European cultural networks. Translation serves a dual function: it facilitates the import of global cultural capital, particularly from the Anglophone sphere, while also reinforcing regional exchange with neighbouring linguistic communities. At the same time, domestic publishing in Croatian remains numerically dominant, reflecting a strong national production base that continues to expand in absolute terms. The Croatian case thus illustrates how a small linguistic market can simultaneously maintain a solid domestic publishing core while gradually increasing its engagement with international literary flows.

### 2.2.5.1 Book Production in Croatia

Between 2014 and 2024, the number of books published in Croatia fluctuated more noticeably than in some comparable small markets, though it ultimately followed a moderate upward trend in the later years of the period. In 2014, a total of 4,598 books were published. This figure declined steadily over the following three years, reaching its lowest point in 2017, with

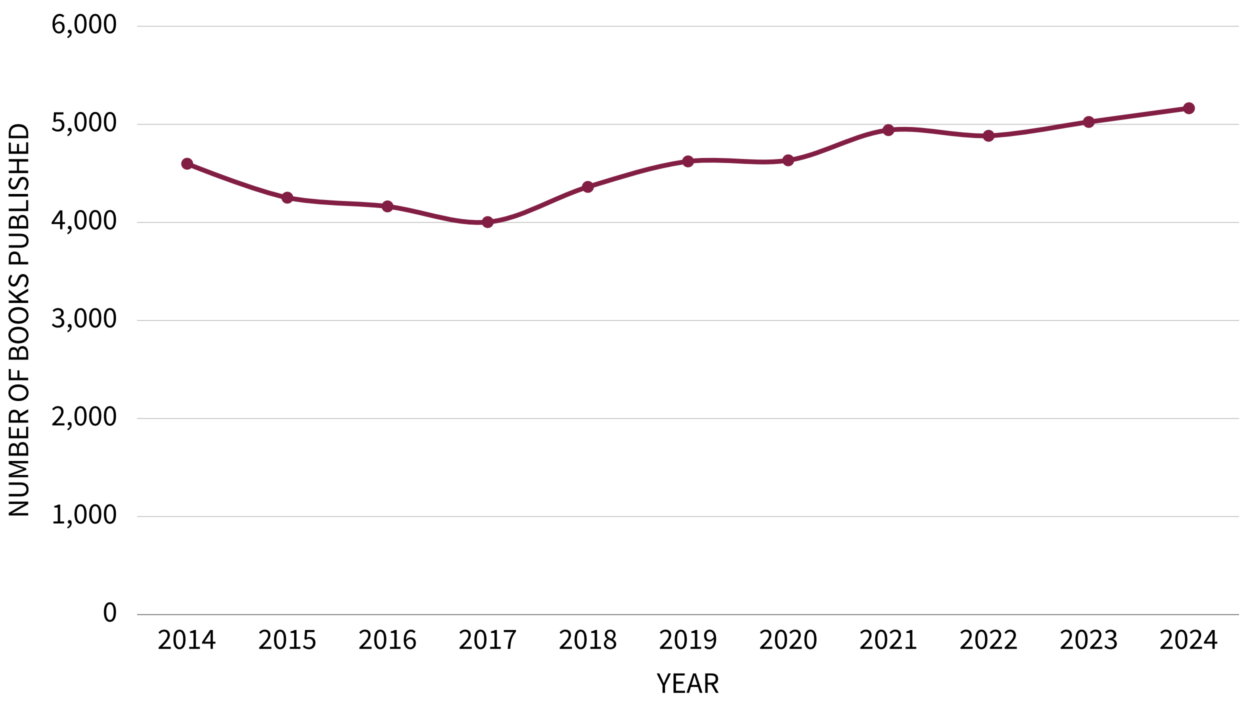
4,003 titles. The period from 2014 to 2017 therefore represents a contraction phase in overall book production. From 2018 onwards, however, the market began to recover. Output rose to 4,362 titles in 2018 and further to 4,622 in 2019.

Unlike some other European markets, Croatia did not experience a sharp decline in 2020; instead, production remained stable at 4,633 titles, suggesting a degree of resilience despite the broader disruptions associated with the pandemic. A more pronounced growth phase followed between 2021 and 2024. In 2021, production increased significantly to 4,941 titles. Although there was a slight decrease in 2022 (4,883 titles), the upward trajectory resumed in 2023 (5,024 titles) and continued in 2024, which recorded the highest figure of the examined period at 5,164 books.

Overall, the data suggests that while the Croatian book market experienced a temporary contraction in the mid-2010s, it has since entered a phase of gradual expansion. The steady growth observed after 2018 indicates a strengthening of publishing activity rather than short-term fluctuation alone.

**FIGURE 13**

BOOK MARKET IN CROATIA: ALL BOOKS PUBLISHED IN CROATIAN, 2014–2024

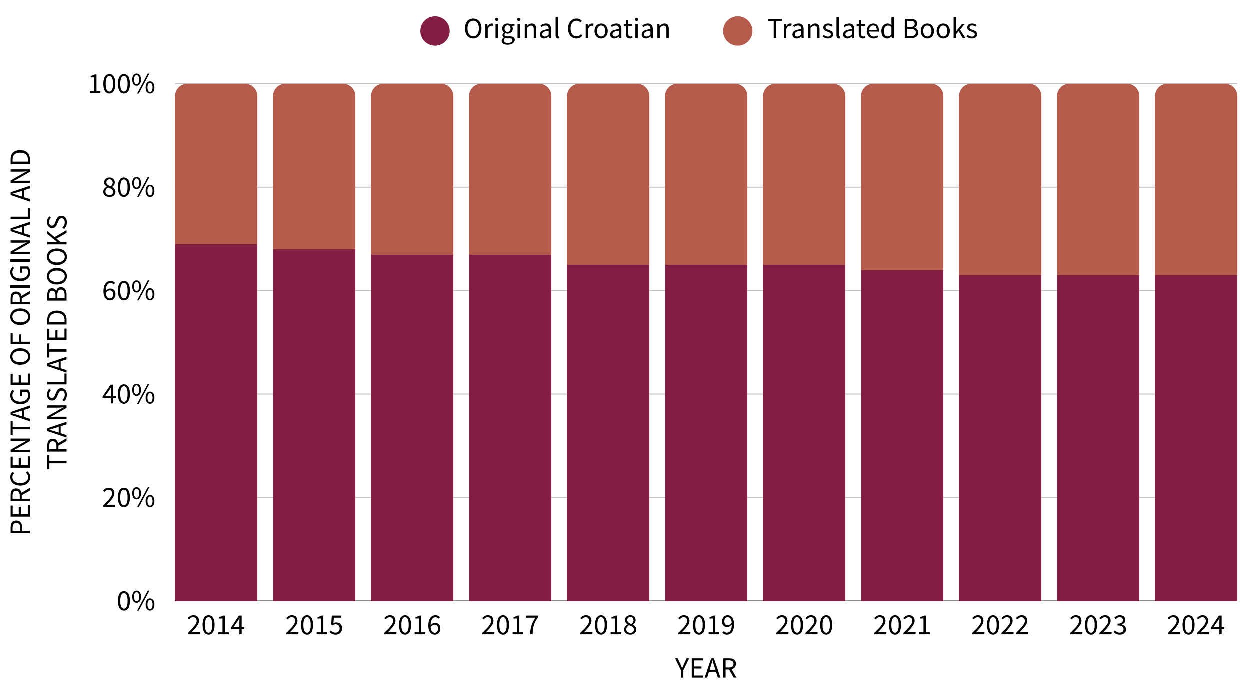


Over the eleven-year period, the proportion of books originally published in Croatian shows a gradual decline, accompanied by a corresponding rise in translated titles. In 2014, original Croatian works accounted for 69% of all publications, while translations represented 31%. By 2024, the share of original works had decreased to 63%, and translations had increased to 37%.

The decline in the share of original Croatian titles was gradual but consistent. Between 2014 and 2017, original works represented 67–69% of total output. From 2018 onwards, this proportion fell to 65%, and subsequently to 63–64% in the period 2021–2024. Translations, in turn, rose from approximately one-third of annual production in the mid-2010s to more than one-third in the early 2020s. This gradual shift suggests a growing openness of the Croatian market to international literary production, while still maintaining a clear majority of domestic-language publishing.

**FIGURE 14**

BOOK MARKET IN CROATIA: ORIGINALS VS. TRANSLATIONS, 2014–2024




## 2.2.5.2 Top 10 Source Languages for Translation

The dataset also provides detailed information on the top source languages for translations into Croatian between 2014 and 2024. In 2016 and 2022, eleven languages are listed due to ties for tenth place (in 2016, Slovenian and Polish shared the final position; in 2022, Greek and Russian were tied).

English overwhelmingly dominates as the primary source language throughout the entire period. It consistently accounts for between 42% and 52% of all translations. After a slight decline between 2014 and 2017 (from 48% to 42%), the share of English-language translations increased again, reaching 50% in 2022 and peaking at 52% in 2024. In absolute terms, English translations remain far ahead of all other languages, confirming Croatia's strong integration into global Anglophone literary flows.

Italian and French occupy the next positions, though at significantly lower levels. Italian generally accounts for 7–12% of annual translations, with a notable peak of 12% in 2023. French remains stable at around 7–9% across most of the period. German follows closely, typically contributing between 5% and 8%, though its share shows a slight downward tendency in the later years.

Croatian appears among the listed source languages with shares between 9% and 16%. This reflects bilingual or multilingual publications (which libraries often count as translations), re-editions, or works originally produced in multilingual contexts. Its presence in the source-language table indicates internal or regional dynamics rather than foreign-language import alone.

Spanish consistently contributes a smaller but stable share (2–4%), while Slovenian generally accounts for 1–2%, reflecting regional and linguistic proximity. Serbian, Russian and Polish appear with marginal shares, typically around 0–2%, and in some years fall below 1%. Other languages, including Swedish, Portuguese, Hungarian, Norwegian, Greek and Dutch, contribute sporadically and usually account for 1–2% individually.

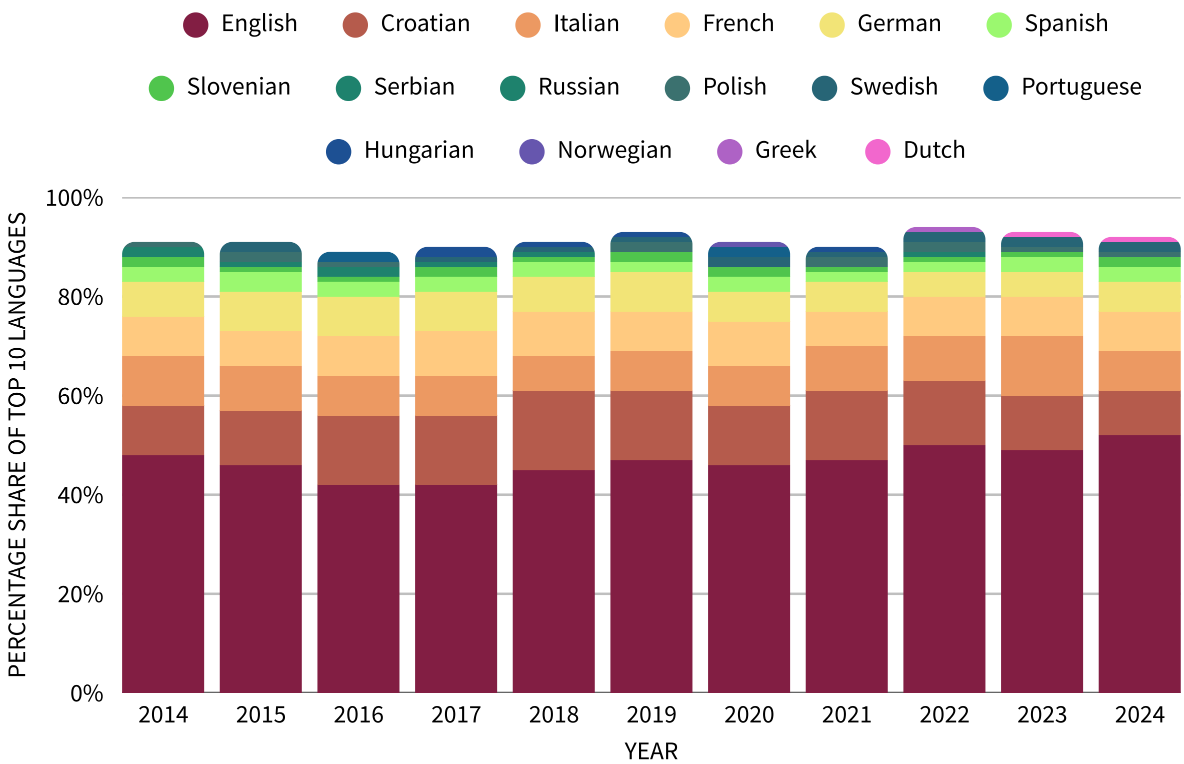
The top ten source languages together account for between 90% and 94% of all translations annually. The highest concentration is observed in 2022 (94%), while the lowest occurs in 2016 and 2024 (90%). This consistently high percentage indicates a strong concentration of translation flows within a relatively small group of dominant languages.

The Croatian translation market is therefore characterised by a clear structural pattern: overwhelming dominance of English, strong secondary positions for major European languages (Italian, French, German), and a modest but stable presence of regional and smaller

European languages. While translations are increasing in relative importance within total publishing output, the structure of source languages remains highly concentrated and comparatively stable over time.

**FIGURE 15**

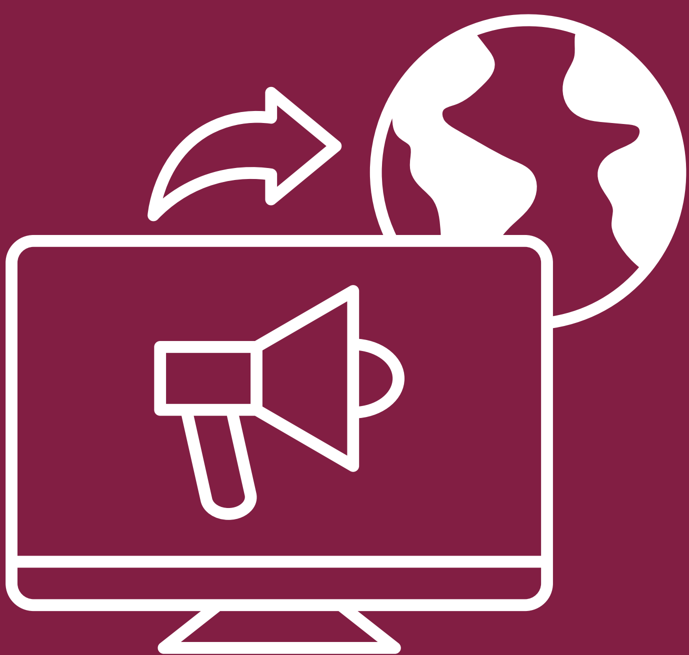
TOP 10 SOURCE LANGUAGES FOR TRANSLATION INTO CROATIAN, PER YEAR, 2014–2024



# CHAPTER 3

# COMPARISON OF BOOK TRANSLATIONS ON SELECTED EUROPEAN MARKETS ACCORDING TO PUBLISHING INDUSTRY DATA

BY RÜDIGER WISCHENBART



As we will demonstrate below, English is the predominant original language in translated books, accounting for over 60 percent of all such publications. French is the second most popular language in several markets, but its market share is much more modest, in the low double digits.

Debates on cultural diversity have highlighted the fact that Western European languages are almost exclusively represented across Europe. This pattern can be attributed to a hierarchy based on cultural prestige, which has been established through the historical, political and cultural dominance of a few Western powers.

The only significant exception to this pattern is the recent surge in titles translated from Japanese originals, which are typically illustrated, serialized stories from the manga genre. In France, where graphic novels – or 'bandes dessinées' – have been popular since the 1930s, Japanese is now the second most popular source language, accounting for 20% of all translations. In Germany, there has been a notable increase in the demand for visual narratives featuring characters with large, expressive eyes. Since 2021, Japanese has overtaken French as the third most popular original language, representing 12.8 % of translated titles in 2023.

Another traditional pattern for translations is that languages with a comparatively small number of native speakers can only have a presence in tiny niches of reading audiences. However, this rule has been successfully overcome by crime fiction written in Swedish, and to a lesser extent in Norwegian. Led by Stieg Larsson with his 'Millennium' trilogy, some hugely successful novelists have overcome hurdles of cultural hierarchy in the second half of the 2000s, finding a huge following first in France and then across Europe and beyond. Supported by a range of films and TV series based on these novels, 'Nordic crime' is now firmly established as a global subgenre.

Indeed, it could be argued that Nordic crime paved the way for reaching a significant fan base, a pathway that has since been used to much wider effect by the many waves of 'romance' and its derivatives.

## 3.1 Limitations of This Research, Due to the Restricted Availability of Data

Our evaluation of the share and impact of translated books on the overall book business and reading audiences in this report is hindered by the unavailability of even the most generic market data. For instance, there is currently no information available on the market share, in terms of generated revenue or unit sales, of translated books. The only figures that we have for a reasonable number of language markets and countries is the number and share of translated titles as compared to all new titles released in a year.

What are the reasons for this? Market research firms such as Nielsen GfK (in the UK, France, Spain, Italy or Poland) or MediaControl (in Germany and Austria) require metadata to identify titles of a certain type and genre. The widely adopted ONYX standard facilitates such analysis; however, practitioners have noted that many publishers neglect to define their translated titles as such.

Another source of data confusion is that in many countries, both new title statistics and data on translations are produced by publishers' trade organisations. These reflect what publishers roll out to consumers year after year. In contrast, librarians also release figures on the number of titles they register for their catalogues. Unfortunately, these two sets of data are not consolidated and can differ significantly. For this chapter, we therefore decided to work mostly with data produced by publishers' trade organisations. In some cases though, like Austria, we had to rely on library data, as no publishers' statistics were available.

Another limitation of our analysis is due to a shift in users' consumption patterns.

A significant proportion of material published and consumed as 'books', or related forms of narration, is not subject to the market research conducted by the traditional book business. This is particularly evident in models of distribution and consumption that extend beyond the traditional linear author > publisher > wholesaler > trade value chain. Examples include much of the content that is self-published and streamed audiobooks, as well as most of the content that is made available to audiences via digital platforms, such as Audible, Spotify, Storytel, or services dedicated to a highly specific target audience.

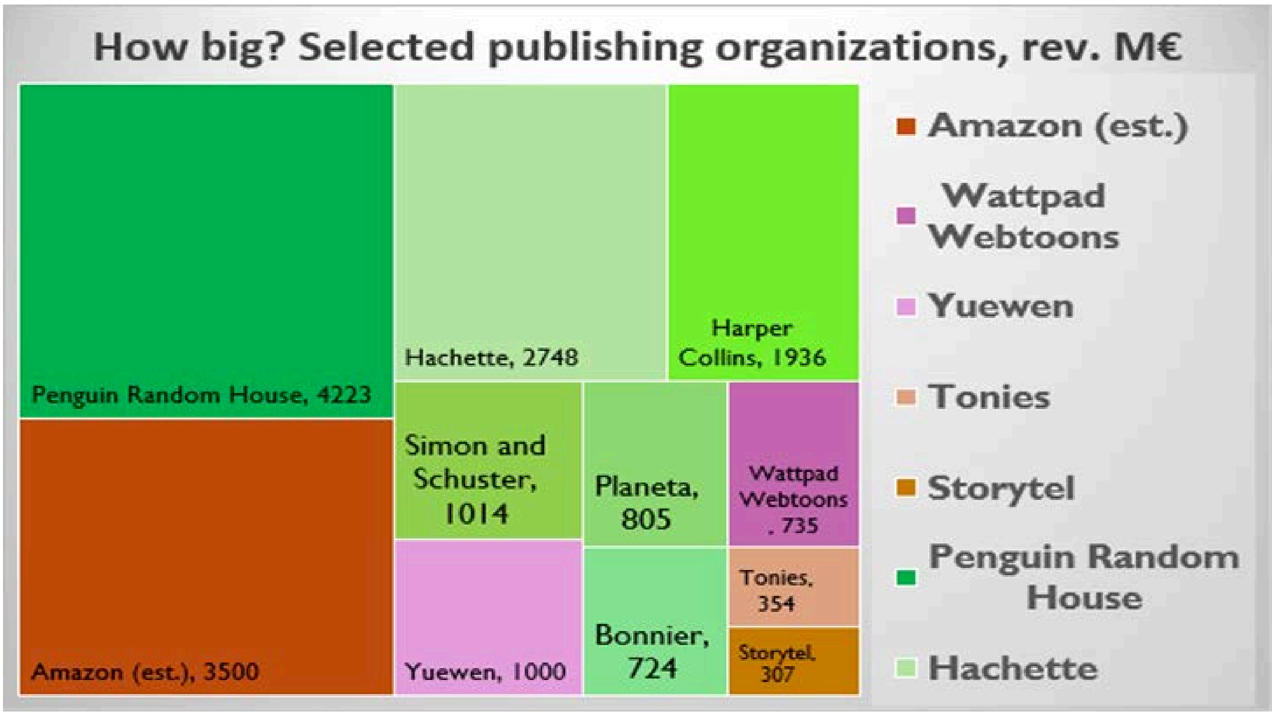
An excellent example of this is the Tonie box, which was originally developed in Germany but is now available around the world. It has become popular among young children and their parents, offering both audio adaptations of book titles and original publications for very young audiences aged between three and eight.

In addition to their unique profiles and models, these platforms share the characteristic of not being fully incorporated into the conventional market data of the traditional book industry. It is evident that the scale and reach of these services are already considerable and growing. Unfortunately, a significant number of highly relevant models are not included in our analysis due to a lack of reliable financial and market reach data. This applies to platforms such as Amazon (especially its self-publishing, audiobook and subscription channels), Wattpad, Webtoons, the Chinese Yuewen brand of self-published titles, as well as Tonie boxes aimed at children, or the Swedish audiobook startup Storytel.

In an earlier report, "Publishing Beyond Publishers", dedicated to such models, we produced a chart representing a selection of these services, combining publicly reported and estimated revenue figures.

**FIGURE 16**

HOW BIG? SELECTED PUBLISHING ORGANIZATIONS, REV. M€.




*Source: Rüdiger Wischenbart, with Thad McIlroy: Publishing Beyond Publishers, Vienna 2024. %*

The majority of the data on translation and book markets in general represent only books and reading materials produced and distributed by traditional publishing ventures, as shown in the above chart.

The translation landscape has become increasingly complex in recent years, with the emergence of self-published authors such as American Bella Forrest and Slovenian Gaja J. Kos, who have started to self-publish translations of their books. Following the introduction of Kindle Direct in autumn 2025, which will allow self-published authors to publish English/Spanish and German/English translations, it will be necessary to develop entirely new approaches in order to understand the translation landscape.

# 3.2 Understanding the Specifics of Book Translation Markets

An analysis of European book translation markets requires an understanding of specific developments in the trade book markets more broadly. The publishing and distribution of books for the general consumer is a business that is undergoing significant changes on multiple levels.

Today, consumers have the opportunity to select their reading material from a variety of media formats and channels.

In addition, the business models behind these offerings have diversified. They now range from the mostly binary options of buying a copy of a book or borrowing it from a library or friend to subscription models of various kinds. These subscription models often allow readers to choose between a physical format (mostly a printed book) and various digital formats (not just e-books, but also digital audio or serialised stories 'pushed' onto a smart device).

It has become common practice for readers to switch between various options, depending on the type of content and the circumstances of consumption. For example, they might read a romance novel on a phone while commuting or listen to a digital audiobook for a more literary novel or biography. In such cases, they may prefer a printed book when studying a more complex topic that requires highlighting and commenting passages with a pencil to help them remember the content.

Please be aware that other factors also have an impact. The newest and most popular book at the moment can be purchased online, while a backlist title or a classic can be found and picked up more conveniently in a brick-and-mortar bookstore that facilitates browsing.

Over the past 15 years, the economics and market forces for books and reading have changed significantly due to several driving forces. Since the international economic crisis of 2008, many traditionally strong book markets have suffered significantly in terms of both reach, as measured by unit sales, and in value, as measured by turnover, notably when measured in real terms, by adding inflation.

## 3.3 General Shifts in the Book Markets

When book markets suffered significant constraints under the restrictions imposed by the Coronavirus pandemic in 2020 and 2021, many book industry organisations were quick to emphasise the 'resilience' of the book business across Europe. Indeed, by 2023, most markets reported a total turnover that was clearly higher than in the pre-pandemic year of 2019. Germany and France both demonstrated an increase in turnover of 4.5% and 4.9%, respectively, between 2019 and 2023. Sweden's growth was 8.3%. Spain, Italy and the United Kingdom even demonstrated double-digit increases of 17.9%, 13.2% and 12.4%, respectively.

However, it should be noted that the majority of these reports omitted the fact that inflation had not been taken into account.

In the context of German-language publishing, the turnover generated from sales of books in German-language markets has remained relatively stable in nominal terms over the 16-year period between 2008 and 2024. In 2008, German publishers reported book revenues of 9.6 billion euros. In 2024, the respective value was slightly under 9.9 billion euros. In real terms, the book industry declined by 26.8% in real value, due to inflation.

In early 2025, the Federation of European Publishers released a chart that caused widespread disruption among book professionals across Europe. Based on consolidated revenue data from its members, the book publishing industry has seen a significant decline in its value, with a loss of almost a quarter (24.1%) in the previous two decades, when inflation is taken into account.

**FIGURE 17**

NET PUBLISHERS' TURNOVER (BLN EUR) 2004-2023 - NOMINAL VS. REAL


*Source: Federation of European Publishers, 2025*

The chart which illustrates European publishers' net turnover (in billion euros) from 2004 to 2023, both in nominal and real terms. This is a report by the Federation of European Publishers, dated 2025.

The contraction of many European book markets can be observed by examining not only the generated revenue, but also the industry's reach to consumers.

The measurement of purchased units is not influenced by inflation or price adjustments. A recent study by the London-based market research company Nielsen has revealed some surprising results.

**TABLE 3**

EVOLUTION OF UNIT SALES IN SELECTED MARKETS, FROM 2023 TO 2024, IN PERCENT

| **Market** | **Units 2023 > 2024** |
|---|---|
| Belgium / Flanders | -2.3% |
| Belgium / Wallonia | -2.5% |
| France | -2.8% |
| Ireland | -5.5% |
| Italy | -1.8% |
| Netherlands | -0.1% |
| Poland | 0.6% |
| Portugal | 6.0% |
| Spain | 5.6% |
| UK | -1.6% |

*Source: Nielsen, 2025*

The most effective strategy in achieving maximum reader reach has been demonstrated in Spain and Portugal, two countries with historically low rates of book reading. Both countries have recently experienced above-average general economic performance, from which the book business could also benefit. In Germany, meanwhile, unit sales of books have been in a continuous decline for over a decade.

