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INTERNATIONAL APPROACHES TO REGULATION IN THE PUBLISHING AND PRINTING SECTOR

ЗАРУБІЖНИЙ ДОСВІД РЕГУЛЮВАННЯ ВИДАВНИЧО- ПОЛІГРАФІЧНОЇ ГАЛУЗІ

Summary. *Introduction. Social dynamics determine the trends in the development of the publishing and printing industry and require effective regulation. The industry market structure is interconnected with economic and educational-cultural development, which determines publishing and printing enterprises' demand and investment opportunities.*

Purpose. The study aims to analyse the experience of regulating the publishing and printing industry in developed countries worldwide.

Materials and methods. The article examines the specifics of regulating the studied industry in various countries. The leaders of the global publishing and printing market are identified. The influence of the leading players on the market environment is outlined. It has been established that continuous innovations in publishing and printing formats optimise the general aspects of demand and consumption in the industry, acting as one of the key factors driving the market

and ensuring the balance of economic interests. With the development of digitalisation, the opportunities for publishers have significantly expanded, requiring them to integrate digital communication tools and invest in developing, enhancing, and promoting content in text, audio, and video formats.

Results. The main approaches to regulating the publishing and printing industry activities in the USA, Canada, Poland, Finland, and China have been analysed. It has been determined that despite the rapid progress of digital technologies, traditional books have not lost their strong positions. Key factors contributing to the growth of the book market have been highlighted. It has been proven that in order to increase the efficiency of the publishing and printing industry, it is advisable to implement measures such as investing in production modernisation, creating business associations, and integrating international experience, which will ensure the growth of their competitiveness, profitability, and investment attractiveness, as well as implementing a system of employee motivation and increasing their competence in the context of soft skills.

Discussion. It is substantiated that the international experience of regulating the studied industry should be studied and integrated in Ukraine, considering the need to adapt to the existing conditions of printing enterprises.

Key words: *public administration, state administration, state regulation, publishing and printing industry, sustainable development, effect, balancing of economic interests, employee motivation, efficiency, intensification, soft skills.*

Анотація. *Вступ. Соціальна динаміка визначає тенденції розвитку видавничо-поліграфічної галузі та потребує ефективного регулювання. Структура ринку галузі взаємопов'язана з економічним та освітньо-культурним розвитком, що визначає попит та інвестиційні можливості видавничо-поліграфічних підприємств.*

Мета. Метою дослідження є аналіз досвіду регулювання видавничо-поліграфічної галузі в розвинених країнах світу.

Матеріали і методи. У статті досліджено особливості регулювання досліджуваної галузі в різних країнах. Визначено лідерів світового видавничо-поліграфічного ринку. Окреслено вплив провідних гравців на ринкове середовище. Встановлено, що безперервні інновації у форматах видавництва та друку оптимізують загальні аспекти попиту та споживання в галузі, виступаючи одним із ключових факторів, що рухають ринок та забезпечують баланс економічних інтересів. З розвитком цифровізації можливості для видавців значно розширилися, вимагаючи від них інтеграції інструментів цифрової комунікації та інвестування в розробку, покращення та просування вмісту в текстових, аудіо- та відеоформатах.

Результати. Проаналізовано основні підходи до регулювання діяльності видавничо-поліграфічної галузі в США, Канаді, Польщі, Фінляндії та Китаї. Визначено, що незважаючи на стрімкий прогрес цифрових технологій, традиційна книга не втратила своїх міцних позицій. Виділено ключові фактори, що сприяють зростанню книжкового ринку. Доведено, що для підвищення ефективності видавничо-поліграфічної галузі доцільно впроваджувати такі заходи, як інвестування в модернізацію виробництва, створення бізнес-асоціацій, інтеграцію міжнародного досвіду, що забезпечить зростання їх конкурентоспроможності, прибутковості, інвестиційної привабливості, а також впровадження системи мотивації співробітників і підвищення їх компетентності в контексті *soft skills*.

Перспективи. Міжнародний досвід регулювання досліджуваної галузі доцільно вивчати та інтегрувати в Україні з огляду на необхідність адаптації до існуючих умов поліграфічних підприємств.

Ключові слова: державне управління, державне управління, державне регулювання, видавничо-поліграфічна галузь, сталий розвиток,

ефект, баланс економічних інтересів, мотивація працівників, ефективність, інтенсифікація, soft skills.

Problem statement. In modern market conditions, efficiency regulation is an essential foundation for ensuring the competitiveness of enterprises in the publishing and printing industry. It has a comprehensive impact on the organisation's production sphere.

