



# Talking About Audio: Analysing Book Industry Trade Talk on Audiobooks and Streaming in Sweden and Norway

Terje Colbjørnsen<sup>1</sup> · Kim Tallerås<sup>1</sup> · Ann Steiner<sup>2</sup>

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## Abstract

Streaming services are creating significant shifts in Scandinavia, with audiobooks distributed through subscription-based services accounting for about a quarter of sales in the Swedish and Norwegian book markets. In this study we ask: What are the common and diverging themes of trade talk on audiobooks and streaming services in Sweden and Norway? Our findings indicate that trade talk in the two countries differs distinctively. The differences suggest that discussions over audiobooks and streaming form two quite distinct discourses: A business and innovation discourse which is dominant in Sweden and a cultural policy discourse which is dominant in Norway.

**Keywords** Audiobooks · Streaming services · Cultural policy · Norway · Sweden

## Introduction

Streaming services for audiobooks are creating significant shifts in the Scandinavian book markets. Audiobook usage is rapidly increasing and already represents a substantial part of turnover in the book industry. Unlike previous digital developments in the book trade, like the emergence of online book retail, the e-book format and e-book reader technologies, the shift to streaming audiobooks is not driven by US companies. By some accounts, the Nordic streaming audiobook boom lacks parallels across the globe both in terms of rapid growth and impact on the industry. In his

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✉ Kim Tallerås  
kita@oslomet.no

Terje Colbjørnsen  
terjec@oslomet.no

Ann Steiner  
ann.steiner@littvet.uu.se

<sup>1</sup> Oslo Metropolitan University, Oslo, Norway

<sup>2</sup> Uppsala University, Uppsala, Sweden

*Book Wars. The Digital Revolution in Publishing* (2021), John B. Thompson arrives at a reserved conclusion when it comes to the potential for subscription models in the US and UK:

[I]t seems likely that subscription will continue to play a relatively minor role in the evolution of the ecosystem of books in the Anglo-American world. Despite the many announcements of the arrival of the Netflix for books, subscription services in the book industry have not acquired anything like the significance they have in music, film and television industries ([1], p. 348).

The situation in Scandinavia is notably different. The subscription models at hand are much like a Netflix or Spotify for books: monthly subscriptions, large selections, and unlimited listening. Major players include Storytel, BookBeat, Nextory and Fabel, all homegrown companies now competing to partake in the audiobook boom. 2021 book sales statistics for Sweden indicate that digital audiobook usage has risen dramatically, representing the only major sector of the book industry with continuous growth in the last five years. Streaming services had a 26% market share in Sweden, and while that includes e-books, over 90% of streaming is of audiobooks ([2], pp. 9–10, p. 29). Norway is seeing a similar development to Sweden, with rapid and continuous growth. According to figures from the Norwegian Publishers' Association, the number of single *listens* to audiobooks in the streaming services increased from 2 million in 2017 to 6.6 million in 2020. Sales of subscriptions to these services accounted for 23% of net sales in the general book market for 2021, an increase of 31% from 2020.<sup>1</sup>

Since 2015, a number of services catering to the audiobook listening public has appeared. The plentiful recent ventures indicate that Scandinavian streaming services also represent innovation, entrepreneurship, and new business opportunities for media companies in a globalised marketplace that is typically dominated by US companies. As a result of these significant and quite rapid shifts, existing policies for culture and literature, as well as policies that support business in general, are challenged. Executives and professionals in the book trade naturally discuss these developments. In this study, we have conducted a content analysis of articles found in the book trade press in Sweden and Norway between 2017 and 2021, represented by Svensk bokhandel and Bok365, respectively. Thus, this study examines a specific form of 'trade talk' [3], as trade publications not only report what takes place, but also constitute a site for discussion and sense-making. In the study we ask: What are the common and diverging themes of trade talk on audiobooks and streaming services in Sweden and Norway? How are business and policy aspects accentuated in the discourses on audiobooks and streaming services?

The comparative aspect of the study is motivated by the need to go beyond obvious similarities and uncover differences and contrasts between the two countries. As we will show, while the fundamental market changes have been similar in Sweden

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<sup>1</sup> The number of listens refers to the yearly report from 2020. The figures on net sales income refer to the Q4 2021 report. Statistics published on the Publishers Association website: <https://forleggerforeningen.no/bransjefakta/statistikk/>

and Norway, the trade talk has differed significantly. An important part of the background for the operation of the contemporary book industries are the tensions that exist at the intersection of business, culture, technology, and policy. These are tensions that can be discovered in the discourses on audiobooks and streaming.