**TABLE 4**

TOTAL ANNUAL BOOK UNIT SALES IN GERMANY

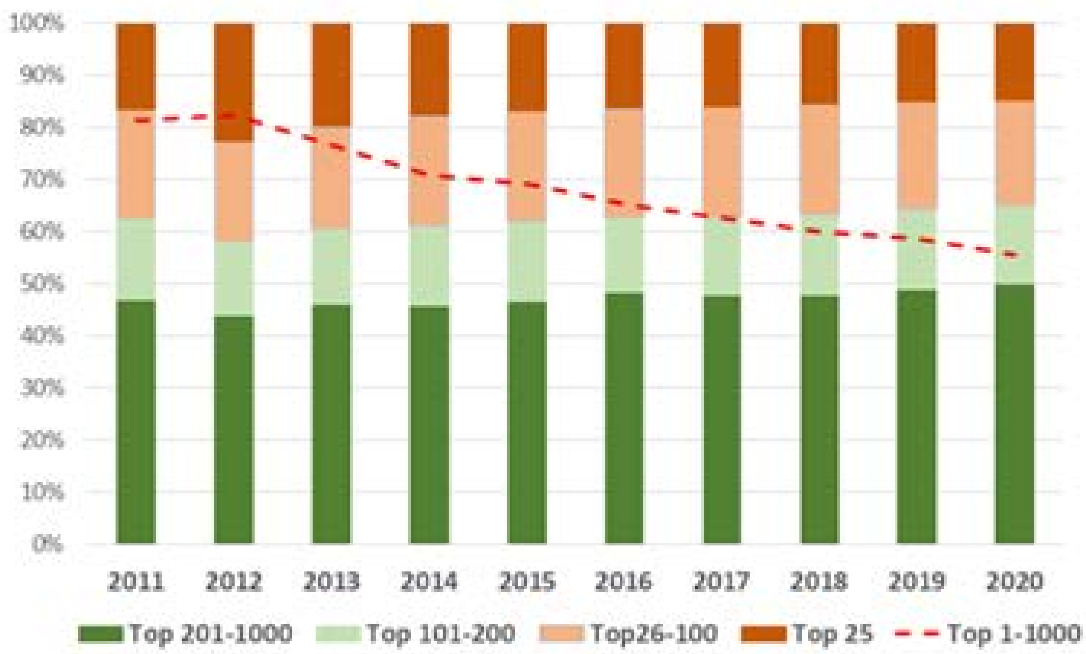
| Year | Units sold (million) |
|---|---|
| 2015 | ca. 383 |
| 2018 | ca. 358 |
| 2023 | ca. 322 |
| 2024 | ca. 316 |

*Source: Börsenverein*

An analysis of unit sales of successful fiction titles provides valuable insights into the market environment for translated books. The following chart illustrates the long-term performance of the respective annual top 1000 best-performing fiction titles in the German-language markets between 2011 and 2020.

**FIGURE 18**

GERMAN LANGUAGE FULL YEAR PRINT TOP 1000 UNIT SALES, 2011-2020




*Source: Data courtesy of MediaControl, analysis by Rüdiger Wischenbart, 2022*

A linear decline in unit sales has been observed for nine of the last ten years. Even the impact of the 2020 Coronavirus pandemic had a significant effect on the respective underlying dynamics.

Despite a surge in the launch of major international fiction bestsellers this decade, the overall share of unit sales by the top 25 titles has slightly declined. Meanwhile, the mid-list segment, represented in this chart by titles ranking between 201 and 1,000, has the tendency to grow. This is positive news for the fiction in translation sector, which is well represented in that segment.

It is imperative to consider one more detail that will have a significant impact on the commercial viability of the translations. The decline in unit sales has led to a reduction in average print runs, particularly for mid-list titles, many of which are translations. Alongside the supplementary expense of translators and the fact that many translated books originate from smaller, independent publishing houses, this results in a considerable strain.

## 3.4 Analysis and Comparison of Book Translations in Selected European Markets

### 3.4.1 Austria

The book and translation market in Austria is a particular case in that the country of around 9.2 million inhabitants shares the same main language as neighbouring Germany, which is home to almost 85 million.

Therefore, the Austrian and the German book markets are deeply intertwined. And yet, Austrian publishers traditionally face significant challenges in accessing the German market, competing with the by far larger German publishers and retail groups, and thus tend to focus on rather local and regional topics.

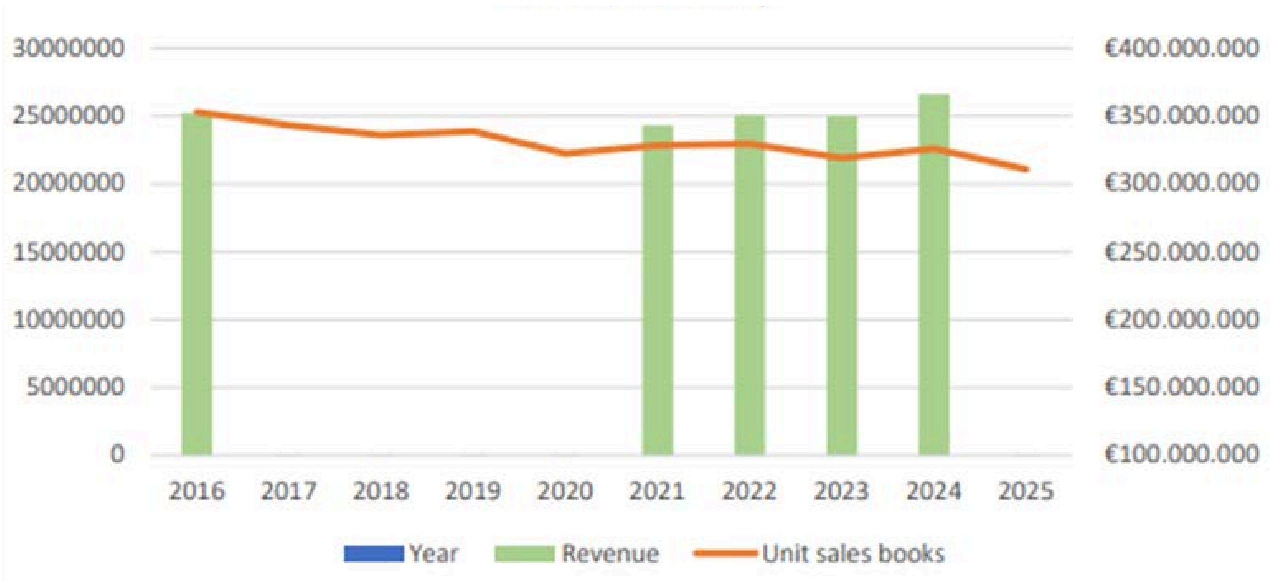
In literary fiction, for example, Austrian authors often debut at local publishers, yet, when successful, switch to German houses for their subsequent works.

Publishers with headquarters in Germany, meanwhile, operate local Austrian branches, notably in educational textbooks and in professional publications, but also in literary fiction and nonfiction.

The overall market evolution for books in Austria by and large echoes trends that are familiar from its almost tenfold larger neighbor in the North. Over the past decade, revenue generated from book sales has fluctuated only slightly, while the number of books consumed has steadily declined.

**FIGURE 19**

AUSTRIA: NOMINAL REVENUE AND UNIT SALES, 2016-2024




*Source: Data courtesy of Hauptverband d. österr. Buchandels, MediaControl*

From 2016 to 2024, the total Austrian book market grew by 4 percent. However, this equals a one-third decline in generated real value once inflation is factored in. Unit sales fell by 17 percent during this period.

No comparable data is available with which to measure the performance of local Austrian publishers alone. However, exports from German publishers to Austria hint at increasingly stiff competition between domestic performance and books imported from Germany, with the latter rising by 14 per cent between 2016 and 2023. No data are available for Austrian exports to Germany

### 3.4.1.1 Translations into German from Austrian publishers

This trend exerts additional pressure on the inclusion of new translations in the catalogues of Austrian publishers, as translations require extra investment to pay translators. Public subsidies from Austrian institutions are only available for titles originally published by Austrian publishers that are then picked up by foreign publishers.

Unfortunately, hard data for measuring and understanding respective developments are remarkably scarce. The Association of Austrian Publishers and Booksellers (Hauptverband des österreichischen Buchhandels) does not collect the respective information. And the Austrian National Library (ONB), as the recipient of ‘legal deposit’ of Austrian publications, is given significant numbers of titles that come from other providers than just commercial publishing houses, namely academic works from universities, and publications from various types of public and private organizations. A direct comparison of new titles counted by the trade association versus those being catalogued by the library is hardly conclusive.

More about the Austrian book market can be found in Chapter 3.4.1 Austria.

**TABLE 5**

COMPARISON OF NEW TITLES, TRADE ASSOCIATION DATA VS. LIBRARY DATA

| Year | New titles from Austrian publishers | Legal deposit of titles to ONB |
|---|---|---|
| 2010 | 8,132 | 9,544 |
| 2015 | 7,930 | 9,424 |
| 2020 | 8,686 | 8,147 |
| 2021 | 12,157 | 9,788 |
| 2022 | 11,297 | 9,272 |
| 2023 | 9,225 | 7,986 |
| Total 2020 > 2023 | 41,365 | 35,193 |
| Sources | HVB / Statistik Austria | ONB (Austrian National Library) |

Independent of the challenging data situation, a few regional specifics can be highlighted regarding the ambitions and preferences of Austrian publishers, when it comes to leveraging translations of – notably literary – titles. After the fall of the Iron Curtain in 1989, and the subsequent opening of borders, cultural exchanges with neighboring countries in Central and Southeast Europe quickly evolved into vivid cultural exchanges and dialogues on a both institutional and more informal, and at various informal, personal levels. Several Austrian publishers saw this as an attractive opportunity to explore the region's literary traditions, which had deep historical roots but were cut off by the political split between East and West for around half a century.

In the 1990ies and 2000s, numerous writers, especially from Czech, Slovak, Hungarian, former Yugoslavian, Albanian, Romanian, and Bulgarian backgrounds were translated into German and published by mostly very small Austrian publishers, resulting in a lively – often also two-sided - exchange which found interested recipients not just in Germany, but via the German translations also across Europe. An analysis of the available data for the recent decade, since 2015, unfortunately, is much less conclusive and clear in this regard than one might have expected.

**TABLE 6**

TRANSLATIONS, COLLECTED BY THE AUSTRIAN NATIONAL LIBRARY (ONB)

| **Source languages** | **2015** | **2019** | **2020** | **2021** | **2022** | **2023** |
|---|---|---|---|---|---|---|
| **All (*)** | 185 | 177 | 217 | 335 | 511 | 266 |
| English | 63 | 57 | 73 | 127 | 231 | 134 |
| French | 32 | 33 | 30 | 64 | 81 | 37 |
| Italian | 16 | 14 | 17 | 23 | 33 | 8 |
| CEE ()** | 56 | 98 | 83 | 113 | 252 | 110 |
| Share of English (%) | 34% | 32% | 34% | 38% | 45% | 50% |
| Share of CEE % (**) | 12% | 20% | 18% | 11% | 6% | 12% |

*Source: Data courtesy of ONB and Statistics Austria.*

*(*) All translations, except those from a German original.*

*(**) CEE refers to translations from Central and East European languages, notably Albanian, Bosnian, Bulgarian, Czech, Hungarian, Polish, Romanian, Serbian, Slovak, and Slovene.*

The challenge for a proper understanding of these data plays out at several levels. It is unclear if these numbers include a complete record of respective publications from Austrian publishers, nor which other sources have been delivering titles. Also, the significant annual ups and downs are hard to qualify.

The share of translations from English is significantly lower than for book translations published in most other European countries, most likely due to the particularly high cost of translation rights for many of these works.

The extraordinarily large proportion of Italian translations may be due to the close historical and contemporary cultural interactions between Austria and “South Tyrol” – the “Autonomous Italian province of Bozen/Bolzano”.

The combined annual numbers of translations from languages across Central and Eastern Europe (CEE) are also clearly higher than elsewhere.

#### 3.4.1.2 Political dimensions of the cultural exchanges, expressed in and driven by translations by Austrian Publishers

Austria provides an outstanding scheme of financial support to its book publishers, both from federal (national) and from regional funds. The ongoing federal programme for local publishers and their role in fostering domestic cultural expressions, established in 1992 (“Verlagsförderung”) is the most prominent expression of this dedication. Additional translation grants are available for translations of the works from Austrian literary authors into foreign languages.

The Austrian authorities and their representatives often underline the importance of the country's culture in general, and the active role of its domestic publishers in particular, in cultural exchanges and dialogue across Europe and beyond.

To underline this point and justify the corresponding public funding, we recommend that relevant data be collected on a broader and more comprehensive basis in the future. This would better represent the cultural value created by publishers and translators, not only through the translation and publication of works by Austrian authors into other languages, but also vice versa, through the translation of works from other languages and cultures by Austrian publishers.

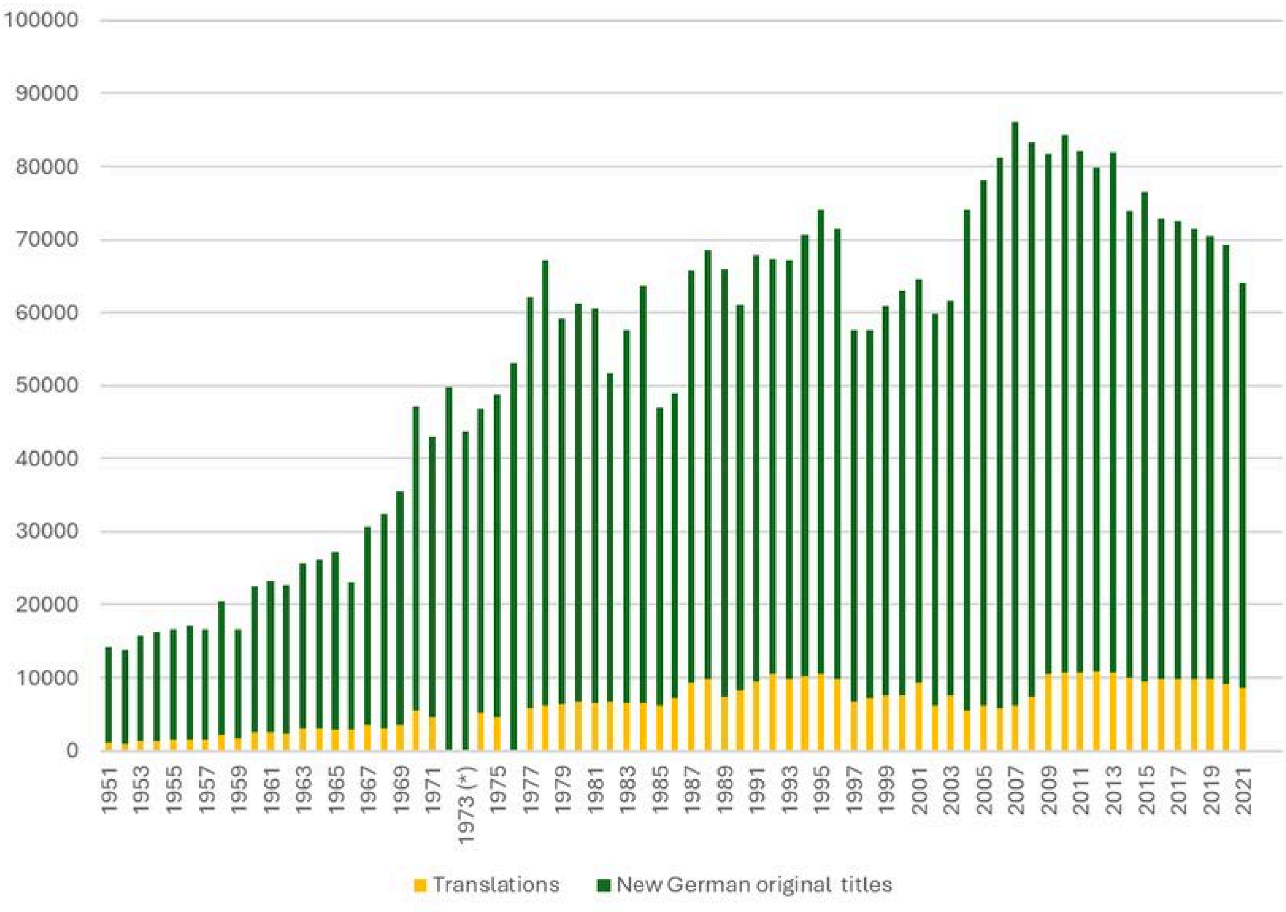
### 3.4.2 Germany

An analysis of translated books in Germany over a period of seven decades, from 1951 to 2021, reveals several notable continuities.

The year 1951 is a significant marker in the economic history of post-World War II Germany, as it marks the beginning of a period of significant economic growth and development. This period is characterised by a steady increase in the number of new titles released annually, from 14,094 in 1951 to 67,176 in 1978, which is almost five times the previous year's figure.

**FIGURE 20**

NEW ORIGINAL GERMAN TITLES AND NEW TRANSLATIONS RELEASED BY GERMAN PUBLISHERS, 1951-2021




*(*) No annual data available. (Source: Börsenverein)*

In 2007, Germany reached an all-time high with 86,084 new titles published. The economic crisis of 2008 had a significant impact on the book industry, with ongoing repercussions, as evidenced by the decline in new annual releases. This reversal was further enforced by an industry-wide consensus that publishers had overproduced new books in the 2000s.

By 2021, Germany's publishers had seen a 25% decrease in title output, with the number of new titles falling to 63,992.

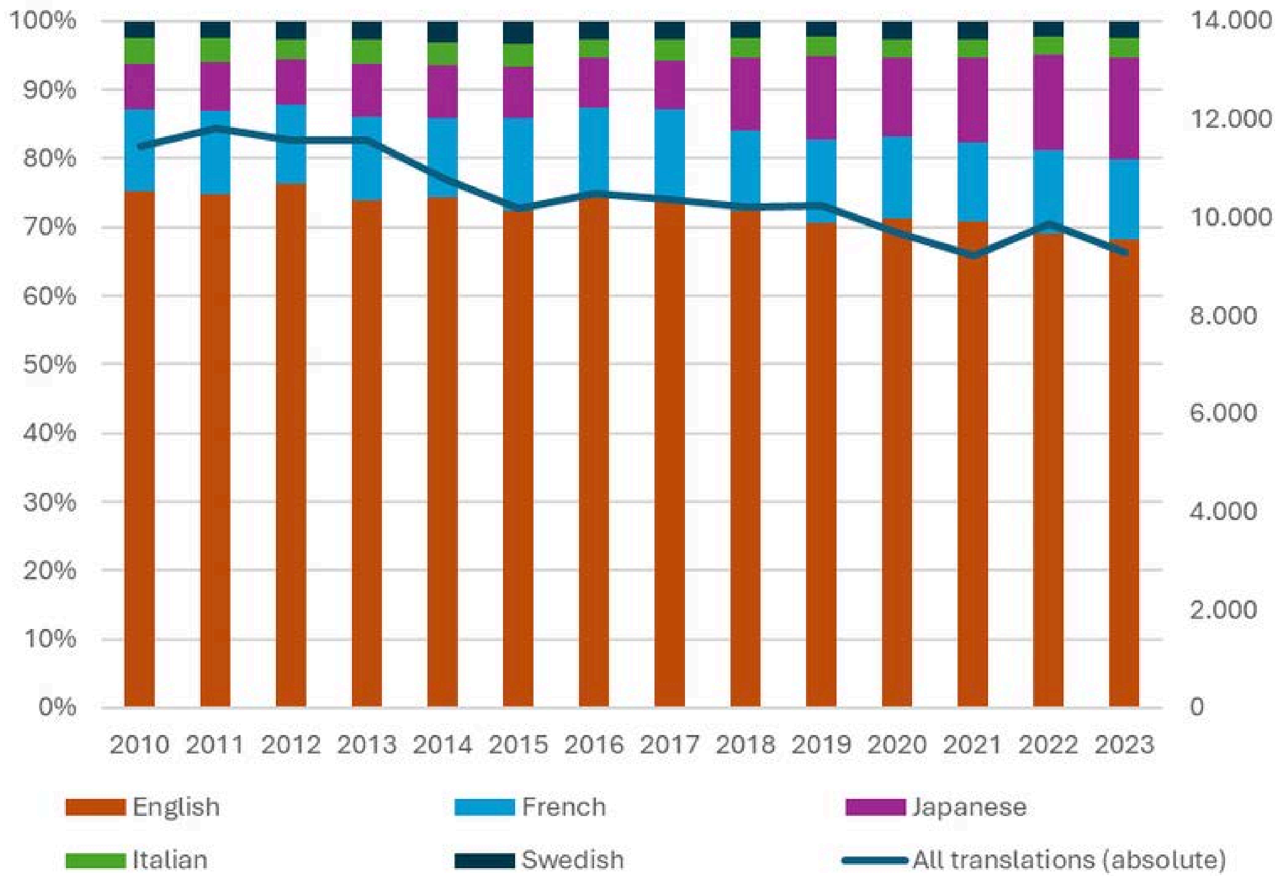
From the outset in the 1950s, translations accounted for just under 10 per cent of these titles. By 1960, this figure had increased to 12%, and remained at a stable level between 11% and 13% in the early 1980s. The median share of translations across the seven decades is 12%.

Since then, this threshold of 12% to 14% of translations has remained consistent and stable. This indicates that the absolute number of translated books per year has been declining in a nearly proportional manner with the total number of new releases, from 10,599 in 2009 to 8,703 in 2021. This is equivalent to a decrease of 18%.

It is evident that a significant degree of continuity can be observed among the original languages from which books have been translated into German over the years. However, in recent years, we also see some remarkable shifts.  English-language books used to account for almost two-thirds of all translations (67% in 2007), yet their share declined to 59% in 2023, and 55 % in 2024).

**FIGURE 21**

TRANSLATIONS INTO GERMAN BY ORIGINAL LANGUAGE, AND ABSOLUTE NUMBER OF NEWLY RELEASED TRANSLATED TITLES, 2010-2024




*Source: Börsenverein "Buch und Buchhandel in Zahlen")*

The most significant change, reflecting a shift in readers' cultural habits, is the surge in Japanese manga, serialised illustrated stories that have become extremely popular with younger audiences. In 2021, manga overtook French translations in terms of volume. By 2023, new Manga releases in German accounted for almost 12.8% of all new titles (up from 5.8% in 2010), against 10.3% of translated French originals. However, it is unclear whether the revenue share from manga titles is commensurate with their impact on the total number of consumed titles and readers' attention.

The Italian and Swedish translations are both in fourth and fifth place, with a percentage in excess of two percent in each case. The top five original languages accounted for almost 87% of all translated books in 2023 (down from 97% in 2010).

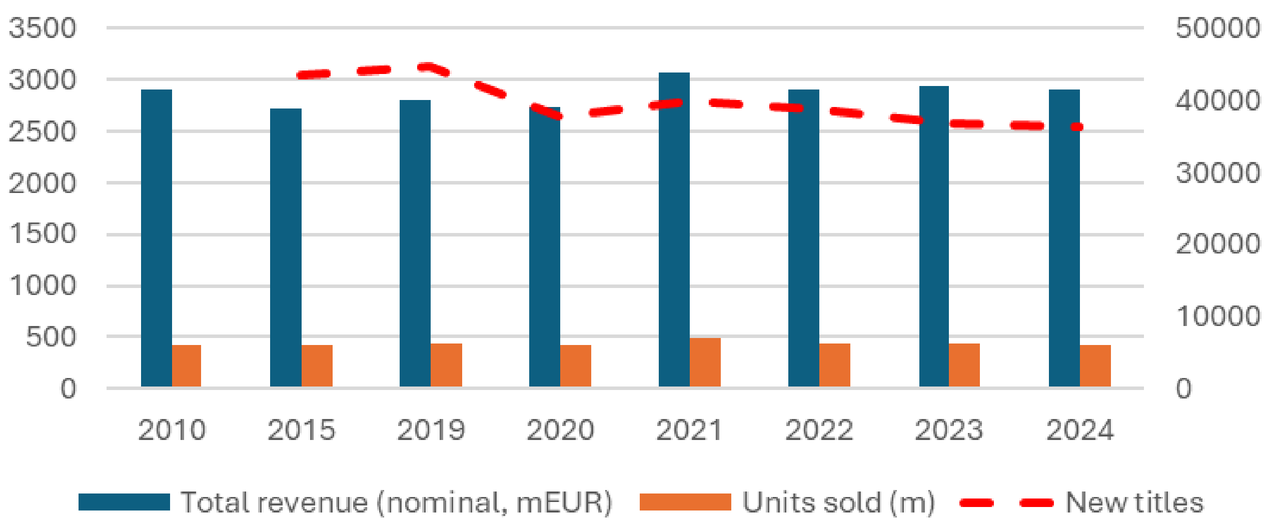
### 3.4.3 France

The book sector in France has experienced a period of sustained stability and consistency over the past 15 years. The number of units sold remained consistent, with only a slight increase in 2021, attributable to the recovery from the impact of the pandemic in 2020/2021. The number of new title releases declined by around 17% between 2015 and 2024, from 43,600 to 36,232, which is well in line with other major European book markets. This decline can be attributed to an overproduction that has now been corrected, following the economic slump of 2008 and the impact on sales from the pandemic.

However, the French book industry has experienced a significant decline in real terms, with a 24.7% decrease in market value over the past 15 years, largely due to the impact of inflation.

**FIGURE 22**

FRANCE, KEY INDICATORS 2010 TO 2024: NOMINAL PUBLISHING REVENUE, UNITS SOLD, NEW TITLE RELEASES




*Source: SNE*

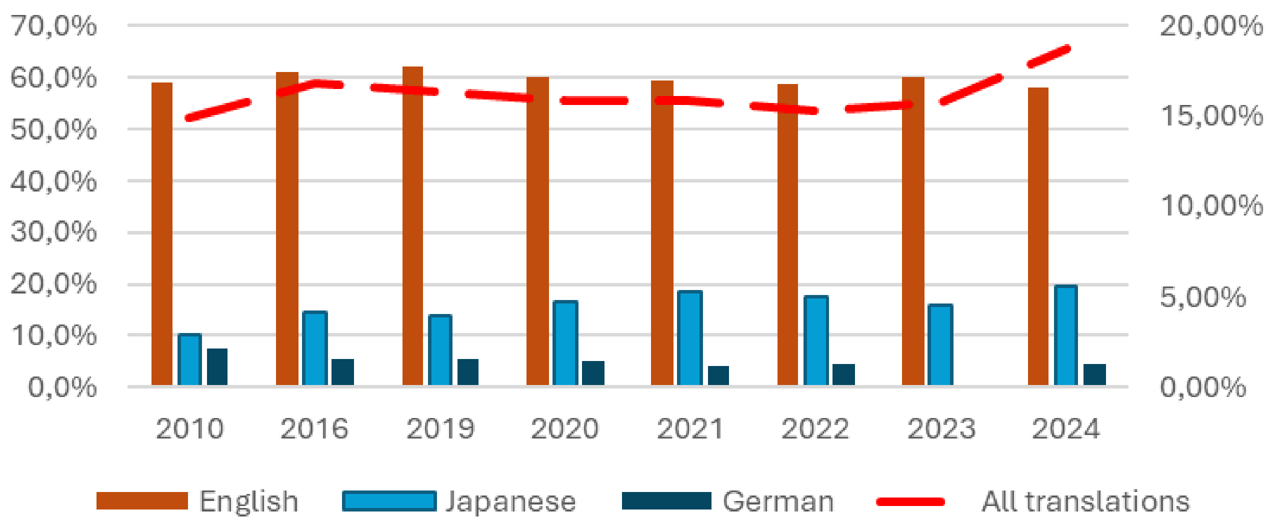
There has been a significant increase in the number of titles translated into French during the period between 2010 and 2019, with a rise from 9,406 to 13,993. The impact of the pandemic resulted in a significant decrease to just 7,953, followed by a rapid recovery, with 2024 reporting a pre-pandemic level of 13,262 translated titles into French.

