

Dynamic Capability of the Publishing and Printing Industry During the Covid-19 Pandemic

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Abstract

The Printing and Publishing Industry around the World has experienced a significant impact due to the COVID-19 Pandemic. This research attempts to provide a perspective/review regarding the existence of the Printing and Publishing Industry during the COVID-19 Pandemic. This research aims to identify and explain dynamic Capability through adaptive strategies implemented by Printing and Publishing Companies in facing the crisis and the COVID-19 Pandemic, as well as the efforts made to maintain their existence and competitiveness. The method used in this research is a literature review, which collects data from reliable sources such as journals, books, and industry reports. The form of review in this study is Narrative Review. This method presents narrative information, allowing the author to interpret and criticize findings from various literature sources. Narrative reviews are often used to provide an overview of a topic, find gaps in existing research, and identify areas for further research. The analysis results show that the COVID-19 pandemic has significantly impacted the printing and publishing industry, causing decreased market demand, difficulties importing raw materials, and limitations in production due to health protocols that must be followed. However, the Industry has shown extraordinary resilience and adopted various strategies to survive the Pandemic, such as innovating products, expanding online markets, and optimizing system expansion. Overall, even though the Printing and Publishing Industry experienced challenges during the COVID-19 Pandemic, the Industry was able to survive and thrive. Along with the adoption of digital technology and changes in consumer habits, the Printing and Publishing Industry has excellent potential to continue to grow and face challenges in the future.

Keywords: COVID-19 Pandemic, Digital Technology, Printing and Publishing Industry



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Introduction

The COVID-19 pandemic has fundamentally altered the landscape of various industries, with the printing and publishing sector being no exception. As the World grappled with unprecedented challenges, companies within the Industry faced significant disruptions, including the closure of physical retail outlets, supply chain interruptions, and a dramatic shift in consumer behavior. In this context, dynamic, adaptive, absorptive, and innovative capabilities have emerged as a critical framework for understanding how firms can navigate such turbulent environments and maintain their competitive edge.

Dynamic capabilities refer to a firm's ability to integrate, build and reconfigure internal and external competencies to address rapidly changing market conditions (Teece, 2007). The Pandemic has underscored organizations' need to respond to immediate challenges and

anticipate future trends and opportunities. Companies that have successfully harnessed their dynamic capabilities have demonstrated resilience, adaptability, and a commitment to continuous innovation, enabling them to thrive amidst adversity.

The Printing and Publishing Industry has been integral to human life for centuries. This Industry also experienced a fate that was not much different, being struck by COVID-19. Printing and Publishing businesses have been devastated by unforeseen circumstances, production has been disrupted, income has dwindled, and machine installments have failed to pay. Expenditure expenses remain constant but without income. This causes many printing and publishing businesses to experience pressure and bankruptcy. Digital printing entrepreneurs, especially suppliers, have felt the impact directly since the end of January 2020, when Wuhan in China was declared under lockdown. Considering that many raw materials and machines are imported from that country.

The Central Leadership Council (DPP) of the Association of Indonesian Graphic Companies stated that the impact of COVID-19 on the Graphic Printing Industry has been tremendous, including:

- a. Almost all printing companies in Indonesia are experiencing a decline in turnover and production of more than 70%.
- b. March, April, and July 2020 are the months leading up to the new academic year, where there should be an increase in the production of school books. However, due to the Pandemic, there is no clarity on orders from publishers or government decisions, so production has stopped. Schools and institutions are postponing decisions to purchase books or orders for printed materials because they are waiting for further instructions from the Government regarding the use of funds diverted to tackle COVID-19.
- c. Retail sales experienced a drastic decline due to customers no longer stopping by the printing shop due to business activity restrictions, so many swerved temporarily to produce cloth masks and PPE.
- d. Many printers are experiencing financial difficulties due to many orders that have been carried out, but the payment has been postponed, and cancellations have occurred. This was felt by many MSMEs in the printing sector who produced wedding invitations but then canceled them.

