

# BOOKS ON SCREENS

PLAYERS IN THE SWEDISH  
E-BOOK MARKET

Annika Bergström,  
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**NORDICOM**

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# Preface

This book is a summary of our research on e-books focusing on Sweden as the main case, during a period when an increasing number of early adopters started to use e-books. We wanted to follow the changes in the system of e-books by studying all the major actors during the project period, 2012 to 2016.

Many changes have taken place in the book market during these few years and it is still a field of ongoing change. The introduction of e-books is a rather new route for the book to reach its readers, but it is not the only, nor the last digital solution to the problem of dissemination and access.

Through a grant from the Swedish Science Research Council (Vetenskapsrådet) we had the opportunity to work together as a research group, with different backgrounds, coming from two universities, to study the major agents involved in the production, dissemination and use of e-books. This has been very stimulating collaboration for all of us. The project has also included collaboration with other European researchers in publishing and book studies as well as reading research.

Several results have been published previously in articles and conference presentations, as well as at the Swedish book fair, *Bok och bibliotek*, in Gothenburg and in other contexts. However, we also wanted to summarise the research in a book.

This book is a collaborative product to which all members in the project group contributed. However, the chapters have one or two main researchers and main authors. Thus, the lead author for Chapter 1 was Lars Höglund; Chapter 2, Tom Wilson and Annika Bergström; Chapter 3, Tom Wilson, Annika Bergström and Skans Kersti Nilsson; Chapter 4, Tom Wilson; Chapter 5, Elena Maceviciute and Skans Kersti Nilsson; Chapter 6, Skans Kersti Nilsson; Chapter 7, Elena Maceviciute and Tom Wilson; Chapters 8 and 9, Birgitta Wallin and Elena Maceviciute; Chapter 10, Elena Maceviciute and Tom Wilson; Chapter 11, Annika Bergström, Lars Höglund and Skans Kersti Nilsson.

Gothenburg and Borås September 2017

*The authors*



## Chapter 1

# Introduction

After influencing many other media such as newspapers, television and films, digitisation has reached the book, which, in its printed form, has been unchallenged for almost five centuries. The e-book has, after a rather short period, become established in most countries.

The e-book is now an option for authors, publishers, booksellers, libraries, and readers. As an innovation, it may affect all of these actors. But that is not all: several areas are affected by a growing e-book market including education, culture, media and business and new kinds of actors are entering the book market. While the printed book remains the main model, the e-book offers new possibilities for dissemination, eliminates the problem of unequal access due to distance and allows for reading and information acquisition when the reader is on the move. The e-book has also entered the political scene as an object for policy and legislation as well as a tool supporting other goals, as when former US president, Barack Obama, began using e-books in a programme to reduce the digital divide between information rich and information poor (The White House, 2015).

While the e-book was still expanding and in a rather early stage of diffusion, we started a project to follow what happens and how its development affects the actors in a small-language area like Sweden, which is our main case. In English-speaking countries, the e-book was already in use by a significant part of the population, but in many European countries it was still in the beginning of a diffusion process. Thus, it seemed an interesting opportunity to study the further development more closely. We wanted to study not just the dissemination process, but to investigate all the actors involved: from authors to readers, including publishers, book-sellers, and libraries. How do they think about and react to the e-book? To what extent will they support change or prefer the existing situation? Will their different interests result in a new situation for the book market only slowly and partially or through more dramatic changes?

The e-book is now well-known and used by a significant user group, almost a fifth of the population in Sweden. In this country, as well as in most European countries, e-book dissemination lags behind the major English-speaking countries when we look at its share of the book market or its share of all book readers in the population.

If we look back in history it is obvious that the book production and the book industry has been affected by technological change many times and from the very beginning with Gutenberg's (re)invention of movable type. Subsequently, the hand

press was replaced by mechanical presses, hand assembly of pages was replaced by the Linotype and Monotype machines and these, in their turn, were later replaced by computer typesetting. The industry, therefore, has a long history of coping with, and adapting to, technological change.

Other parts of the total system of book production, dissemination and use have been less exposed to technological change: a sixteenth century Stockholm bookseller would immediately recognise the modern bookshop, although he would probably be quite overwhelmed by the volume and diversity of material. Libraries, too, although technology has played a major part in their management, remain recognisably libraries, although librarians of even the early twentieth century would find the number of desktop computers available and the notion of access to the Internet quite astonishing.

Also, the majority of authors and readers have until recently been less exposed to technological change: even now, at least some authors prefer to write their works by hand, rather than use even a typewriter, although the vast majority now use a word-processor. Readers have also had continuity in the artefact of the book, which, regardless of how it has been produced, has changed little since the invention of the codex form.