English is the predominant original language in all European markets, accounting for 58% of all translations in 2024, with only slight variations between 59% in 2010, and 64% in 2018.

Translations from Japanese accounted for 19.9% of the market in 2024, which is in line with expectations given the enduring popularity of illustrated storytelling in the French language. The French have a long-standing tradition of "bande dessinée", dating back to the 1930s with Tintin, and the sequels to the tremendously successful Asterix and Obelix brand, which have consistently produced top-selling albums since its first appearance in 1961.

**FIGURE 23**

FRANCE, TRANSLATIONS 2016 TO 2024, TOP 3 ORIGINAL LANGUAGES IN %, TOTAL SHARE OF TRANSLATIONS FROM ALL NEW TITLES IN %




*Source: SNE*

Translations from German accounted for 4.4% of the market in 2024, down from 7.4% in 2010. The top three original languages account for approximately 82% of all translations. For Italian and Spanish, as #4 and #5, the French publishers' association SNE does not provide an exact share in their reports.

The recent increase in translations scheduled for 2024 is likely a reflection of the ongoing expansion of the manga craze among younger French demographics.

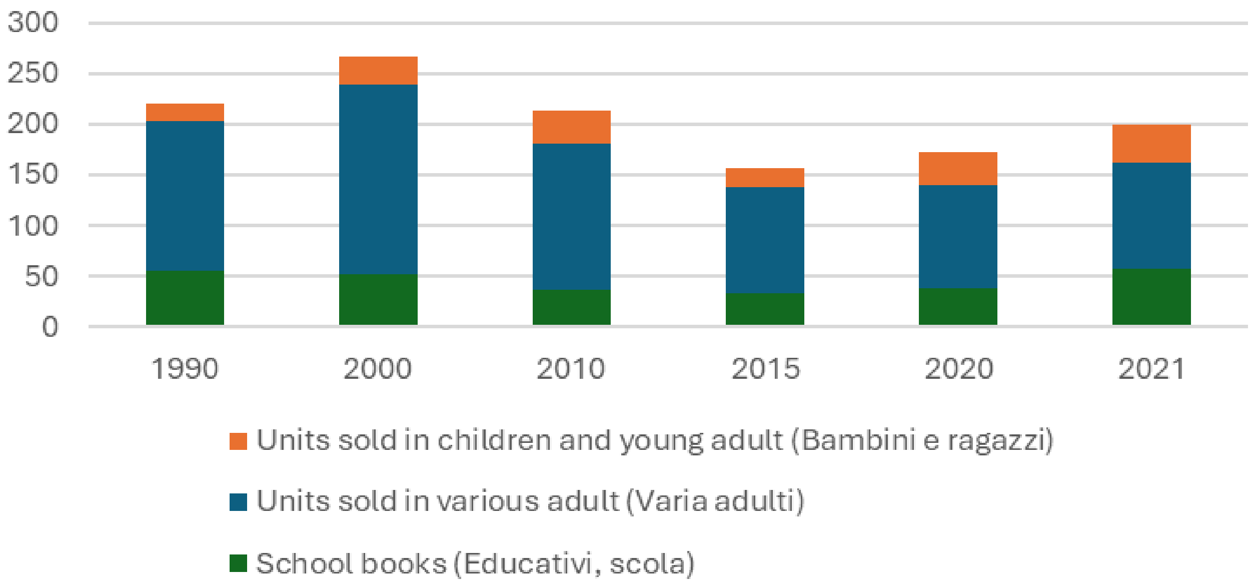
### 3.4.4 Italy

A thorough analysis of book market trends in Italy is challenging due to the varying adjustments made to categories and measurements in respective industry reports over time, which makes it difficult to build consistent overviews.

In recent years, Italian reports have highlighted strong gains in nominal revenue. However, a more cautious and restrained story is told by unit sales figures.

**FIGURE 24**

ITALY, UNITS SOLD IN SELECTED CATEGORIES. MILLION UNITS, 1990-2021



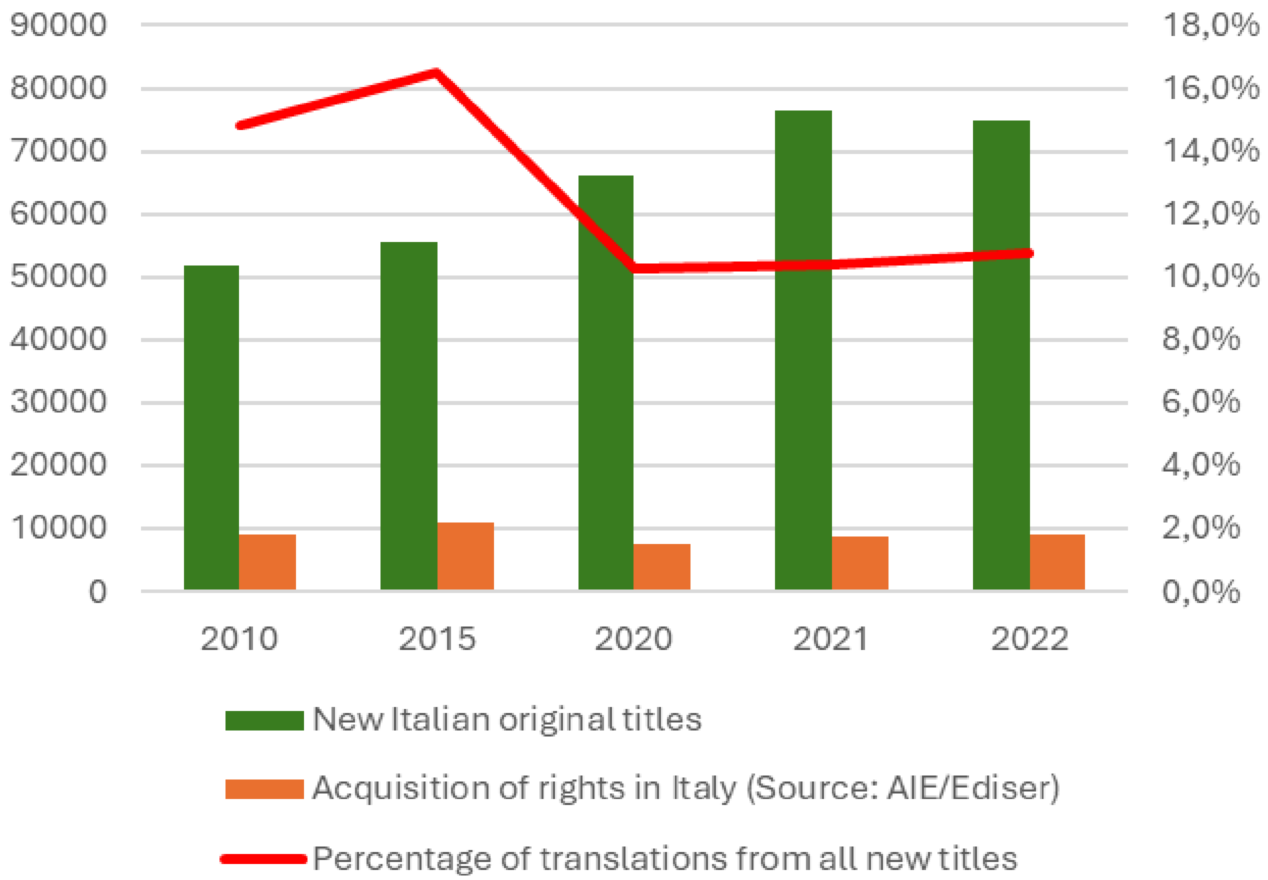

*Source: AIE*

It is interesting to note that there is a peak around the year 2000, followed by a decline until 2015. Subsequently, there was a resurgence, though this never reached pre-2008 levels.

The number of Italian-language translations of foreign titles can only be determined by tracking the acquisition of rights, rather than the number of translated titles that have been released. This figure shows a significant increase from 6,640 rights bought in 2005 to a peak of 9,874 rights in the immediate post-economic crisis year of 2009, plateauing around 9,000 acquisitions annually, with some interim ups and downs. The number of translations into Italian reported for 2022 is 9,034.

**FIGURE 25**

ITALY, NEW ORIGINAL VERSUS TRANSLATED TITLES, 2010-2022



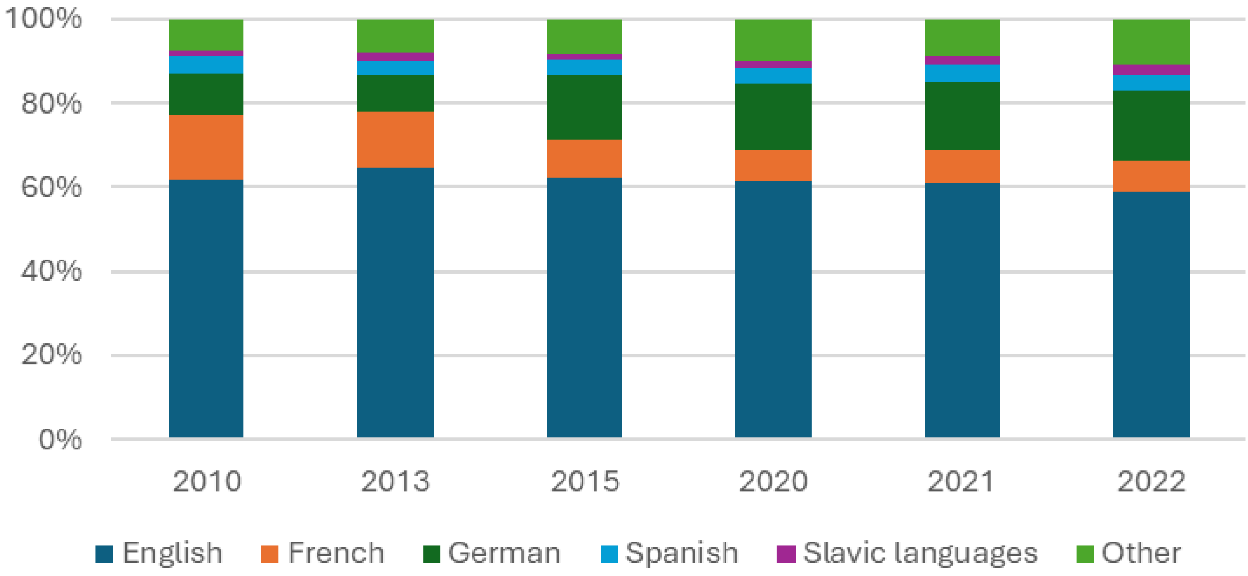

*Source: AIE*

An analysis of the translations by original language reveals the now familiar mix of predominantly English-language originals, followed at a distance by three major Western European languages: French, German and Spanish.

Unfortunately, no figures are provided for translations from Japanese to assess the popularity of animated illustrated storytelling among Italian readers.

**FIGURE 26**

ITALY, TRANSLATED TITLES BY ORIGINAL LANGUAGE, 2010-2022




*Source: Processing of ISTAT and IE-Informazioni Editoriali data by the Italian Publishers Association Research Department*

## 3.4.5 Poland

With a population of almost 38 million, Poland is the fifth most populous country in the European Union, topped by Germany, France, Italy, and Spain, and roughly double the size of Romania or the Netherlands.

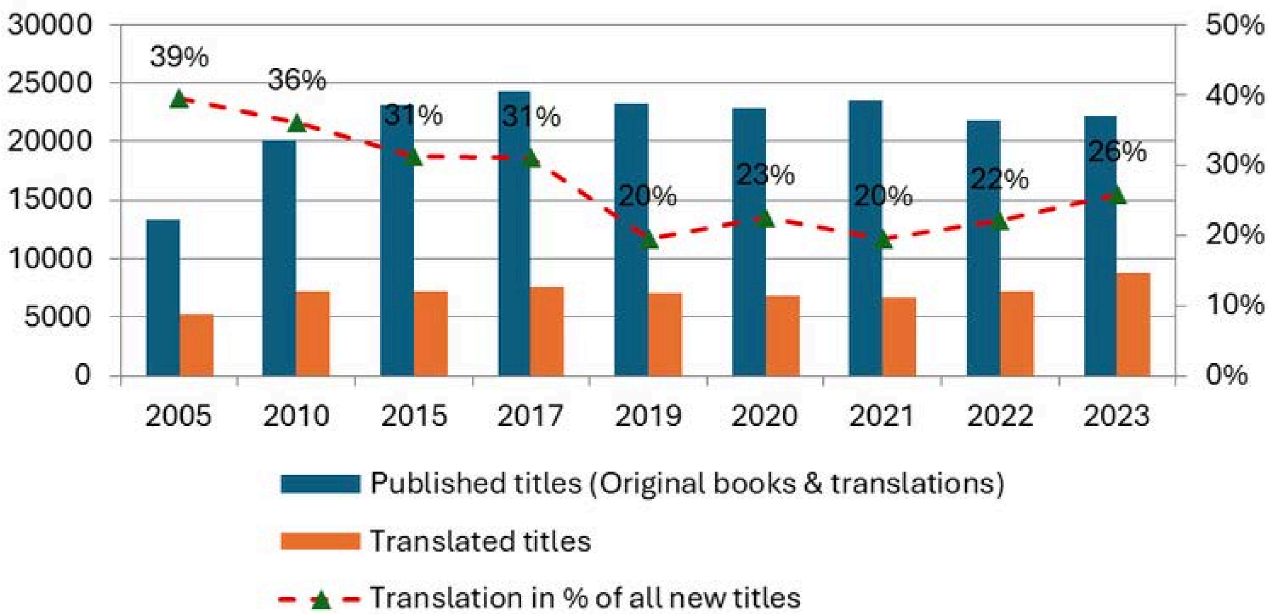
When viewed through the lens of the book industry, a comparison between these markets looks very different.

In 2023, Polish publishers generated a net revenue of 3 billion Zloty (approximately 720 million EUR, at wholesale prices), while in 2024 they generated of 3.1 billion Zloty (approximately 734 million EUR, at wholesale prices) which is slightly less than the estimated 900 million EUR revenue of their Dutch counterparts.

However, when measured by annual title output, Poland is in a much stronger position, with 30,662 new titles released in 2024 (down from 33,893 in 2023), which is well above the estimated annual output of around 18,000 to 20,000 new titles from Dutch publishers in recent years.

**FIGURE 27**

TITLE PRODUCTION & TRANSLATIONS 2005-2023



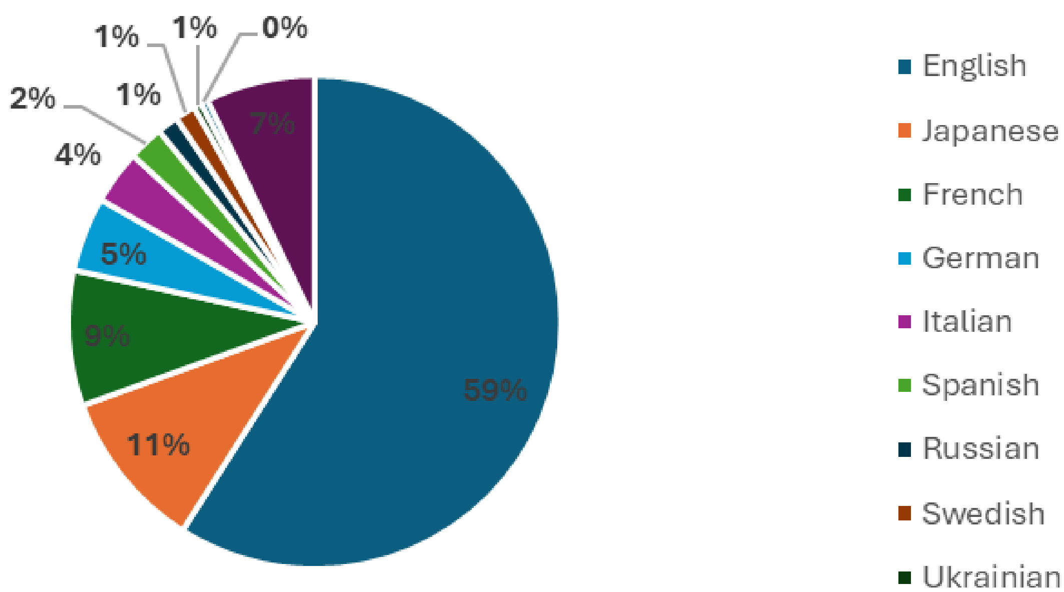

Following accession to the European Union in 2004, Polish publishers experienced a notable increase in the production of new titles, rising from 13,370 in 2005 to 22,590 in 2014. The country's opening up has also also led to an increase in translations, from 5276 translations of foreign languages into Polish in 2005 to a record high of 7534 in 2017. Following a slight decline in 2019 (7,068), followed by a further drop to 6,855 in 2020 due to the pandemic, an all-time high of 8,752 new translations was reported in 2023.

In the 2000s, the production – and certainly also the consumption – of translated books by Polish readers significantly exceeded that of Western European markets, with translated titles accounting for 34% to 40% of all new titles released between 2004 and 2011. Even after this surge, when it appeared that the initial demand for new titles had been met, the proportion of translated works remained at around 30%. In 2019, the level decreased to approximately 20%, which is consistent with the average across Western Europe. This represents one new title in five.

The new peak in 2023 in translated books, when new releases in translation surged again to 26%, suggests that a number of new factors might have come into play, possibly in the form of a mix of manga titles as well as new genres, popular with specific audiences, such as romance and 'romantasy', as we have seen in many book markets not just in Europe, but worldwide.

**FIGURE 28**

TRANSLATIONS INTO POLISH BY ORIGINAL LANGUAGE (IN %, 2023)




The book industry in Poland also demonstrated robust growth, as evidenced by the rise of the annual Warsaw book fair, which emerged as a prominent industry gathering in Europe during that period.

A close analysis of the original languages of the translated works reveals several interesting aspects. Following a similar trend in the changing preferences of young readers in Western European countries, particularly in France and Germany, Polish book buyers accounted for an impressive 11% of translations from Japanese, the language of manga. This figure exceeded the 9% of translations from French.

### 3.4.5.1 The severe distortions of European translation markets

A striking feature of book translations in Poland and throughout Europe is what is omitted.

Even in a country of the former Eastern European bloc, with a rich heritage of Slavic culture and language, of 8752 translated titles, a mere 2% derive from languages other than those of Western Europe, North America, and Japan.

The enduring connection between Polish cultural elites and France is evident in the prominence of French books as a source for translations, with German ranking second at slightly over half the frequency of French. In 2023, 121 translations from Russian, along with another 45 from Ukrainian, offer a modest testament to the shared cultural and historical legacies of these nations, as well as the new realities that have emerged in the wake of the Russian invasion of Ukraine in February 2022, with many Ukrainian refugees arriving in Poland.

As demonstrated repeatedly in this report, the preferred original languages for translating books are English and a consistent selection of six Western European languages: French, German, Italian, Spanish, Swedish, and Japanese.

It is important to note that a statistical approach such as this must be able to accommodate the rare exception. We are aware of the recent Korean Nobel laureate, or the successful Russian exiled in Switzerland. However, the idea that translations of books represent a bold exploration of cultural diversity within the mainstream translation business is, in reality, a gross oversimplification.

## 3.4.6 Sweden: A Digression

The Swedish book market is notable for several unique features which provide valuable insights into the significant changes over the past 25 years in how books are produced, distributed and consumed. At the core of these transformations is the term 'digitalisation', which encompasses a range of powerful, albeit highly different, drivers of change.

Technological developments have led to the introduction of new formats for books, such as e-books and digital audio. These developments have also introduced new channels for the distribution of books to consumers, as well as completely changing the workflows of publishers, distributors, marketers, authors and consumers.

In the contemporary business environment, there has been a notable shift in the economic model for books. These are no longer just being sold or lent from libraries but are now being offered as a subscription or as an add-on in a package deal by an online platform. These platforms have a different main focus, such as general-purpose online portals with their multiple bundled channels (like Google – which includes Google Books – or Amazon, which distributes multiple media content aside from its sales channels).

Cultural shifts have led to consumers perceiving books and long-form reading as just one offering among many others, including films, serialised movies, animated stories, games and music.

While these dynamics are evident in economically affluent societies with a well-developed educational system and a sizable middle-class demographic, they are particularly apparent in Sweden, where the underlying shifts can be observed more clearly and often earlier than in other regions.

The Swedish book market is generally regarded as economically sound, although positive assessments of revenue are tempered by a significant caveat. Håkan Rudels, CEO of Sweden's largest publishing company, Bonnierförlagen (or Bonnier Books), has stated that the situation appears to be much more challenging when sales volumes are taken into consideration.

Overall, book sales have been declining slowly but surely for a number of years. Sweden is well in line with most European book markets in this respect. However, Sweden is a notable exception in the field of digital.

The most significant change in Sweden's publishing industry occurred between 2020 and 2022. According to the Swedish Publishers Association, approximately two-thirds of all books consumed by end-users were streamed via digital subscription services such as Storytel, Bookbeat or Nextory. These services offered digital formats, including audiobooks and e-books. Streaming has overtaken physical bookstores as the largest revenue-generating channel. In 2020, streaming services overtook online bookstores, including the chains of Adlibris and Bokus, in terms of total revenue share.

A respective report by the Swedish Publishers Association summarizes: “Today, books are increasingly consumed as a service rather than a physical product.”

By 2024, 45.7 million book streams had been reported for Sweden, while unit sales of printed books accounted for just 23 million books. It is reported that 67 percent of all sales of books – as opposed to streams – came from printed units, down from 83 percent in 2018.

A notable aspect of book consumption in Sweden is the popularity of "foreign books", which refer to literature in languages other than Swedish, predominantly in English. In 2024, foreign language books attracted a significant audience, with sales of 3.7 million copies, accounting for 17.8% of the total book market, an increase from 14.9% in 2019. For more on this, please refer to the Chapter 4 – Global English and Continental Europe.

Overall, and across all formats and channels – including streaming – the total number of consumed books is showing a steady decline.

Historically, books translated from foreign languages have consistently attracted a dedicated readership in Sweden. Research based on records from the National Library indicates a stable and robust translation market for over a decade, with some familiar – and some surprising – features regarding the original languages of the translated titles. You can read more about the data from the Swedish National Library in Chapter 2.2.2. – Sweden.

English has always been the most prevalent original language, with French and German having a slightly lower share than the Western European average. An interesting detail in the translation numbers is the strong presence of Norwegian and Danish, suggesting a high level of interest among Swedish readers in two of their three direct neighbour countries.

The steady erosion of unit sales will have a significant impact on publishers' decision-making processes when acquiring translation rights, particularly in the context of literary fiction, which often experiences comparably low print runs. The additional cost of translation can exert pressure on a title's profitability. According to certain industry reports, it is the smaller publishers, rather than the larger ones, that are more likely to have their titles translated.

It should be noted that a special case is made for translations from English. It is well-known that some of these titles have the potential to become bestsellers. The recent increase in readers opting for the original versions of these top titles has led to a rational decline in costly translations into Swedish. The data indicates a continuous decline in the number of new translations and re-editions from English, with a decrease of 32% over the last decade. In 2016, there were 2,224 new translations and re-editions from English, but in 2023, this figure was 1,521. We will be covering this trend in more detail in the Chapter 5 - Global English and Continental Europe.