## Background and Analytical Framework

The shift from print sales to digital streaming in the Swedish and Norwegian book industries to some extent parallels that in other media markets, such as music, television and film [4, 5]. These shifts are associated with changes in relationships of power [6–8] and specifically with debates over revenue distribution and the share paid to artists and content originators [9, 10]. As the streaming model (or subscription model) has been introduced comparatively late in the book trade [6, 11, 12], industry actors can refer to developments in neighbouring media markets, seeing both relevant examples of digital innovation and of cautionary tales [10].

The context for this study is the increasingly intertwined Scandinavian book market, particularly visible in the streaming space. Swedish service Storytel, established in 2005, has taken a prominent position and shows international ambitions with operations in over 20 markets and well over 1.5 million subscribers globally. Alongside Storytel, another two Swedish streaming services have both a domestic base and an international spread. Nextory, established in 2015, has launched its app in 10 European countries. BookBeat, the publishing giant Bonnier's streaming initiative since 2015, already exists in 28 mainly European markets. In 2018, the book retail chain Akademibokhandeln launched Bokus Play, the latest arrival to compete for the Swedish audiobook market. Apart from Bokus Play, all of the above have operations in Norway as well, with Nextory and BookBeat launching in 2021 and Storytel starting operations in Norway in 2014, forming a 50/50 co-ownership with Norwegian publisher Cappelen Damm. The second largest service in Norway is Fabel (launched 2017), owned by Lydbokforlaget (in turn co-owned 50/50 by the major publishers Aschehoug and Gyldendal). A third well-established subscription service in the Norwegian market is Ebo Premium. Beyond cross-border competition, ownership structures reveal further Scandinavian entanglements, with several publishers being joint or co-owned.<sup>2</sup> It should, however, be noted that despite all these links between the countries, the book markets also differ in terms of legislation, traditions, historical development, and to some extent cultural and literary policies. Thus, a few differences and similarities between Swedish and Norwegian cultural policy for literature should be pointed out.

In an international perspective, the Norwegian and Swedish systems of support and regulation for authors, books, reading, literature, and book industry are indeed

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<sup>2</sup> Cappelen Damm, whose corporate owner is Danish Egmont, was until June 2021 co-owned with Swedish Bonnier. One of Cappelen Damm's challengers in the Norwegian market, Strawberry publishing, was in May 2021 acquired (70%) by Bonnier.

much alike. In most parts, these systems were established in the years after the Second World War. Sweden and Norway have support systems in the form of reduction or exemption from value-added tax for both print and digital books,<sup>3</sup> a government-funded purchasing program for libraries, and a strong public library system. In both countries, general competition laws apply to book industry actors and may regulate their business activities as much as cultural policies. The Norwegian *bokavtalen* agreement (as described below) is dependent upon an exemption from Norwegian competition laws [*Konkurranseloven*]. In Sweden, competition law is the main regulatory instrument to avoid abuse of market power and has been strongly enforced on the book trade since 1965. Further, since the 1990s, attention has shifted to policies on innovation and supporting the so-called “creative industries” [13–15] which also extend to the book industry. European Union policies within this area, such as Creative Europe and the Digital Agenda, have important ramifications for cultural policy in both Sweden (as a full EU member) and Norway (affiliated through its EEA membership).

While it makes sense to speak of a “Nordic cultural model” developing in the first decades after WW2, the Nordic countries have in the policy approaches to literature and the book industries taken slightly different paths since the 1970s. The foundation of the policies was an extension of the welfare system to include arts and culture [16, 17] and as such it was strongly linked to ideals of a culture of high quality for everyone. Sweden had 1843–1970 a strictly controlled book trade which was mainly made up of in-trade regulations that due to competition legislation were forced out [18]. Due to a time of upheaval in the trade of the 1970s several direct state subsidies were enforced [19, p. 181; 20]. Production support for publishers [*litteraturstöd*] and distribution support [*distributionsstöd*] constitute the main mechanisms, in addition to a public library system, reading programs, author support, and a reduced VAT rate for books.

The literature policy of Norway is aimed at production, distribution, and market mechanisms [21]. Notably as a significant difference from Sweden, book trade regulations are in place in Norway as an important part of the literature policy set-up. While trade systems in Sweden are seen as something to be negotiated by stakeholders (with a combination of competition legislation and strong unions in the background), in Norway, the state has a strong stake in regulation of the trade (for an overview, cf. [22]). This is constructed as a trade agreement (*bokavtalen*) which includes fixed book prices,<sup>4</sup> and an embargo for new titles to be streamed as audio or e-book.<sup>5</sup> The agreement also allows for a regulated system for access to all books across retail channels and standardised contracts for authors. *Bokavtalen* is formally a trade agreement between the members of the associations for publishers and booksellers. However, as the agreement necessitates an exemption from ordinary

<sup>3</sup> Both countries apply reduced VAT (Sweden) or exemption (Norway) on digital books as of July 2020.