As a result of these unfavorable conditions, many printers have started laying off employees without salary or paying half their salary, making work schedules in shifts, and even laying off employees with daily status. It does not stop there; the printing industry also has difficulty meeting its raw material needs. So far, the number of imported components in the printing industry is 7% - 12%, depending on the printed file. Imports depend on China, so supply is somewhat hampered. The Central Leadership Advisory Council (DPP) of the Association of Indonesian Graphic Companies explained the assumption of calculating losses that must be borne by the Printing Industry per month at US\$ 20 billion to US\$ 30 billion per month.

The condition of books in Indonesia is still not good. The situation became even more worrying when the Pandemic also hit the publishing industry, which is the ecosystem in this sector. The Pandemic has provided awareness that the publishing industry in Indonesia does not yet have a strong, healthy, and well-established ecosystem, so when hit by a crisis, it immediately becomes unstable and shaky. One impact that can be seen directly is the decline in bookstore visitors. Besides, bookstores must be closed in areas where large-scale social restrictions (PSBB) are implemented.

Based on a survey conducted by the Indonesian Publishers Association (IKAPI) regarding the impact of COVID-19 on the Book Industry, data was obtained that most IKAPI members experienced a decline in sales due to COVID-19. In the survey, it was explained that the majority felt the impact of losses from COVID-19. More than 50% of IKAPI members experienced decreased income during the Pandemic. Publishers in the regions mostly rely on orders through the Department or Regional Library. However, during the Pandemic, there were no orders at all. Not to mention the problem of piracy, which is increasingly widespread in the digital era. The COVID-19 pandemic has caused physical restrictions that have significantly impacted the Printing and Publishing Industry, especially in decreasing demand for printed products. Many companies are experiencing operational difficulties, distribution difficulties, and even workforce reductions (Tajem & Subanda, 2025). On the other hand, the Pandemic has also accelerated digital transformation, which can be a new opportunity for companies to adopt and develop digital-based strategies.

The printing and publishing industry faces significant challenges with digitalization, changing consumer behavior and business models. Consumers access content digitally more often than in print, thus influencing demand for printed products such as books, magazines, and newspapers. On the other hand, this Industry also faces cost efficiency, product quality, and innovation challenges. Research regarding dynamic Capability in the Printing and Publishing Industry amidst global competition is very relevant and interesting to elaborate on, considering the challenges faced by this sector due to digitalization and changes in consumer behavior.

This paper explores the dynamic capabilities that have enabled the printing and publishing industry to adapt and evolve during the COVID-19 pandemic. By examining the dimensions of adaptive, absorptive, and innovative capabilities, this study will highlight how these capabilities have facilitated effective market responses, continuous innovation, and the establishment of sustainable competitive advantages. Ultimately, understanding the role of dynamic capabilities in this context will provide valuable insights for industry stakeholders seeking to navigate the complexities of a post-pandemic world.

Literature Review

A. Dynamic Capability

Dynamic Capability refers to an organization's ability to adapt, absorb, and innovate in the face of market changes. In the Printing and Publishing Industry context, this Capability includes identifying new opportunities, adapting to new technologies, and developing products relevant to current market needs. Dynamic Capability is an important concept in Strategic Management, and it refers to an organization's ability to adapt and respond to rapid changes in the business environment. By developing dynamic capabilities, the Company can be more flexible in responding to new challenges and creating sustainable competitive advantages.

According to Teece (1997), dynamic Capability is an organization's ability to create, rebuild, and reconfigure internal and external competencies to face rapid environmental changes. This concept emerged as a response to the limitations of the Resource-Based View (RBV) theory, which emphasizes the importance of resources as the key to competitive advantage but does not explain how companies can adapt to rapid change.