**TABLE 7**

TRANSLATIONS FROM FOREIGN LANGUAGES INTO SWEDISH, 2002-2014

| | English | Nor-wegian | French | German | Danish | Spanish |
|---|---|---|---|---|---|---|
| **2002** | 818 | 46 | 35 | 21 | 18 | 13 |
| **2003** | 845 | 55 | 36 | 17 | 14 | 9 |
| **2004** | 851 | 78 | 42 | 23 | 23 | 11 |
| **2005** | 886 | 55 | 42 | 52 | 16 | 16 |
| **2006** | 825 | 36 | 54 | 18 | 23 | 17 |
| **2007** | 918 | 58 | 29 | 33 | 35 | 9 |
| **2008** | 891 | 66 | 52 | 21 | 22 | 20 |
| **2009** | 735 | 47 | 51 | 36 | 29 | 16 |
| **2010** | 743 | 60 | 67 | 27 | 30 | 16 |
| **2011** | 738 | 64 | 59 | 45 | 22 | 25 |
| **2012** | 810 | 77 | 70 | 32 | 31 | 25 |
| **2013** | 726 | 80 | 66 | 41 | 29 | 20 |
| **2014** | 827 | 83 | 84 | 31 | 28 | 18 |
| **Total** | 10.613 | 805 | 687 | 397 | 320 | 215 |
| **%** | 73% | 6% | 5% | 3% | 2% | 1% |

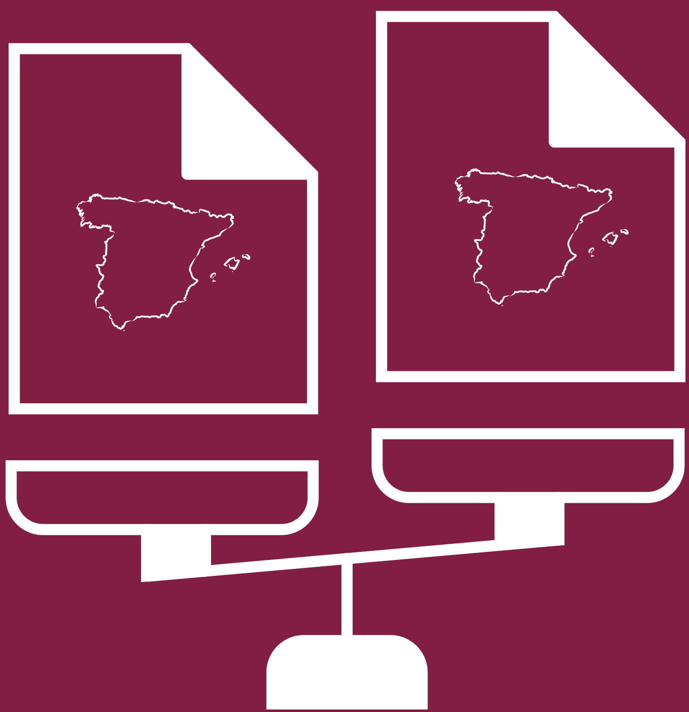
| | **Russian** | **Italian** | **Finnish** | **Ice-landic** | **Other** | **Total** |
|---|---|---|---|---|---|---|
| **2002** | 11 | 11 | 10 | 4 | 68 | 1,055 |
| **2003** | 13 | 6 | 16 | 6 | 76 | 1,093 |
| **2004** | 14 | 9 | 12 | 13 | 69 | 1,145 |
| **2005** | 9 | 15 | 12 | 7 | 36 | 1,146 |
| **2006** | 17 | 12 | 9 | 11 | 59 | 1,081 |
| **2007** | 12 | 16 | 14 | 16 | 76 | 1,216 |
| **2008** | 18 | 17 | 9 | 11 | 84 | 1,211 |
| **2009** | 12 | 7 | 5 | 5 | 77 | 1,020 |
| **2010** | 21 | 17 | 11 | 8 | 74 | 1,074 |
| **2011** | 21 | 15 | 10 | 8 | 66 | 1,073 |
| **2012** | 15 | 20 | 21 | 10 | 84 | 1,195 |
| **2013** | 16 | 23 | 14 | 10 | 70 | 1,095 |
| **2014** | 26 | 17 | 5 | 8 | 67 | 1,194 |
| **Total** | 205 | 185 | 148 | 117 | 906 | 14.598 |
| **%** | 1% | 1% | 1% | 1% | 6% | 100% |

*Note: Data seem to NOT include re-editions of titles.*
*Source: Swedish National Library, www.kb.se.*

# CHAPTER 4

# TWO SYSTEMS, TWO OUTCOMES: A COMPARISON OF TRANSLATION DATA IN SPAIN

BY ANJA KAMENARIČ
AND RÜDIGER WISCHENBART



To gain a full understanding of the scale and dynamics of translation activity, it is necessary to compare data from multiple institutional sources. The way in which various institutions collect, classify and report information varies significantly. As these inconsistencies directly impact the reliability of cross-year and cross-country analysis, we wanted to show an example of how such differences can drastically change our perception of a countries publishing landscape.

For this example, we have chosen Spain. The discrepancies highlight significant structural issues within Spain's data ecosystem, including methodological differences, gaps in legal deposit compliance, and unclear criteria for inclusion. These challenges hinder the ability to produce a unified and reliable picture of national publishing output. For this reason, this report evaluates both the library data and the publishers' association data in separate chapters, as well as shows the comparison here.

We approached the data for Spain in two different ways. The chapter in the publishers' associations data covers all official languages in Spain (Catalan, other Hispanic languages), while the library data section focuses exclusively on Spanish-language publications. Please note that there are some differences in the time range. The publishers' association data ranges from 2011 to 2024, while the library data ranges from 2014 to 2024, with incomplete data from 2024.

# 4.1 Library Data

**BY ANJA KAMENARIČ**

The Spanish National Library provided the data for the Spanish translation segment. The data set for the time frame of 2014 to 2022 was shared with us on the 2nd of December 2024. The dataset provided includes records from the inception of the National Library's holdings to the present. The datasets for 2023 and 2024 were shared with us on the 24th of February of 2026.

It is important to note that the library went through a significant system change, as during our inquiry they we were migrating from their former ILS to a new one. That means that the datasets for 2023 and 2024 were retrieved by the librarian directly from the new system itself, by requesting books published in Spain in 2023 and 2024, in Spanish as the language of publication, and including the original language field. They did not include all the information of the previous sets, such as titles, authors, genre, etc. It also created a new challenge, as the system displayed language information that wasn’t there in the previous sets. In the original language column, it was possible for there to be more than one language, meaning that the book which was translated was multilingual. For those, we counted each language separately for the final count of the top ten source languages.

It is also important to note that the numbers for 2022, 2023 may be lower than reality, as the transition of systems delayed cataloguing, while 2024 is incomplete. The librarians indicated, however, that the data should still be reasonably representative, with the ratio between translated and original titles likely to remain consistent with prior years.

For the purposes of this study, the years 2014 to 2024 will be focused on, aligning with the eleven-year range analysed for the other countries. The data were filtered to include only Spanish-language books published in Spain. A significant number of Spanish translations are present in the dataset, but these will be addressed in the final language count. The list encompasses all publications that the National Library categorises as monographic. It should be noted that this encompasses textbooks, academic books, instructional manuals and role-playing games. However, it does not include reprints.

### 4.1.1 Book Production in Spain

The datasets provided by the Spanish National Library captures the number of books published annually in Spain in the Spanish language from 2014 to 2024. Spain is a multilingual country, with several spoken languages, including Catalan, Galician, and Basque, alongside Spanish (Castilian). For the purposes of this study, however, the analysis is limited to books published in Spanish, excluding works in other languages.

Between 2014 and 2019, the annual number of Spanish-language publications showed moderate fluctuations, with a peak in 2019 (58,222 titles) and a low in 2018 (51,797 titles). This period is characterised by stability, with an average of approximately 54,720 books per year.

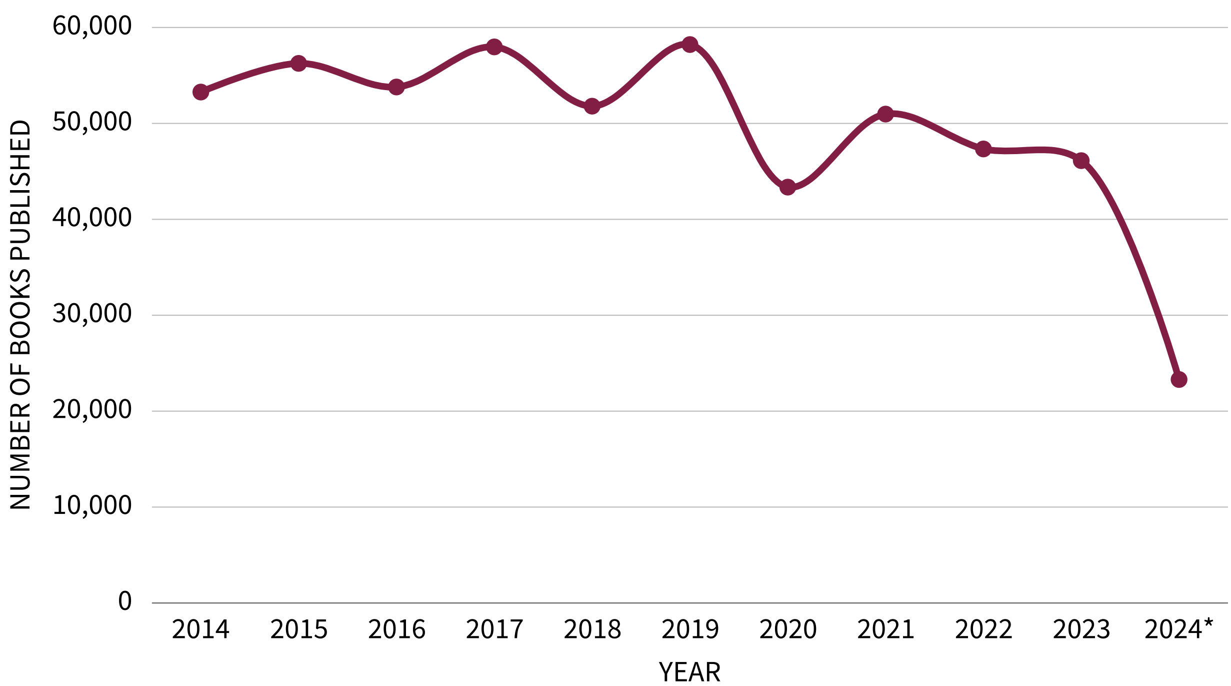
A significant decline was observed in 2020, when the number of publications fell to 43,357. This drop coincides with the onset of the global pandemic of the novel strain of Coronavirus, which has had a significant impact on the publishing industry and library cataloguing activities. While there was an increase in figures in 2021 (50,972 titles), these figures did not return to pre-pandemic levels.

In 2022, the production of Spanish-language books continued to decline, with a total of 47,338 titles published, with 46,118 books published in 2023. According to information from the Spanish National Library, this reduction may be partly attributable to delays or incomplete records rather than an actual decrease in publishing output. The data for 2024 is incomplete. The ratio between translated and original works, however, appears to remain fairly consistent with previous years, suggesting that trends in publication types have not significantly shifted despite the seeming numerical drop.

Overall, the 2014–2024 data indicate a relatively stable pattern of Spanish-language book production in Spain, interrupted by a clear pandemic-related downturn and a possible post-pandemic adjustment period.

**FIGURE 29**

BOOK MARKET IN SPAIN: ALL BOOKS PUBLISHED IN SPANISH, 2014–2024




**Data for 2024 is not complete, as the library's cataloguing process is ongoing.*

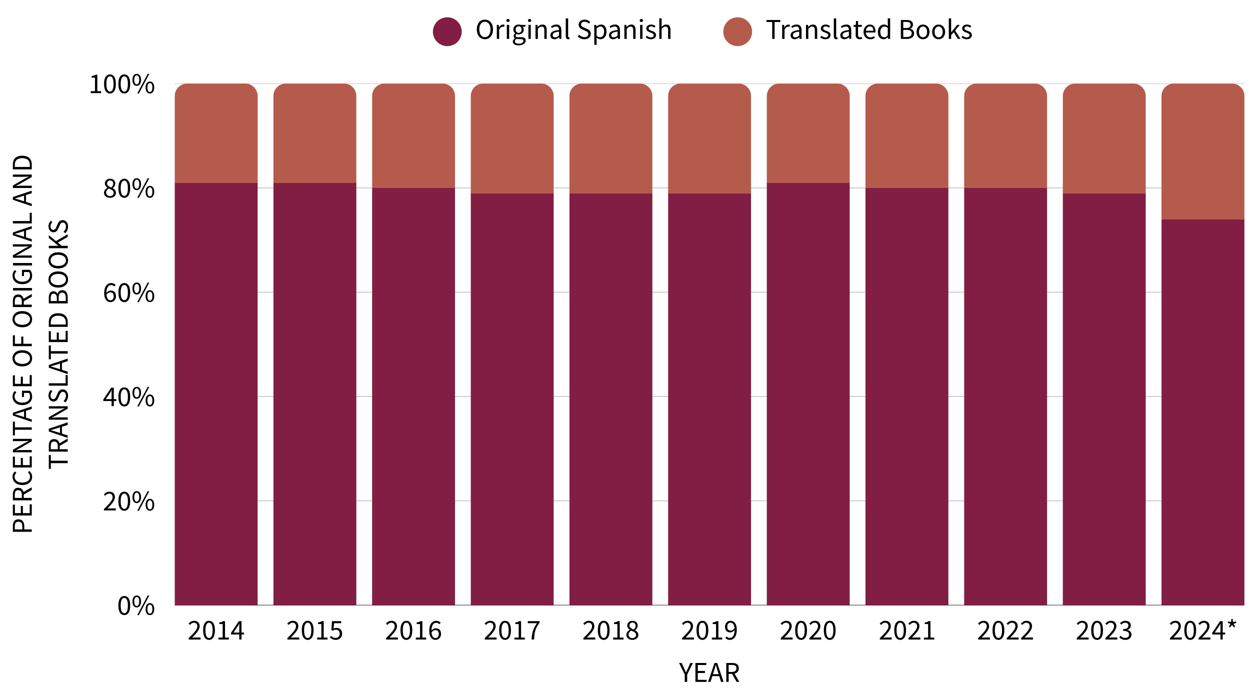
The proportion of original works in Spanish compared to translated books in the Spanish-language publishing sector in Spain remained notably stable across the observed period. Original works consistently accounted for approximately 80% of all Spanish-language publications, while translations comprised the remaining 20%.

From 2014 to 2016, the share of original Spanish-language titles remained between 80% and 81%, with translated works representing 19–20%. From 2017 to 2019, a gradual and minor shift was observed, with the proportion of originals decreasing slightly to 79% and translations increasing to 21%. This trend indicates a slight increase in translated content during those years, although the change is too insignificant to be regarded as a structural transformation in the market. The onset of the pandemic in 2020 coincided with a return to the previous distribution ratio (81% originals, 19% translations). In the subsequent two years, the ratio stabilised at around 80% originals and 20% translations. 2024 appears to have a drop in original Spanish titles; however, that can be attributed to the fact that the data is incomplete and the ratio may change.

Overall, the data indicates a high degree of continuity in the Spanish-language book market in Spain, with translations consistently forming a minority share of publications. This pattern aligns with trends observed in other European countries with robust national literary production, where translations supplement rather than dominate domestic publishing. Given the stable ratio, fluctuations in total publication numbers between 2014 and 2022 appear to have affected both categories proportionally, without substantially altering the balance between original and translated works.

**FIGURE 30**

BOOK MARKET IN SPAIN: ORIGINALS VS. TRANSLATIONS, 2014–2024




**Data for 2024 is not complete, as the library's cataloguing process is ongoing.*

## 4.1.2 Top 10 Source Languages for Translation

The distribution of source languages for translated books in Spain from 2014 to 2024 reveals a consistent dominance of English, accounting for over half of all translations in every year of the observed period. The proportion of English-origin titles ranges between 55% and 59%, with the highest proportion recorded in 2021 (59%) and the lowest in 2016 and 2018 (55%). This ongoing dominance is indicative of the global impact of English-language publishing and its solid position in the Spanish book market.

French is the second most common source language, with a share of between 12% and 13% that has remained relatively stable throughout the period. Italian follows, though with a smaller and slightly declining share, falling from 8% in 2014–2016 to 6% from 2018 onwards. Germany occupies the fourth position, with its share decreasing from 6% in 2014 to 4% in 2021 before recovering slightly to 5% in 2022. Although the 2024 data is incomplete, in its current state it shows a significant rise in Japanese translation. The language share was consistently 2-3% up to 2023, where it jumped to 5%. Based on the incomplete 2024 data, it's the 3rd most common source language in Spain, although that won't be definite until the end of 2026.

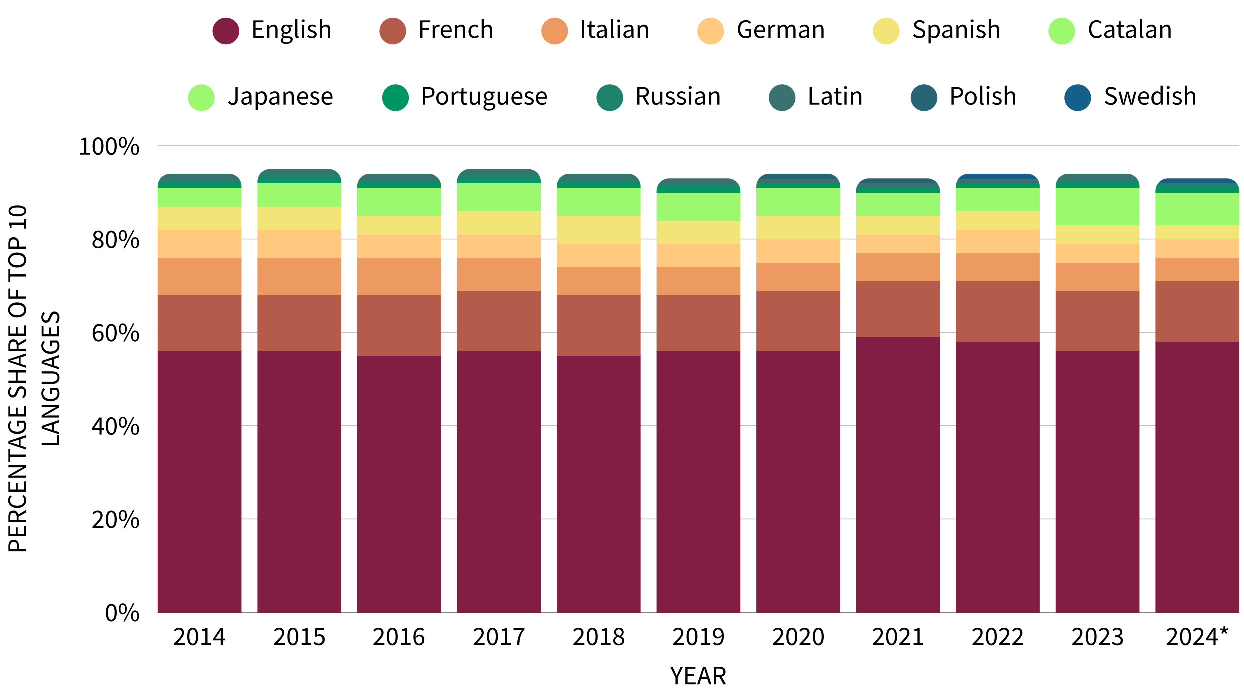
Translations from other languages spoken in Spain, such as Catalan, are also present, though in smaller proportions. Catalan translations range from 2% to 4%, peaking in 2017–2019 before declining to 2% in 2022. Other source languages, including Portuguese (1%), and Latin (1%), contribute a modest but consistent volume to the translated corpus. The substantial number of Latin translations is primarily derived from historical texts and biblical translations. Russian shows a gradual disappearance from the data after 2016, while Polish and Swedish appear only sporadically in 2020–2022, accounting for 1% or less of the data each.

A notable feature of the Spanish translation market is the substantial number of works categorised as "Spanish" translations, which represent 4 – 6% of all translations every year. These figures reflect a significant volume of intra-Spanish translations between different varieties of the language. One potential explanation for this phenomenon is that the books are translated from Latin American editions and adapted for the European Spanish market, or vice versa, from European Spanish works revised for Latin American audiences. While such translations involve the same language in a broad sense, they often require cultural, lexical and orthographic adjustments to suit regional readerships. This phenomenon partially explains the visible share of "Spanish" in the source language data and highlights the linguistic diversity within the Spanish-speaking world. Please note that, although the data set table we received does not specify this, according to the librarians who sent us this data, it is likely that this number also includes multilingual publications. Libraries categorise multilingual books as translated works, given that the text is often written in one language and then translated into the others.

The dataset under review demonstrates a highly concentrated translation market in Spain, with English as the overwhelmingly dominant source language and French as a distant second. The remaining languages are used less widely, suggesting that there has not been much diversification in the linguistic origins of translated works. The stability of these proportions over time indicates that shifts in total translation volume are unlikely to significantly alter the hierarchy of source languages in the near future, with the exception of the Japanese, which has had a steady increase.

**FIGURE 31**

TOP 10 SOURCE LANGUAGES FOR TRANSLATION INTO SPANISH, PER YEAR, 2014–2024




**Data for 2024 is not complete, as the library's cataloguing process is ongoing.*

# 4.2 Publisher’s Data

**BY RÜDIGER WISCHENBART**

Spain is a distinct case in this regard, as it recognises several regional languages, including Catalan, Galician and Basque, as official languages within their respective regions. Conversely, Castilian holds the status of being the official language across the entire country.

The regional linguistic specifics are clearly evident in the output of the many regional publishing companies

The city of Barcelona, capital of the region of Catalonia, is widely regarded as the de facto capital of the Hispanic book business. It is home to the two biggest publishing ventures in the Spanish language and several mid-sized publishing houses with a strong cultural and literary standing.

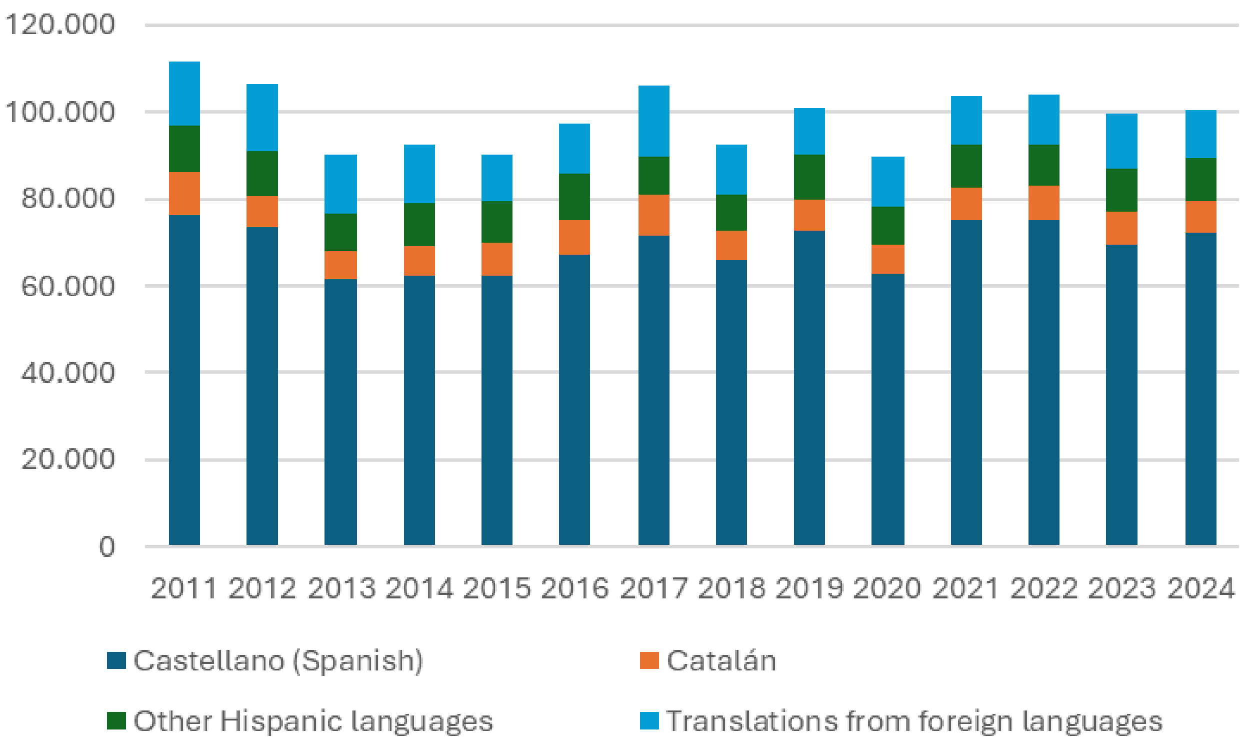
The two largest corporate publishing groups are Grupo Planeta and Penguin Random House Grupo Editorial. Planeta is a family-owned publishing group that holds approximately 100 imprints and has a strong presence in the Spanish-language publishing sector of Latin America. Legally incorporated with headquarters in Madrid, Planeta's publishing business is run out of Barcelona. Penguin Random House Grupo Editorial is the Hispanic division of the New York-based Penguin Random House publishing venture, which is fully owned by the German cross-media group Bertelsmann.

Barcelona is home to a number of independent publishers specialising in high-quality fiction and non-fiction books. Notable among them are Edicions del Periscopi, which specialises in fiction in Catalan, and Tusquets Editores, a prominent independent publisher that specialises in high-quality fiction in both Castilian and translation.

The official Spanish translation statistics demonstrate the cultural complexity of the region, with significant quantities of new original titles published in each of the languages, as well as translations between various regional languages and translations from foreign languages.

**FIGURE 32**

SPAIN, NEW TITLES BY HISPANIC LANGUAGES, AND TRANSLATIONS FROM FOREIGN LANGUAGES, 2011-2024




*Source: Ministry of Culture, CULTURABase. NIPO: 822-20-050-3*

Overall, the data indicates a reasonable level of stability in the publication of new titles in Castilian. The output in regional languages and translations has declined over the past one and a half decades.

**TABLE 8**

SPAIN, NUMBER OF NEW TITLES PUBLISHED IN SPAIN IN VARIOUS DOMESTIC LANGUAGES AND IN TRANSLATIONS FROM FOREIGN LANGUAGES, 2011-2024

| | 2011 | 2015 | 2019 | 2020 | 2021 | 2024 |
|---|---|---|---|---|---|---|
| **TOTAL** | 96,862 | 79,397 | 90,073 | 78,422 | 92,722 | 89,347 |
| **Castellano (Spanish)** | 76,181 | 62,526 | 72,921 | 6,277 | 75,234 | 72,539 |
| **Catalán** | 9,926 | 7,346 | 6,978 | 6,878 | 733 | 7,083 |
| **Other Hispanic languages** | 10,755 | 9,525 | 10,174 | 8,774 | 10,158 | 9,725 |
| **Translations from foreign languages** | 14,938 | 10,659 | 11,018 | 11,549 | 10,834 | 11,227 |
| **Translations. from foreign languages in % of all new titles.** | 15% | 13% | 12% | 15% | 12% | 13% |

*Source: Ministry of Culture*

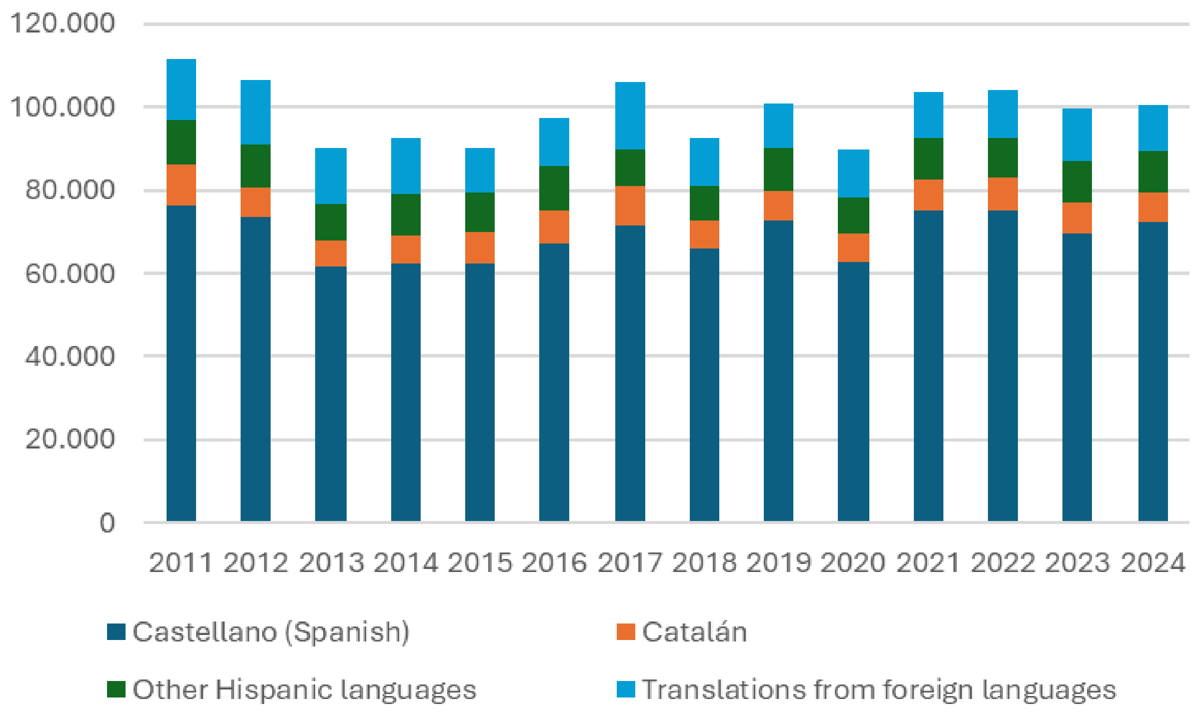
During this period, Spain experienced significant economic and market fluctuations, impacting both the overall economy and the book sector.