<sup>4</sup> Prices are not *fixed* as such, but booksellers are not able to give rebates on sales to consumers in excess of 12.5% of sale price. This “fixed” price applies to new titles, i.e. within the publication year and until May the following year.

<sup>5</sup> “New titles”, see footnote 4.

competition law, it is widely seen as a part of the State's support for literature. While the regulation of book pricing has been subject to liberalisation [23, 24], the 1962 policy has held its ground both under conservative and social-democratic governments, although more vigorously supported by the latter. With the change of government in 2021, the social-democratic Minister of Culture initiated a process towards a legislation of the principles in the trade agreement (*boklov*, or *Book Law*). In effect, the trade regulation system means that Norwegian streaming services are backlist services, unlike their Swedish counterparts, although backlist titles play a significant role in all book streaming [25].

## Methods and Materials

The shift to streaming in the book trade is presently the subject of much book industry trade talk, or “trade stories” [3], and is expressed in trade journals and elsewhere, constituting a form of “industry lore” or collective sensemaking [10, 26]. We will use this discourse as an entry point and as data material for the study.

The empirical basis of the study consists of an analysis of 705 articles published in the Swedish and Norwegian book trade press between January 2017 and July 2021. 407 of the articles were published in the Swedish outlet *Svensk bokhandel*, and 298 in the Norwegian outlet *Bok365*. *Svensk bokhandel* (SvB) was until recently owned by The Swedish Booksellers Association [Svenska Bokhandlareföreningen] and The Swedish Publishers' Association [Svenska Förläggareföreningen] but was sold to the media company Ny Teknik in April 2021. SvB operates as an independent magazine with a broad industry focus. *Bok365* is an independent website that publishes editorial and journalistic material from the entire book trade including industry news and literary criticism. The outlets were chosen because of their continued attention to developments in the book industry and because they hold comparable positions in their respective countries. Articles from *Svensk bokhandel* have previously been analysed by Füst and Olofsson [27] to examine perceptions of the digital change in the Swedish book industry 1999–2018. They emphasise the central role *Svensk bokhandel* has in the industry as a public agenda-setting arena. *Bok365* has a similar position in the Norwegian industry.

Searches for relevant articles were performed in the media archive Atekst for the Norwegian material and via the website search tool of *Svensk bokhandel* for the Swedish material. All articles mentioning “audiobooks” (search terms: “Ijudbok” or “Ijudböcker” in Swedish; “lydbok” or “lydbøker” in Norwegian) in the two sources were downloaded and analysed. The retrieved material was analysed in a descriptive manner based on a thematic content analysis [28]. Analytical categories, constituting a coding scheme for grouping thematic focuses identified in the selected articles, were established through an initial pre-study. In the final analysis, the following nine categories were employed (Table 1):

The categories are somewhat broad but represent what we found to be fruitful analytical constructs in the investigative pre-study. Each article was read by one of the article authors and assigned to a category. After a joint assessment of the results, a small

**Table 1** Categories employed in the analysis

Coding category	Description
Format	The articles deal with various digital technology and content formats, innovation, and developments within these etc.
International: [country]	The articles deal with international matters or matters related to countries other than Sweden and Norway respectively
Business and industry	The articles deal with business and industry matters: Acquisitions, expansion, mergers, collaborations, “movers and shakers”, hiring, new companies etc.
Policies	The articles deal with literary or cultural policy, or contract regulations in the industry
Economy	The articles deal strictly with economic matters (whereas some of the articles in the Business category can thematize economic matters as part of a broader context)
Statistics/research	The articles deal with statistics or research in the field
Interviews	The articles are personal interviews
Literature	The articles are book reviews or report best seller lists etc.
Library	The articles deal with issues related to the handling of audiobooks in libraries

number of the categorizations were adjusted to ensure inter-coder reliability. Quotes exemplary of trade talk were collected during the categorization process. The thematic analysis was followed by a qualitative re-reading of central articles and interpretation of collected quotes in light of the categorization.

