

E-BOOK PUBLISHING IN ESTONIA: PUBLISHERS' PERCEPTIONS AND EXPERIENCES

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The article treats the development of commercial e-book publishing in Estonia from the publishers' perspective. The data is collected by surveys and interviews carried out among publishers in 2016. The results reveal that the main hindrances like the limited size of the Estonian-language e-book market, the readers' preference for printed books as well as non-profitability of e-books had remained the same compared to the study by Helen Reiser from 2011. The availability and affordability of different reading devices, on the contrary, had ceased to be a barrier to e-book production according to the publishers' perceptions. The publishers value their first experiences with e-books and wish to secure their image as e-book publishers, although they do not predict a rapid increase in the production. Perceptions of the e-book market drivers and barriers of the Estonian publishers are similar to the attitudes of publishers from other small-language markets like Sweden, Lithuania and Croatia.

KEYWORDS: *small e-book market, e-book publishing, Estonia, publishers.*

INTRODUCTION

E-books have been published in Estonia since the 1990s but the breakthrough in commercial e-book publishing started only in the end of 2010 when several book publishers started producing and selling their e-books in epub format. The initial phase of e-book publishing in Estonia has been explored in a couple of research works. Helen Reiser¹ studied the situation in the emerging e-book market in her Seminar paper (2011) and Arūnas Gudinaičius² compared the development of e-book publishing in the three Baltic countries

in his overview published in 2013. A new study was carried out in 2016³ in order to analyse the development of e-book publishing in Estonia in its first stage (2011–2016) from the publishers' perspective, to explore the publishers' experiences in e-book publishing, the hindrances and success they have encountered as well as their prognosis for the further development of e-book publishing in Estonia. The study focuses only on commercial e-book publishing and includes only publishers of priced Estonian and Russian-language e-books that were published in Estonia in 2011–2015.

The research questions for this study were:

- Who produced the e-books – the publishers themselves, conversion services and/or vendors?
- In what formats were the priced e-books published?
- Which publishers published the largest number of priced e-books?
- What were the main problems that the publishers faced when publishing and marketing e-books?
- What did the publishers consider as positive experiences of e-book publishing?
- What were the publishers' prognoses for the development of e-book publishing in the following years?

In order to establish the population of the firms who had published e-books in Estonia in 2011–2015 and the quantity of e-books published during the studied period, the study started with the identification of e-books on sale at the online bookstores at the beginning of 2016. This approach was used due to the lack of official statistics on e-books. Data on the experiences of e-book publishers was collected with semi-structured interviews and a survey.

LITERATURE REVIEW

Among the abundant research literature on e-books there are several studies that explore e-book publishing from publishers' viewpoint and establish their perceptions on the drivers and barriers of this process.

1 REISER, Helen. E-raamatute kirjastamise ja leviku hetkeseis Eestis: Probleemid ja võimalused: [unpublished Seminar paper]. Tallinn, 2011.

2 GUDINAVIČIUS, Arūnas. An overview of the digital publishing market in Baltic countries (Estonia, Latvia and Lithuania). *Libellarium*: journal for the research of writing, books, and cultural heritage institutions, 2013, 6 (1–2), p. 43–54

[interactive]. ISSN 1846-9213 [accessed 25 November 2017]. Access through Internet: <<http://www.libellarium.org/index.php/libellarium/article/view/183/187>>.

3 FELT, Kairi. *E-raamatute kirjastamine Eestis 2011–2015: arengud ja perspektiivid*: [unpublished Master thesis]. Tallinn, 2016.

In the report on the global trends of e-book market developments Rüdiger Wischenbart⁴ has divided the world e-book market into three zones – the English-language USA and Great Britain, European countries and emerging markets. Due to a small number of inhabitants in Estonia (1,318 000 in 2018)⁵ the developments here cannot be compared with the English-language markets or even with the big countries of Europe, but rather with the other small-language markets. This concept has been used in the e-book research project carried out in Sweden with the aim to study the process of e-book production, distribution and adoption in 2012–2016⁶. Here the small-language markets include the Nordic countries as well as Central and Eastern Europe.

All these countries as well as the Baltic states have progressed in e-publishing cautiously and slowly. According to the data collected by the publishers' associations of the Nordic countries on the year 2014, the e-book sales amounted to 5,2% of publishers' trade turnover in Denmark, 2% in Sweden, 1% in Norway, 0,6% in Finland and 0,25% in Iceland⁷.

In Estonia, no statistical data exists about the market share of e-books, but several estimates determine it around 1–2%⁸.

The results of the Swedish e-book project have been published in the collective monograph "Books on Screens. Players in the Swedish e-book Market" (2017). The monograph includes the special chapter "Publishers and the e-book" written by Elena Maceviciute and Thomas D. Wilson that examines the publishers' opinions and perceptions about e-book publishing in Sweden⁹. Publishers of e-books have been studied also in Lithuania¹⁰ and Croatia¹¹. A couple of articles by Wilson and Maceviciute compare the publishers' attitudes towards e-books in Sweden, Lithuania and Croatia¹².

The analysis of the abovementioned studies enables to identify several factors that stimulate the development of e-publishing:

- rapid development of sales platforms on the Web that simplifies and speeds up the acquisition of e-books¹³
- possibility to sell e-books directly through the publisher's Website¹⁴
- increase in self-publishing that makes publishing more convenient and profitable for authors¹⁵; self-publishing can help publishers to identify new authors¹⁶
- public financial support to e-book publishing¹⁷
- diversification of the devices suitable for e-book reading¹⁸
- certain groups of readers have become accustomed to buy and read of e-books¹⁹
- demand for a convenient portable book format among readers²⁰
- the need for e-books in education²¹.

Among the barriers of e-publishing were:

- high VAT on e-books that is considerably higher than for paper books and raises the prices of e-books²²