As for many other media, digitisation of the book may also involve structural changes in the business as a whole. In 2010 the Amazon e-book reader, Kindle, became the Christmas gift of the year in the USA, and since then the growth of e-books has been dramatic. Now, only six years later e-books are available in most countries and languages and the e-book market continues to grow as a global phenomenon. However, in many small-language areas, book production, whether in print or in digital form, is difficult, mainly due to the limited size of the market. It is also a fact that technological change implies new habits and change among human users. This often turns out to be more confused and a slower process compared to technology development as such.

As the e-book has arrived it is reasonable to expect that it will have an impact on the traditional roles and functions of each and every actor in the system of book production, distribution and use. How, and to what extent, this is happening seemed very interesting to study further. When looking into this we found that there was little research available and the existing reports mainly addressed the situation in the English-language market. Thus, we planned a research project with a Swedish focus to study the e-book and involved actors and to make part of the output from the project available as an e-book.

## The e-book project

This book is a result of a long-term collaboration between two universities. The research team is composed of representatives from the University of Gothenburg and the University of Borås. The team includes researchers with different backgrounds and from different disciplines, including library and information science, literature, media, sociology and communication studies. Our focus is on Sweden as the main



case, but other countries are considered and compared in the discussions. The project has concentrated on the process of e-book production distribution and adoption in Sweden. This is done so in the context of the digitisation of knowledge and cultural production in Sweden.

The aim of the project was to follow the e-book during the early stages of its introduction from 2012 to 2016. We have investigated its impact in the book publishing, distribution and use system in Sweden, as an example of the changing book culture of Swedish digital society. The changes in society and in the nature of the book as such, or in any part of the system, are expected to bring a change in the system overall.

What is the impact of the e-book for society and how are different actors meeting the changed situation as e-books become more and more available? How are authors, publishers, libraries, booksellers and users changing their behaviour and to what extent will the e-book market grow and eventually affect reading practices? With questions like these we have approached all major actors from authors to readers gathering data about their plans, attitudes, opinions and behaviour during a few years of the early diffusion process.

The project explores:

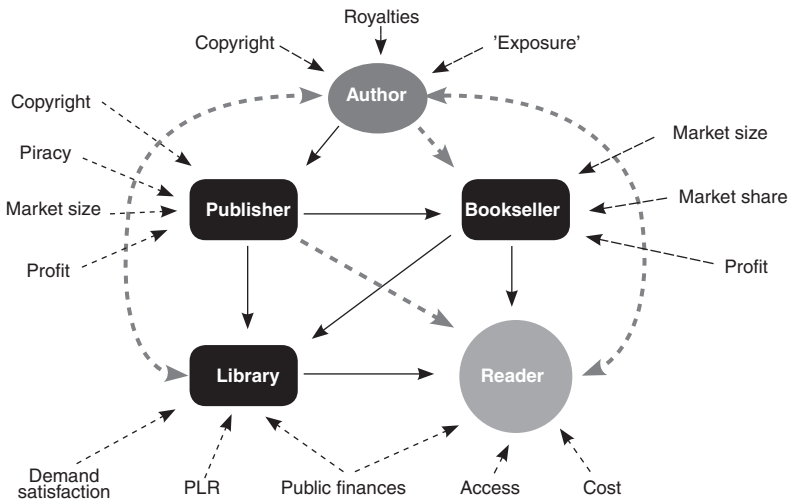
- Swedish authors and book publishers (the production part of the system) to establish their perception of the present status and future of the e-book;
- the distribution part of the system, Swedish book-sellers, aggregators and libraries, and their roles in the e-book distribution chain and their changing functions. These institutions represent two very different sectors: commercial and public, and the change of these functions as well as perceptions of their roles in the future by themselves and the governing bodies will have a crucial influence on shaping the media landscape in Sweden;
- policy and legal aspects related to e-books; and
- the use and consumption of e-books. This part includes studies of individual end-users of e-books and also the changing behaviour of the reading public.

The project plan was partly inspired by Winston's (1998) theory of innovation, which is presented in the theory chapter. During the project the relevance of this theory, emphasising forces stimulating the new development as well as forces holding back the change became even more obvious. The theory is here applied to the system of e-book production and distribution, considering also the relationships between its major actors, but we are also looking at a number of aspects influencing the actors and possibly changing their relationships when the e-book is introduced. Figure 1.1 gives an overview of the project, showing the relationships between major actors for the traditional routes from author to reader as well as for new alternative routes, facilitated by the e-book. Thus, we can expect several changes in the system as a whole.