Despite the similarities between *Svensk bokhandel* and *Bok365*, they have a slightly different focus and consequently there is a diversity in whose voice is heard. In the material we find four groups of agents: (1) authors, (2) individuals working for a company in the trade, (3) individuals outside the trade but with a stake in it, e.g. critics and journalists, and (4) politicians. It is a limitation of the study that we have not systematically investigated whether different editorial practices entail that these agents have a different distribution in the total coverage. Although *Svensk bokhandel* and *Bok365* mainly have content that expresses various forms of trade talk, they are also slightly different in their inclusion of journalistic genres. *Bok365* contains, for example, literary reviews. These differences can also possibly skew the material in ways that must be taken into account.

## Findings

In the following sections, we first present results from the quantitative thematic content analysis. We then exemplify and analyse these findings in more detail, and in a more qualitative manner. Finally, we discuss the findings in the context of existing theories as well as conditions in the Swedish and Norwegian cultural industries, in order to point out some plausible explanations.

**Table 2** Average articles per month (exact number in parenthesis)

	2017	2018	2019	2020	2021
Bok365	2,2 (26)	4,3 (52)	6,5 (78)	6,8 (81)	10,2 (61)
Svensk bokhandel	8,6 (103)	6,8 (82)	7,8 (93)	5,8 (70)	9,8 (59)

**Table 3** Frequency of articles assigned to the different categories in the two countries

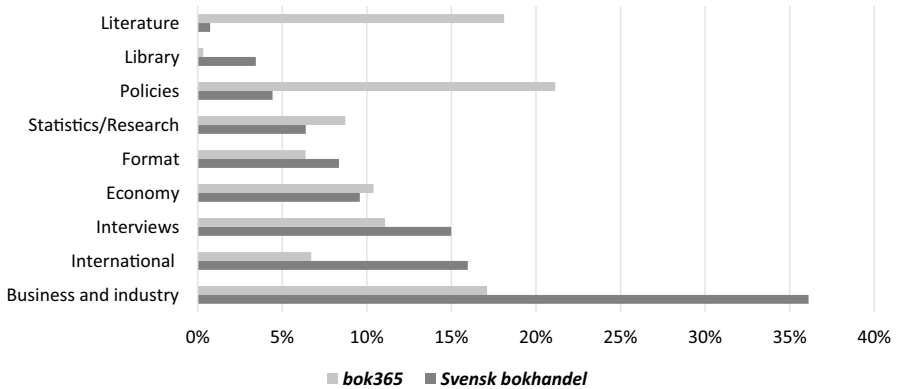
	Svensk bokhandel		Bok365	
Business and industry	147	Policies	63	
International	65	Literature	54	
Interviews	61	Business and industry	51	
Economy	39	Interviews	33	
Format	34	Economy	31	
Statistics/Research	26	Statistics/Research	26	
Policies	18	Format	19	
Library	14	International	20	
Literature	3	Library	1	
Total	407	Total	298	

## Overall Trends

The sheer number of articles mentioning audiobooks per year gives an indication of how important the format is in the trade. Table 2 shows the average number of articles that mention audiobooks, published each month in the relevant years. While the numbers vary slightly from year to year in Sweden, the number of Norwegian articles has grown steadily. Note that 2021 only includes articles published between January and June (Table 2).

The increased attention in the Norwegian trade talk is parallel to the rapid growth of streaming audiobooks in the book market. Although the customer orientation towards streaming services is comparable across the Scandinavian countries, we do not find that this is reflected in any increase of articles mentioning audiobooks in *Svensk bokhandel*. One reason being that the streaming services were established earlier in Sweden and interest has been fairly stable over these years with a significant number of articles each month. Another explanation is that the articles differ thematically. As shown in the next sections, the clash between the fast-growing streaming services and Norwegian cultural policy mechanisms has led to controversies that have received a great deal of attention. Whereas in Sweden the discussions have been heated at times, most of them can be related to conflicts between different stakeholders making debates and issues constant.

To categorise the material each article was assigned a theme according to its content. Table 3 shows the number of articles in each category, and Fig. 1 shows a comparison between the Swedish and Norwegian distribution. *Business and industry* is a top category in both outlets. In *Svensk bokhandel* the category includes the most



**Fig. 1** Comparison of categories in the Norwegian and Swedish material. Share (%) of the total amount in each country

articles by far (36% of all articles). The share assigned to the categories *Interviews* and *Literature* reflects the slightly different editorial practices in the two outlets. Although interviews make up a significant proportion of the *Bok365* articles, *Svensk bokhandel* contains significantly more. The *Literature* category, which captures material that mainly thematizes literary aspects (in a broad sense), such as book reviews, recommendations and stories about authors, is significantly more prominent in *Bok365* than in *Svensk bokhandel*. In the analysis, we have mostly omitted these categories, which we considered to be outside of what we define as trade talk and of little relevance to our research question. *Economy* and *Statistics/Research* are given more or less the same attention across the outlets.