- 4 WISCHENBART, Rüdiger; CARRENHO, Carlo; CELAYA, Javier; KOVAČ, Miha. *Global eBook: A report on market trends and developments*. Vienna, 2015. 256 p. ISBN 9783903074026.
- 5 Eesti rahvaarv kasvas eelmisel aastal, 16. jaanuar 2018 [interactive]. *Statistika andmebaas*. Tallinn: Statistikaamet [accessed 20 January 2018]. Access through Internet: <<https://www.stat.ee/pressiteade-2018-007>>.
- 6 BERGSTRÖM, Annika et al. *Books on Screens: Players in the Swedish e-book market*. Göteborg, 2017, p. 15.
- 7 *Nordic book statistics report* [interactive]. Oslo, 2014. [accessed 15 January 2018]. Access through Internet: <<http://www.forleggerforeningen.no/wp-content/uploads/2015/12/Nordic-Book-Statistics-Report-2014.pdf>>.
- 8 LEHTSAAR-KARMA, Heli. E-raamatute turul valitsevad skeptikud ja optimistid. *Äripäev*, 7 December 2015 [interactive]. [accessed 25 September 2017]. Access through Internet: <<https://www.aripaev.ee/uudised/2015/12/07/skeptikud-ja-optimistid-e-raamatute-turul>>; KOGERMANN, Gertti. Eesti juhtivast raamatuarist globaalselt tunnustatud ettevõtteks. *Raamatupidamis- ja maksuinfoportaal*, 11.11.2016 [interactive]. [accessed 30 December 2017] Access through Internet: <<http://www.rmp.ee/ettevotlus/kasulik/eesti-juhtivast-raamatuarist-globaalselt-tunnustatud-ettevoteks-2016-11-11>>.
- 9 MACEVICIUTE, Elena; WILSON, Thomas D. Publishers and the e-book. In BERGSTRÖM, Annika, et al. *Books on Screens*. Göteborg, 2017, p. 93–116.
- 10 GUDINAVIČIUS, Arunas; ŠUMINAS, Andrius; MACEVICIUTE, Elena. E-book publishing in Lithuania: the publisher's perspective. *Information Research*, 2015, 20(2) [interactive]. ISSN 1368-1613 [accessed 20 November 2017]. Access through Internet: <<http://www.informationr.net/ir/20-2/paper672.html>>.
- 11 DESPOT, Ivona; JAKOPEC, Tomislav. The strategy for the development of electronic publishing in small markets. *Libellarium*, 2013, 4 (1–2), p. 81–90 [interactive]. ISSN 1846-9213 [accessed 25 November 2017]. Access through Internet: <<http://www.libellarium.org/index.php/libellarium/article/view/186>>; VELAGIĆ, Zoran; PEHAR, Franjo. An overview of the digital publishing market in Croatia. *Libellarium*, 2013, 4 (1–2), p. 55–64 [interactive]. [accessed 25 November 2017]. Access through Internet: <<http://www.libellarium.org/index.php/libellarium/article/view/184>>.
- 12 WILSON, Thomas D. E-books: the publishers' dilemma. *Libellarium*, 2015, 8 (1), p. 5–13 [interactive]. [accessed 2 April 2016]. Access through Internet: <<http://www.libellarium.org/index.php/libellarium/article/view/210>>; WILSON, Thomas D.; MACEVICIUTE, Elena. Publishers' responses to the e-book phenomenon: survey results from three 'small language' markets. *Information Research*, 2016, 21(4), paper 725 [interactive]. ISSN 1368-1613 [accessed 15 September 2017]. Access through Internet: <<http://InformationR.net/ir/21-4/paper725.html>>.
- 13 WISCHENBART, Rüdiger et al. *Global eBook*, p. 150–162.
- 14 WILSON, Thomas D. E-books: the publishers' dilemma, p. 8.
- 15 WISCHENBART, Rüdiger et al. *Global eBook*, p.170–173.
- 16 WILSON, Tom D. E-books: the publishers' dilemma, p. 9.
- 17 WISCHENBART, Rüdiger et al. *Global eBook*, p.112, 124.
- 18 Ibidem, p. 149, 160, 185.
- 19 Ibidem, p. 49.
- 20 GUDINAVIČIUS, Arunas; ŠUMINAS, Andrius; MACEVICIUTE, Elena. E-book publishing in Lithuania; MACEVICIUTE, Elena, WILSON, Thomas D. Publishers and the e-book, p. 96.
- 21 Ibidem.
- 22 TOMAŠEVIC, Nives; DESPOT, Ivona. Impact

- the market for e-books in the local languages is limited in the small countries²³
- in the small-language markets readers prefer to buy e-books in foreign languages, a large share of e-books sold in Europe are in English, bought and read by people who speak (also) English²⁴
- lack of export markets for books in small languages²⁵
- low demand in local e-books due to lack of convenient reading devices or lack of digital reading habit²⁶
- threat of piracy that prevents publishers from earning revenue²⁷
- wide selection of free e-books on Web platforms²⁸
- high cost of investment required for entering the e-book market makes it hard to break even in a small market²⁹
- lack of suitable business models for selling and lending of e-books to libraries³⁰.

Regardless of the barriers, the technological and social innovation pushes digital publishing. The study by PricewaterhouseCoopers encouraged publishers to enter digital publishing and to position themselves as e-book publishers despite the possibility of short-term losses³¹.

Publishing of e-books in Estonia has been tackled only in few research articles and student research works. One of the studies has been carried out by Arunas Gudiniavičius and treats the situation in the e-book market in the Baltic countries in autumn 2013. The author comes to the conclusion that the largest number of e-book titles (3200) was on sale in Estonia, but the prices of e-books were also the highest there³².

The situation in the Estonian e-book publishing has been characterised briefly in the study initiated by Rüdiger Wischenbart “Global eBook: A report on market trends and developments”³³. His data originates from the editor-in-chief of the publishing house Tānapāev Tauno Vahter, who compared publishing of printed and e-books also in his paper presented at the seminar “E-publishing: Production, Marketing, Distribution, Piracy” organised by the Lithuanian Publishers Association. According to his data there had been 1500 e-books on sale in Estonia in autumn 2012³⁴.

The emergence of the e-book market in Estonia has been analysed in an article by Aile Möldre that tackles e-book publishing and its results from the perspective of different agents of the process – publishers, authors and buyers³⁵.

E-book publishing in Estonia has been treated in several student research works. The Seminar paper “The Current Situation in E-book Publishing and Distribution in Estonia : Problems and Possibilities” by Helen Reiser (2011) provides valuable data on the attitudes of publishers towards e-book publish-

ing in Estonia. The data was collected by the survey of 27 publishers in March 2011. 19 respondents had already started to publish e-books and eight had not. The data reveals that among the main hindering factors publishers mentioned inexperience in digital copyright management (31,5%), technological issues (11%), lack of specialists (11%) and threat of piracy (11%). A quarter (25,5%) of respondents did not feel that publishing of e-books would be timely³⁶.

of EU's single European market on e-books and its implications regarding publishing industries in small countries. *Knygotyra*, 2014, 62, p. 60–72 [interactive]. [accessed 2 April 2016]. Access through Internet: <<http://www.journals.vu.lt/knygotyra/article/view/3609/2621>>; WISCHENBART, Rüdiger et al. *Global eBook*, p. 57–58; GUDINAVIČIUS, Arunas; ŠUMINAS, Andrius; MACEVICIUTE, Elena. E-book publishing in Lithuania.