Within a collaborative research project the actors involved in production, dissemination and use of e-books have been studied in several ways during the project. Data in

the project include repeated national surveys as well as interviews, focus-group interviews and collections of news and reports. The data used are described more in detail in the empirical chapters. While the main case for this book is Sweden, other countries and languages are considered and used for comparative studies. In addition to articles and this book, the project also produced a blog (*The e-book research project* at <https://projectebooks.wordpress.com/>) and a Flipboard magazine (*News on e-books* at <https://flipboard.com/@ebooksinsweden/news-on-e-books-du77ors8y>) reporting news on e-books from different countries. In early 2017 the Flipboard magazine contains more than 12,000 items and has almost 7,000 followers world-wide. The interest in e-books in Sweden and internationally has increased during the project period and there is a continuing inflow of new reports on developments related to e-books in different countries.

The current understanding of the e-books is normally that it is an 'electronic version of a printed book which can be read on a computer or a specifically designed handheld device' (E-book, 2017). While the most common form of e-books tends to look very similar to printed versions, the electronic form also means that new functions and appearances can be added. There are several examples of this which may call for modified definitions in the future. Books can be thought of as media and just as other forms of media, they can affect our thinking and world views. However, the e-book is not the only way for digital dissemination of book content. During the project, streamed media have become popular and the percentage of 'readers' who choose to listen to audiobooks has increased. The focus here is however on e-books, intended for reading.



**Figure 1.1** Interactions in the e-book field

*Note:* PLR – public lending right. The dashed grey lines indicate the possibilities opened up by the e-book. Arrows outside the actors indicate several influences and issues considered in the project.

*Source:* Personal communication, T.D. Wilson.

## Structure of the book

After this first introductory chapter, we present the e-book as a social and technological innovation in Chapter 2. The e-book format and the tools for reading e-books are presented and discussed more in detail in this second chapter.

The e-book involves a complex set of technologies including not only the format of the files that allows the text to be read on different devices, but also the technology of the devices themselves. Consequently, when we decide to read an e-book we are taking decisions on the presentation of the text but also on the nature of the device we choose to adopt. As described in Chapter 2, we are also involved in other decisions, for example, which digital service to use. But media are not just technologies; they are also cultural systems, which are rather stable over time, whereas technologies might shift. The content of a medium can change, the audience can change as can the social status of a certain medium (Jenkins, 2006). This chapter outlines the e-book as a technological and cultural product. Here we also present data on access to the technology, especially reading devices such as tablet computers, e-readers, and smartphones, now used for many purposes, including reading in Sweden.

In Chapter 3 the overarching theoretical perspective, i.e., Winston's theory of technological innovation, is presented and discussed. Considering the e-book as an innovation several theoretical perspectives and models are presented in addition to Winston's theory: for example, classical innovation theory, models of technology acceptance, theories related to attitudes and behaviour and the e-book as a media and cultural phenomenon. Finally, the theories used are shown in relation to their main application areas: society, organisation and person or audience.

Chapter 4, 'The e-book market', includes an analysis of publishing in Sweden as well as an international perspective on the publishing business. The chapter aims at describing the publishing business from these perspectives. It is shown how the book market, world-wide, is composed of a small number of very large international companies as well as thousands of medium-sized and small companies. In any one country, the book sector is under pressure and in interplay with global book and media market players, and a description of the industry is problematical because of this diversity. The e-book market in Sweden is characterised within this context.

In Chapter 5 policy issues and legal aspects of the e-books are dealt with. In this chapter, we try to capture policy making processes and problems surrounding e-books in Sweden within international context. Content analysis of literature and documents constitutes the base for this chapter, with interviews with key persons providing additional material. Part of the chapter outlines the legal basis of e-book production and circulation in Sweden.

Most of the empirical studies are presented in Chapters 6-11. Here interviews and surveys of authors, publishers, readers and intermediaries such as booksellers and librarians, are used as a basis for analysis and discussion.

Chapter 6 presents the authors' perspective as a result from interviews with 26 authors from Sweden and the Swedish-speaking part of Finland, which has its own book-circuit. Respondents were recruited from three categories: authors with experience of having published e-books through a publisher, authors with experience of self-publishing, and authors with no experience of e-book publishing at all. The analysis is conducted in relation to different themes, discussing authors' perspectives and their earlier experiences of and attitudes towards e-books. The chapter also includes studies of authors' views on marketing, distribution, dissemination, legal issues; finance; policies, and their own reading and thoughts about the future of e-books.