When articles were assigned to the *International* category a code for the specific country thematized was included (for example *International:UK* and *International:Swe*). The category is in general assigned to more articles in *Svensk bokhandel* than in *Bok365*, but the detailed coding also shows that the Swedish material is more directed towards developments, business, and innovation outside the Nordic countries such as the US and UK. However, the single country which gets the most attention is the neighbouring Norway. Similarly, in the Norwegian articles, most attention is given to Sweden and Denmark.

It is evident that *Svensk bokhandel* pays particular attention to developments in *Business and industry*, which among other things covers the expansion of the streaming market. One of the reasons for the high number of articles in this category may be the fact that leading streaming providers with international ambitions such as Storytel, Nextory and BookBeat are all Swedish by origin. Storytel launching in South Korea and Russia are examples from the material. As such, they represent an ambitious start-up culture which is arguably more prominent in Sweden than in Norway. However, while the *Business and industry* category is less frequent in *Bok365*, this publication also reports on industry aspects like individuals changing jobs.

Differences in the distribution of articles assigned to the categories *Policies* and *International* suggest variances in what the trade talk across the two countries. In



the Swedish material, *Policies* is used to categorise only 4% of the articles. The tendency is to speak about literature and reading in general terms rather than call for specific political actions [29, 30]. It is also noteworthy that price regulation—absolutely central to the Norwegian discussion—is only mentioned once as an option in the Swedish material, by the representative from the Writer’s Union (SvB (editorial) 23 August 2019). While aspects pertaining to contracts with authors and translators were quite well covered, few of these discussed matters in relation to policy but were seen as something to be negotiated between the different parties of the trade. Thus, articles that in a Norwegian context most likely would have had a policy angle, typically in Sweden instead were about *Economics* or *Business and industry*. There is no mention of a need to have public policies restricting contracts or setting the terms for the book trade. Instead, looming in the background since 1970, is a strong political ideal (independent of political colour) of a free (book) market without restrictions.

In *Bok365*, the *Policies* category is the most frequent and assigned to over 20% of the articles. It seems reasonable to suggest that this reflects the more comprehensive Norwegian literature policy but also that there is a consensus that market regulations are important parts of cultural policies—although not undisputed. We see this as the main difference between the literary policies of Sweden and Norway: Can and should the book trade be regulated? We will expand on this issue in the following parts of our analysis.

### **Differing Trade Talk**

As outlined, the most prominent finding from the thematic analysis is that the same media trends and challenges in two countries with similar culture and societies raised radically different issues in the trade talk. Evidently, this fact needs to be nuanced and explored in more detail.

While the rapid growth in audiobook subscriptions represents a welcome financial development in general, the expansion of the market does not have the same ramifications for all actors in the book industry. Some publishers and authors make more money, but certainly not all. The new market structure has also led to common concerns over revenues from streaming compared with print, debates over revenue distribution and contracts, as well as fraught relationships between publishers and streaming providers (and between publishers and libraries, but this receives little coverage in this part of the trade press). Such concerns and issues characterise the trade talk in both countries. The trade talk also shows awareness of the situation in neighbouring countries.

In terms of how the audio book markets are developing, there are clear parallels and similar situations in Sweden and Norway, but Sweden seems to be one step ahead, in the sense that the market share for audiobooks has grown earlier. One reason being that several international streaming providers originate there. Overall, many of the same actors are present in both countries, e.g. Storytel, Nextory and BookBeat. Publishers on both sides of the border seek market opportunities with their neighbours, sometimes resulting in cross-border mergers and acquisitions. However, as publisher Kristoffer Lind of Lind & Co (later purchased by Storytel

AB) noticed upon entering the Norwegian market, policies set different frameworks for operations:

“– The initiative gave us taste for more, but the fixed price regulations on the Norwegian market created difficulties. According to them, streaming is defined as a new format which means that a title will have to wait until May following the original publishing before it can be released.” (SvB 31 January 2019)

Lind’s views of the Norwegian audiobook market are indicative of how the digital turn has both challenged and been restricted by literature policy [21, 31, 32]. Here, we would like to highlight two cases, one in Sweden and one in Norway, that showcase some of the same stakes and interests in relation to distribution rights, but that ultimately take different turns. What we may term the *Bonnier vs. Storytel* case and the *Horst/Strawberry vs. Gyldendal* case, both show similar tensions between publishers and streaming providers arising from disagreements over whether publishers should be required to deliver books to all stores/streamers, and under what conditions and contracts.