Effective production requires balanced development, the implementation of advanced technologies and creative solutions, transformation of the system of production personnel motivation, identification of consumer needs and demands for their maximum satisfaction, and ensuring an adequate level of quality in publishing and printing products. Implementing the mentioned regulatory directions largely depends on the volume of investments, which correlates with the effectiveness of market participants' activities.

The study of foreign experience in regulating this sector is critical to developing the publishing and printing industry in Ukraine. The aim is to integrate successful models and practical solutions further.

Recent research and publications analysis. The issue of the development of the publishing and printing industry falls within the scientific interests of several contemporary scholars. Notably, significant contributions to the formation of a conceptual approach to management and marketing in this industry have been made by researchers such as Ye. Palyha, T. Sydorchenko [1], J. Child [2], D. Shaver, M. Shaver [3], S. Scott, W. Orlikowski [4], M. Zenkin, A. Ivanko, V. Kokhanovskyi [5], G. Prashar, H. Vasudev, D. Bhuddhi [6]. Of particular scientific interest is the issue of improving efficiency in the industry. Modern authors H. Van Kranenburg, J. Hagedoorn, J. Pennings [7], C. Guren, T. McIlroy, and S. Sieck [8] have studied aspects of measuring international diversification in the publishing industry and the industry market dynamics. Meanwhile, researchers A. Saha, S. Van Lente [9], A. Grossmann, and B. Brembs [10] have

substantiated the methodology of employee stimulation and motivation reflected in production efficiency indicators. Researchers N. Rashidian et al. [11] and K. Hyland [12] analyse the transformation of modern academic publishing and the regulation of the publishing and printing industry in certain countries in the context of active digitalisation of society.

Contemporary scholars' analysis of scientific research results indicates that the problem of regulating the publishing and printing industry is currently relevant and a priority. At the same time, there is a lack of research on foreign experience concerning the intensification of efficiency, balancing economic interests, and compelling employee motivation, which is necessary given the active social dynamics and the shifting focus of development in the studied industry.

Research aim. The study aims to analyse the experience of regulating the publishing and printing industry in developed countries worldwide.

Presentation of the main material. In 2023, the global publishing and printing market was valued at 144.67 billion USD. According to authoritative forecasts, the market volume is expected to grow by an average of 1.8% annually from 2024 to 2030. The lion's share of production in the industry belongs to the USA and leading European countries, particularly England [13].

As evidenced by these countries' experience, continuous innovations in publishing and printing formats optimise the industry's overall aspects of demand and consumption, acting as one of the key factors driving the market. However, the dominant players are primarily academic publishers, with non-academic (commercial) publishers representing a relatively small share in comparison. Academic publishers have symbiotic relationships with the education system. Most directly serve schools, colleges, universities, and research institutes that cover technical, medical, and professional education [3].

The successful experience of regulating the publishing and printing sector is based on understanding the dynamics of the book phenomenon and social demand. Indeed, books have undergone significant transformations throughout

history, from papyrus to the advent of e-books. In foreign countries where the publishing and printing industry keeps pace with the times, the market has adapted to new book formats—digital and audio—following the emergence of digital media and new technologies [11]. Since reading has moved to screens, the opportunities for publishers have significantly expanded. However, they must integrate digital communication tools and invest in developing, enhancing, and promoting text, audio, and video content.

As international experience shows, one of the critical challenges in the industry market is the rising prices of printed and electronic books. This prompts consumers to seek alternative options for purchasing new copies: used books, free e-books, and discounted e-books from discount newsletters. At the same time, the cost of textbooks has recently increased [2].

When analysing the publishing and printing industry in the USA and Europe, it is essential to note the specific advantages of leading companies in shaping the main market trends. The influence of prominent players on the market environment is quite significant, as most have extensive networks on all continents. Among the well-known players in the book market are Penguin Random House, Hachette Book Group, HarperCollins, Simon & Schuster, Macmillan, and Pearson [14]. These companies, holding the lion's market share, are characterised by diverse product portfolios and have a strong presence in the global environment. The market also includes medium and small business players who offer a selected range of products, with some engaged in self-publishing.

Key players in Europe and North America focus on strategic initiatives (acquisitions and launching new collections, partnership development, and investments) for successful development to intensify efficiency and strengthen their competitive positions in the global market [4]. Figures 1 and 2 represent the revenue levels of key educational book publishers in the USA and the UK in 2021.