23 TOMAŠEVIC, Nives; DESPOT, Ivona.

Impact of EU's single European market, p. 70; GUDINAVIČIUS, Arunas; ŠUMINAS, Andrius; MACEVICIUTE, Elena. E-book publishing in Lithuania; MACEVICIUTE, Elena, WILSON, Thomas D. Publishers and the e-book, p. 97.

24 KOVAC, Miha. Global English and publishing trends at the turn of the 20th century. *Knygotyra*, 2014, 62, p. 15; WISCHENBART, Rüdiger et al. *Global eBook*, p. 49.

25 GUDINAVIČIUS, Arunas; ŠUMINAS, Andrius; MACEVICIUTE, Elena. E-book publishing in Lithuania; MACEVICIUTE, Elena, WILSON, Thomas D. Publishers and the e-book, p. 97.

26 MACEVICIUTE, Elena; WALLIN, Birgitta; NILSSON, Kersti. Book selling and e-books in Sweden. *Libellarium*, 2015, 8 (1), 15-29 [interactive] [accessed 25 November 2017]. Access through Internet: <<http://www.libellarium.org/index.php/libellarium/article/view/211/283>>; GUDINAVIČIUS, Arunas; ŠUMINAS, Andrius; MACEVICIUTE, Elena. E-book publishing in Lithuania.

27 MACEVICIUTE, Elena; NILSSON, Kersti; WILSON, Tom; BERGSTRÖM, Annika; HÖGLUND, Lars. The case of the e-book in „small language“ culture: media technology and the

digital society. *Knygotyra*, 2014, 62, p. 76; MACEVICIUTE, Elena; WILSON, Thomas D. Publishers and the e-book, p. 97.

28 MACEVICIUTE, Elena; NILSSON, Kersti; WILSON, Tom; BERGSTRÖM, Annika; HÖGLUND, Lars. The case of the e-book in „small language“ culture, p. 76.

29 WISCHENBART, Rüdiger et al. *Global eBook*, p. 49.

30 MACEVICIUTE, Elena; WILSON, Thomas D. Publishers and the e-book, p. 97.

31 *Turning the Page: The Future of eBooks*. Price-waterhouseCoopers, 2010 [interactive]. [accessed 25 November 2017]. Access through Internet: <<https://www.pwc.co.uk/assets/pdf/ebooks-trends-and-developments.pdf>>.

32 GUDINAVIČIUS, Arunas. An overview of the digital publishing market in Baltic countries, p. 49.

33 WISCHENBART, Rüdiger et al. *Global eBook*, p. 90.

34 VAHTER, Tauno. *Books vs e-books in Estonia*. PowerPoint presentation of the paper given at the seminar at the Lithuanian Publishers Association, 30 November 2012 [interactive]. [accessed 25 November 2017]. Access through Internet: http://www.lla.lt/uploads/documents/Bookpublishing%20in%20Estonia_Vilnius%202012.pdf.

35 MÖLDRE, Aile. Estonian publishing sector at the turn of the 20th and 21st centuries: emergence of e-book market. *Knygotyra*, 2014, 62, p. 94–115.

36 REISER, Helen. E-raamatute kirjastamise ja leviku hetkeseis Eestis, p. 47.

The major drivers of e-book publishing were the desire to keep up with technological developments, to try the alternative ways of publishing and to stay in competition. Demand in e-books was mentioned by only three respondents³⁷.

The respondents of the survey evaluated the success of e-book sales as weak or average³⁸. Among the major hindrances the publishers presented the high price of e-book readers (23 respondents), limited number of Estonian-language e-book titles on the market (19 respondents) and book-buyers' preference of paper-books (18 respondents)³⁹.

The publishers argued that a wider selection of Estonian-language e-books as well as more intensive advertising could contribute to the increase in the sales of e-books in Estonia during the following years⁴⁰.

In order to explore the further developments in the publishing of e-books in Estonia a new survey among publishers was conducted in February 2016⁴¹.

Self-publishing is also gaining popularity among Estonian authors. Pille-Riin Larm interviewed 15 self-publishing writers about their experiences and opinions about e-book production. The interviews were published in the cultural weekly *Sirp* in 2017⁴².

For the interpretation of the results of the survey among publishers, it is also useful to compare them with consumers' opinions about e-books. There are but a couple of studies dedicated to the consumers' perspective in Estonia. Mai Põldaas carried out a study about the understandings of public library visitors as audience of one cultural institution. Fifteen semi-structured interviews were conducted for data collection with readers of different public libraries in the age of 14 – 84 years. The interview included questions about the use and attitude towards e-books. The interviewees preferred printed books, but considered e-books useful while traveling or reading in public transport. People in their middle-age were of the opinion that the availability of e-books in Estonian was limited. They thought that e-books were too expensive in Estonia⁴³.

The survey by Avelly Albo carried out among the students of the Rapla Veisroosi Secondary School in 2015 included 70 respondents in the age of 16–18 years and provides data about the attitudes and experiences of young people with paper and e-books⁴⁴. According to the results of the study 23% of the students had read e-books, the rest preferred paper books, admitting their special charm. All the students who had read e-books had read free e-books and only 13% had also read a priced e-book.

In order to establish the number of priced Estonian and Russian-language e-books issued in 2011–2015 and available in the sales network in February 2016, information was gathered from the websites of institutions who sell and lend e-books. The data on e-books was also collected from the department of information systems of the National Library of Estonia, Estonian national bibliography database and the Estonian ISBN Agency. The analysis of this data was carried out using the spreadsheet programme.

Data about publishers' experiences and perceptions of e-book publishing was collected through a questionnaire. The aim was to include publishers who had sufficient experiences in e-publishing and had issued more than just one or two priced e-books. Thus the sample of the survey included publishers who according to the data from the Estonian ISBN Agency had planned to produce at least 15 e-books in 2011–2015 as well as actual publishers of at least ten e-books who had not necessarily applied for the ISBN numbers. The latter were identified by studying the websites of e-bookstores Krisostomus, Rahva Raamat, Apollo and Raamat24. A list of other six publishers was added on the basis of Kairi Felt's work experiences in the National Library of Estonia. The final sample included 50 publishers.

With the aim of testing and adjusting the questions of the questionnaire, semi-structured interviews were carried out with three representatives of publishing houses. The interviewees were selected from the publishing houses who had submitted applications for at least fifty ISBNs for e-books in 2011–2015 and who thus had a wide experience in e-book publishing. All three interviews were carried out by mobile phone, recorded and transcribed.

The texts of the interviews were analysed thematically. Thematic analysis is a form of qualitative content analysis which enables identifying meanings and patterns or themes⁴⁵. The information obtained from the interviews was used

37 REISER, Helen. E-raamatute kirjastamise ja leviku hetkeseis Eestis, p. 48.

38 Ibidem, p. 54.

39 Ibidem, p. 55.

40 Ibidem, p. 57–58.

41 FELT, Kairi. *E-raamatute kirjastamine Eestis 2011–2015: arengud ja perspektiivid*: [unpublished Master thesis]. Tallinn, 2016.