1. Dimensions of Dynamic Capability

a. Adaptive Capability

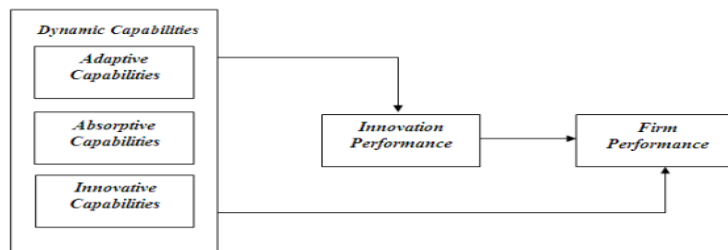
The ability to identify and exploit opportunities in the market and the Company's ability to respond to changes quickly and effectively. Indicators of this dimension are (1) the ability to monitor markets and competitors, (2) appropriate resource allocation for marketing activities, and (3) response to emerging opportunities and threats.

b. Absorptive Capability

Ability to evaluate and use knowledge from outside the Organization. This Capability is critical for innovation and new product development. Indicators of this dimension are (1) the intensity of research and development activities and (2) the ability to assimilate external information and apply it in an internal context.

c. Innovative Capability

The ability to develop new products or markets while including innovation in products, processes, and problem solutions. Indicators of this dimension are (1) the number of product and service innovations produced and (2) process innovation implemented in the Company's operations.



Source: Author Processed, 2025

Figure 1. Relationship Between Dynamic Capabilities, Innovation Performance, Firm Performance

2. Process of Dynamic Capability

Dynamic Capability is carried out through four stages, namely:

- a) Identification and Assessments
Collect data about environmental changes affecting the Industry's Key Success Factors (KSF).
- b) Conformity Assessment
Assess the suitability between Company resources and capabilities and Key Success Factors (KSF).
- c) Capability Update
Adjusting or updating resources and capabilities so that they can become a source of competitive advantage.
- d) Resource Usage
Utilize updated resources to formulate new strategies

B. Development of Publishing Activity Models

The evolution of publishing activity models has gained significant attention in recent years, particularly in response to the changing dynamics of the digital landscape and the impact of global events such as the COVID-19 pandemic. This literature review synthesizes key findings from various studies that explore developing innovative publishing models, the role of dynamic capabilities, and integrating new technologies in enhancing publishing activities.

The National Publishing Development Plan explains that the development of the publishing activity model has undergone several phases in line with technological developments, including:

- a) Traditional Publishing Phase, namely activities that include searching, selecting, compiling, and distributing printed materials, such as books, newspapers, magazines, and brochures. The publisher is solely responsible for deciding the book's content, structure, appearance, and marketing.
- b) The digital (electronic) publishing phase, namely publishing, aims to develop a connection with the development of the Internet. This affects product output and the sales value chain. Products that were previously in physical form have changed to digital form. In terms of marketing, this electronic publication model allows direct interaction between the publisher and the final consumer.
- c) In the self-publishing phase, the publisher facilitates writers to publish their work using print-on-demand. This helps novice writers publish and market their work without submitting it to major publishers. The existence of self-publishing provides efficiency in terms of production.

C. Transformation of Books and Print Media

Books are a window to the World and a way to gain unlimited knowledge. Besides increasing knowledge, novels, comics, and books that tell funny stories can be entertainment. Books are also a tool for knowing the history of world civilization. A survey has shown that reading books can reduce stress levels by up to 68% (higher than listening to music or playing games). Other research also states that reading books can stimulate the mind and can even prevent Alzheimer's disease and dementia.

The Government continues to encourage increased public interest in reading, one of which is by designating May 17 as National Book Day. However, digitalization has also disrupted books and interest in reading. The ease of getting information from social media, especially videos and short articles, makes people prefer using social media. Even though information from social media often does not match reality. Ibrahim, an anthropo-linguistics expert, stated that,

"Society is currently experiencing a big leap, namely the shift in reading behavior from reading without fingers to reading with the touch of a finger on a device. With this digital disruption, reading and writing literacy has decreased and instead given birth to new habits, namely oral habits, updating status, and speaking a lot with one's fingers without thinking first, which ultimately reduces interest in reading books. Netizens get much information from various sources but have not yet fully developed the habit of reading and writing."