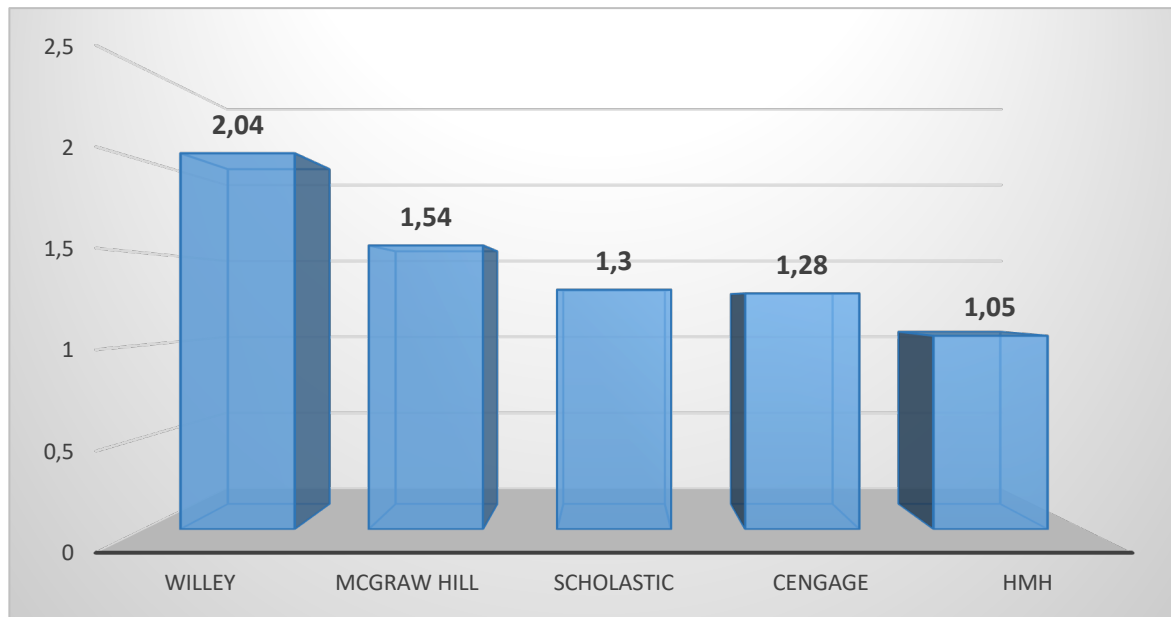


Fig. 1. Publishers' Revenues in the US in 2023, USD billion

Source: compiled by the author based on [13]

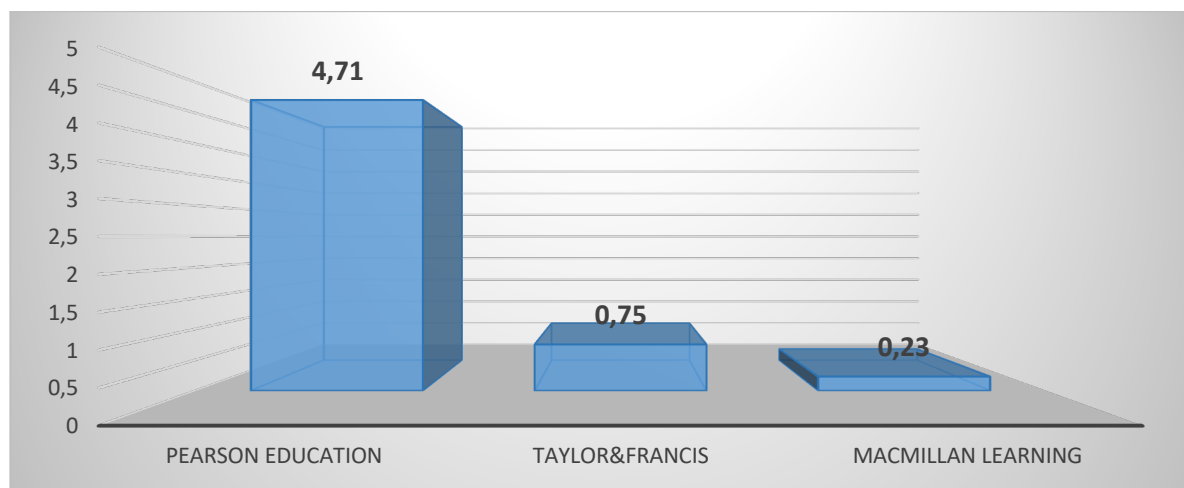


Fig. 2. Publishers' Revenues in the UK in 2023, USD billion

Source: compiled by the author based on [13]

Leading companies focus primarily on contracts for special editions and innovative releases to reach a broad audience and attract new clients, gaining competitive advantages over other publishers. These companies also focus on launching collections featuring memorable characters and series currently relevant to specific social categories to connect with a larger audience [5].