42 LARM, Pille-Riin. Isekirjastaja happy end. *Sirp*, 2017, 22 September.

43 PÕLDAAS, Mai. Public libraries as a venue for cultural participation in the eyes of the visitors. *Media Transformations*, 2015, 11, p. 115–116.

44 ALBO, Avely. E-raamat kui lugemise lisavõimalus Rapla Vesiroosi gümnaasiumi 10.LR, 11.Ü ja 12b klassi õpilaste näitel. *Raplamaa Sõnumid*, 2016, 2 March.

45 EZZY, Douglas. *Qualitative Analysis: Practice and Innovation*. New South Wales, Australia, 2002. xvii, 190 p.; FLICK, Uwe. *Introducing*

to formulate the answer options for the questionnaire as well as in the analysis of the results of the study.

The questionnaire includes both open-ended and closed questions. The design of the questions was based on the data collected from semi-structured interviews and the questionnaire from the Seminar paper by Helen Reiser (2011). The choice of questions as well as different possible answers to closed questions were also based on the analysis of existing research on the topic, presented in the literature review. The questionnaire included 18 questions that were conditionally grouped into five blocks. Questions 1–7 dealt with the characteristics of the e-books issued by a publisher (number of titles, languages, formats) and the production process; questions 8–10 tackled with the problems in e-book publishing; question 11 identified the positive experiences in e-book publishing, questions 12–14 were aimed at establishing the future intentions of the respondent in e-book publishing whereas question 12 included two additional sub-questions depending on the previous answer. Questions 16–18 gathered data about the publisher.

The questionnaire was created as a Web survey in Google Forms. Before the survey was conducted, one e-book publisher tested the Web survey form that resulted in the rewording of two questions and a couple of answers to closed-ended questions. The survey was carried out on February 15–25, 2016 when 24 respondents completed the questionnaire. In order to increase the response rate the deadline was extended till the sixth of March. In all, 32 publishers (64% of the respondents) completed the questionnaire. Two responses were excluded from the analysis due to the fact that the respondents had issued only free e-books. Thus the analysis was conducted using 30 responses.

The data collected through survey responses were recorded in xsl format that enabled to analyse them with Microsoft Office Excel 2007. Answers to open-ended questions were analysed using thematic analysis. The results of the survey were compared with the data collected via semi-structured interviews.

RESULTS

The search in online bookstores established 2834 titles of priced e-books issued by Estonian publishers in 2011–2015 (2766 in the Estonian and 68 in the Russian language). According to the study by Helen Reiser, there had been 770 Estonian-language titles on sale in April 2011⁴⁶, thus their number had more than tripled in five years, increasing by about 400 titles annually. There were seven publishers among the respondents of the survey who had published

some e-books in Russian, two – in English and one in Norwegian. The latter firm also offers e-publishing services to other publishers. The proportion of Russian-language books is very small and locally oriented. The publishers who are active in Estonia produce mainly digital versions of works by local Russian-language authors or translations from Estonian. The publishers and online bookshops in Russia offer a wide selection of both free and priced e-books available to the readers in Estonia, thus there is no need in duplicating their production.

The collected data indicates that around 12–13% of all the Estonian-language titles were issued in parallel as e-books. Still, many publishing houses are even more active in releasing digital copies of their publications. Nearly a half of all respondents of the survey (14 publishers) produce e-books of all their new titles if the terms of the author's contract enable it. Nine publishers try to predict the future success of the e-book prior to making a decision about the publication. The successful sales of the paper book can also encourage the publisher to publish an e-book. However, in general the publishers wish to refrain from endangering the sales of paper books.

The e-books available in the online bookstores at the beginning of 2016 were published by 183 publishers. More than one hundred titles were issued by the publishing houses Ersen (512 titles), Varrak (414 titles), FUTU Print (207 titles), Tänapäev (179 titles) and Loomingu Raamatukogu (114 titles). The sixth largest publisher (103 titles) was the conversion service Eesti Digi-raamatute Keskus (Estonian Digital Book Centre) who has started its own publishing business. The majority of publishers (108 or 59%) had issued only one or two e-books. Thus the range of active digital publishers is rather limited. Varrak, Ersen and Tänapäev belong to the largest publishing houses in Estonia. Loomingu Raamatukogu issues the series of translated belles-lettres, offering also their e-versions. FUTU Print specialised in publishing of classical literature e-books (closed in 2017).

The data about electronic publishers can be studied against the background of the general number of publishers in Estonia. According to the data from the National Library of Estonia, 875 publishers issued publications in 2016. The majority of them (82%) were various firms, societies, institutions, persons, etc., for whom publishing is an ancillary activity. Eighty publishers issued more than six titles⁴⁷ and they can be included among the firms who are dedicated to

Research Methodology: A Beginner's Guide to Doing a Research Project. London, 2011. 296 p.

⁴⁶ REISER, Helen. E-raamatute kirjastamise ja leviku hetkeseis Eestis, p. 40.

⁴⁷ *Kirjastajate arv ja osakaal raamatunimetuste*

järgi 2016. aastal [interactive]. Tallinn, Eesti Rahvusraamatukogu [accessed 27 November 2017]. Access through Internet: <<http://www.nlib.ee/trukitoodangu-statistika/>>.

publishing. According to expert estimations the number of permanently operating publishing houses is around 50–60 firms⁴⁸, the majority of whom produce at least some e-books.

All but one respondent publish their e-books in epub format. Nine publishers published e-books in epub and pdf format; two had produced some books in mobi format. One respondent published only in pdf and html formats.

To the question about the producers of e-books more than a half of the respondents (16 publishers, 53%) answered that they were outsourcing their e-book production. More than a quarter (8 respondents, 27%) produced the e-books in-house and a fifth (6 respondents, 20%) use both forms of production (Figure 1). Interviewee 1 explained that earlier the firm outsourced the produc-

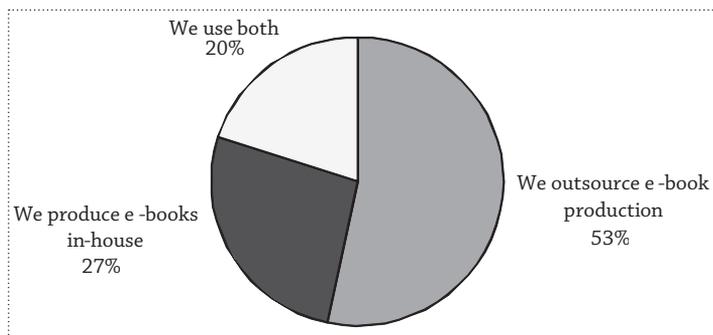


FIGURE 1. Publishers about the production of e-books

tion to conversion services, but now makes the epub files in-house. Gradually publishers obtain experiences in producing e-books that enables them to reduce production costs.