Interest in reading in Indonesia is relatively low compared to other countries. Based on a survey conducted by the Program for International Student Assessment (PISA) released by the Organization for Economic Co-operation and Development (OECD) in 2019, it was stated that Indonesia was ranked 62nd out of 70 countries regarding literacy levels. On the other hand, 91.58% of Indonesians aged 10 years and over prefer watching shows in videos or films on television and other media. Likewise, UNESCO data states that the ratio of Indonesian people who like to read is only 0.01%, meaning that out of 1,000 Indonesians, only one person likes to read. This raises concerns that interest in reading is increasingly eroding.

With the increasingly rapid development and speed of the Internet, the circulation of entertainment, information, and knowledge in video format is increasingly massive. Books have also transformed into digital books or e-books, which are easy to carry anywhere, get, and distribute; download and share them without the hassle of visiting a bookstore or library. Likewise, for people who are lazy about reading, some e-books can produce sound or audiobooks via the voice-over feature (Ibrahim et al., 2022).

The rapid development of online media today is indeed a threat to print media. This makes it very easy for people to use devices or gadgets to access online media; of course, readers who faithfully read through print media will most likely switch to online media. This reality threatens the existence of the print media industry. However, print media still has a distinctive character; the news published is complete, clear, and detailed. In contrast, even though its distribution is faster and up to date, online media still requires tools connected with internet technology.

D. Printing and Publishing Industry during the Covid-19 Pandemic

The ongoing COVID-19 pandemic has forced many businesses to close down, especially those involved in the tourism and culinary business sectors, including the printing and publishing business. The Pandemic does not discriminate in hitting businesses, from family businesses to those worth billions. Discussions on Twitter social media stated that many publishers were struggling to increase online sales due to physical stores being forced to close for safety and security, resulting in book sales decreasing drastically, coupled with the ample supply of pirated books in PDF form. This has postponed many book launch dates, and most publishers prioritize publishing digital books first.

The results of a survey by the Indonesian Publishers Association of 100 Book Publishing Companies stated that during the period of social restrictions due to the COVID-19 pandemic, 58.2% of publishers experienced a decline in sales of more than 50%. Meanwhile, 29.6% of other publishers experienced a decline in sales of 31-50%, 8.2% experienced a decline of 10-30%, and only 4.1% saw their sales stable on regular days. Even though conventional book sales are increasingly sluggish, book sales through online platforms have the opportunity to increase. The chairman of the Central Indonesian Publishers Association (IKAPI) said that it is hoped that switching conventional book formats to digital will be an alternative to boost publishers' Business. However, the problem is that not all publishers have online bookstores or collaborate with other online stores/marketing sites. The next obstacle that needs to be watched out for is various forms of piracy, both in cyberspace and the physical market. The situation of sluggish book sales is not only experienced in Indonesia; several publishers and world book organizations are also experiencing it.

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The International Publishers Association (IPA), International Authors Forum (IAF), European and International Booksellers Federation (EIBF), International Federation of Reproductive Rights Organizations (IFRRO), and the Science, Technology and Medical Book Publishers Organization (STM) urge countries in the World to appreciate, support and

promote the importance of books. The Indonesian President Joko Widodo also expressed the invitation to read books via his Instagram account. It does not stop there; the Government has declared May 17 National Book Day with the hope that people's interest in reading and literacy will increase. In other countries, the Government provides stimulus funds for publishers. For example, in the Czech Republic, England, and Ireland, the Government buys e-books from publishers through the State Library to be read for free by the people or get tax relief.