The economic crisis of 2008 had a significant impact on the book business, leading to a decline in revenue from a peak of €3.185 million in 2008 to €2.182 million by 2013. Meanwhile, the publishing sector, along with the broader economy, has shown a consistent recovery, reaching almost pre-crisis levels. In 2024, publishing revenue reached €3.038 billion, marking a nominal increase of 39% from its low point in 2013. During this period, the book business experienced significant growth in real terms, despite the general inflation rate of 22.7%.

Let us now turn our attention back to the evolution of book translations from foreign languages in such complex conditions.

**FIGURE 33**

SPAIN, NUMBER AND SHARE FROM ALL NEW TITLES OF TRANSLATIONS FROM FOREIGN LANGUAGES, 2011-2024

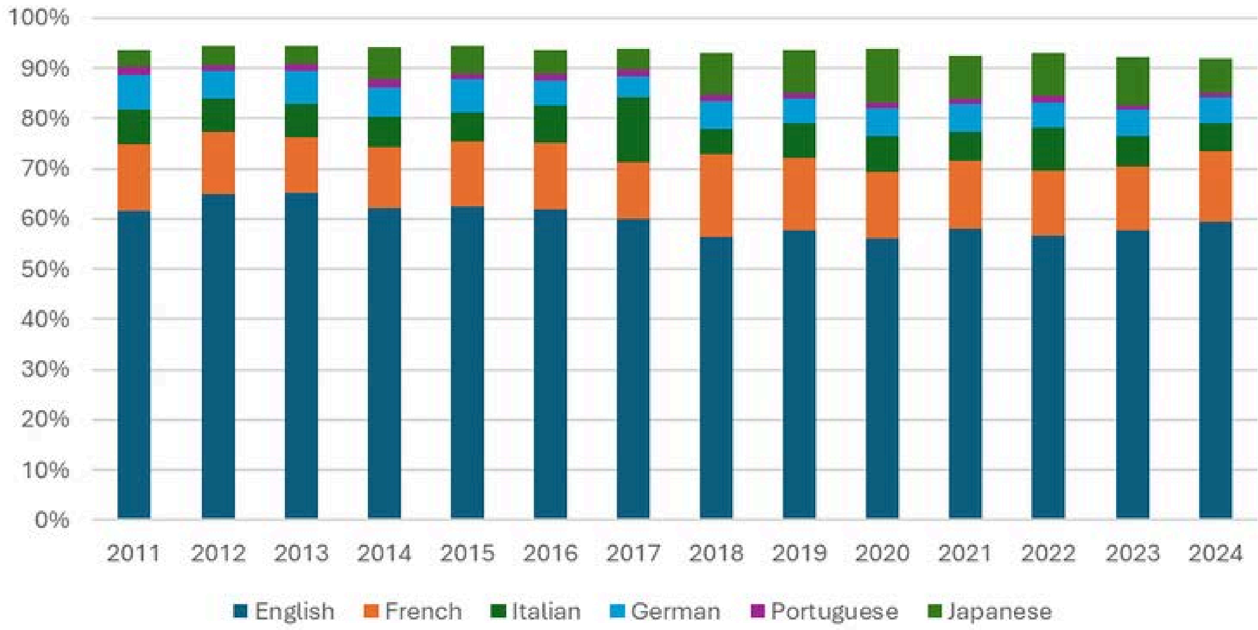



*Source: Ministry of Culture*

Following a slight delay and a surge in translated books from foreign languages around 2011/2012, there was a significant decrease in translations. However, a new normal of between 12% and 14% was established after the 2020/2021 COVD-19 pandemic.

**FIGURE 34**

SPAIN, SHARE OF ORIGINAL FOREIGN LANGUAGES IN TRANSLATIONS, 2011-2024




*Source: Ministry of Culture, CULTURABase. NIPO: 822-20-050-3*

The preferred original languages of foreign translations follow a pattern that echoes neighbouring France. As would be expected, English is the preferred original language across Europe. French has maintained a strong presence, with a consistent share of between 12% and 14% over the past decade and a half.

This status can be regarded as just another illustration of the profound integration of Spain into Europe since the demise of the Franco regime in the mid-1970s, when French held the top spot among all translations into Spanish, then the only official language in the country. Following the transition to a democratic regime in the 1980s, English emerged as the preferred foreign language among Hispanic readers.

Another notable development in the field of Spanish translations is the increasing prevalence of Japanese translations, which can be attributed to the growing popularity of manga. This trend saw a substantial rise from 3% in 2011 to 11% in 2020 and 10% in 2023. However, this figure declined to 7% in 2024. It remains to be seen at which level a new balance will be achieved

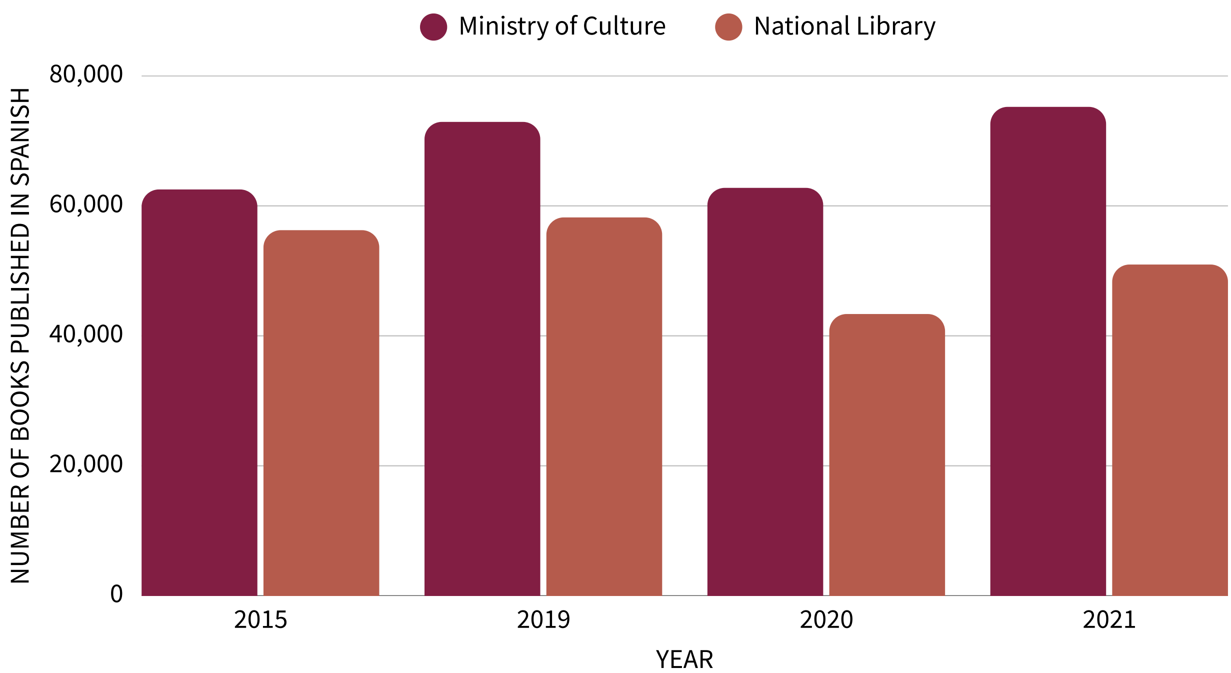
# 4.3 Differences in Data

**BY ANJA KAMENARIČ AND RÜDIGER WISCHENBART**

There are some significant differences in the data. For the overlapping years with complete data (2015; 2019-2021), data from the publishers' associations chapter, gathered from the Ministry of Culture, consistently shows 25-48% higher numbers than the library data for Spanish publications. This is particularly interesting, because the library date contains textbooks and other works that don't fall under trade publishing. The data from the publishers' associations chapter also shows a more modest decline after the pandemic, while the library data shows a slightly larger drop.

**FIGURE 35**

BOOKS PUBLISHED IN SPAIN AND IN THE SPANISH LANGUAGE, COMPARISON BY DATA SOURCE




With regard to the top languages, English is still nominated in both data sets, followed by French. Italian is also prominent in both. Boths sets of data also note the rise Japanese translation, though the data from the publishers' associations chapter shows a greater rise in than the library data.

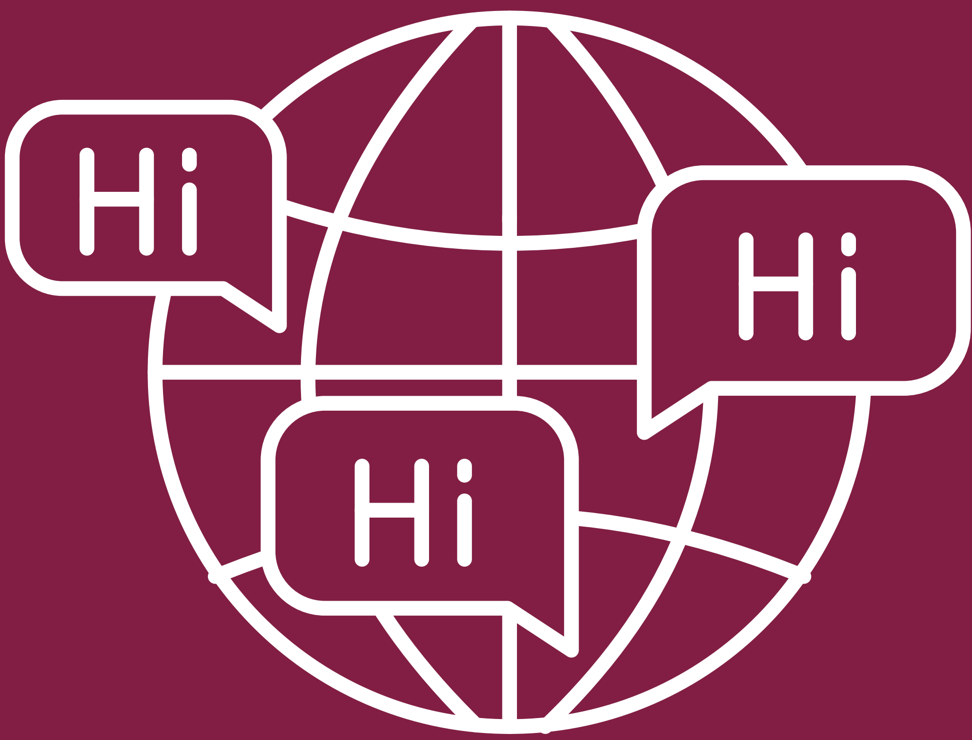
The reason for the discrepancies could be that not all publications have been submitted to the National Library, despite it being mandatory. It should also be noted that the library data excludes reprints, while it’s unclear if they’re counted in the Ministry’s data. Furthermore, the following questions must be addressed: the provenance of the Ministry's data, and the criteria for the inclusion of a book in the count. Without this information, it is challenging to ascertain the reasons behind the significant number of discrepancies.

Taken together, these observations highlight a broader issue: Spain's institutional publishing statistics are not fully harmonised, which makes it difficult to make long-term comparisons and cross-sector analyses. This misalignment is precisely why the report relies on both data sources rather than prioritizing one. In order to gain a more complete and balanced understanding of Spain's translation landscape, it is essential to evaluate the Ministry of Culture data and the National Library data side by side.

# CHAPTER 5

# GLOBAL ENGLISH AND CONTINENTAL EUROPE

BY MIHA KOVAČ
AND ANJA KAMENARIČ



# 5.1 The History

**BY MIHA KOVAČ**

From a linguistic perspective, contemporary Europe appears to be a modern-day manifestation of ancient Babylon in reverse. Between the late 14th and late 20th century, Europe underwent significant cultural, economic and social development, leading to the emergence of a diverse array of languages and cultures. In this process, the printing press played a crucial role as a basic information infrastructure. This not only generated an information explosion but also enabled the standardisation of national languages and, consequently, the rise of national identities.

Over the last three decades, as we have entered the era of screens and digital technologies, we have been working to develop a tool that will enable swift communication across all European languages. As with print in the 15th century, digital technologies form the basic infrastructure in this process. These processes will have a significant impact on the role of translation in Europe. At the time of writing this report, a common second language appeared to be the most obvious candidate for such an across-cultures communication tool in Europe. The need for it was always present, albeit less obvious and widespread. Following the shift in Latin's role (in some regions of the Habsburg Empire as late as the mid-19th century!), languages with the highest number of speakers, and a rule in countries that held power at the time, languages became the obvious candidates for such a role. These common languages were either used regionally, for example German in Central Europe or Russian in Central Asia in some parts of Eastern Europe, or their usage was limited to different fields of human activity, such as French in diplomacy.

Despite the setbacks experienced during wartime, the need for common transnational communication accelerated throughout the 20th century. Following the First World War, French, German, Russian and English were the obvious candidates for such a dominant role. After the Second World War, English emerged as the clear winner. When we first analysed the growing importance of English as a second language in the European publishing and reading landscape three key reasons for its rise came to mind:

Firstly, following the decline of German and Russian as languages of international scientific communication due to the rise of Nazism and Communism, English became the preferred language of academia. This coincided with a significant expansion of tertiary education after the mid-20th century. This dual trend had a significant impact on the number of people in Europe (and worldwide) who could speak English well, particularly among the educated classes who make up the core readership for books.

Secondly, American English assumed a dominant position in global popular culture, particularly in music and film. As the role of books shifted from elite culture and knowledge transmission to mass entertainment during the latter half of the 20th century, they became more closely aligned with broader cultural industries. Harry Potter was probably the first bestseller to achieve significant sales in continental Europe, establishing a benchmark for cultural and linguistic influence. In continental Europe, the shift to reading English-language bestsellers in English was preceded by a long tradition of translated English and American bestsellers that dominated European bestseller charts. Examples of such works include Jaws by Peter Benchley, The Exorcist by William Peter Blatty and The Godfather by Mario Puzo. These novels, in a similar manner to Jurassic Park by Michael Crichton, achieved global renown – or even after – the movies they inspired, thus initiating a novel trend of cross-media bestsellers.

Thirdly, the rise of global online book retailers such as Amazon has had a significant impact on improving access to English-language books worldwide. English readers in non-English-speaking countries suddenly had greater access to a much wider selection of books and e-books, often at lower prices than books in local languages. This included bestsellers translated from English.

The accelerated role of English as a second language post-2010 can be attributed to the ubiquity of smartphones. Smartphones have transformed the way we consume media content, becoming a universal device that incorporates all 20th-century media formats into a convenient pocket-sized tool. In essence, we no longer have to visit a cinema, library or bookstore, or find a TV or radio set if we want to read a book, listen to our favourite music, watch a movie or listen to a radio show (nowadays referred to as a podcast). All we need to do is take out our smartphone. Furthermore, smartphones enable us to communicate with a wide range of individuals. Social media platforms provide us with information regarding the content that others are engaging with, such as music, films, debates, and opinions. As one would expect, the languages with the highest number of speakers and content creators naturally produce the highest volumes of content. Consequently, smartphones have played a significant role in promoting the English language across continental Europe.

This also led to a significant increase in the market for English-language books in continental Europe. Firstly, we will consider the potential volume.

# 5.2 English-Language Book Markets in Continental Europe

**BY MIHA KOVAČ**

A self-evident truth about the book publishing industry is that the number of people who can speak and read a particular language has a direct impact on the size of the book market in that language. Consequently, the number of English speakers on the continent is a key factor in gauging the potential size of the English book market there.

According to Eurostat data, in 2022, only 25.3% of working-age adults (defined as people aged 25-64 years) in the EU reported that they did not know any foreign languages. A higher proportion (37.6%) reported knowing one foreign language, while 24.7% knew two foreign languages and 12.3% knew three or more. It should be stressed that multilingualism is especially typical for younger generations; in 2022, more than four-fifths (84.4%) of the EU's population aged 25-34 years knew at least one foreign language.

It is particularly noteworthy that smaller countries have often been multilingual powerhouses. According to Eurobarometer data, more than half of the adult working-age population in Slovenia and Luxembourg knew three or more foreign languages, and in Slovenia, Sweden, Lithuania, Estonia, Latvia, Luxembourg, the Netherlands, Finland, Cyprus and Denmark, more than 90% of the population was able to speak a foreign language.

In addition to the languages of neighbouring countries, English is the predominant second language. English is used as a second language by 20% of Europeans on a daily basis, and 47% of Europeans can hold a conversation in English. As illustrated in the table below, the percentage of respondents whose native language is not English but who can converse in it varies from 83% in Sweden to 21% in Luxembourg.

**TABLE 9**

PERCENTAGE OF SPEAKERS THAT CAN HOLD A CONVERSATION IN ENGLISH

| Country | Percentage |
|---|---|
| Sweden | 83 |
| Netherlands | 81 |
| Malta | 80 |
| Denmark | 79 |
| Cyprus | 71 |
| Finland | 70 |
| Germany | 56 |
| Austria | 48 |
| Greece | 47 |
| Slovenia | 45 |
| Belgium | 40 |
| Estonia | 38 |
| Portugal | 37 |
| Croatia | 36 |
| Czechia | 33 |
| France | 33 |
| Lithuania | 30 |
| Italy | 30 |
| Slovakia | 29 |
| Spain | 27 |

However, this perspective does not encompass the full scope of the situation. When asked to identify the most important foreign language for their children to learn in order to secure their future, Europeans identified English (85%) as the most important language. It is evident that other languages are significantly lagging behind, with German (13%), Spanish (13%), French (12%) and Chinese (11%) being the most prominent. Such expectations are reflected in the English proficiency of young Europeans. Seven out of ten people in the 15-24 age group claim to be able to have a conversation in English.

Assuming that a proportion of the entire European Union population (450 million) is able to converse in English, it is estimated that this group represents a potential volume of the European market for print and digital English-language books. This market is estimated to be approximately 220 million, which is equivalent to about two-thirds of the US population. If we assume, conservatively, that 20% of Europeans who use English as a second language on a daily basis (approximately 90 million people) represent the potential volume of the English book market in continental Europe, this would still make the size of the market approximately 30% bigger than the UK population. However, if we project the trends in young Europeans' language abilities over the next 50 years and assume that the US and EU populations will be similar, it is estimated that 70% of Europeans will be able to have a conversation in English,

| Country | Percentage |
|---|---|
| Hungary | 26 |
| Poland | 25 |
| Latvia | 25 |
| Bulgaria | 24 |
| Romania | 22 |
| Luxembourg | 21 |

which would be more or less equal to the current US population. If current trends continue, the English book market in continental Europe will reach similar levels to that of the United States within the next few decades.

However, as we will demonstrate in the following chapter, these trends may be significantly reversed by the adoption of translation technology.

Finally, it should be noted that another significant English book market may be emerging in China. According to Yascha Mounk, "the 高考 (high school leaving exam) is more difficult and more intense than any American equivalent". Unfortunately, there is no data available on the English reading habits of young Chinese people, nor are there statistics on the number of English speakers in the overall population.

## 5.2.1 The Growth and Distribution of English-Language Book Sales in Europe: A Few Examples

As demonstrated below, the presence and impact of books in English vary across European markets, reflecting distinct linguistic, cultural, and economic dynamics. In Germany, the English-language fiction sector generated €90 million in revenue in 2023, with 6.3 million units sold. This corresponds to 5.8% of total fiction revenue and over 6% of all fiction copies sold. It is noteworthy that English-language fiction experienced a 10% growth, driven by both demand (6%) and price increases (4%). Across all genres, English-language books accounted for 5% of the German book market. As reported in "Englisch wächst schneller – buchreport".

The Netherlands demonstrates a notable degree of market penetration of English-language books in Europe, with a 25% market share in 2023, representing an increase from 22% in 2022. The young adult (YA) segment is of particular interest, with over 60% of its revenue attributed to English books. In 2024, for instance, a striking example was Jennifer Egan's novel, of which 65% of total sales occurred in English.

In Estonia, while precise sales figures are unavailable, the market exhibits strong linguistic readiness: 84% of the population report active or passive knowledge of English (it should be stressed that this number, compiled by Estonian state-run broadcaster ERR, is almost three times higher in comparison to Eurobarometer data, so a degree of doubt about its validity is in place here). Market analysis indicates a generational shift, with younger readers demonstrating a preference for English-language materials, partly due to delays and cost barriers associated with translation.

In contrast, France reports a much lower presence of English-language books, with a market share of approximately 1% in 2023–2024. Similarly, Italy maintains a marginal English-language market share of around 1%.

In Sweden, the online bookseller Adlibris reported that 26% of its sales in 2023 were English-language titles, up from 20% in 2016, indicating consistent growth in demand.

In Spain, the English-language market is still in its infancy, with sales being predominantly driven by Spanish, Catalan, and Basque titles. In terms of market competition, English-language books are not yet a significant issue.

In Greece, local publishers are facing competitive pressure from low-priced English-language editions. A recent example of this is the success of Rebecca Yarros' Onyx Storm in the Greek market, aided by a timely Greek-language release.

Slovenia presents a case of generational divergence in English-language reading habits: Market research indicates that 76% of readers aged 18–24 read in English, compared to only 21% of those over 50. Amongst Gen Z readers, a broad selection is the main motivation for reading in English, with 62% citing this as their primary reason.

### 5.2.2 Motivations Behind English-Language Reading Preferences Among Young Europeans

As indicated in Eurobarometer data, across Europe, young readers are increasingly preferring English-language books, a trend influenced by a variety of cultural, linguistic and economic factors that differ by country.

In Germany, the level of engagement with English-language literature among young people is influenced by a combination of immediacy and cultural alignment. A recent survey by the German Publishers' and Booksellers' Association (Börsenverein) revealed that 21 percent of readers aged between 16 and 19 frequently read books in the original language. Young adult (YA) readers also turn to English editions for faster access to trending titles, bypassing the delays associated with translation. Furthermore, global platforms such as BookTok have a significant influence on their preferences, with many seeking identical editions promoted by international influencers. The perceived educational value of reading in English – particularly for improving language proficiency – and the view that humour and meaning are often diluted in translation further reinforce this trend.

The situation in the Netherlands is shaped by both economic and social considerations. English-language books are often more affordable than Dutch ones due to national fixed pricing legislation. Furthermore, delays or unavailability of translations of popular titles in Dutch may encourage youth to read in English. Social media also plays a significant role; similar to the trend in Germany, young readers often seek the same covers and titles trending on TikTok. This has contributed to a broader cultural shift in which reading in English is considered mainstream among Dutch youth.

In Slovenia, surveys indicate that the primary motivator for reading in English among young adults (YA) is the wider selection of available content. Research indicates that 62% of Generation Z readers cite greater choice as the principal reason for their preference for English. Furthermore, the pervasive exposure to English via digital media has significantly enhanced the language fluency of young people. The accessibility of digital formats, particularly audiobooks and e-books, is also a contributing factor, as English editions are frequently more readily available than their Slovenian counterparts. Furthermore, a survey of students enrolled in educational and library programmes revealed that approximately 90% of respondents read in English. When asked to name the titles of their last three books, 25% of respondents identified only English-language publications.

Research indicates that Estonian youth also favour English for reasons of immediacy and affordability. English editions are released sooner than their Estonian equivalents and are generally more cost-effective. A growing number of young readers are choosing English over Estonian, a trend that is being further encouraged by the use of English texts for educational purposes, particularly in language learning.

In France, the trend of young people reading English-language material is at an earlier stage of development. Observations from the Paris Book Festival suggest that French youth are beginning to follow global English-language trends, largely influenced by social media platforms such as TikTok, which promote American bestsellers.

All of these data points indicate a significant historic shift, with English gaining ground in continental Europe from the end of the Second World War onwards. The language moved from academia, diplomacy and business to popular culture, thus becoming a part of the daily lives of many more ordinary continental Europeans. Many authors and publishers, especially those in the younger demographic, were quick to adapt to this trend. In Germany, for example, Josi Wismar, who is a BookTook author of 2024, uses English titles for all her books, despite the fact that they are written in German and sold on the German market. Furthermore, German publishers have started to publish English bestsellers in both the original and German translations simultaneously. Furthermore, they began to purchase the English rights of English-originated bestsellers for sales in continental Europe, with a view to offsetting losses incurred due to reduced sales of German translations. Hanser Verlag published T.C. Boyle's new novel No Way Home simultaneously in English and German for the European market, and in German.

# 5.3 A Genre in Between Global English and Translations: Romantasy

**BY ANJA KAMENARIČ AND MIHA KOVAČ**

Studies show that translating fantasy literature presents a unique challenge due to the influence of the genres distinctive properties and cultural contexts. Fantasy literature frequently incorporates complex imaginary worlds with invented terminology, languages and cultures. It often incorporates culturally specific allusions and mythological elements that may be unfamiliar in the target culture, necessitating adaptation or explanation to retain narrative coherence and emotional impact. The translation of proper names and invented terms poses a special challenge for translators. They must decide whether to foreignize, naturalize, or creatively adapt them to preserve meaning without confusing or alienating the reader. Maintaining internal consistency for names, magical systems and places while preserving immersive quality demands high levels of creativity and attention from translators. Many fantasy and romance works are published as multi-book series, requiring translators to maintain terminological and stylistic consistency across volumes.

The prevalence of medieval fantasy in modern culture is intrinsically linked to the deep cultural roots of medieval history and folklore in European societies. It is a dominant presence in both literature and media representations of fantasy in Europe. However, it is important to acknowledge the pervasive influence of the Anglophone world within this genre. American and British writers have a significant global influence, with renowned authors such as J.R.R. Tolkien (British), George R.R. Martin (American), and J.K. Rowling (British) having a profound impact on shaping the genre landscape. English-language markets (U.S. and U.K.) dominate publishing rights and global distribution. However, non-English European fantasy literature can thrive within European language markets, especially in German, French and Slavic languages, while it often struggles in international markets. Eastern European fantasy literature is not always readily available in English, despite enjoying significant regional popularity.

As demonstrated above, there is a specific trend among young European romantasy readers (also clearly visible on Booktok) that labels translated romantasy as "cringe", stating that certain phrases frequently used in such works simply do not work or have the same "feel" in their native languages. This circumstantial evidence suggests that a significant proportion of reading in English among younger generations takes place in these genres. In essence, while quality translations are readily available and widely read in many European countries, some European readers are drawn to English works due to increased exposure and familiarity with Anglophone fantasy traditions, which have historically influenced the genre.