Less than a half of all respondents (12 respondents, 40%) of the survey perceived that their expectations about e-book publishing had been met, for 11 respondents (37%) the process had not happened as expected and seven respondents (23%) could not tell precisely. The respondents who were disappointed in e-book publishing considered the lack of habit to read e-books the major barrier to success. All the other factors of failure were regarded as significant by only a limited number of respondents (Table 1).

Thus, part of the publishers had predicted the development of their digital publishing activities rather realistically, but others obviously overestimated the speed of e-book market growth. The publishers who were unable to specify their perceptions probably treat e-books as a marginal source of revenue and represent the wait-and-see attitude towards the e-book market.

TABLE 1. Reasons why e-book publishing did not meet the expectations of publishers

Why publishing of e-books did not meet the expectations of publishers?	Number of publishers (n = 30)
Buyers lack the habit to read e-books	11
E-books are too expensive	4
Buyers lack technological skills	3
Buyers lack necessary equipment	2
E-book readers are too expensive	2

Non-profitability of e-books was identified as the greatest problem of e-book publishing by the majority of survey respondents (18 respondents, 60%). The small revenue proceeds from the limited number of buyers as preference is still given to paper books. However, in case of the biggest publishers revenues from e-books can be considerable. CEO of the publishing house Varrak Priit Maide has argued that e-books account for 3% of their turnover. The proportion seems small but if the turnover exceeds 3 million Euros and the revenues from e-books are about 100 000 Euros, it is worthwhile to publish them⁴⁹.

High VAT on e-books was pointed out by 14 respondents (47%) and issues of copyright by 13 respondents (43%). The publishers mentioned that several Estonian authors did not wish to publish their works as e-books. When the sales are small, authors' royalties remain modest that decreases their interest in e-publishing. Indifference towards e-books is also characteristic of the Estonian writers who publish their books themselves – the interviews carried out by Pille-Riin Larm with 15 self-publishing authors demonstrated that only three of them had experimented with publishing of e-books but considered this to be economic nonsense⁵⁰.

The contract terms with foreign authors that forbid simultaneous publication of paper and e-books were mentioned by eight respondents. Other issues were considered less problematic and three respondents had no problems in e-book publishing (Figure 2).

The e-book market did not develop as fast as it had been expected. The interviewees pointed out that they had very low expectations about the possible revenues as purchases of e-books were only just beginning to take off. A comment by interviewee 1 argued that due to active media coverage interest in e-books seems to be larger than it is in real life where e-book is a niche product.

48 LARM, Pille-Riin. Varraku kübaratrikk. *Sirp*, 2016, 4 March.

valitsevad skeptikud ja optimistid.

49 LEHTSAAR-KAARMA, Heli. E-raamatute turul

50 LARM, Pille-Riin. Isekirjastaja happy end. *Sirp*, 2017, 22 September.

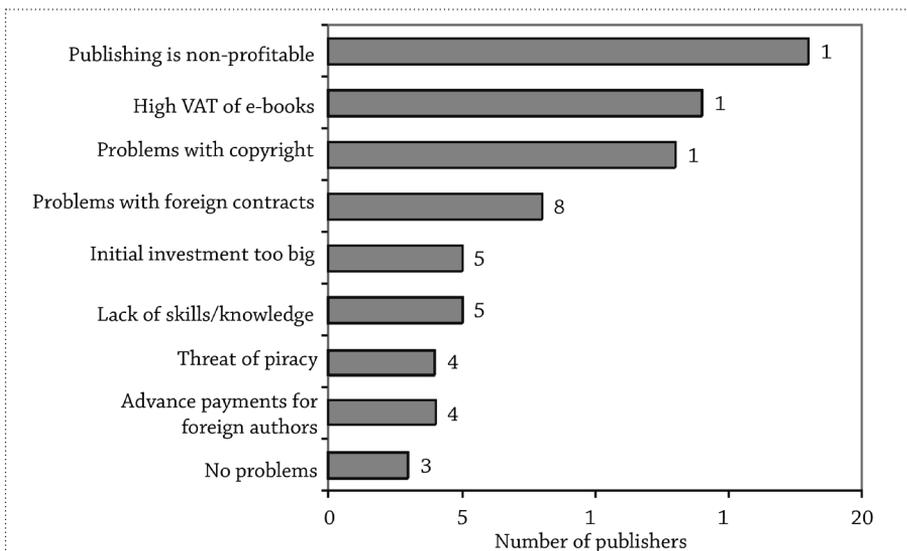


FIGURE 2. Problems connected with e-book publishing

The majority of respondents (23 respondents, 77%) regarded the limited market of Estonian-language e-books as the greatest barrier to large sales. Readers' preference of paper-books and free e-books were also perceived as major problems inhibiting the sales of e-books (correspondingly 11 (36%) and 8 respondents (27%)). Lack of a suitable and functioning model for selling e-books to libraries was mentioned by seven respondents (23%). Other factors were mentioned by only a limited number of respondents (Figure 3).

Interviewee 1 commented on the rapid rise in prices of e-books during the last couple of years. A lot of e-books can be purchased for 17–18 Euros. The bestselling e-books are often connected to various promotion campaigns. For example, in order to make the client a special offer, the importer of e-readers or tablets buys a certain amount of licences – if one buys a tablet, it comes with, for example, five e-books. These kinds of campaigns lead to distorted sales figures. The confusing effect of special campaigns was mentioned also by two respondents of the survey. Interviewee 1 also described the experiences with the subscription service Elisa Raamat as problematic as the revenue remained very low and after a half-year trial their firm stopped participating in the service.