Storytel started modestly in Sweden already in 2005, but it was with the arrival of two new streaming services in 2017 that the real audiobook boom was created. This led to a much more competitive audio market, and at one point all streaming appeared to be one and the same which spurred all three to diversify. During the following years, there was a general sense in the book trade of a Klondike of start-ups (the fact that Storytel in 2009 based the company on a famous Dragon’s Den appearance added to this feeling). The possibilities for international expansion from Nordic actors in digital media had already been proven by Spotify in the music industry. However, the expansion was not equally favourable to everyone in the book trade, and optimism was soon contrasted by conflicts over money and literary quality. Concerns were expressed over size of digital revenues and distribution of revenues between publishers, streaming providers, translators and authors.

The *Bonnier vs. Storytel* case in 2019 begun with Bonnier holding back some new titles as exclusive to their own streaming service BookBeat, causing, what was termed in *Svensk bokhandel*, an “audiobook war”: “– For this, there is no other term but audiobook war. Possibly chicken race.” (SvB 10 April 2019). While some publishers were adamant that all titles should in principle be available to all retailers, others, like publisher Fredrik Ljunggren of the small and independent Ehrlin, were nonplussed about these expectations:

“– I’m new to the business, but for me it’s completely inexplicable why all retailers should stock all items. Within tv and music this is a way of competing. *Game of thrones* has been a USP [Unique Selling Point] for HBO. Not everything can be available everywhere” (SvB August 23, 2019).

The rights of publishers and authors to choose their sales channels was not only a question of access but also of payment. The backdrop was an unpredictable revenue-share payment system that made it unclear how much authors and publishers would be paid from the streaming services. On the other hand, there was money to be made, with publishers testifying that in some genres 50% of incomes is from

streaming [33], 36). Bonnier, as one of the two largest general publishers in Sweden, wanted to secure a better agreement, much to the detriment of most other publishers. The conflict between Storytel and Bonnier about the revenue share model led to the withdrawal of Bonnier books from the Storytel catalogue making them exclusive to their own streaming service, BookBeat. In the end a settlement led to the streaming provider negotiating an exclusive deal with one publisher, which enhanced the debates over unequal conditions in the trade. The waging war was thus both between publishers and streaming services and between different publishers, causing concern and tension in most camps. The conflict highlighted many issues at hand, but in Sweden the solutions were only business oriented and none of the articles in *Svensk bokhandel* featured a call for political solutions to the issues. As pointed out by head of BookBeat, Niclas Sandin: “- I think it is really unfortunate that two of Sweden’s largest audiobook publishers choose to exclude one of Sweden’s largest retailers (...). But everyone makes their own choices” (SvB August 30, 2019).

In Norway, a similar debate was raging in the Horst/Strawberry vs. Gyldendal case which eventually was tested before the courts. At the core of this debate, is how to interpret the existing policy framework in the context of streaming services. The terms of the aforementioned *bokavtalen* agreement are particularly central. In 2017 an addendum was included to the agreement stating that the established obligation of procurement [*skaffe- og leveringsplikten*] for physical books across booksellers also would apply to audiobooks across streaming services. This addendum was not followed up in any practical sense, which led to debates between the streaming providers and the publishers. In 2018 and 2019, streaming providers Storytel and Fabel were notified to the Norwegian Competition Authority (NCA) by competitor Ebok Premium for keeping titles exclusive. In the autumn of 2020, seven best-selling authors wrote an opinion piece in the newspaper VG, claiming that the major publishers excluded them from important audiobook markets. The seven authors had all traded publisher to the industry newcomer Strawberry, but their audiobook backlists were still contracted with Lydbokforlaget and only available through its platform Fabel. The authors claimed that the major publisher violated *bokavtalen*. Eventually, one of the complaining authors, crime fiction writer Jørn Lier Horst and his publisher Strawberry took advantage of a loophole in the contract agreement still geared towards a CD-based audiobook market. According to Lier Horst’s interpretation of the contract, the rights fell back to him because the publisher failed to uphold the contract. Consequently, parts of his backlist were re-recorded and made available on new terms. In response, Gyldendal sued Lier Horst, but later lost in the courts.<sup>6</sup> The debates and trade talk related to this conflict is heated and characterised by strong language as in the following quotes by CEO in Lydbokforlaget Anne-Kristin Vasseljen and CEO in Cappelen Damm Tom Harald Jensen, who both called for piracy, primarily directed at the Strawberry publishing house:

“- We cannot accept pirated copies circulating in the Norwegian book industry.” (Vasseljen, Bok365 November 11, 2020)

<sup>6</sup> The case was first appealed by Gyldendal but has later been settled privately between the parties.