In Chapter 7 the publisher's perspective is presented. Results are presented both from previous research and from a survey and 18 interviews with publishers conducted within the project. The data reveal the reluctance of traditional business to exploit the full potential of e-books, the uncertainties related to the developments in the market and demand, the conflicts with other actors emerging in a changing situation, and the strategies adopted to cope with and exploit new technology.

Chapter 8, 'Selling the e-book', is focused on book distribution and sale. Sweden is a vertically integrated market with mediators, such as booksellers and aggregators, at risk of being disintermediated. This chapter contributes to the overall model of e-books in a small-language country by analysing book selling, pricing and distribution based on a survey and on semi-structured interviews with booksellers and aggregators.

In Chapter 9 studies on public libraries in Sweden are presented. This chapter reflects on the e-book situation in public libraries, which were also the main channel for e-books to readers by the end of the project. Among issues highlighted here are: public library services advancing the e-book loans; the advantages and shortcomings of the agreement with Elib from 2001 to 2014, and after the introduction of the new model of loan pricing. The role of libraries and media in a democratic society is viewed in the light of new developments and more concretely in giving access to e-books. The chapter is based on the results of case studies, statistical analysis of secondary data, and library surveys.

Chapter 10 presents the studies of academic libraries, in which digital resources, in terms of journals, e-books and access to databases, are now dominant. Students and faculty now have a long tradition of using such materials, and most universities and university colleges also support other interested persons in the population. This, however, does not preclude the existence of controversies in e-book acquisition, management and use in academic libraries as revealed by the analysis of data. A survey of academic libraries and published research are the main sources for the analysis.

In Chapter 11 we investigate reading and readers based on repeated surveys of the Swedish population and interviews as well as individual and group interviews among book readers. The dissemination of e-books in Sweden is also discussed in relation to studies of e-book use in other countries. In interviews, readers' perspectives and attitudes are described. The interviews show the great variety of preferences regarding

book reading. The impact of sociodemographic factors, such as age, education and income, as well as attitudes and library use are analysed with the help of survey data.

Finally, in Chapter 12, we summarise the findings, relating them to the theoretical framework and the ongoing struggle between forces stimulating change and forces holding it back or with the words of Winston the factors in society which can be considered as 'supervening necessities' and 'suppression of radical potential'.



## Chapter 2

# The e-book as a technological and social innovation

The e-book involves a complex set of technologies, including not only the format of the files that allows the text to be read on different devices by ‘flowing’ to the appropriate dimensions, but also the technology of the devices themselves, their screens, their battery life, and their portability. Consequently, when we decide to read an e-book we are also taking decisions on the presentation of the text (e.g., the font size) and on the nature of the device we choose to adopt. We are also involved in other decisions, such as whether or not to use library e-book services, or services such as Storytel or Scribd, and whether to use a multi-purpose device such as the iPad, or a smartphone, or to use an e-reader and, if the latter, which online retailer to favour, by choosing, in Sweden, a Cybook Opus from Bokus, or a Letto from Adlibris. Even in Sweden one might, as a regular reader of English titles, choose a Kindle from Amazon.

These sets of decisions apply to us as individuals, but some of the same decisions apply to organisations that may wish to employ e-books as part of their marketing strategy, or to libraries deciding whether or not to offer e-book services, or to other organisations deciding how to employ e-books internally, for functions such as staff training, maintenance manual design, and so on. Organisations will have to make some of the same decisions as individuals but other decisions will also be involved. For example, a public library will need to decide which e-book service provider to use and an academic library will have a similar decision to make about the provision of academic texts. Publishers, too, must make a whole set of decisions about e-books from deciding which books to convert, which formats to employ, whether and how to involve retailers in selling, and how to sell directly to readers.

We might also consider the notion of societal adoption of e-books, which may come about when policy decisions are made at governmental level about the terms under which public libraries may seek to use e-books, or about the use of e-textbooks in schools. We can describe these situations as societal adoption because their impact will be felt throughout the society, rather than in some specific organisation or in the life of an individual reader.

## The digital file

The content of an e-book takes the form of a digital file and, in modern *printed book* production, digital files of various kinds are used, with the PDF format being the most common. Publishers may also accept files produced by layout programs such as Quark Express and InDirect: these programs have their own file formats but can export files in formats such as PDF, XML and EPS (encapsulated PostScript).

Virtually all modern book production, therefore, is based on a computer file of one kind or another and creation of an e-book involves conversion of these original files to an e-book file format. In some cases, for example, when producing marketing material as ‘e-books’, a company will simply create a PDF file from a desktop publishing program such as Quark Express, but digital versions of books published by the major publishing houses will be produced in one or other of a number of file formats, the chief of which at present is EPUB3, although Amazon’s Kindle range of e-readers requires a version of the MOBI format, the most recent of which is the KFX file format.