Method

The method used in this research is a literature review, which collects data from trusted sources such as journals, books, and industry reports. A literature review is a systematic, explicit, and reproducible method for identifying, evaluating, and synthesizing research works and ideas that researchers and practitioners have produced. A literature review aims to analyze and synthesize existing knowledge related to the research topic to find free space for the research to be carried out. The form of review in this research is a Narrative Review. Narrative review is a research method used to examine and summarize existing literature on a particular topic without following strict systematic procedures, such as in a systematic review. This method presents narrative information, allowing the author to interpret and criticize findings from various literature sources. Narrative reviews are often used to provide an overview of a topic, find gaps in existing research, and identify areas for further research.

Result and Discussion

A. Impact of the Covid-19 Pandemic on the Printing and Publishing Industry

The COVID-19 pandemic has made many changes both socially and economically. Changes in habits by adopting new habits such as always maintaining a healthy and clean lifestyle, being more alert to the spread of the virus by not crowding with many people, reducing activities outside the home, and being selective in consuming goods and necessities that are considered unimportant. People, especially in urban areas, increasingly use the Internet for all their needs, especially to avoid physical touch or face-to-face meetings on a large scale and to communicate and search for entertainment/news (Koesanto et al., 2023).

The printing and publishing industry is one of the business sectors that has experienced a significant impact due to the COVID-19 pandemic. This Pandemic has affected many aspects of life, including how humans access information, and the World of print media is no exception. Turnover has decreased due to people not buying as many newspapers for various reasons: unnecessary spending efficiency, not leaving the house so they do not buy newspapers, and avoiding touching physical items to prevent virus transmission. Many publishers experienced declining print book sales due to closed bookstores, while demand for electronic books (e-books) increased. Several changes were made, including many publishers shifting their focus to digital publications, e-books, and home delivery services to stay connected with readers during the Pandemic. Not all publishers experienced a decline in sales. However, several publishers focused on genres such as culinary and health guidebooks and

experienced increased sales during the Pandemic. Several publishers also launched books on topics related to the COVID-19 pandemic, which later became best sellers.

On the other hand, the COVID-19 pandemic has also encouraged technological developments in the printing and publishing industry. The surviving printing and publishing companies invest in technology and software to produce high-quality work virtually and improve efficiency. Several companies are adopting 3D printing technology to produce products related to COVID-19, such as masks and face shields. Thus, the printing and publishing industry is still sustainable and able to adapt to difficult situations despite experiencing many challenges.

B. Business Strategy for the Publishing and Printing Industry amid the Covid-19 Pandemic

The current Pandemic is a moment for the printing and publishing industry to increase literacy. With the travel ban, people can read books in e-books and audiobooks. In other words, this Industry needs to intensify the conversion of printed books to online. Another way, if this Industry is ready with an e-commerce system, it can help sales a little in times of crisis like now. However, physical books are also needed, considering Indonesians are not used to reading e-books and audiobooks, and not all regions have internet access.

The next step that can be taken is to review the budget and maintain a healthy cash flow. Business finances are crucial and must be considered, especially in such conditions. Finances that are not managed well and carefully can risk the continuity of this Business. A budget is a description of the budget of a business that is important to carry out, both for evaluating work results and making plans and targets for the next period or year. In situations like this, Management must be wise in making decisions. Is there a budget that can be trimmed to cut expenses? Management must record every transaction properly and neatly to balance cash flow.

Maintaining good communication with customers is also an effective way to maintain the trust and loyalty of existing customers. Customer relationship is a strategy that can be carried out by providing excellent service; customers will feel privileged and do not rule out the possibility of repeat transactions; it is also a powerful weapon that is profitable because it is recommended to new customers without having to spend enormous costs in carrying out promotions.

In Business, the principle of prudence and sensitivity to conditions around you is the key to success in maintaining existence. The right business strategies and steps by Management will direct the direction of this Business in the future, whether it is necessary to diversify products, collaborate with other printers, or take over to strengthen existing businesses. Communication between various levels of Management needs to be maintained well and intimately so that the agreed Vision and Mission can be realized. The business world is full of uncertainty and shocks; naturally, everything planned with complete calculations can change drastically and be unpredictable (unpredictable), like the current conditions of the

COVID-19 Pandemic. Thus, support from all levels of Management is always needed so that the principle of check and balance operates as it should.