Among the positive experiences of digital publishing the publishers emphasized the acquisition of new knowledge and skills (24 respondents, 80%). They were willing to position the firm on e-book market and raise the awareness of

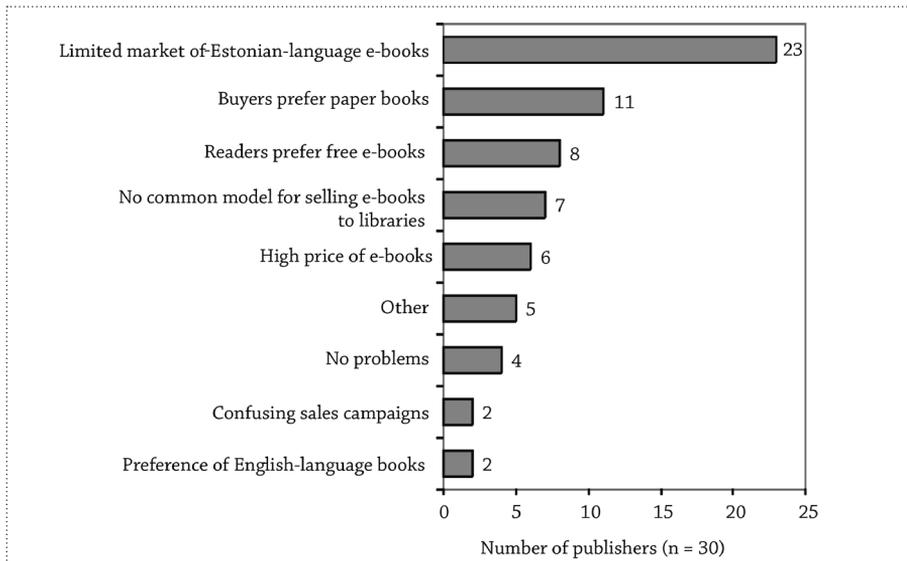


FIGURE 3. Problems in the sales of e-books

readers, acting in anticipation of the possible market growth. Only four respondents had been able to earn the expected revenue (Table 2).

TABLE 2. Positive experiences in publishing of e-books

What did the publishers consider to be positive experiences of e-book publishing?	Number of publishers (n = 30)
We have obtained new knowledge and skills	24
We have let the readers know that we publish e-books	13
We have positioned ourselves as e-book publishers	9
We have earned the expected revenue	4
Cannot say	4

Interviewee 3 commented: “... I think that some generation might turn to e-books, especially the sci-fi readers... they might buy more e-books and thus we can reach them with these books...may be they do not purchase paper books but do purchase e-books”.

The majority (26 respondents, 87%) of publishers planned to continue e-book publishing in the following three years. Ten of them were willing to increase digital publishing, 16 respondents intended to keep it on the same level.

While predicting the development of e-book publishing in Estonia during the following 3–5 years, 21 respondents (70%) believed in its further growth, 8 were of the opinion that it will remain on the previous level and one predicted the decrease (Figure 4).

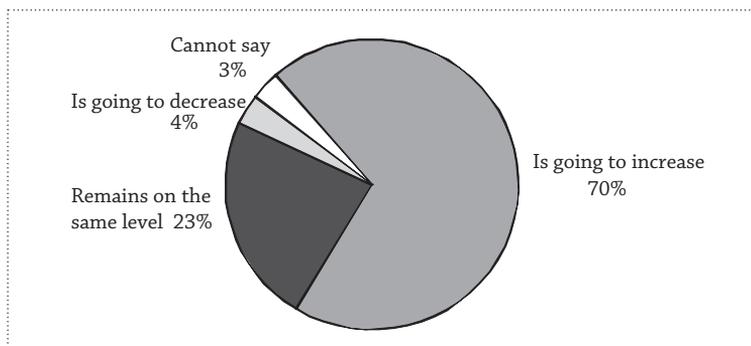


FIGURE 4. Predictions about the development of e-book publishing in Estonia

The respondents link the possible e-book market growth with the development of digital reading habit (23 respondents, 77%) and buyers' growing interest in e-books (15 respondents). The development of subscription services (12 respondents) as well as easier operation on the sales platforms (12 respondents) were also considered among driving forces of e-book sales. Many publishers

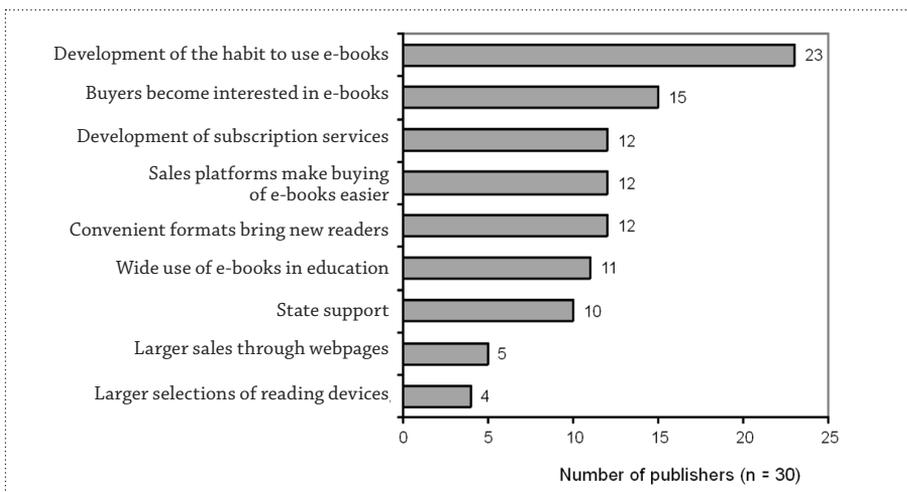


FIGURE 5. The drivers of the possible increase in the sales of e-books

expect support from the state (10 respondents) that presumes the decrease of VAT on e-books and help with the regulations of sales to libraries. Indirectly the state support also includes wider use of e-books in education (Figure 5).

The general attitude towards the future is expressed in a comment by one of the respondents: „*e-publishing ... today it is rather a hobby, but in the future it becomes a growing trend also in Estonia*“.

DISCUSSION AND CONCLUSIONS

The results of the study reported considerable increase in the e-book title production in Estonia during the past five years. The survey data reveals that conversion services played an important role in digital publishing – the majority of publishers use their services. E-books are sold mainly on different online bookstores, sales and lending platforms. Selling e-books from publishers' Websites has become marginal. Here the Estonian results are similar to these from Croatia and Lithuania where 27% of publishers sell e-books directly, whereas the proportion in Sweden was 50%⁵¹. There the increase in sales was seen as the main benefit of selling directly from Websites. In Estonia, on the contrary, the publishers admit that only a small proportion of e-books are sold directly that diminishes the popularity of this channel. The reason for this difference might be the successful development of the Estonian online bookstores by the large book vendors Apollo, Rahva Raamat and Krisostomus that has been mentioned as a driver of e-book publishing by Wischenbart in the report from 2015⁵².

Discussing the development of subscription services, Wischenbart argues that due to the novelty of this phenomenon, the real assessment of their impact is premature⁵³. Despite the negative comment by one of the interviewees, the respondents of the survey seem to believe in the incentive effect of the subscription services as well as the improvement of sales platforms on the success of e-books. There are two subscription services operating in Estonia in 2018: the local application Elisa Raamat and international platform Fabula. Elisa Raamat, operating from 2014 gained popularity quite speedily – the application was downloaded nearly 30 000 times by the beginning of 2016⁵⁴.