The EPUB format is used by virtually all of the e-readers on the market, except for the Kindle, and consists of ‘a ZIP archive that contains, in effect, a website – including HTML files, images, CSS style sheets, and other assets. It also contains metadata’ (EPUB, 2016). Most e-readers will also read PDF files, which are used by journal publishers for digital publishing and by institutions for research paper depositories; however, such files do not *flow*, i.e., they do not change layout according to screen size and orientation, but are simply representations of a printed page; consequently, they may be less easy to read on screens that are small (such as those of smartphones) or that have a different orientation (e.g., landscape rather than portrait) from the original file (Kudler, 2016).

An EPUB file, on the other hand, is *flowable*; the text is organised in relation to the screen, not to some original page layout. Thus, someone reading an Apple iBook publication is able to switch from reading in portrait mode, where the text is in a single, wide column, to reading in landscape mode, where the text automatically re-oriens and divides into two columns. Other document attributes, such as font size, font family, and background colour can also be changed in an EPUB document.

The EPUB3 format is also regarded as suitable for producing accessible formats for visually impaired people. Two Swedish Agencies, the Agency for Participation<sup>1</sup> and the Agency for Accessible Media<sup>2</sup>, are conducting a project testing its possibilities in this respect (the Agency for Participation, 2015).

A further advantage of the EPUB format is that it allows for some degree of *interactivity* including animations, slideshows and embedded videos, which are typical of the so-called *enhanced e-book*. Page layout software such as InDesign and QuarkExpress can produce EPUB files with this capability. The EPUB specification (World Wide Web Consortium, 2017) sets out the basis on which these features may be used, but Garrish and Gylling (2013: 191) warn:

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1. Myndigheten för delaktighet.

2. Myndigheten för tillgängliga medier.



Interactivity remains at the vanguard of ebook support. The more the publication deviates from a traditional book, the less likely it is to be fully cross platform. Many EPUB 3 reading systems will never support interactivity, and the standard is not specific about how conditional or partial support should be best implemented.

To date, although many examples have been produced, enhanced e-books, whether as EPUB files or as separate applications, have made very little impact. The main reason for this is suggested by Costanzo (2014):

The main problem is that the market as it currently exists does not allow publishers to deliver the same enhanced product across all current digital platforms, whether it be Apple's iPad, Amazon's Kindle Fire, Barnes & Noble's Nook, and Kobo's Arc. And when you stop and think about it, no other content creator is faced with this conundrum.

This may explain the publishers' lack of interest in this new medium, but there is the further question relating to the reader's apparent lack of interest. There is little research in this area, so we offer the suggestion that the joy of reading lies in that fact that a book stimulates our imagination, we imagine what characters will look like, we can 'see' in our mind's eye, the action unfolding. The enhanced e-book is an interpretation of the text by an editor (or producer!) involving video and/or animations, and/or sound recordings. Readers, however, interpret the text themselves and the lack of success with enhanced e-books, so far, may be the result of readers saying 'Why should we accept someone else's interpretation of the text when we can produce our own?'

In the academic market, enhanced e-textbooks may be a different story, but experience is still limited. Reporting on a two-year study, Denoyelles, Raible and Seilhamer (2015) noted that:

Lower cost and convenience remain the top reasons students purchase an e-textbook, not the interactive features designed to enhance learning.

Universities in the USA, and to some extent in the UK, are becoming involved in the local production of e-textbooks, by allocating time to academic staff to prepare the material. However, another source of learning materials of increasing importance is found in the online learning platform (also known as learning management systems), which students can access at any time, whether locally on-campus, or externally as distance learning students. An alternative strategy to producing e-textbooks would be to enhance the resources available on such platforms in such a way as to satisfy student requirements.

## The reading device

Clearly, a digital file requires some computing device to enable it to be displayed on a screen to be read by a user. Any computer with the necessary program for reading a particular format will be able to display the file. A significant characteristic of the *book*,

however, is its portability; we can read it on the train or the bus, in bed, at the beach, or at a study table in a library. Consequently, the e-book began to grow in popularity only when portable computing devices became available and enabled the digital file to be carried around as easily as the printed book.

The digital file may be downloaded to a device, or *streamed*: the subscription service, Scribd, for example, offers either streaming or downloading. If the file is streamed, the device must be connected to the Internet whenever the file is read. This can be a serious barrier to use, especially when travelling, unless the owner has a mobile phone account for the device.