C. Future Prospects for the Printing and Publishing Industry Post the COVID-19 Pandemic

Domestic book publishers estimate that the National Book Industry can record a rebound or recover after being hit in the last two years by the COVID-19 pandemic. The performance of book publishers is projected to grow 10% -20% throughout 2022. The Community Activity Restrictions Program (PPKM) has begun to be relaxed, and schools and academic activities have begun to be implemented, making this Industry enthusiastic again, albeit slowly.

The printing and publishing industry still has bright prospects for the future. This Industry must adapt quickly to market changes and carry out appropriate innovations. Adaptation amidst advances in digital technology has meant that bookstore owners throughout Indonesia, from small to large scale, are starting to look at and rely on online book sales while maintaining physical outlets. The provision of these two sales concepts is to provide choice and convenience for consumers according to their respective preferences.

Developing book publishing in Indonesia faces various political dynamics and modernization in every era. Even though the book business has existed since colonial times, the revival of the book publishing business with a spirit of Nationalism was marked by the formation of the Indonesian Publishers Association (IKAPI) in the 1950s. This Industry has experienced ups and downs, starting from enjoying subsidies from the Government, even though these incentives were later removed and a period of suspension. There were also good times for the Presidential Instruction book procurement project, such as the period of press freedom, until the creative economy flourished, which encouraged this Industry to become enthusiastic again. Currently, the book industry must adapt to new opportunities and challenges in the era of digitalization. Despite being eroded by digitalization, the public still demands book printing. The proliferation of independent writers who wish to print their own written works has become a driving force for the printing industry to continue turning while being more adaptive in serving clients' needs.

Technology continues to develop, bringing publishing not limited to print media but also electronic forms that offer greater flexibility, including moving objects and sounds with high resolution. Publishers can no longer view themselves only as providers of physical products but of ideas and information. In this phase, the publisher's assets lie in the content, which adds value by providing it in different formats.

Conclusion

The COVID-19 pandemic has profoundly impacted the publishing industry, necessitating the development of new publishing activity models that can adapt to rapidly changing circumstances. The urgency for timely dissemination of research findings related to the Pandemic has led to significant alterations in publication processes, emphasizing the need for efficiency and innovation. This paper explores the evolution of publishing activity models

during the Pandemic, focusing on the acceleration of publication times, the role of open innovation, and the implications for knowledge sharing and collaboration.

The Printing and Publishing Industry has experienced a significant impact due to the COVID-19 Pandemic. Despite this, this Industry is still surviving and adapting to difficult situations. This Industry also continues to develop by adopting digital technology, product innovation, and e-commerce to provide quality products and services to consumers. Dynamic capability dimensions (adaptive absorptive and innovative capabilities) are the key to the Company's remaining relevance and competitiveness in a dynamic business environment. By developing these three dimensions, companies can be better prepared to face market challenges, innovate continuously, and create sustainable competitive advantages.

The Central Government needs to pay attention to making special policies by providing incentives, including eliminating taxes and various other conveniences so that the Printing Industry continues to exist. The Printing and Publishing Industry needs to intensify the conversion of printed books online. The printing and publishing industry must be ready with an e-commerce system to help sales in times of crisis, like now, by not abandoning physical book printing, considering that Indonesian people are not used to reading e-books and audiobooks. The Printing and Publishing Industry must be wise in making decisions. The printing and publishing industry must record every transaction properly and neatly to balance cash flow.

On the other hand, customer relationship is a strategy that can be implemented by the Printing and Publishing Industry by providing excellent service (pre and post-sales post-sales transactions). The principle of caution and sensitivity to conditions occurring around us is the key to success in maintaining existence. The right business strategy and steps taken by Management will direct this Business's future direction. Support from all levels of Management is always needed so that the principle of check and balance runs as it should.

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