“– Strawberry trawled the Norwegian book market for rights that had expired, or that were otherwise possible to acquire. [...] This is not publishing, but piracy.” (Jensen, Bok365 April 21, 2021)

The accused publisher Strawberry claimed on their side that they only challenged the status quo in a stagnant market, divided between a few powerful publishers with a lot to lose:

– The Norwegian book industry has for decades been impacted by a few large actors who have been satisfied with the status quo, and consequently reducing competition to a minimum. [...] What [representatives for the established publishing industry] have experienced the last couple of years is not piracy, but mutiny.” (Co-owner of Strawberry publishing Magnus Rønningen, Bok365 April 21, 2021)

In Sweden, there have been various debates about distribution rights, but these have been seen as business conflicts between the parties of the book trade: authors, publishers, and streaming services. In Norway, distribution rights are linked in various ways directly to literature policy. In several cases, there is an immediate call for policy intervention. In the following quote there is a direct appeal from the Minister of Culture Trine Skei Grande:

“– Now this needs to be resolved! There’s a clear political expectation that procurement obligations also need to encompass audio books, and it’s utterly regrettable that it’s taken so long to put this in its right place.” (Trine Skei Grande, Bok365 May 30, 2019)

In some ways, this contrasts with the way her counterpart Amanda Lind takes a backseat when pressed on the issue of ownership concentration by a reporter from *Svensk bokhandel*:

“– I find it hard to see how I would be able to control this politically. I can make sure that there are good preconditions for publishing literature in Sweden. The literature support [Litteraturstödet] is one such measure which is meant to be well-functioning and sufficient.” (Amanda Lind, SvB, May 5 2019)

The strong link to cultural- and literature policy creates some specific axes and dynamics in Norway. For example, there is a clear discursive contrast between new actors such as Strawberry on the one hand and the established publishers on the other. Strawberry challenges the establishment; the establishment defends the existing system. Here exemplified by the author Jørn Lier Horst sharing his frustration over the discursive practices in the courtroom where he and Strawberry challenged both cultural policy practices and an established publisher, as explained above:

“– For me it has been frustrating to listen to how our counterpart and their witnesses have attributed to me—and to Strawberry—hidden agendas and ulterior motivations. To listen to Tom Harald Jessen speak of lyricism and poetry for

the few, while I and my author colleagues are portrayed as cynical capitalists... that's just madness." (Bok365 April 26, 2021)

## Discussion

Even though the book industries in Sweden and Norway face many of the same challenges, both rhetoric and practical solutions differ. In other words, media change in two countries with similar culture and societies can potentially raise radically different issues in the trade talk. In this discussion, we will revisit explanations for differences between Sweden and Norway that can be found in the developments of trade and business structures, slightly different views on technology and innovation, and, last but not least, in diverging views on cultural policy and literature policy.

The first explanation for different discourses around audiobooks and streaming have to do with trade and business structures. The Swedish deregulation of the book trade in 1970 has made the book industry sensitive to market changes which over the years has led to major fluctuations in sale channels. In the 1970s, for example, subscription book clubs rapidly expanded into a 35% market share. Similarly, in the late 1990s, internet bookstores quickly took a third of the market, more or less wiping out the book clubs [34]. The rapid expansion of streaming twenty years later is, in other words, something seen before. That may help to explain why authors and publishers in Sweden are not overly concerned, despite big changes in the industry.

While Norway has certainly seen many of the same shifts in book retail and distribution, the Norwegian market has arguably been more stable in recent decades. Even the digital turn of the 2000s can be characterised by a certain continuity [6, 11]. Literature policy (subsidies and regulations) has played a stabilising role by providing frameworks for book industry actors and acted as a safeguard against competition from foreign actors, even to the point where entries by Swedish actors were tricky (as the quote from Minister of Culture Lind above indicates). The biggest threat, nonetheless, is seen to come from Amazon and other international digital media players.