Three categories of device are now available for reading e-books: *e-readers*, which are designed specifically to display e-books; *tablet computers*, which are general purpose computing devices capable of accepting application software that will display e-books from different providers; and *smartphones*, which are mobile (or cell) phones, with the same kind of application software as tablet computers. It is possible, of course, to read e-books on a laptop or desktop computer, but greater portability is achieved with the more special purpose devices.

Access, however, must be viewed in a broader perspective, including not only the physical device, but also people's ability to understand how systems work, their confidence and trust in new systems, economic and social benefits and costs, and how certain technologies are accessible with the existing cultural norms (McCreadie & Rice, 1999; Verkasalo *et al.*, 2010).

### *E-readers*

The first e-book readers were produced in 1998, sometime before the real surge in publication of e-books. The investors behind the development were publishers and booksellers: the Rocket E-book was financed by Barnes & Noble and the German publisher Bertelsmann, and the SoftBook Reader by Random House and Simon and Schuster (Lebert, 2011). Ultimately, both of these devices were bought by Gemstar and neither is produced any longer.

How *portable* these early devices were is questionable: the Rocket E-book weighed about 624 grams and the SoftBook, 1.3 kilos: by comparison, the Kindle Paperwhite, one of the most popular e-readers of 2016 weighs 206 grams. The most popular early e-reader was the Sony Reader, which was produced from 2004 until 2014. It was the first e-reader to use the E Ink technology described below and was also comparatively light in weight at 250 grams. Also, in 2004, Amazon began work on an e-reader, the Kindle, which entered the market in 2007. Amazon's big advantage lay in its ability to negotiate with publishers for the sale of e-books: in 2015, Amazon sold 74 per cent of all e-books bought in the USA, representing 71 per cent of the dollar sales (Hoffelder, 2015), thereby providing a market for its own e-reader.

Apart from the reduction in weight of devices since these early machines, one of the chief developments has been in display technology. The *de facto* standard is

E Ink, defined as a ‘microencapsulated electrophoretic display’ (E Ink, 2016), which was invented at the MIT Media Lab by two undergraduate students, Cominsky and Albert, under the direction of Joseph Jacobson a physicist who, while a postgraduate student at Stanford University, had postulated a low-power, multi-page reading device. Cominsky, Albert, Jacobson and others at MIT established the E Ink corporation to take the technology to the market and their company was ultimately bought by a Taiwanese company, Prime View Int’l Co. Ltd., which supplies the technology not only to tablet computer manufacturers but also to mobile phone producers. A colour version of E Ink has been developed and is intended mainly for use in large format signs and displays in shops and other public places.

No e-reader dominates in Sweden, perhaps because the take-up of the medium is so slow and modest, and with no vendor such as Amazon promoting e-books and its own reader. International brands such as the Kindle, Kobo and Nook are available, but a specifically Swedish brand is not available. The bookshop Bokus, sells a version of the Cybook Opus, produced by the French company Bookeen, while Adlibris, the biggest book retailer in Sweden, sold the Letto, a re-badged version of the BeBook, produced by the Dutch company Endless Ideas. The company declared bankruptcy in 2012, and Adlibris now sells the Letto Frontlight, which is based on Bookeen’s Cybook Muse Frontlight, making the French company the provider of ‘Sweden’s e-reader’.

### *Tablet computers*

Although the idea of a highly portable computing device is quite common in science fiction (e.g., Asimov’s [1951] ‘calculator pad’), the reality had to await the development of miniaturised components and improvements in display technology. The first commercially available example was the GRIDPad, which, at 2.0 kilos and costing €2,700 with software, was, by current standards both heavy and very expensive. In spite of this, however, it sold, in its best year, €27 million worth (GRIDPad, 2016), mainly to organisations.

The first really successful tablet computer for personal use was Apple’s iPad, first produced in 2010. In the fourth quarter of 2013, its most successful quarter, the iPad sold more than 26 million units, but, since then, competition from other manufacturers has reduced its market share and in the first quarter of 2016 it sold just over 10 million units (Leswing, 2016).

The main competitors to the iPad come from Samsung (the Galaxy Tab), Google (the Nexus) and Sony (the Xperia). Apart from the operating systems (Apple uses IOS, while the rest use Google’s Android OS), all are competing in the same areas: weight, screen design and display technology, and diversity of applications available. For some years, many more applications were available for the iPad but the two operating systems are now about equal in this respect. Both operating systems have the same applications for reading e-books, so a Kindle book or an Apple iBook may be read on either system. In other words, the ‘readers’ are now simply application software.

### *Smartphones*

The original mobile phones had very small screens which displayed little more than the time and the telephone number called or calling. This is all that was needed, since they were only telephones. The smartphone, however, is a computing device with software applications and, although pre-dated by smartphones from Ericsson, Palm and Blackberry, the first really successful smartphone was Apple's iPhone, which came on the market in 2007 (Martin, 2014).