One of the main approaches to regulating the activities of the publishing and printing industry in Europe and the USA is careful market analysis and

monitoring of consumer preferences. Leading companies take into account that the pandemic has caused significant changes in reading habits on a global scale. In particular, the younger generation prefers digital technologies—e-books, podcasts, and audiobooks. Additionally, the "Mystery" genre has led the market in recent years and accounted for nearly 17% of global revenues in 2023 [14]. Furthermore, leading company managers recognise that reading can potentially be more attractive with digital content, as it stimulates the imagination and helps individuals detach from stressors.

Among the leading distribution channels for publishing and printing products in developed countries, local bookstores dominate (accounting for more than 50% of global revenue in 2023 (see Fig. 3)). Positioned as hubs for like-minded people, many such stores create specialised in-house book clubs and themed reading groups, organise regular author events that inspire people with new thoughts and ideas [7]. Additionally, online marketing is gaining popularity in the industry. The online channel is expected to grow 2.9% from 2024 to 2030. An innovative idea used by online providers of publishing and printing products is to sell used books in good condition at low prices. This has proven to be a very successful initiative among students. For example, the website Kitabay, operating in India, sells second-hand books at a nominal price of 14 USD while offering free shipping above a certain amount.



Fig. 3. Distribution Channels of the Publishing and Printing Industry in the USA and Europe in 2023, %

Source: compiled by the author based on [14]

In 2023, printed books accounted for the largest share of the industry market — more than 78% of global revenues. Despite the rapid progress of digital technologies, traditional books have not lost their strong positions. Among the main factors contributing to the intensification of the publishing and printing industry market is consumer spending growth, which contributes to increased income and innovative components [14].

The study of foreign experience in the development of the publishing and printing industry in the context of the USA, China, Poland, and other countries indicates the presence of specific regulatory features in each of them, but at the same time, a common trend towards the horizontal and vertical integration of enterprises. In particular, the experience of the USA is seen as valuable, where the effectiveness of industry development is determined by the implementation of investment activity and the formation of enterprise associations with more than ten participants. To intensify competitiveness, given the rapid development of modern information technologies, publishing and printing enterprises in the USA are actively expanding their market by providing additional services in digital formatting and design [7]. In Ukraine, such experience is considered appropriate for integration, as it will provide significant competitive advantages.

Canada's experience in regulating the publishing and printing industry through consolidating large enterprises and active cross-sectoral integration is seen as effective. Particular attention is given to the country's system of training specialists in the industry. This is implemented through the self-financing of printing enterprises and a specialised Trust Fund, which provides scholarships for the most talented young people and ensures student internships [12]. At the same time, the concept of training modern specialists in publishing and printing focuses on developing soft skills, particularly critical thinking, creativity, communication competence, and adaptability.

The experience of Poland in developing the printing and publishing industries is also relevant, where comprehensive state support plays a significant

role. The state directly regulates the activities of the printing and publishing sectors, including through the compensation of financial costs for translation activities (translating Polish authors' works into foreign languages and foreign authors' works into Polish), as well as creating favourable conditions for regulating pricing policies for certain types of products and intensifying investment [8]. The regulation of Poland's publishing and printing industry also has other representative aspects in the context of market expansion, such as increasing the share of exports. In this regard, a unique role is given to ensuring favourable investment conditions, particularly acceptable interest rates on borrowed resources.

The experience of Finland's publishing and printing industry is worth studying, especially in effectively identifying new markets and unoccupied niches, which is particularly relevant in light of declining demand in traditional markets. Printing houses primarily focus on finding new operational contexts, providing consulting and production services for creating electronic archives, selecting influential types of advertising products, and distributing them [16]. In this context, the need arises for personnel to develop the necessary soft skills and maintain strong motivation.

Regarding the experience of regulating the publishing and printing industry in China, it is essential to note the focus on improving product quality. Implementing the ISO 9001 series quality management system and its internal quality management systems is a mandatory requirement in the activities of industry enterprises. It is also quite common to see the consolidation of enterprises within which intensified quality control is implemented. The specificity of this control is that the controlling function is performed by the specialists of the central body of the association and the specialists of individual enterprises.

Conclusion. Thus, the international experience of regulating the publishing and printing industry is appropriate for study and implementation in Ukraine, considering the need for adaptation to the current conditions of printing

enterprises. Based on the analysis of foreign trends in the development of publishing and printing enterprises, it can be asserted that to intensify the efficiency of their activities, it is necessary to stimulate investment in the upgrade of production and management processes, form associations of industry enterprises, and study the advantages and disadvantages of regulatory models of the publishing and printing industry in international experience. This synergy will allow for the intensification of their competitiveness, profitability, and investment attractiveness.

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