### 5.3.1 The Difficulty of Translating Fantasy and Romantasy from Slavic and Other Small Languages

As previously stated, all fantasy and romantasy translations present complex challenges; however, Slavic and other small European languages, such as the Baltic languages Latvian and Lithuanian, face additional difficulties. In this section, the focus is on West and South Slavic languages, which represent two major branches of the Slavic language family. The West Slavic group encompasses Polish, Czech, Slovak, and Sorbian, predominantly spoken in Central Europe. The South Slavic group consists of languages such as Slovene, Croatian, Serbian, Bosnian, Montenegrin, Macedonian, and Bulgarian, which are spoken across the Balkans. The

Slavic language group also includes East Slavic languages such as Russian, Ukrainian and Belarusian. However, due to the size of Russia, it is considered a separate market in this chapter.

Many Slavic and Baltic fantasy works draw on indigenous mythologies, folklore and cultural nuances that may prove unfamiliar to target audiences, complicating effective cross-cultural transfer. Slavic languages generally exhibit grammatical and syntactic differences when compared with Germanic and Romanic languages. This can result in challenges when attempting a direct translation, often requiring adaptations to maintain flow and readability. Slavic languages have a comparatively limited global presence, leading to a shortage of experienced translators from Slavic to other languages and placing them at a disadvantage in major translation markets, especially English. For these reasons, translating Slavic fantasy to other languages is considered challenging and requires sensitive cultural and linguistic handling.

Furthermore, many distinguished works of Slavic fantasy have been translated into European continental languages, such as German and French, with Russian being another notable example. However, Russian is also a Slavic language, and it has a significantly larger and distinct market.

Examples of such translations, which either fall in the fantasy genre or include mentions of hard to translate slavic mythology and fantasy elements, include Nobel laureate Olga Tokarczuk's novel *Primeval and Other Times*, which has been translated into over twenty languages, including German and eventually English (symptomatically, first published by a small press in Prague, specialised in publishing internationally unknown top-class literary works in English); *Silva Rerum* the historical book series by Lithuanian writer Kristina Sabaliauskaitė, which was translated into Polish and Latvian; and Bulgarian author Nikolay Haytov's *Wild Stories* (Диви разкази), a collection of realistic short stories rooted in rural Bulgarian life, which has been translated into over twenty languages, including French, German, and Russian, and is now included in the UNESCO historical collection. Barbi Marković is also an interesting case study. She is a Serbian author who currently resides in Austria. She has published *Minihorror,* a collection of short stories with elements of horror and fantasy, in German. The book was awarded the Leipzig Book Fair Prize for fiction in 2024.

Translators must decide how to adapt culturally specific names and folklore elements. They can either keep the original forms (foreignization) or adapt them (naturalization). Each choice affects the reader experience and cultural authenticity. This can be a challenging decision, given the lesser familiarity with Slavic folklore elements in larger countries. Many Slavic fantasy works draw from rich but complex mythologies, with creatures and concepts that are not directly equivalent in target languages. This makes such texts more difficult and time-consuming to translate. Furthermore, fantasy readers often have expectations regarding tropes and narrative styles, which can make the marketing of Slavic fantasy more challenging. It is not impossible, as demonstrated by the example of Bella Forrest (or more likely, a group of writers), who is best known for the A Shade of Vampire series (2012–2021). This series focuses on a vampire clan from the Ukraine and sold millions of copies through self-publishing platforms like Amazon Kindle Direct Publishing and CreateSpace. It is evident that her utilisation of Slavic mythology has undergone an anglicised transformation from the outset.

Translators must therefore balance preserving original style with meeting target audience genre conventions. It is challenging to adjust sentence structures for fluency while preserving meaning in Slavic languages due to the richness of their morphology. Preserving unique voices in languages with different expressive means demands creative translation strategies. These factors require translators to have deep cultural and linguistic expertise in both the source and target languages, as well as familiarity with fantasy genre norms. This is precisely the area in which AI is most likely to fall short. While machine translation can support fluency and consistency, it may struggle to preserve style, creativity, and cultural nuance. At this stage, the most effective approach involving AI seems to be a collaboration between human expertise and machine assistance. One such example of this kind of collaboration is Nuanxed, a translation company that employs translators to proofread and refine AI-generated texts.

### 5.3.2 Andrzej Sapkowski: The Classic International Success

In order to provide a clearer illustration of the path of Slavic and Baltic fantasy authors, and the challenges they face in translation, we have selected three case studies that demonstrate the variety of their experiences. The first of these is the most well-known success story from the Polish fantasy market. Andrzej Sapkowski is a prime example of transitioning from regional to global success. His significance extends beyond the commercial success he has achieved. His saga about Geralt of Rivia has been translated into 37 languages and has sold over 33 million copies worldwide. In 2020, Amazon reported Sapkowski as their bestselling author, even surpassing J.K. Rowling.

There are, naturally, numerous factors contributing to his success, and these extend beyond the literary realm. Sapkowski's work is notable for its combination of Slavic mythology with modern realism. The world he creates draws considerable inspiration from Tolkien's work, while also displaying notable influences from Polish history and Slavic lore. Initially sceptical of video games, he was able to achieve global fame through CD Projekt's *Witcher* games, thanks to the sale of rights at a low price. Following the success of the Netflix TV adaptation, the author achieved record-breaking sales on Amazon. This demonstrates the potential for increased sales through multimedia expansion and highlights the significant development prospects of Slavic fantasy. However, it is probable that, during this process, the complexity of Slavic lore in his work was adjusted to appeal to global audiences.

### 5.3.3 Kristina Sabaliauskaitė: Local Success with (no?) International Potential

She is a prime example of local literary success. Her tetralogy *Silva Rerum* (2008-2016) is a historical fiction series, and is the most widely read Lithuanian literary series. The period under discussion covers 1659-1795 and encompasses four generations of the Norvaiša family. The book was met with overwhelming popularity in Lithuania, with 22 reprints of the first volume alone. The first two volumes were named books of the year, and the series was listed among the top 100 popular Latvian books of all time.

She achieved moderate success with translation into other European countries, including Latvia and Poland. Her Silva Rerum was nominated for Central European awards (Angelus) and attracted significant attention beyond Lithuania's borders. She is published by traditional, respected publishing houses, and has received award nominations for her work and achieved very large sales numbers in her home country. However, she has yet to achieve success in many larger markets, especially the English-speaking ones. Her achievements in international sales should be reflected in the figures, though these have not yet reached the level of success achieved by Andrzej Sapkowski. It is possible to theorize that this is due to the multimedia aspect of Sapkowski's work, or general differences in genre, but there is no clear answer as to why such a local success has so much unfulfilled international potential. Furthermore, it is pertinent to consider whether other Slavic or Baltic authors can emulate Sapkowski's international success, or whether his achievement was merely a one-time phenomenon.

## 5.3.4 Zoe Ashwood: Self-Publishing in English

In comparison to Sapkowski and Sabaliauskaitė, Slovenian author Kaja Bucik has taken a significant step forward. As Zoe Ashwood, she writes romance novels in a variety of genres, including fantasy romance, magic romance, small-town cozy monster romance, witch romance and paranormal erotica. All Zoe Ashwood books are originally written in English and are available for purchase on Amazon. The author's home base is located in Ljubljana, from which all publications are managed. As of July 2025, her sales figures placed her within the top 1000 in her respective genres, and her leading titles received up to 6000 Goodreads ratings.

She began her writing career in 2015 by participating in National Novel Writing Month (NaNoWriMo), and by 2019, she had published her first novel on Amazon's self-publishing platform. Since 2021, she has worked exclusively as an author and self-publisher, a rare occurrence in such a small market. Her body of work includes the popular fantasy romance series *Her Orc* and *Nora Moss*, which blend fantasy and romance elements. Her writing is distinguished by its focus on "cinnamon roll heroes" and themes of magic and true love.

In 2023, Ashwood participated in a romance novel writing workshop organized by Cankarjeva založba, a major Slovenian publishing house. Following the workshop, she published her first Slovenian fantasy romance novel in 2024 with a traditional Slovenian publishing house. Her decision to primarily write in English and self-publish is indicative of a broader trend among Slovenian authors seeking to reach international audiences, given the relatively small and insular nature of Slovenia's literary market. However, if successful Slavic fantasy authors like her, can only find international audiences and global success by writing in English and self-publishing, what does that mean for local book markets?

To summarise, translating from European languages with smaller number of speakers (e.g. Baltic, Nordic, or lesser-used Slavic tongues) into English or larger European languages poses several challenges. There is a limited number of experts who are specialised in both the source language and the target major language. The challenge in this regard lies in the complexity of rendering unique cultural references in a comprehensible and engaging manner, a task not easily automated. As demonstrated by Zoe Ashwood, some authors of Slavic background have found a way to overcome these difficulties by writing in English. This approach can involve the loss of "non-globalisable" segments of their cultural and linguistic background, allowing them to become part of the vast global English-speaking community.

# 5.4 Is Global English Our Future? Or Not?

**BY MIHA KOVAČ**

If we were to extrapolate these trends into the future, we could predict that within 50 years, a significant proportion of continental European authors will be writing their books in English, with some even achieving bestseller status in the United States and globally. However, the future is rarely as it seems. For example, if we were to travel back in time using a time machine to 1525, we might assume that, according to that time, Latin was becoming more prevalent as a common European language. However, a hundred years later, in the mid-17th century, the situation was different. The popularity of books published in vernacular languages was increasing, while those in Latin were becoming less popular. This linguistic shift in early modern Europe occurred not only because the market for Latin books was saturated due to the development of printing technology. Furthermore, the Catholic Church's Latinate inclinations have become less appealing in the wake of the Protestant movement's success. In the second part of this chapter, we will demonstrate that current societal and technological developments may also hinder the growth of global English.

In other words, in order to understand the future role of English as a second language in continental Europe, it is reasonable to consider possible technological, societal and cultural developments that could change the path of English to become the primary all-European communication tool. Two potential factors contributing to this phenomenon are the waning of American global soft power due to internal political discord, and the unconventional foreign policy of the US. Additionally, the rapid advancements in AI's translation capabilities are a contributing factor.

For the purposes of this report, we will set aside any discussion of global power changes and instead focus on translation machines, which appear to be having a significant impact on the way we write, read and switch between different languages. Before we proceed, it would be prudent to consider the current state of AI implementation in continental Europe and its publishing sectors.

# CHAPTER 6

# AI, PUBLISHING, AND SMALL-LANGUAGE MARKETS

BY MIHA KOVAČ
AND ANJA KAMENARIČ

# 6.1 AI and the European Book Market

**BY ANJA KAMENARIČ**

While the global debate focuses on large markets and their vast commercial infrastructures, the impact of AI on smaller linguistic and cultural environments may be even more profound. In such markets, resources are limited, readerships are fragmented, and publishing has always required a careful balancing act between cultural mission and economic survival. AI tools, whether for marketing, editing, production or reader engagement, enter this ecosystem with both potential benefits and risks. The following section will therefore consider how AI is being applied in various domains of the publishing sector, and what these applications mean for publishers operating outside the world's dominant languages.

Major European publishers are progressively incorporating AI tools across their value chains, from the acquisition of manuscripts to the formulation of marketing strategies. This is particularly evident in academic publishing, where adoption patterns vary significantly between market sizes. Smaller markets tend to adopt more cautious, slower, experimental approaches, while larger publishers typically employ aggressive scaling strategies. The difference can be attributed to large investment costs associated with AI implementation.

## 6.1.1 AI and the General European Business Market

The Nordic countries have emerged as leaders in European AI adoption in business, with Denmark, Sweden, Finland, and Norway showing particularly strong performance. According to recent Eurostat data, Denmark is leading the way in European AI adoption, with 27.6% of companies using AI technologies. Sweden is close behind, with 25.1% of companies adopting AI. This leadership extends specifically to the publishing sector, where Nordic publishers have been among the most innovative in implementing AI solutions.

Denmark's strategic approach to AI has resulted in the highest corporate AI adoption rate in Europe, with 28% of companies expected to use AI by 2024. Danish publishers have been beneficiaries of government initiatives, including the Centre for Artificial Intelligence in Society and platforms for developing Danish language models. These measures have ensured that AI tools can effectively work with Danish content.

Estonia's adoption of artificial intelligence in a small market setting is a subject of particular interest for study. Despite its small size, Estonia has developed a comprehensive national AI strategy and has been proactive in ensuring AI systems work effectively with the Estonian language. The government has collaborated with Meta and other AI developers to provide Estonian language datasets, demonstrating how small countries can ensure their linguistic heritage is preserved in the AI age.

Slovenia has also demonstrated considerable AI ambitions, notably through its involvement in EU AI factory initiatives. The objective is to leverage European funds for the development of supercomputing infrastructure, as it is part of the EuroHPC project, which seeks to establish a network of supercomputers across Europe. The objective is to enhance research capabilities and facilitate the digital transformation of the economy. The project involves acquiring the latest technologies to enable complex simulations and analyses, which are crucial for advancements in areas such as artificial intelligence.

## 6.1.2 AI and Translation

In the forthcoming section, we will be exploring the application of AI in translation. To provide a concise overview, we will be listing a few examples to illustrate this topic. Taylor & Francis, a major academic publisher, has developed a comprehensive AI translation programme supporting over 30 languages, including many European languages such as Bulgarian, Czech, Danish, Estonian, Finnish, Polish, Romanian and Slovak. The system undergoes rigorous testing and includes comprehensive glossaries for technical terminology, with all translations subject to copyediting and author review. This new approach to book translation is expected to bring a range of benefits to authors. Previously, most authors would have had to arrange for a translation of their work before they could submit it to a publisher for consideration, making international academic publishing more accessible to authors from smaller markets.

Springer Nature, a renowned academic publisher, proudly offers complimentary auto-translation services for book authors. This inclusive service caters to a diverse range of linguistic needs, including multiple Eastern European languages, ensuring that authors can submit their manuscripts in their native tongue.

The largest Dutch publisher, Veen Bosch & Keuning, has implemented a limited experimental programme using AI to translate fewer than ten commercial fiction titles from Dutch to

English. This initiative, conducted with explicit author consent and human editorial oversight, represents a cautious approach typical of small market publishers accessing broader English-speaking audiences.

In recent years, there has been an increase in the number of companies specialising in book translation technology. One such example is Nuanxed, which has branch offices in Sweden and Belgium. The company claims to have produced over 900 translations using AI-assisted workflows, with a focus on creating more work for translators through post-editing rather than replacing human expertise.

The case of Sermitsiaq, Greenland's largest news publisher, illustrates both the potential and limitations of AI for minority languages. MediaCatch, a Danish startup, has developed a specialised AI translation tool for Danish-Kalaallisut translation, trained on 15 years of professional newspaper translations. This has enabled Sermitsiaq to offer subscription services that include access to AI translation tools, demonstrating how small markets can innovate to serve bilingual communities.

### 6.1.3 AI and Audiobooks

The use of AI in the production of audiobooks is not a recent development. This issue was already being reported as far back as 2021. Since that time, there has been significant progress in the technology, which is now widespread and commonplace, with many audiobook companies utilising AI. Significant changes have occurred in the market this year.

Audible has announced plans to expand its audiobook catalogue with the addition of AI-powered narration and upcoming AI translation services. The aim of this expansion is to increase accessibility and global reach. Publishers have the option to choose between a fully managed production service or a self-service model. Both options offer over 100 AI-generated voices in multiple languages and accents, with options for exclusive or non-exclusive distribution. Independent authors can also participate through an invite-only beta with Kindle Direct Publishing. While Amazon’s translations programmes are currently focused on larger language markets, there is potential for expansion into smaller markets.

Similarly, Spotify has partnered with ElevenLabs to expand its audiobook offerings by incorporating AI-narrated titles. Previously, Spotify's audiobook distribution platform, Findaway Voices, accepted AI-recorded audiobooks only from select partners and required a review before publishing. ElevenLabs' AI voice software now enables authors to narrate their books in 29 languages. The software offers a complimentary 10-minute text-to-voice conversion per month, with premium tiers available for purchase. While Spotify continues to support human narration, it recognises that digital voices represent a cost-effective solution for smaller authors and older titles.

AI in audiobooks is also becoming a part of the European publishing space. Storytel, a global leader in audiobook subscription services, leverages AI to elevate the audiobook listening experience through a feature named the Voice Switcher. Initially launched in Sweden and Poland, it allows listeners to switch between different narrations, including three high-quality AI-generated synthetic voices, which are optimised specifically for reading fiction. These AI voices complement the original human narration, offering users personalised options such as choosing between male or female voices and different narration styles.

One AI voice is an AI-generated version of Stefan Sauk, a well-known Swedish actor and narrator. Storytel has highlighted that 89% of their listeners have abandoned a book due to dissatisfaction with the narrator's voice rather than the content, making this feature significant for improving user satisfaction. The AI voices were developed in collaboration with ElevenLabs, a company that has a reputation for creating high-quality synthetic voices, and have received positive feedback, with 9 out of 10 people unable to distinguish AI narration from human narration in tests. Storytel clearly labels when AI voices are used to maintain transparency.

This use of AI by Storytel demonstrates a practical and user-centric application in a major European audiobook market, showing how AI can augment rather than replace human narrators, personalise experiences, and address user preferences in European language markets like Swedish and Polish.

In terms of smaller markets, Slovenia's largest publisher, Mladinska knjiga Založba, uses AI to produce some of their audiobooks. The production costs of audiobooks are relatively high, especially given their relatively small audience. On the publisher's reading platform, MK+, we can find several audiobooks where the reader's name is listed as "machine reading". This means that the book was read by AI voices and edited by a human editor. To date, all books that are machine readable have been in the non-fiction category.

AI audiobooks are especially useful for small European markets because they dramatically reduce the cost and time required for audiobook production, making it accessible to smaller publishers and independent authors who might otherwise be excluded due to high narration expenses. AI facilitates the production of multilingual audiobooks with natural-sounding voices, including regional accents, which helps to reach diverse local audiences and expand market access. Furthermore, AI facilitates personalised listening experiences through customisable narration styles and voices, enhancing audience engagement. These benefits include greater inclusion and content variety, as well as accelerated growth in markets where professional narration resources are scarce and budgets limited. This makes AI a key enabler of audiobook accessibility and expansion in small European countries.

### 6.1.4 AI and AI Content Creation and Enhancement: Academic publishing

The majority of content creation and enhancement activity has so far been focused on academic publishing. European publishers in small markets are exploring the use of AI for various content creation and enhancement purposes. Academic publishers, including those affiliated with universities in smaller European countries, are leading many of these innovations. Amsterdam University Press and Central European University Press have developed comprehensive AI policies that strike the right balance between innovation and academic integrity.

These policies permit the use of AI for activities such as brainstorming, proofreading, structural feedback and translation assistance, while ensuring strict adherence to requirements for transparency and human oversight. The approach taken by these academic publishers provides a model for how smaller market publishers can develop responsible AI usage guidelines.

Springer Nature and Elsevier, as multinational publishers, have a significant European presence and thus have considerable influence on small market practices. Their AI policies, which prohibit AI authorship while allowing AI assistance for language improvement and technical tasks, have become the gold standard for European academic publishers. A comparison of the approaches adopted by these publishers demonstrates how the industry is converging on certain principles while allowing flexibility in implementation.

### 6.1.5 Publisher Guidelines and Policies

Amsterdam University Press and Central European University Press have created detailed policies covering AI usage by authors, editors and peer reviewers. The guidelines stipulate that authors must disclose the use of AI tools and detail the role of AI in the creation of the manuscript. The policies explicitly prohibit AI authorship while allowing AI assistance for language improvement, data analysis, and visualisation tasks. These guidelines are intended to serve as models for other European publishers developing their own AI policies.

Elsevier's global AI policy exerts a notable influence on European Academic publishing practices. The policy stipulates the disclosure of generative AI use and prohibits AI authorship, placing emphasis on human accountability for all content. Springer Nature's comparable strategy exemplifies industry convergence on fundamental principles, while permitting flexibility in the specifics of implementation.

Conversely, in the domain of trade publishing, Penguin Random House's decision to prohibit AI training on its books exemplifies a response by publishers to the challenges posed by AI. The company's copyright page amendments explicitly state that no part of their books may be used for AI training purposes.

This approach contrasts with more permissive policies adopted by other publishers, who are experimenting with AI applications while maintaining strict human oversight. The variety of approaches adopted by European publishers reflects the experimental nature of current AI adoption and the absence of established industry standard.

The Federation of European Publishers' position paper provides guidance for European publishers navigating AI adoption. The FEP emphasises both opportunities for optimisation and efficiency improvements, while stressing the importance of copyright protection and fair compensation for creators.

Les Nouveaux Éditeurs, founded by former Hachette Livre CEO Arnaud Nourry, has adopted a clear stance against artificial intelligence in content creation. As of April 2025, the publishing group has formally prohibited two practices: shareholder interference in editorial decisions and the publication of books written using artificial intelligence. This position forms part of a "disruptive" approach to publishing, with a focus on editorial independence and quality.

Nourry states that these restrictions are clearly defined as requirements that guarantee the quality of their books.

The Börsenverein has provided guidance on AI opt-out mechanisms and the labelling of AI-generated content. They reference the Text & Data Mining Reservation Protocol, which uses the attribute "tdm-reservation" with two possible values: Value "1": Please note that processing for text and data mining is restricted (rights are reserved) and Value "0": Processing for text and data mining is permitted without restrictions. Please note that the file is no longer accessible on their website.

Large publishers such as Hachette differentiate between operational and creative usage. They have made it clear that they want to protect artists, so they will not use creative AI, but they are open to responsible experimentation for operational use. Penguin Random House has reportedly implemented an internal application designed to provide insight into data and streamline business processes. Those responsible at HarperCollins also share this view. It is evident that the majority of publishers in various publishing sectors have not yet established explicit standards and policies for the responsible use of AI.

### 6.1.6 Implications for Small Markets

The impact of AI on smaller linguistic and cultural markets in publishing is both significant and complex, presenting unique challenges and opportunities that differ from those in larger markets. It is vital for smaller markets, with their limited resources and fragmented readerships, to carefully navigate the integration of AI tools. This is so that they can balance cultural preservation with economic viability. While larger academic publishers are adopting AI more aggressively, European trade publishers are adopting more cautious, experimental approaches due to investment costs and the need to maintain editorial integrity.

Leading European small markets, particularly Nordic countries like Denmark, Sweden, Finland, and Norway, have demonstrated robust AI adoption, bolstered by government support and strategic initiatives. These initiatives facilitate the effective utilisation of AI within native linguistic contexts. Estonia and Slovenia are demonstrating proactive government-driven AI strategies. They are collaborating with major technology firms and participating in EU projects to develop AI infrastructure and language-specific tools. However, these developments are still in the early stages, so no final results are yet available. Estonia's endeavours to ensure that AI systems function effectively with the Estonian language demonstrate how small markets can leverage AI to preserve minority languages and enhance digital transformation.

In the field of translation, AI is facilitating greater access for authors in smaller language markets by reducing barriers to international publishing, particularly in academic publishing and in news. Programmes by Taylor & Francis and Springer Nature provide AI-assisted translation services across numerous European languages, supported by human editorial oversight. Smaller publishers, such as the Dutch Veen Bosch & Keuning and Greenland's Sermitsiaq, are adopting a cautious approach to innovation, with the objective of reaching a broader audience without compromising on quality. Emerging startups emphasise collaboration between AI tools and human translators rather than replacement.

Audiobooks are a prime example of an area where AI provides substantial benefits for smaller markets by drastically lowering production costs. Leading platforms such as Audible, Spotify and Storytel use AI narrations that complement human voices, enabling personalised experiences and expanding multilingual offerings. Publishers from smaller markets, such as Slovenia's Mladinska knjiga Založba, leverage AI to produce cost-effective audiobooks, particularly for non-fiction, addressing a niche that would otherwise be financially untenable.
Among trade publishers in Europe's smaller markets, responses to AI vary widely. Penguin Random House, for example, has taken a protective stance against AI training on their content, while Les Nouveaux Éditeurs has implemented an outright ban on AI-generated works. The Federation of European Publishers is a vocal advocate for copyright protection and fair remuneration, while also encouraging the adoption of AI-driven efficiency measures. Meanwhile, organisations such as the Börsenverein provide technical guidance on AI opt-out protocols and transparency around AI-generated content. Finally, we turn to Nuanxed, a company that demonstrates the potential of AI. They have produced over 900 translations using AI-assisted workflows, combining them with translator post-editing to ensure human and AI collaboration.

Overall, the use of AI in small European publishing markets is encouraging innovation while prompting important questions regarding cultural preservation, editorial independence, and fair use. These markets are realising that AI is not just a tool for automation, but a means to sustain and enrich minority languages and diverse cultural expressions. By combining cautious experimentation, government support and clear ethical policies, smaller publishers can leverage AI to overcome resource constraints, expand their reach and remain competitive in a rapidly evolving global landscape.

# 6.2 AI and the Future of Translations: a Zulu-Slovenian Case Study

**BY MIHA KOVAČ**

In order to gain a comprehensive understanding of the various dimensions involved in AI-powered translations, we conducted a small-scale experiment. The objective of this experiment was to assess ChatGPT's proficiency in translating languages that do not share any common linguistic links. This means we wanted to ascertain ChatGPT's ability to translate between languages without the involvement of human translators or direct translations. We selected Slovenian and Zulu because there is no documented history of cultural interaction between the two languages. Slovenian is spoken by two million people in a small European country between Austria, Italy, Croatia and Hungary. Zulu is spoken in South Africa, around 8,300 km away from Slovenia, as a first language by around twelve million South Africans, predominantly living in the KwaZulu-Natal province. There is no record of Slovenian colonisation of South Africa or of Zulu colonisation of Central Europe. Nor are there any Zulu-Slovenian translations, dictionaries, Zulu departments at Slovenian universities or Slovenian departments at South African universities. To summarise, until now there have been no Zulu-Slovenian human-made direct translations.