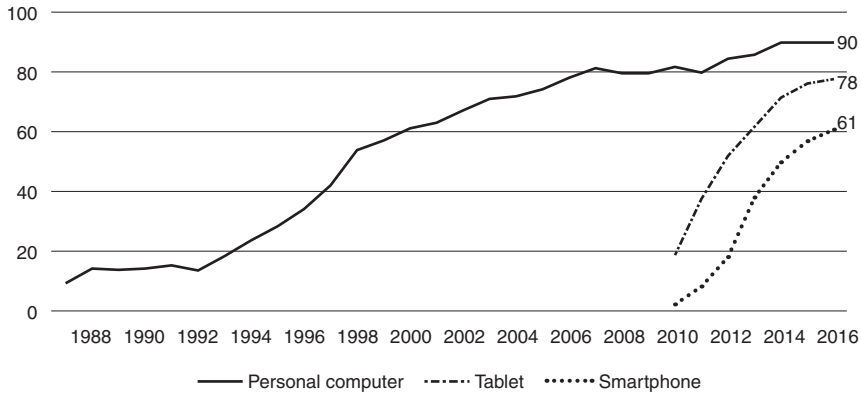
It was possible to read an e-book on the iPhone screen, but the development of models with larger screens has led to increased use for e-book reading. The biggest iPhone screen is now almost 14 cms. (measured on the diagonal) while a number of manufacturers are now producing 17.78 cms. screens, which leads to them being called *phablets* (a combination of *phone* and *tablet*).

A study by Nielsen in the USA showed that reading on all devices had declined from 2014 to 2015, except for reading on smartphones (as indicated by downloads to these devices), which had almost doubled from 8 per cent to 14 per cent (Nielsen Holdings, 2016).

### The Swedish situation

Sweden ranks among the top ten countries when comparing Internet access, skills, and usage (Internet World Stats, n.d.; Eurobarometer 381, 2012). For the individual, access to reading devices and knowledge how to handle them also affects use, as do personal reading habits. In Sweden, most readers access e-books by tablet or laptop computers (Findahl, 2014), while, for instance, in the USA specialised tablets like Kindle are still most common (Zickuhr & Rainie, 2014). Access to reading devices is fairly good in Sweden, tablet access in households in 2016 was 61 per cent; 90 per cent had access to a computer and 78 per cent to a smartphone (Figure 2.1). On a general level, the prerequisites for e-book reading are good. The percentage with specialised e-book readers in the household was only 8 per cent in 2014 (the Media Barometer, 2015).

Typical of media technology in general, the diffusion is unevenly spread (Table 2.1). Age also proves to be of great importance on these matters. Among people aged 30 to 50 years, almost eight out of ten (76 per cent) access a tablet, 96 per cent have household access to a personal computer, and 91 per cent have a smartphone. The figures for persons aged 65 or over are 43, 79 and 53 per cent, respectively. Age differences are statistically significant for all three devices and especially important for access to smartphones.



**Figure 2.1** Access to reading devices in the Swedish population, 1987-2016 (per cent)

*Comments:* The respondents were between 16 and 85 years old.

*Source:* The National SOM Survey 1987-2016.

**Table 2.1** Access to reading devices, 2016 (per cent and Eta)

|                            | Personal computer | Tablet | Smartphone | n     |
|----------------------------|-------------------|--------|------------|-------|
| Total                      | 90                | 61     | 78         | 3,271 |
| <b>Sex:</b>                |                   |        |            |       |
| Women                      | 89                | 61     | 78         | 1,689 |
| Men                        | 92                | 61     | 79         | 1,573 |
| <i>Eta</i>                 | 0.07              | 0.00   | 0.04       |       |
| <b>Age:</b>                |                   |        |            |       |
| 16-29 years                | 97                | 59     | 92         | 494   |
| 30-49 years                | 96                | 76     | 91         | 926   |
| 50-64 years                | 95                | 67     | 85         | 826   |
| 65-85 years                | 79                | 43     | 53         | 1,025 |
| <i>Eta</i>                 | 0.28              | 0.27   | 0.41       |       |
| <b>Level of education:</b> |                   |        |            |       |
| Low level                  | 71                | 39     | 47         | 522   |
| Below average              | 92                | 64     | 81         | 924   |
| Above average              | 96                | 62     | 84         | 769   |
| High level                 | 96                | 68     | 87         | 1,007 |
| <i>Eta</i>                 | 0.31              | 0.20   | 0.34       |       |
| <b>Household income:</b>   |                   |        |            |       |
| Below average              | 76                | 38     | 56         | 799   |
| Average                    | 95                | 62     | 81         | 1,339 |
| Above average              | 98                | 82     | 94         | 929   |
| <i>Eta</i>                 | 0.32              | 0.34   | 0.35       |       |

*Comments:* The question was posed: 'Do you have household access to the following media technologies?' The options for answering were: 'Yes', 'No', and 'Don't know'.