The Seminar work by Reiser demonstrated that high prices of reading devices, small number of Estonian-language titles available in sales platforms and

51 WILSON, Tom D. E-books: the publishers' dilemma, p. 8.

52 WISCHENBART, Rüdiger et al. *Global eBook*, p. 90.

53 Ibidem, p. 179.

54 Elisa Raamatul on ligi 30 000 kasutajat. *Eesti Päevaleht*, 2016, 20 January.

lack of interest among buyers were among the most important hindrances of e-book distribution in Estonia. Five years later the choice of devices had expanded and the prices had fallen. Thus, publishers consider the accessibility and price of reading devices as a minor problem. This is similar to the findings of the survey among publishers in Sweden who did not regard the cost of reading equipment as a noteworthy barrier to e-book publishing⁵⁵. This conclusion is different from the results of surveys in Lithuania where publishers considered the price of e-readers an important hindrance⁵⁶. The Estonian publishers are of the opinion that potential readers of e-books have sufficient knowledge, skills and devices for reading them.

Several studies regard the limited size of a small-language e-book market as the most important barrier to e-book publishing and sales⁵⁷. The Estonian publishers also consider the small number of buyers as the most important hindrance to e-book sales resulting in the non-profitability of publishing. Although potential readers have the necessary devices and skills, they lack the habit of digital reading. Similarly, the surveys among the publishers in Sweden and Lithuania report the readers' preference for printed books was seen as one of the biggest barriers of e-book production⁵⁸.

The qualitative study by Mai Põldaas revealed that in case the interviewees had to choose between a printed or e-book, all preferred printed books. However, many of them admitted that for guidebooks, dictionaries, learning materials and the like, the electronic format is justified and suitable⁵⁹. Preference of paper books could decrease over time, but on the other hand, it would not necessarily lead to notable increase in the e-book sales as reading of free e-books will probably also remain popular. The study carried out by Avely Albo among the students of the Rapla Vesiroosi Secondary School in 2015 demonstrated that students had read mainly free e-books and only 13% had also read a priced e-book. It is also noteworthy that 54% of the respondents believed in the growing popularity of e-books in the future, pointing out their convenience⁶⁰. According to the co-founder of Kobo Inc Michael Serbinis, the development of digital reading habit takes at least two decades and the use of e-books will not become dominant before the end of the 2020s⁶¹.

The studies by Tomašević and Despot⁶² as well as the report about global e-book market trends (2015)⁶³ drew attention to the high VAT of e-books in the European Union member states that increase their prices. The Estonian publishers share this opinion and have raised the issue in the media several times. The solution of this problem requires the change of EU policy that treats e-book

as a service rather than a product. All measures that contribute to lower prices of e-books would promote e-book distribution.

According to the study by Reiser, inexperience in digital rights management and threat of piracy were mentioned as barriers to e-book publishing by Estonian publishers in 2011⁶⁴. By 2016, copyright issues remained an obstacle to e-book publishing whereas the rules of contracts with foreign authors had become a special concern. Obtaining copyright for e-publishing was seen as problematic also by Lithuanian publishers⁶⁵. Piracy is perceived as a minor problem in Estonia and the respondents of the survey obviously trust the readers and their knowledge about copyright. In Sweden, publishers did not appreciate the technology of copyright protection and feared the negative impact of piracy on their income⁶⁶.

The lack of suitable business models for the sales and lending of e-books to libraries belonged to the inhibiting factors of the e-book distribution both in Estonia and in Sweden⁶⁷. The Estonian publishers also expect the state to support wider use of e-books in education. Similar expectations were emphasized by the Lithuanian and Swedish publishers⁶⁸.

While many countries have experienced a surge of self-publishing boosted by various self-publishing platforms as described by Wischenbart⁶⁹, the

55 WILSON, Thomas D.; MACEVICIUTE, Elena. Publishers' responses to the e-book phenomenon, p. 97.

56 GUDINAVIČIUS, Arunas; ŠUMINAS, Andrius; MACEVICIUTE, Elena. E-book publishing in Lithuania.

57 TOMAŠEVIC, Nives; DESPOT, Ivona. Impact of EU's single European market; GUDINAVIČIUS, Arunas; ŠUMINAS, Andrius; MACEVICIUTE, Elena. E-book publishing in Lithuania; MACEVICIUTE, Elena; WILSON, Thomas D. Publishers and the e-book.

58 WILSON, Thomas D.; MACEVICIUTE, Elena. Publishers' responses to the e-book phenomenon, p. 97; GUDINAVIČIUS, Arunas; ŠUMINAS, Andrius; MACEVICIUTE, Elena. E-book publishing in Lithuania.

59 PÖLDAAS, Mai. Public libraries as a venue for cultural participation, p. 115-116.

60 ALBO, Avely. E-raamat kui lugemise lisavõimalus.

61 WISCHENBART, Rüdiger et al. *Global eBook*, p. 36.

62 TOMAŠEVIC, Nives; Despot, Ivona. Impact of

EU's single European market on e-books, p. 63.

63 WISCHENBART, Rüdiger et al. *Global eBook*, p. 184.

64 REISER, Helen. E-raamatute kirjastamise ja leviku hetkeseis Eestis, p. 51.

65 GUDINAVIČIUS, Arunas; ŠUMINAS, Andrius; MACEVICIUTE, Elena. E-book publishing in Lithuania.

66 WILSON, Thomas D.; MACEVICIUTE, Elena. Publishers' responses to the e-book phenomenon, p. 96-97; MACEVICIUTE, Elena; NILSSON, Kersti; WILSON, Tom; BERGSTRÖM, Annika; HÖGLUND, Lars. The case of the e-book in „small language“ culture, p. 76.

67 MACEVICIUTE, Elena; WILSON, Thomas D. Publishers and the e-book, p. 97.

68 GUDINAVIČIUS, Arunas; ŠUMINAS, Andrius; MACEVICIUTE, Elena. E-book publishing in Lithuania...; WILSON, Thomas D.; MACEVICIUTE, Elena. Publishers' responses to the e-book phenomenon, p. 97.

69 WISCHENBART, Rüdiger et al. *Global eBook*, p. 170-173.

phenomenon is marginal in Estonia. There are no Estonian-language self-publishing platforms and the international services are mainly used by institutions, schools, firms, etc. Lack of interest in publishing of e-books among established self-publishing authors was established by Pille-Riin Larm⁷⁰.

The positive experiences obtained by publishers in e-book publishing can be treated as stimulating factors. The present study established that publishers valued the new knowledge and skills as well as positioning themselves on the market as e-book publishers. Publishing of e-books is perceived as preparation for the future, although the publishers do not believe that e-books replace paper books in the following years. In this aspect the Estonian publishers act in accordance with the recommendations by PricewaterhouseCoopers urging publishers to adapt to the changes and develop a viable digital business model⁷¹.