On the UK and US markets a strong distrust has developed among authors, publishers, and academics towards digital book sales mainly due to the one dominant player, Amazon (eg. [1, 35, 36]). For instance, Thompson notes that "the book world before Amazon was a different kind of place from the world that we now know" ([1], pp. 141–42). Not only does Amazon have enormous power over publishers and authors but also over readers and data through its control over hardware and software. The role of Amazon in contemporary book trade is hard to overstate. Amazon and other international actors also play an important part in the Scandinavian discourse: It matters who the technology companies are. Ownership affects trade talk, particularly if they are seen as representatives of "big tech" or as small start-up initiatives. In both Norway and Sweden, technology innovation is generally held in high esteem but experiences from the music, film, and tv-industries have shown how precarious shifts to digital streaming can be for the creative industries [4, 9, 37]. In the book industry, the unlimited access model that is characteristic of streaming in general, is met with much resistance. One of the world's biggest publishers,

Penguin Random House, declines to offer their titles to *all you can eat* streaming services. Furthermore, there is a strong concern that the shift to streaming represents not only a sales shift but that they are disruptive agents that will transform literature and reading in general [10, 38, 39].

This ambivalent relationship with business and innovation is not new to the book industry. Several studies have pointed to the fraught and intertwined relation between literature and “literature’s aura of distinction” ([40], p. 107) on the one hand and the broader cultural industry on the other (cf. [41–43]). It is a relation that is marked by literature being seen as “more” than other cultural products and at the same time being financially and practically dependent on the general cultural industry. In the Swedish trade journal, there is this general sense of streaming services being innovative and good for the business of books, bringing both money and new engagement with literature. Evidently, diverging and opposing opinions are coming from authors and publishers but all in all the strong criticism displayed in the Norwegian (as well as in the US and UK markets) is much less prevalent. Any attempt to explain these differences would verge towards guessing and requires more research but one factor is the status and strong belief in national innovation and technology. In this light, it matters whether Storytel (to take the most obvious example) is a nationally based start-up or seen as a big tech intruder. Distrust towards technology companies is aimed at international global giants such as Amazon and Google—and in Norway Storytel—while local companies are given more leeway.

In Sweden, the trade talk thematizes innovation, international trends and general business issues; in Norway, it is characterised by cultural policy issues. Our material shows that the Norwegian *bokavtalen* agreement has become a catalyst for debate and conflict in the face of new formats and business models. Arguably, *bokavtalen* is not only important in the debate over audiobooks and streaming for its practical consequences; it is symbolically significant as the clearest example of a market regulation set up to achieve cultural policy aims like diversity and access. In the Norwegian version of the trade talk, *bokavtalen* is a common reference point, signifying the cultural obligations of publishers and booksellers, but also challenged by the changing literary landscape.

While the emerging streaming market is strongly linked to policy regulations in Norway, any ideas of trade regulations have ever since 1970 been difficult in Sweden, not so say impossible. The decision to deregulate the book trade in Sweden was not one of cultural policy, but business policy to uphold competition law, and most everyone in the book world was strongly opposed [44]. It is complicated, and probably unfeasible, to tell if the consequences of a deregulated trade in Sweden have been positive or negative as so many factors have come into play over the last 50 years. The general sense in both business and among cultural commentators is that a regulated market has advantages but that it is both politically and practically impossible to turn back after all this time. Consequently, there is hardly ever anyone bringing regulations up on the agenda.

## Concluding Remarks

Audiobooks and streaming have made a considerable impact on the book industries in both Sweden and Norway. Unsurprisingly, trade publications such as *Svensk bokhandel* and *Bok365* are packed with reports and discussions about the audiobook boom. Across the Scandinavian borders, streaming providers, publishers and booksellers compete and collaborate, merge and acquire. Business opportunities are ripe in these fast-growing markets, while disagreements over revenue distribution and content distribution form the major hindrances—much like in neighbouring media markets for music and audio-visual content. Nonetheless, despite similar media trends across the border, our study shows that trade talk in the two countries has differed distinctively. In particular, we found that the Swedish trade talk related predominantly to issues that we categorised as *Business and industry*, whereas the Norwegian discourse was much more focussed on what we termed *Policies*. The differences suggest that discussions over audiobooks and streaming form two quite distinct discourses in the trade talk across the two countries: A business and innovation discourse and a (cultural) policy discourse. Both discourses are present in both countries, but the first is clearly dominant in Sweden and the second is clearly dominant in Norway. It falls somewhat out of the scope of the present article to go into detail on the causes for the differences, but we have pointed to trade and business structures, views on technology and innovation, and views the role of cultural policy and literature policy as important factors to take into account.

On a general level, our findings suggest that national and regional cultures—across business, policy, and cultural life—create different frameworks and contexts for media development, even in an age of globalised media distribution. Widening the scope to other countries would likely show an even greater variety based on specific national traditions and trade history.

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