When asked how the translation from Slovenian to Zulu was achieved, ChatGpt posited that "realistically speaking, there are almost no Slovenian Zulu documents, so that's a big part of why I have to rely on English as a bridge". Furthermore, the machine indicated that the training documents used for learning both languages were different. Specifically, the Slovenian-English training used "EU Parliament texts, subtitles and literature", while the Zulu-English training process relied on "Bible translations, educational content and some news corpora". The machine was also aware that using an intermediary language limits the quality of translation: »Slovene uses cases, flexible word order, and aspect in ways that are hard to preserve through English, which has more rigid syntax. That rigidity can then limit the expressiveness of the final Zulu translation, which is itself rich in verbal structure and metaphor«. *(https://chatgpt.com/share/689ca494-05b4-800d-8959-2ada0ec04b4f)*

For the initial phase of the experiment, we selected a short text that had not been published at the time of the experiment. The content was twofold in nature, with one aspect dealing with global issues in book production and the challenges of defining what constitutes a book in the digital environment (further information on this can be found in Chapter 1 - What is a Book?). The other aspect focused on local issues, including the 20th anniversary of the Slovenian book magazine Bukla and the advantages such a magazine brings to the small Slovenian book market. Using ChatGPT-4, we translated the Slovenian text into Zulu in Ljubljana. We then used ChatGPT account in Pretoria to translate the Zulu version back into Slovenian and English, with the kind assistance of a colleague, Samantha Miller, from the University of Pretoria. We determined the distance between the two accounts for two reasons. Firstly, we assumed that, similar to human translators, Slovenian-based and South African-based ChatGPTs would be more proficient in their "domestic" languages than, for example, ChatGPT accounts used in Iceland or Kamchatka. It is worth noting that when asked about this, ChatGpt4 denied any influence of geolocation on the quality of the translation *(https://chatgpt.com/share/689ca5da-6008-800d-9797-aa37d8f5a8aa=).*

It is imperative to note that, despite the machine's assertion that that “I don’t have memory across sessions by default”, we sought to ascertain whether acquiring additional translation training would be achieved through repeatedly translating from one language to another using the same account. The machine again denied having any memory across sessions, yet when asked more in detail, it confirmed that when "memory is turned on, I can remember facts you choose to share, like“You're working on a translation project from Zulu to Slovene.”I still don’t remember the content of specific texts unless you ask me to — and I confirm that I'm storing it«.." In order to remain on the safe side, it was decided that the translation would be carried out in two distant geolociations *(https://chatgpt.com/share/689ca5da-6008-800d-9797-aa37d8f5a8aa).*

The results were surprisingly good. In cases of short and technical sentences, the gist of Slovenian-Zulu translation as done in Pretoria, and of Zulu-Slovenian and Slovenian-English translations as done in Ljubljana, were pretty much close to the Slovenian original: there were differences in wording, but the meaning was the same. Furthermore, there were no grammatical errors, and the language was fluent. Significant differences were only identified during the translation of long and complex sentences.

In this instance, the results were somewhat unexpected. Allow me to provide an illustration using a short paragraph that was translated manually from the original Slovenian text to English. It should be noted in brackets that this is one more example of a need for a common language – as most of the readers of this text do not speak Slovenian, we must rely on English, as long as we assume that translation machines are not totally reliable.

“Forty years ago, it didn’t make sense to print books in runs of fewer than 1,000 copies, and the cost of such a print-run was comparable to buying a small car. Today, a book can be produced in a single copy, a few dozen, or a few hundred, and the cost often doesn’t exceed that of a regular, mountain, or electric bicycle—depending on the print run. An e-book can be created and offered to readers for the price of a bicycle bell, and it’s only a matter of time before software will be able to convert a written book into a fully acceptable audio version or podcast for a similarly marginal cost. As a result, some estimates suggest there are now millions of “book-like” contents in various formats drifting through this new reading universe, entirely off the radar of traditional publishing statistics”.

In the context of Ljubljana-made Slovenian-English machine translation, ChatGpt omitted types of bicycles, seemingly failing to comprehend the comparison between bicycle prices and book production costs (coloured yellow). In Slovenian-Zulu translation as done in Pretoria and Zulu-Slovenian translation as done in Ljubljana, not only the types of bicycles, but also the bicycle bell disappeared (marked in blue). Yet in Zulu, the machine hallucinated a bit and “upgraded” the translation in a way that it -quite rightfully - added podcasts to a “fully acceptable audio version of a book” (marked with red).

Finally, ChatGPT performed admirably in its English translation of the sentence "There are now millions of 'book-like' contents in various formats drifting through this new reading universe" (highlighted in green). In the Slovenian original, the verb "svaljakti se" was used for "drifting around". The literal translation to English would be "loitering around". As a conscious and politically correct translator, ChatGPT avoided using slang that might not be properly understood by English readers and instead used more neutral wording. In the Slovenian-Zulu-Slovenian translation, ChatGPT has simplified the text further by stating that “in this new world of reading, thousands of new books exist”. However, it has omitted the section of the sentence that refers to publishing statistics (highlighted in red). By changing 'book-like' contents to books, ChatGPT has overlooked the main point of the sentence, which is that, in this new reading ecosystem, we might not be dealing with books anymore, but with other types of textual media (again, see Chapter 1 - What is a book? for more of this) (also marked with red).

The lesson we can learn from comparing these short machine-translated paragraphs is that they are human-like. As ChatGPT4 emphasises, this is similar to the experience of human translators, who may find that "an intermediary language blurs the style of the primary language and simplifies longer and more complex sentences".

In summary, inaccuracies in the Slovenian-Zulu-Slovenian translations, including a minor inaccuracy regarding podcasts, were comparable to those made by humans. Notably, the Slovenian-English translation exhibited minimal to no significant errors, approaching the proficiency level of a typical human Slovenian-English translator. To illustrate this point, we will use anecdotal evidence.

One of the authors of this report has spent twenty years working in the Slovenian publishing industry as an editor. During this time, he encountered a variety of bizarre human-made translation errors. In today's tech parlance, these errors would be referred to as 'hallucinations'. For instance, one of the translators of a health handbook was unaware of Florence Nightingale's identity. Consequently, she assumed that she was a renowned Italian opera singer from Florence who was nicknamed the Nightingale of Florence. The translator accordingly rearranged the whole sentence, so instead of describing the founder of modern nursing, the sentence talked about a famous Italian opera singer, especially popular among the ill. Similarly, another translator translated iron pills to iron fillings (to his defence, it should be mentioned that in Slovenian, the word pill sounds a bit familiar as word filling) so that the sentence in Slovenian read that persons with iron-deficiency anaemia should take iron fillings as a remedy. And finally, an otherwise very reliable translator of crime novels, misread periodic table as period table, consequently imagined it as a medical instrument used in gynaecology, and rearranged the whole sentence in a way that the killer tortured one of his victims on a period table.

In the pre-AI era, such errors were regarded as typical of the book production process and were identified and rectified by editors. In order to excel in their profession, these editors needed to possess a broader range of general and linguistic skills than the translators they recruited, and some of them were highly skilled translators.

The point is clear: translation technology will render the services of average and below-average translators redundant. Furthermore, as we have seen, machines will be capable of translating between languages for which there are no human translators, thus increasing the opportunities for cross-cultural textual exchange. However, as with human translators, it is probable that machines will continue to produce hallucination effects. Consequently, for the foreseeable future, if we wish to avoid consuming iron fillings or pursuing nightingales in Florence, there will still be a requirement for translators and text editors in the book industry.

As the Slovenian/Zulu poetry translation experiments below demonstrate, machine translations should not be used in certain cases. In order to make effective use of translation technology, it will be essential to have highly skilled editors who have received specialised training. The recruitment and training processes for these editors will need to be different and more demanding than they are today. In the absence of human oversight, translation technology has the potential to cause significant challenges in the publishing industry. For instance, legal action from individuals who may have been adversely affected could lead to a multitude of minor incidents, potentially transforming an editorless publishing industry into a highly litigious one.

As previously stated, it is important to note that there are two further issues that require our attention. Firstly, as emphasised by Keith Rieggert in his presentation at the US Book Show, today's AI "is the worst we will ever use". In other words, AI is advancing at an accelerated rate.

It is reasonable to assume that translation machines of the future will be less prone to hallucinations than their predecessors, even when dealing with complex sentences. As mentioned in the introduction, already in November 2025 Kindle Direct started to offer its authors the possibility to machine translate their works from Spanish to English, from English to Spanish, and from German to English. It is thus possible to envision a future in which users of AI-powered reading devices will be able to read not only English/Spanish and German/English translations, as Kindle Direct users do, but also a majority of books in any preferred language. This will be similar to the way in which we can choose a font on our reading devices. As demonstrated by our Zulu-Slovenian experiment, this kind of machine translation will facilitate cultural exchanges among language landscapes that had no contacts whatsoever.

As we will demonstrate below, there will be a cost involved. Furthermore, the complex nature of certain texts may render them unsuitable for machine translation. To illustrate this point, let us consider a few examples.

## 6.2.1 Machine Translating More Complex Texts: A Mission Impossible?

As Castano and others demonstrate, genre fiction texts tend to exhibit simpler syntax and a reduced number of word families when compared to literary fiction. For instance, in 2006, Paul Nation calculated that “eight hundred word families or lemmas will help you speak a language in a day-to-day setting, but to understand dialogue in film or TV you'll need to know the 3,000 most common lemmas, and if you want to get your head around the written word - so novels, newspapers, excellently-written BBC articles - you need to learn 8,000 to 9,000 lemmas”. Therefore, the first precondition for a translator working on a more complex literary and non-fiction text is to know around 9,000 lemmas in both the source and target languages involved in a translation process.

Recognising and comprehending such a vast array of words in multiple languages would undoubtedly pose a challenge for a human, but not for an AI system. A more problematic issue is the machine's inability to comprehend the social, cultural and linguistic contexts of these words. Research indicates that grammatical gender influences how individuals perceive concepts: German speakers describe a key as hard, heavy and jagged (in German, key has masculine grammatical gender), while Spanish speakers describe a key as intricate, lovely and shiny (in Spanish, key has feminine grammatical gender). Furthermore, in multilinguals, emotional response can vary depending on the language used. For example, discussing a distressing experience or reading about it is likely to be more evocative in one's first language.

In addition to their emotional impact, languages influence perception. A study using eye-trackers revealed that when participants were asked to locate a previously seen object, their eyes moved differently depending on their language proficiency. For instance, English speakers looked at the flag when searching for a fly, while Spanish speakers, when looking at the fly (mosca in Spanish), also looked at the windmill (mullino). Therefore, it was the similarity of the words, rather than the shape of the objects, that had an effect on eye movement. A study of Berinmo language has revealed that its speakers utilise a single lexeme to denote colours that English speakers would recognise as green and blue. In contrast, they employ a distinct lexeme to refer to colours that English speakers would describe as yellowish green or bright green.

What is the most effective method of translating such differences in perception from one language to another? A further compelling question is how to translate poetry, where meanings are also created by the sounds of words and associations among them, recognisable only to speakers of a given language. The answer to this question is both simple and complex. As Daniel Kahneman and Amos Tversky demonstrated in 1981, languages shape how we understand the world around us. In other words, they provide a framework for how we perceive reality. Therefore, translators who are able to translate complex texts competently must be proficient in both the source and target languages. They must have a vocabulary of at least 9,000 word families and be able to discern the subtle nuances in word meanings and allusions. In essence, effective translators must navigate two distinct linguistic realms, simultaneously meta-observing and analysing the disparities these languages engender in their rationales and sentiments. It is only on this basis that one can undertake a translation of a text in which nuances are of importance. However, what are the implications when machines attempt to emulate this process?

To illustrate this point, we will refer to a short poem by the Slovenian poet Andrej Rozman Roza. When machine translating from Slovenian to English, the result was initially surprisingly good. In other words, the machine succeeded to produce a few rhymes and caught at least part of the gist of the poem:

**Maybe I'm a latent gay,**
for I'm latent in many a way,
but I don’t really care,
and pink, to be fair,
rhymes with red and white —
and peace between left and right.

For the reds are fading fast,
if the whites would blush at last,
then in pink, both might meet,
and make reconciliation sweet.

However, the machine failed to recognise – or mimic in English translation – that in Slovenian, the opening two lines sound as if they were written by someone who makes a joke out of proper Slovenian spelling. The word marsikej (translated as 'in many a way') is spelled correctly as marsikaj in Slovenian, thus deviating from orthographic norms. This small deviation results in the word marsikej rhyming with gej (="gay", as adapted to Slovenian orthography), which also signifies a cheerful deviation, albeit from mainstream sexual practices (at least that was the perception of gays in Slovenia at the time). The wordplay employed at the poem's outset engenders a sense of playfulness in the reader, signifying that numerous elements within the poem should be interpreted with a degree of subtlety. The colour pink, for example, as it appears in the fourth line, is not only the result of mixing red and white, but also a symbol of homosexuality. In the Slovenian context, the colours red and white hold a particular significance. They are symbols of the Partisans and the Home Guard, two fractions that fought each other during WW2 (the latter closely collaborating with Nazis, and the former, besides struggling for liberation, also conducting a communist revolution in close cooperation with Soviet Union). The machine wisely understood this and accordingly changed the sixth line of the poem that in Slovenian reads “peace between red and white” to “peace between left and right”, clearly exposing the political message of the poem that might be hidden for somebody who is not familiar with Slovenian history and symbolic meanings of colours. In other words, as a human translator might do, CharGpt4 sacrificed the metaphor for the clarity of the message (to its credit, Chat accompanied English translation of the poem with a comment that the translation preserves the play of colours /red–white–pink/ as a metaphor for political or personal reconciliation).

However, to fully comprehend the poem's significance within its cultural and historical context, one must also be acquainted with the contemporary political landscape of Slovenia, where discussions surrounding the Second World War persist. Furthermore, the loss of the playful undertones of the poem in the English translation results in the concept of reconciliation between the two sides (i. e. mixing red and white to more cheerful pink), loses part of its epistemic humility, thus less clearly indicating that reconciliation can come into being only when both sides start to take their identities a bit less seriously. The combination of reds and whites blending into pink is further enriched by the knowledge that the poem's author Andrej Rozman, nicknamed Roza, meaning "pink" in Slovenian, as a kind of performance once participated in elections for Slovenian president (more on this translation process here *https://chatgpt.com/share/687e6b86-8a88-800d-9e56-d544d7fe2012*).

As Marianne Dimopulos emphasised in her conversation with J.M. Coetzee on human and machine translations, the importance of human involvement in translation lies precisely in finding “solution to these extremely difficult cases of equivalence…The rest is pure mechanics. In the near future, what is called translation, will be made with machines with little or no difficulty.”

In summary, in our small experiment the machine properly transplanted the gist of the poem to English, likely no worse than an average human translator would do. To surpass this translation, a translator would have to be capable of finding English wordplays and cultural and political metaphors, that would adequately substitute the Slovenian ones in a similarly playful way. The best poetry translations indicate that such translations are possible.

It remains to be seen whether doing this kind of perfect translations will remain a human domain or machine will be capable to do it too.

The results of the Slovenian-Zulu-English translation of the same poem were radically different. As with the work of an ignorant (hallucinating?) human translator, the machine's interpretation of the poem shifted its tone from a playful comment on Slovenian cultural, sexual and political landscape, into a gentle, lyrical confession of a homosexual struggling with fears when considering coming out:

**Maybe I'm an invisible fairy,**
for I hide a lot in my life.
But that doesn't bother me at all,
and pink goes well with red and white,
like peace among those who care for each other.
When red calms down
and white perhaps becomes sensitive,
they can meet in pink —
in its beauty and great kindness.

The question, of course, is why Slovene – English translation equalled an average human translation, but Slovenian – Zulu -English translation actually created a new poem (of a mediocre quality). The primary reason for this is that the machine did not undergo Slovenian-Zulu translation training, as there is an absence of adequate Slovenian-Zulu documentation. Thus, the machine – as confessed by itself – used the English language as a pivot. But such an answer triggers a new question: if this is indeed the case, why did the Slovenian-Zulu-English translation of a less complex text work quite well?

As demonstrated in a study, translation machines utilise English in a distinct manner: translation machines use English as a pivot in a specific way: the mode's internal lingua franca is not English as such, as Chat tried to persuade us, but concepts that are biased toward English. Hence, »English could still be seen as a pivot language, but in a semantic, rather than a purely lexical, sense«.

Therefore, when translating between two languages that are culturally and geographically distant, with English serving as a "conceptual" pivot, concepts that are biased towards English do not translate as smoothly to each other as they did in the Slovenian-English case.

We can hypothesise that with English as a pivot, machine translations are less accurate when there are not enough semantic similarities between the languages in case – and more complex the texts, more obvious this becomes. Accordingly, it is likely that machine translation will do better if all languages become semantically and conceptually penetrated by English. We might indeed be building a new Babel - but a Babel of similarly conceptually biased languages.

It should be noted that AI will require human assistance not only in translating complex texts. It is important to note that issues may also arise when dealing with genre fiction that contains newly invented imaginary words and terminology. As we have seen, this can also happen when dealing with globally unknown mythologies, such as Slavic.

## 6.2.2 What Does All This Mean?

This message is clear: it is intended for authors, translators and publishers. Intellectual breakthroughs are achieved, simply put, when new intellectual concepts are made that interpret the word in new ways. In order to verbalise them, it is not only necessary to use new words or old words in new ways, but also new kinds of wordings. Consequently, language evolves both lexically and syntactically.

It is possible for machines to produce new poems that are average from a literary point of view yet, for a non-trained eye, indistinguishable from existing human-made poems. In other words, a machine can replicate a poem in Lord Byrons's style, but it cannot replicate unique authorial and reading experiences and mental break-throughs Byron's poems made when they were written. This remains a uniquely human enterprise.

Consequently, future conceptual breakthroughs, including their translations, are likely to remain within the domain of human expertise. Echoing Twertsky and Kahnemann, J.M. Coetzee pointed out in discussion with Mariane Dimopoulos that "a proposition, expressed in German words, is a proposition about the universe relative to the conceptual structure of German language. It is, so to speak, a German proposition aspiring to be German truth, neither absolutely true not false; whereas a proposition expressed in mathematical terms is an absolute proposition, either absolutely true or absolutely false".

When newly created and really innovative, such propositions change the linguistic and mental universe in which they were born and are consequently outside conceptual biases of translation machines - and likely only human translators, understanding their uniqueness and newness, will be capable of accommodating them in a variety of languages.

In the era of machine intelligence, only human authors and translators with above-average skills will be able to produce new content; the average ones will be substituted by the machines. If correct, this message requires radical rethinking of the ways many sectors of society operate, more demanding education and publishing criteria and strategies being just a few very obvious ones.

And this is not bad at all.

# CHAPTER 7

# (NEW) DYNAMICS IN PUBLIC POLICIES IN TRANSLATION

BY YANA GENOVA

The aim of this chapter is to highlight trends and developments in public investments, both by national governments and the European Commission, in book translations across Europe. In light of the issues addressed in this report, it also aims to identify key challenges and dilemmas that are relevant – or that will become relevant – to translation policymaking in the near future. As with the Translation Report 2025 as a whole, the methodology here is subject to certain constraints, primarily due to limitations in data availability.

While book translations have always been recognized as a driver of societal change, the arguments, and the rationale for investing tax-payers money in translations, has historically been subject to change. Since the end of World War II, public - and occasionally private - funds have been allocated to translations by governments and international bodies. Some of the larger, now largely forgotten translation funding and promotion initiatives of the 20th century included the following: UNESCO's Collection of Representative Works and its dissemination through translations, USIA and Franklin Book Programs, the socialist state-sponsored translations as ideological export, Translation Project of the Open Society Institute's for key works in the humanities.

In these and other programmes, the publication of translations was intended to **serve different strategic agendas - post-war reconciliation, ideological and religious propaganda, decolonization efforts, knowledge transfer, modernization, democratization, development.**

Today, the arguments for public investments in translations range from those centered on **national branding and cultural diplomacy** (as in the various national export schemes) to promoting **unity in diversity** (as emphasized by the EU). They also include measures to strengthen regional cooperation through initiatives such as Traduki, the Nordic and the Black Sea programs, as well as measures to **foster identity and cultural autonomy** for minority or repressed languages such as Catalan, Basque, Romani, Franco-Provençal and others. Furthermore, there are arguments addressing **the correction of imbalances between "center" and "periphery"** in the global circulation of cultural products. A common argument for these investments is **the market-correction rationale**, which highlights the commercial risks associated with publishing translations due to the additional costs involved with translation and marketing. Critics have also argued that such public interventions can distort the free market and disrupt its intricate balance of supply and demand.

Regardless of their rationale, national and international public entities and their investments in translation grants are **important players in the transnational literary field**, facilitating the circulation of literature and the internationalisation of literary authority. This underscores our ongoing dedication to delving deeper into the trends in publicly supported translations across Europe within the framework of the Translation Reports series.

## 7.1 Public Investments at National and International Level

The European book industry achieved its highest-ever nominal turnover in 2024, reaching approximately €24.9 billion, as reported by the Federation of European Publishers (FEP). The inflation-adjusted figure, however, equates to approximately €15.5 billion, reflecting a sharp decline compared to the 2007 real turnover figures. It is not possible to provide an exact figure for the total annual investment from public sources in the publishing sector, reading development and translations. It is clear that national governments throughout Europe utilise a range of financial and policy mechanisms to support a healthy, balanced and thriving translation ecosystem. Examples of such policies and programmes include the following measures for relevant stakeholders:

- Literary translators can benefit from professional development initiatives, individual working grants, creative residencies, mobility schemes and awards.
- Publishers and literary agents can access grants for production and translation, as well as for marketing costs. They can also apply for international fellowships and participate in book fairs.
- Authors can participate in festivals and receive promotional catalogues for their promotion abroad.

In most national cultural policies, **the international promotion of a language's literature is recognized at the policy level as intrinsically paired to supporting the domestic book sector and fostering local talent development.**

Despite its limited mandate in the domain of the cultural policies of member states, the European Commission (EC) also has a range of instruments in place to support the European translation sector. In addition to its dedicated funding scheme on the Circulation of European

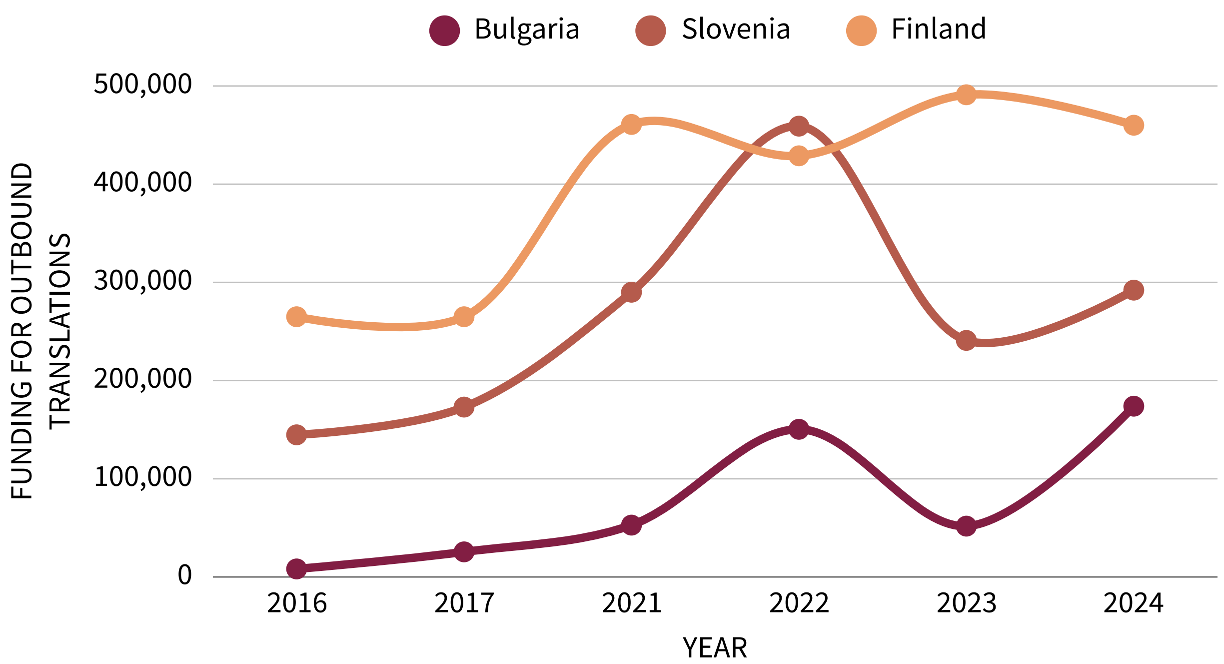
Literary Works, the EU plays a significant role in promoting the European book and translation sector. This support is provided through ongoing policy dialogue and knowledge exchange, as well as financial contributions in the form of project grants within the Creative Europe, Horizon or Erasmus programmes. In that sense, the EU's policy document Translators on the Cover, released in 2022, is a pioneering example of the role that a supranational institution may play in assessing the existing mechanisms, facilitating exchange and input from across different member states and book markets, and providing guiding values and ideas.

In this chapter, we focus exclusively on publishing grants for translations at national level provided by book agencies or equivalent bodies, and at European level, by the Circulation of European Literary Works program. Overall, **public investments in the form of translation grants are steadily increasing.** For instance, the European Commission's budget for literary translations through the Circulation of European Literary Works Programme has increased from approximately €3.4 million per year during the 2016-2017 period to up to €5 million per year in the 2021-2024 period.

Let us consider a few examples to illustrate the scale and dynamics of funding for outbound translations by three state government programmes.

**FIGURE 36**

BUDGET DYNAMICS 2016-2024 OF SELECTED GRANTS PROGRAMS



It is important to note that having a large budget does not necessarily guarantee success. It is the combination of flexibility and sustainability within funding programmes, supported by adequate but not excessive budgetary resources, that creates meaningful and lasting impact.

As demonstrated by the above examples, national translation funding programmes operate with significantly different annual budgets, and these budgets are not always proportionate to the national GDP. For instance, while the GDPs of Sweden and Austria are relatively comparable in size, the national investment for translation funding is nearly three times larger in Sweden. Other factors, such as the total budget for culture and its distribution across cultural subsectors, do naturally play a role. However, in the book sector, the annual production of original titles is of greater relevance as a point of comparison. In other words, a more appropriate and equitable metric for gauging governments' dedication to the promotion of national authors and literary works is the ratio of domestic literary production to public expenditure on its translation abroad. In that respect, it is interesting to note that Slovenia produces an average of 3,846 original works per year in the 2020-2024 period while its government has supported an average of 165 titles in outbound translation. Bulgaria produces almost twice more original works with 6,856 titles, but exports almost nine times less (18 titles) through its funding programme. Furthermore, the fluctuations in Slovenian investments in translations abroad can be attributed to the preparatory measures for Slovenia's role as the Guest of Honor at the Frankfurt Book Fair in 2023, along with a subsequent "post-Frankfurt fatigue." In contrast, the fluctuations in the Bulgarian budget for translations indicate a concerning lack of sustainable commitment from policymakers.