The results of the study demonstrated that the Estonian publishers hope to increase the sales of e-books through the changes in the habits of readership. The Estonian publishers are cautiously optimistic about the future of e-books and plan to continue to publish them. The result is similar to that by Reiser in 2011 when the majority of publishers intended to increase e-book publishing⁷². The findings of the present study suggest that e-books have not become the source of revenue for most of the Estonian publishers. They plan to keep their e-book production on the previous level and not to increase it considerably. However, the largest publishers strive to create a sufficient e-book selection and offer the buyers a choice between paper and e-versions.

The prognosis about the rapid increase in the number of Estonian-language e-book titles presented by Reiser has come true. The publishers are still of the opinion that continuous expansion of the selection of e-books would contribute to wider reading and sales.

In general, the development of e-book publishing in Estonia has many similarities with the other small countries. The markets are limited and there are few buyers of national-language books outside the country. Like in Sweden, Lithuania and elsewhere, the book publishers are primarily oriented on paper books and have in mind the readers' preference for printed texts. The low demand causes non-profitability of e-books. At the same time the range of e-books offered on the market is constantly increasing, providing the buyers and readers with the widening selection. The readers obtain the possibility to choose whether to purchase the printed or e-book or even both. The Estonian writer Mihkel Mutt has admitted to possess both versions of the most important books⁷³. This is the best option for readers that gradually leads to wider demand and revenues.

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SKAITMENINIŲ KNYGŲ LEIDYBA ESTIJOJE: LEIDĖJŲ POŽIŪRIS
IR PATIRTIS
Aile Möldre, Kairi Felt

Santrauka

Straipsnyje nagrinėjama komercinės skaitmeninių knygų leidybos plėtra Estijoje leidėjų požiūriu. Šio tyrimo tikslas – išanalizuoti elektroninių knygų leidybos Estijoje kūrimo pirmąjį etapą (2011–2016 m.) leidėjų požiūriu, ištirti leidėjų patirtį, kliūtis ir sėkmę elektroninių knygų leidybos srityje, taip pat pateikti jų mintis dėl tolesnės skaitmeninių knygų leidybos Estijoje plėtros. Tyrime dėmesys sutelkiamas tik į komercinę skaitmeninių knygų leidybą ir apima tik estų ir rusų kalbomis 2011–2015 m. Estijoje išleistų elektroninių knygų, už kurias buvo nustatytos kainos, leidėjus. Atlikę paiešką internetiniuose knygynuose, suradome 2 834 Estijos leidėjų išleistų skaitmeninių knygų pavadinimus 2011–2015 m. (2 766 estų ir 68 rusų kalba). Tyrimo metu nustatyti 183 skaitmeninių knygų leidėjai, dauguma jų išleido vieno ar dviejų pavadinimų knygas. Surinkti duomenys rodo, kad maždaug 12–13 % visų estų kalba išleistų knygų buvo tuo pačiu metu išleistos kaip skaitmeninės knygos. Remiantis duomenimis apie leidėjų požiūrį, kurie buvo renkami 2011 m. ir 2016 m. leidėjų apklausų ir interviu metu, galima stebėti elgesio, susijusio su skaitmeninių knygų leidyba, pokyčius pirmojo etapo metu. Į tyrimą buvo įtraukti leidėjai, kurie, remiantis Estijos ISBN agentūros duomenimis, planavo 2011–2015 m. išleisti ne mažiau kaip 15 elektroninių knygų, taip pat ne mažiau kaip dešimties skaitmeninių knygų leidėjai, kurie nebūtinai kreipėsi dėl ISBN kodo. Šiuos kriterijus atitiko 50 leidėjų, 30 iš jų atsakė į klausimą. Pusiaus struktūrizuoti pokalbiai vyko su trimis leidyklų atstovais. Pokalbio tekstai buvo analizuojami tematiškai.

Mažiau nei pusė respondentų (12 respondentų, 40 %) nurodė, kad jų lūkesčiai dėl skaitmeninių knygų leidybos pasiteisino. Respondentai, kurie buvo nusivylę skaitmeninių knygų leidyba, manė, kad pagrindinė kliūtis sėkmei – įpročio skaityti skaitmenines knygas stoka. Didžioji respondentų dalis (18 respondentų, 60 %) nepelningą leidybą nurodė kaip didžiausią skaitmeninių knygų leidybos problemą. Didelių skaitmeninėms knygoms taikomą PVM nurodė 14 respondentų (47 %); su autorių teisėmis susijusius klausimus išsakė 13 respondentų (43 %). Dauguma respondentų (23, arba 77 %) didžiausia kliūtimi dideliems pardavimams nurodė ri-

botą skaitmeninių knygų rinką estų kalba. Skaitytojų teikiama pirmenybė spausdintoms knygoms ir nemokamoms skaitmeninėms knygoms taip pat buvo nurodyta kaip pagrindinė problema, trukdanti parduoti skaitmenines knygas – atitinkamai 11 (36 %) ir 8 respondentai (27 %).

Pagrindinės kliūtys, tokios kaip ribotas Estijos skaitmeninių knygų rinkos dydis, skaitytojų teikiama pirmenybė spausdintoms knygoms ir skaitmeninių knygų nepelningumas 2011 m. ir 2016 m., liko tokios pačios. Kita vertus, leidėjų požiūriu, įvairių skaitymo prietaisų prieinamumas ir įperkamumas nustojo būti kliūtimi skaitmeninių knygų gamybai.

Kaip teigiamą skaitmeninės leidybos patirtį (24 respondentai, 80 %) paminėjo naujų žinių ir įgūdžių įgijimą. Leidėjai vertina pirmąją skaitmeninių knygų leidybos patirtį ir siekia įtvirtinti savo įvaizdį kaip skaitmeninių knygų leidėjų, nors ir nesitiki greito šių knygų gamybos augimo. Apskritai, leidėjų nuomonės apie skaitmeninių knygų rinkos skatinamuosius veiksmus ir kliūtis Estijoje buvo panašios į leidėjų iš kitų mažų kalbų rinkų, tokių kaip Švedija ir Lietuva, išsakytą požiūrį, nors kai kuriais klausimais, pavyzdžiui, požiūriu į piratavimą, skaitymo prietaisų kainas ir prieinamumą, skaitmeninių knygų pardavimą iš leidėjų svetainių, skirtingų šalių leidėjų nuomonės skiriasi.

REIKŠMINIAI ŽODŽIAI: maža knygų rinką, skaitmeninių knygų leidyba, Estija, leidėjai.

Įteikta 2018 m. vasario 12 d.

Priimta 2018 m. kovo 15 d.