## 7.2 What Is “Center” and What is “Periphery”?

In our previous reports and research over the last 15 years, we have examined the trajectories of books, authors and translations from so-called "small" or "less-translated" languages in the European market. We have noted the role of various drivers and facilitators for the occasional breakthroughs of authors and works from the "periphery". These include national and supranational funding programmes, awards and recognitions, cross-media initiatives, regional successes as a means of transfer to a wider visibility, and others. In an ideal scenario, with access to more detailed and reliable data on translations, we would be able to analyse, compare and argue for the impact that funding schemes have on maintaining literary diversity within Europe, as well as on their indirect impact on the viability of small- and mid-size independent publishers or on the visibility and social position of literary translators and authors. Impact assessments of these funding schemes are currently rare. An exception worthy of note is the analysis conducted by the Finnish public agency FILI, which is responsible for monitoring the value of Finland's literary exports. FILI provides concrete figures relating to the revenues received by Finland from abroad as a result of translation rights deals, advances, and royalties on Finnish authors.

For the time being, let us concentrate on the trends within the programmes and on the distribution of symbolic as well as economic capital at several levels: source and recipient languages, genres and authors.

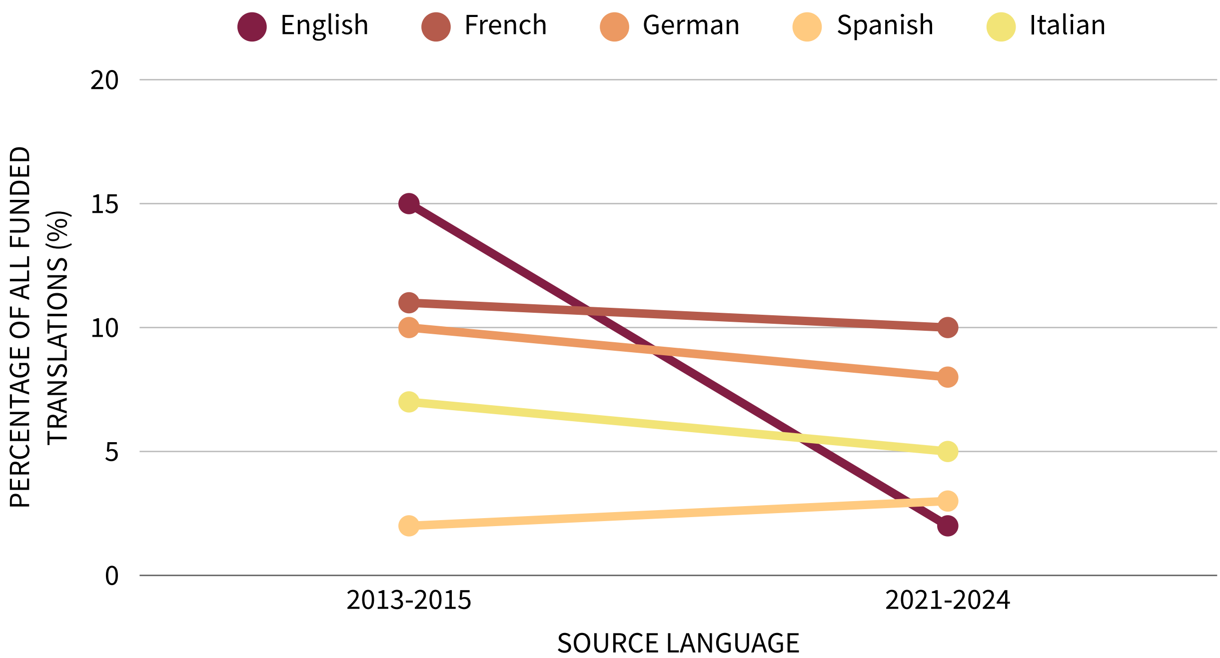
## 7.3 Source Languages

As stated in the 2018 Diversity Report, there has been an **increasing diversity of languages** present in both the translational European programme and national schemes. This trend has been ongoing and has seen a further rise in recent years.

The European Commission's **Circulation of European Literary Works Program**, hereafter referred to as the EU Translations grants scheme, funds publishers' projects for translations. Over the past decade, the programme has undergone various changes, including with regard to eligibility of countries and languages, priority focus areas, criteria, and application requirements. Its central priority of supporting and maintaining European cultural and linguistic diversity by encouraging translations from lesser-used languages remains unchanged. However, during the program's earlier cycles, it struggled to maintain its balancing role within the overall context of the strong dominance of English—and the other languages from the Big 5 as the main source languages for translations.

**FIGURE 37**

THE BIG 5 AS SOURCE LANGUAGES IN EU TRANSLATION GRANTS




Evidently, **English is stepping back** as a linguistic “invasive species”. In the context of the EU, this issue is certainly related to Brexit. However, English remained an eligible source language for the translation of works by citizens of other eligible countries, such as Malta or Ireland. The decrease in the use of the Big 5 source languages, now reduced to the Big 4, from 45% of all funded translations in 2013-2015 to 29% in the current period 2021-2024, indicates that the **programme has found a way to implement its own priorities on languages more coherently in the practice of its funding choices.**

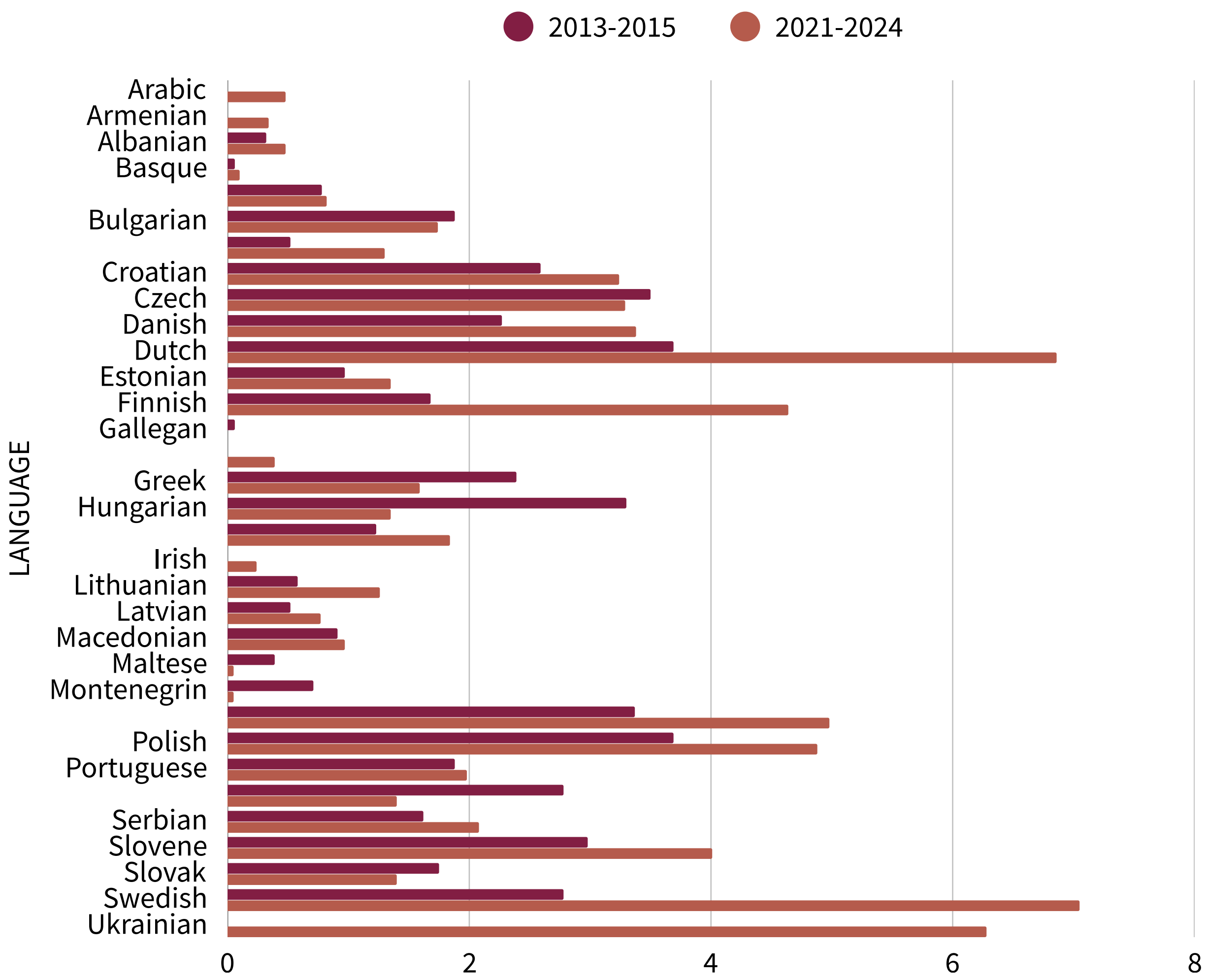
There are also **significant intertwines in the domain of "small" languages as source languages**. While ten years ago, the most common source languages from the Eastern European group were Polish, Czech and Hungarian, and there were only a few authors with more than one translation, nowadays **Ukrainian** is at the very top of the source languages chart with 130 titles, representing 6% of all funded titles between 2021 and 2024, followed by **Polish, Slovenian and Croatian.**

This new interest in **Ukrainian literature** is undoubtedly an expression of solidarity with Ukraine in times of war. The programme also explicitly prioritises publishing cooperation with Ukraine, and projects involving Ukrainian as either target or source language are therefore encouraged. It is interesting to see, however, which countries' publishers make use of this possibility. Out of the 130 Ukrainian titles, 19 have been supported for translation into Polish and 18 into German, followed by Czech (10) and Romanian (9). The results of the state funded Translate Ukraine programme are similar, with Polish and German also ranking as the languages most receptive to Ukrainian literature. However, the results of the two funding schemes – EU grants and Translate Ukraine – over the last three years demonstrate that they reach out to a significantly different range of languages and publishers. There is also limited overlap in Ukrainian authors' names between the two schemes. In summary, the two programmes appear to be a good example of complementarity.

Here is a comparative scale of the presence of a number of languages as source.

**FIGURE 38**

"SMALL" LANGUAGES AS SOURCE LANGUAGES OF TRANSLATION IN EU GRANTS
A COMPARISON



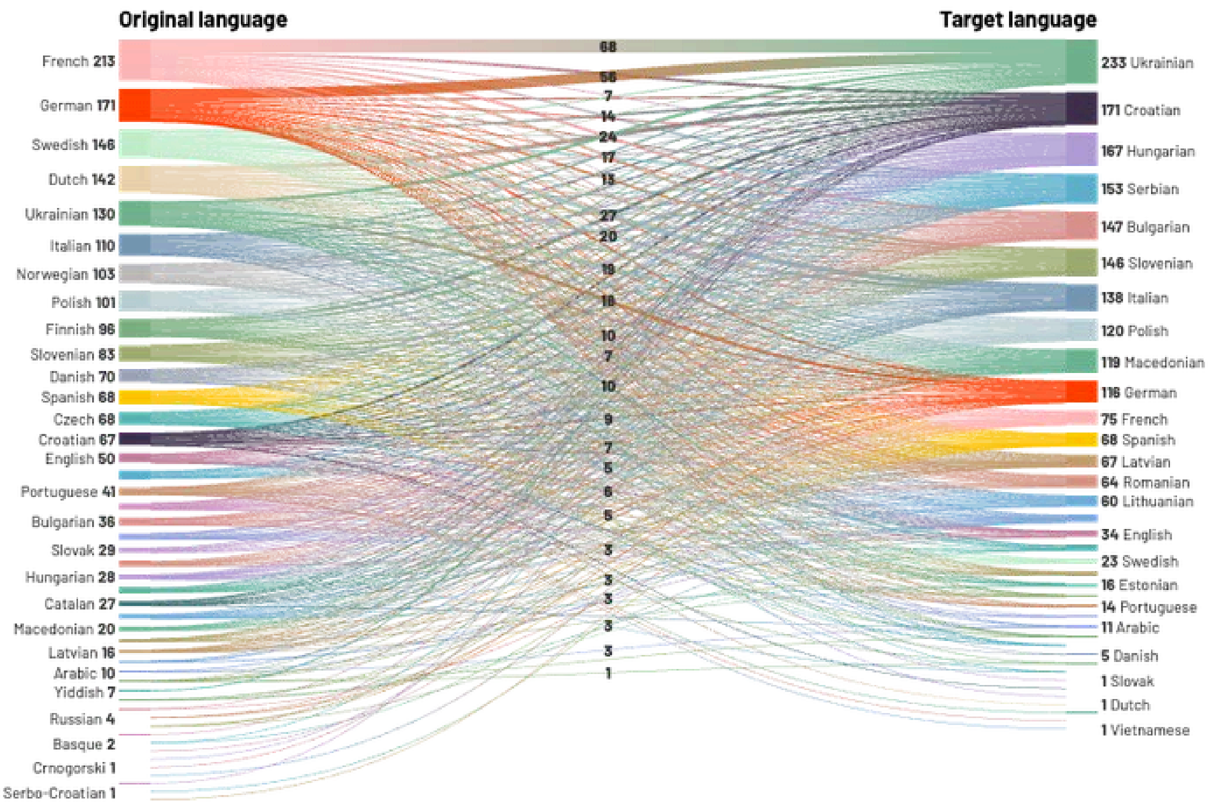
In addition to Ukrainian and the other languages that became eligible in the programme recently (Georgian, Armenian and Arabic), Swedish and Dutch have recently emerged as the most successful languages, followed by Finnish, Norwegian and Polish. It is evident that they maintain their positions as primary source languages from the earlier period. This is in contrast to other languages, such as Montenegrin, Maltese, Hungarian and Greek, which demonstrate a noticeable decrease. There is a clear correlation between the popularity of these five languages in EU grant applications and the ongoing, well-funded efforts of national agencies in their respective countries: the Swedish Arts Council, the Dutch Foundation for Literature, FILI, NORLA, and the Polish Book Institute.

## 7.4 Recipient Languages and Countries

The national agencies supporting outbound translations and the EU grants scheme illustrate an **encouraging trend towards greater diversity in the recipient languages** covered, a trend that is largely unrelated to the size of the programs' budgets. The following example illustrates the intensity of literary exchange in the EU programme, based on the 2070 titles supported over a 3-year period.

**FIGURE 39**

EU TRANSLATION GRANT SCHEME 2021-2024



For many years, the primary beneficiaries of EU grants have been publishers and their readers in **Central and Eastern Europe** (Bulgaria, Slovenia, Hungary, Serbia, North Macedonia, Croatia, Albania and Poland), as well as in two southern European countries, **Italy and Spain**. This tendency has remained largely unchanged in recent years of the programme, with the notable exception of **Ukraine as the newcomer** (225 titles in Ukrainian translation for three years). The question we asked ourselves at the time, and one that has subsequently been raised in discussions about the Diversity Reports, is why publishers from Central and (South) East European countries are so successful in winning grants for translations into their languages, despite the programme's clear priorities being in the opposite direction. Research indicates that CEE markets tend to be more receptive to translations, which may be part of the answer. This is also likely to be a consequence of the publishing business model in smaller markets, which typically have a population of between 2 and 10 million speakers. In such cases, publishers are under significantly more economic pressure. Regardless, as the program operates at a transnational level with a vision of a multilingual Europe balanced in translation flows, it does not factor in market considerations.

In the group of the Big 4, **German and French show significant increase of the degree of openness to fellow-Europeans' literatures** – translations funded grew from 2% to almost 6% in the case of German, and from less than 1% to 3,6% for French. A valid question to consider here is whether this growth is due to the programme's consistent efforts to promote the scheme with reputable literary publishers in French and German-speaking countries, or whether it is due to the changing politics of national funding for quality literature inside the countries. At any event, this is clearly an achievement of the program that designates as its objective to encourage greater visibility of “small” languages across European markets.

The role of **English as a recipient language** in the EU funding scheme is a topic of interest. Even before Brexit and before the reported resolution of the "3% problem", English as a target language constituted only 4.2% of all EU-supported translations. In 2018, approximately 50% of the supported English translations were produced by publishers based outside the UK. In the three years following the Brexit vote, English as a target language in the EU programme saw a significant decline, reaching only 1.6% of all funded titles. Most probably, none of these 34 books by Croatian, Slovenian, Bulgarian, Finish or Dutch authors, is published in Ireland or Malta. Rather, innovative publishers are leveraging advancements in technology and global retail platforms **to connect with international English-speaking audiences directly from their offices in the "periphery".**

Let us now examine a number of **national funding schemes** from across Europe, and explore the countries to which they primarily "export" their literary works.

**TABLE 10**

NATIONAL FUNDING SCHEMES: MOST FREQUENT RECIPIENT LANGUAGES 2020-2024

| from Bulgarian | from Slovenian | from Norwegian | from Finish | from Ukrainian |
|---|---|---|---|---|
| Macedonian | Croatian | Danish | Estonian | Polish |
| Greek | German | German | German | English |
| Turkish | Serbian | Polish | Danish | Bulgarian |
| French | Macedonian | Swedish | Polish | German |
| Italian | Italian | English** | French | Slovak |
| Spanish* | Spanish* | Hungarian | Hungarian | Macedonian |
| German | Greek | Dutch | Swedish | Czech |
| English** | English | Spanish* | Czech | Greek |
| Ukrainian | Arabic | French*** | Russian | Latvian |
| Hungarian | Bulgarian | Bulgarian | English | Lithuanian |

**Spanish, incl. Argentina, Mexico, Spain*
***English, incl. Canada, UK, USA*
****French, incl. Switzerland*

It is important to exercise caution when interpreting the above "ratings", as they do not necessarily reflect the level of publishers' genuine interest in a country's literature. Instead, they are the result of a combination of demand and the decisions made by the selection committees. Furthermore, some countries' policies are explicitly prioritizing certain target languages such as German for Slovenia or the Scandinavian languages in the Nordic programs. In addition, guest-country appearances at major industry events also may change the priorities in outbound translations support. However, the tendency of certain literary communication **regionalism** is detectable in the prevalence of translations between countries and languages with geographical proximity or sharing closer historical and cultural ties: Bulgarian and its closest Balkan neighbours, Slovenia in the ex-Yugoslav realm, intra-Scandinavian circulation, Ukraine and Poland.

It is interesting to note that Bulgarian is among the top 10 languages in terms of recipients across three of the national funding schemes. Based on this, and on personal observations in Sofia bookshops, we can safely assume that all, or nearly all, books in Bulgaria translated from Slovene, Norwegian, Swedish or any of the other languages that feature in the translation statistics as "other languages" are released with some sort of financial support.

It is **noteworthy that German** is among the top languages to which literature from Eastern Europe and Nordic countries is translated. Regardless of the geopolitical explanations one may have, German, Austrian and, to a certain extent, Swiss publishers continue to serve their audiences and **play a central role as intermediaries in the larger Europe**. This finding aligns with an earlier hypothesis from the 2018 Diversity report that "for the international success of Eastern or Central European authors, being published in German is a more natural first step than being published in English or French"

**Literary extension beyond Europe** is explicitly targeted by only a few national support schemes, yet these programmes are **increasingly successful in promoting their authors in non-European regions.** Approximately a decade ago, there was a gradual increase in the presence of non-European languages across the majority of the supported book lists. Today, public funding initiatives continue exploring new markets for European literature, in countries such as China, Korea, India, Nepal, Vietnam, the Philippines, Mexico, and Argentina. Translations into Arabic, particularly with publishers in Egypt and, on occasion, the UAE, have become more prevalent and are no longer considered an exotic exception. As we noted in Chapter 3 - Comparison of Book Translations on Selected European Markets according to Publishing Industry Data, there has been a sharp rise in Japanese literature translations in European markets. However, translations of European authors into Japanese remain scarce.

While there is limited data available on the reception of these works by audiences or their market success, the establishment of such cultural exchange is a significant achievement, aligning with EU policy goals in external cultural relations.

# 7.5 What Literature and Whose Literature

As stated in previous reports and in academic research, it took some time for the national funding agencies to move away from the notion of representing a "national literature" by investing in a top-down supply of high-brow fiction from the national literary canon to international audiences. Today, **public support policies are way more flexible and sensitive to international readers' preferences to literary currents, and to publishers' need to balance between literary quality and market considerations**. Funding schemes nowadays are typically open to different genres and even encourage genre diversity. Literary currents are generally favoured over classics. This is equally valid for the EU grants scheme, which consistently encourages "underrepresented genres" and sub-genres such as poetry, short stories, children's and YA literature.

For instance, the "Translate Ukraine" programme initiated by the Ukrainian Book Institute has successfully engaged international publishers, resulting in the translation of not only Ukrainian fiction (which accounts for approximately 52% of all funded titles) but also children's literature, non-fiction, poetry and comics. NORLA grants are available for a wide range of literary genres, including crime fiction, general non-fiction, picture books, children's books, graphic novels, drama and illustrated non-fiction. The EU translations' support is also more consistently encouraging genre variety, with supported books including children and YA (32% of all titles supported), comics (6%), poetry (5.5%), drama works, etc.

This shift in the notion of what constitutes a literature worth exporting corresponds to the general changes in the market, as described in the previous chapters of this report. How does, however, that translate in the export potential of the authors?

In previous reports, we have analysed the translation trajectory of contemporary literary authors from CEE and other "small" languages, their performance in different markets, and the role of factors such as awards, local reception, and translations into transfer languages. In addition to these factors, we should also consider the role of literary translators as scouts, the growing number of literary agencies, the festivals and other key intermediaries in the literary field. It is clear that national policies and public support play a significant role in this regard. However, analysing such trajectories, even for a limited selection of authors or the new factors influencing authors' popularity, is beyond the scope of this research.

Here we will rather try to see if funding schemes' results can tell us anything interesting about the applying publishers' demand for certain authors or the selection juries' criteria of what constitutes a work worth supporting.

A significant change has been made to the European translations support scheme, with the programme deciding to no longer prioritise grant applications for translations by authors who have received the European Union Prize for Literature (EULP) award. Following the introduction of this affirmative action, **the funding rate for EULP authors has increased from 6% of all funded titles at the beginning to 32% and more in subsequent years. However, this figure has subsequently decreased to 4.2% following the withdrawal of the measure**. In earlier research, we have found that all funded works originally written in Maltese, Bosnian and Montenegrin as well as most of the works from Latvian, Bulgarian or Macedonian, were by EULP winners. This has led us to suggest that, in the absence of the affirmative measure, authors from these languages would have minimal opportunity to attract publishers' attention. We were only partly wrong. We have also implied that the extensive presence of CEE publishers as grant recipients is directly linked to the extensive presence of EULP authors in their choice of authors. Furthermore, the translation trajectories of the EULP authors reflected the general imbalances and symbolic power relations between "small" and "big" languages, ensuring EULP authors had wide exposure everywhere but in the large markets.

The detachment of EULP from funding priorities led to several noteworthy developments. Firstly, there was a significant decrease in publishers' interest in EULP authors. For instance, among the 16 Latvian original works supported in the last 3 years, there is but one EULP winning author: Laura Vinogradova. Out of the 36 Bulgarian originals, one is by the EULP winner. Georgi Bardarov. The other Bulgarian authors are present with one book only, except for Vera Mutafchieva, Zdravka Evtimova, Emine Sadkí, Nadya Radoulova, Lydmil Stanev and Mihkail Zaimov. Similarly, among Macedonian authors there is only one EULP author, Nenad Joldeski.. Secondly, despite initial predictions, **the presence of authors from "less-translated" languages was not negatively affected,** with the exception of Maltese and Montenegrin. Instead, it increased overall to 71%. The EULP-winning authors still feature among the most popular authors among grant recipients, but they are by no means among the most popular ones.

An analysis of the **top 65 authors** with four or more titles translated with EU support in the 2021-2024 period reveals a **clear pattern in their profiles.**

- Writers of young adults' and children's literature, comics, and graphic novels:

The marked predominance of this group – 35 out of top 65 authors, is a complete novelty. Within the group, we have Belgium and French comics but mostly young adult literature, featuring coming of age narratives, or stories of overcoming loneliness, exclusion and anxiety about the future of the planet.

This new wave of YA and children's authors **originally writes in languages from all ends of Europe** such as Dutch (Bart Moeyaert, Anna Woltz, Toon Tellegen), Swedish (Martin Widmark, Eva Lindström), Finnish (Aino Havukainen), Czech (Petr Stančík), Slovenian (Peter Svetina), Macedonian (Biljana Crvenkovska), Polish (Anna Paszkiewicz, Tomasz Małkowski).

In summary, the most prominent authors in the most significant funding programme in Europe write for young audiences and frequently transition to literary writing from other fields, such as advertising, film or education.

This new wave somehow blurs distinctions such as "East" and "West" or "centre" and "periphery", and the differences in writing- and illustration traditions. Furthermore, it is indicative of a shift in the profile of CEE authors who travel in translation.

- Nobel Prize winners

In fact, only two of them: Fosse has 12 translations, and Tokarczuk has nine.

- EULP authors

There are only nine EULP-winners in the top 65: Nordenhof, Solà, Mugerli, Pedreira, Leino, Faulerová, Bastašić, Blees and Daull.

- Other literary fiction authors

In earlier periods of the programme, there were clearly distinguished literary figures, such as Karl Ove Knausgård and László Krasznahorkai, who had three or more titles in translation, yet were not among the EULP (or Nobel) prize winners. Now, good old fiction authors and their literary works for adults are already a minority—less than one fifth—among the top 65 most translated authors. These authors come from a wide range of language areas and have little in common regarding style or plots: Flisar, Nettingsmeier, Petrović, Vajanský, Paulsen, Schneider, Ólafsdóttir, Ahava, Zhadan.

Turning now to the national funding schemes, we can note two interesting observations about the profiles of authors whose books are supported in translation:

- The support programmes operate with different definitions of what constitutes a "national" author. In other words, the scope and requirements of the translation funding programmes reveal certain peculiarities in the way public agents understand their cultural diplomacy agendas. For instance, all countries in the European North, as well as Germany and France, have allocated support for immigrant authors and/or support outbound translations of works originally published domestically but written in minority or other languages. This approach enables the soft power of literature to contribute to the national branding of the country as multiethnic, multicultural and inclusive. Slovenia also permits interested publishers to submit proposals for the translation of Slovenian authors who may not be writing in Slovenian but are considered as being part of the Slovenian cultural realm. In contrast, Bulgaria does not consider the possibility that Bulgarian authors writing in other languages, or even writing about other countries, can serve as ambassadors of Bulgarian culture.

- The authorship landscape is more diverse, with fewer "literary export stars" from small markets. The well-known names continue to dominate the list of most widely supported authors in translation: Karl Ove Knausgård and Jon Fosse (NORLA), Max Seeck and Tove Jansson (FILI), Drago Jančar and Evald Flisar (JAK), Serghiy Zhadan and Sofia Andrukhovych (Translate Ukraine). However, the majority of authors present in the grants scheme, appear in the lists with translation into only one or two languages. There are a number of potential explanations for this, including the possibility that recipient markets may already be saturated with works by well-known "star" authors, or that some prominent authors are less productive at present. Part of the explanation lies in the consistent and strategically focused efforts of book promotion agencies, literary agents, and translators-turned-agents. Their work tailoring local authors' offerings to carefully chosen recipient markets and publishers enables the appearance of 'unusual suspects' in translation.

# CHAPTER 8

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