*Source:* The National SOM Survey 2016.

There are also differences owing to level of education; access to personal computers, tablets, and smartphones is far more common among the highly educated than among persons with an educational level below average. Almost everyone with a high level of education has access to a personal computer at home, 68 per cent have a tablet, and almost nine out of ten own a smartphone. The educational differences in household access to technologies for e-book reading are statistically significant for all three devices.

Media technologies are often expensive investments and economic cost is an important factor of explanation for access, especially in the beginning of the diffusion process (Rogers, 2003; Verkasalo *et al.*, 2010). It is evident that household income plays a significant role in explaining access to e-book reader devices. Practically all households with incomes above average have a personal computer, 95 per cent have access to a smartphone, and 80 per cent to a tablet.

Sex differences, on the other hand, do not contribute to the uneven distribution of e-book reading devices to any large extent. Taken together, the differences in access seem to correspond with what is known about the diffusion of new media innovations (Rogers, 2003).

There can be little doubt that the evolution of reading devices for e-books will continue into the future, but the direction of that evolution is, inevitably, uncertain. One possibility is the development of even lighter and more flexible devices; for example, the Chinese firm, Lenovo, has demonstrated flexible and foldable displays (Ruddock, 2016), and LG, the Korean electronics company, has demonstrated an 18-inch flexible TV screen (Crew, 2015), leading to the suggestion that such ultra-light screens could come to be used in phones and tablet computers.

## E-books as social innovations

Media are not just technologies; they are also cultural systems which are stable over time, whereas technologies might shift. The content of a medium can change, the audience can change, as can the social status of a certain medium (Jenkins, 2006).

The term *book* denotes both the message (words and images) and the medium (bound paper) (Rao, 2003). A book is twofold: a manufactured artefact and a conveyer of meaning. The relation a reader has to a book is also a relation between the two bodies. The images on the covers, fonts and paper quality all contribute, along with the text, to the overall experience of reading a book. The book's materiality and the physical forms of a text affect the meaning and how the text may be interpreted. Transformations in the book and transformations in reading practices necessarily go hand in hand. Form is inseparable from content (Littau, 2006), or, as McLuhan (1964: 7) puts it:

... the personal and social consequences of any medium – that is, of any extension of ourselves – result from the new scale that is introduced into our affairs by each extension of ourselves, or by any new technology.

The majority of printed books are designed to be read linearly. Most often, e-books of today are digital versions of the printed book made available for reading on portable devices. Some e-books may take advantage of different interactive functions. Additional windows may open with further information, the reader may be able to move around the e-book to follow a theme or idea that cuts across several chapters, film clips may be interpolated with the text (Armstrong, 2008). The term *e-book* might be seen as limiting by connotation to the printed book, when at the same time enabling a variety of functions. A more comprehensive definition for an e-book could be derived: text in digital form, or a book converted into digital form, or digital reading material or a book in a computer file format or an electronic file of words and images displayed on a desktop (Rao, 2003). Terms such as *electronic (or digital) publications* or *electronic documents* open up for wider interpretations and more flexible ways of reading (Brown, 2001).

Reading digital texts is part of a more complete and compelling information experience. First, reading on screens presents a more flexible reading experience. Readers of digital text may search, scan, select, cut, paste and create a personal library of related files that hold their citations and texts. Further, people may feel a disorientation when reading extensive texts on a screen. With an e-book on a screen many well-known navigational aids (location of headings etc.) are gone. In order to compensate for the lack of orientation and the loss of pages to flip through in a digital reader device, software has been developed to support fluid navigation in digital texts (Brown, 2001; Liu, 2005).

Some people suggest that reading on screen is slower than reading print on paper, with less long-term retention of the material. Others report that e-reading has reinvigorated their interest in reading and the frequency with which they read (Peters, 2010). In discussing our reading preferences and habits, it is important to distinguish our many different acts of reading and focus on the different purposes for which we read a particular text (Brown, 2001). One also needs to include the contexts of reading devices: e-books must compete with videos, movies, TV episodes and other media all delivered to the same personal, portable device (Peters, 2010).

## Conclusion

Given the pace of change in computing devices and related technologies, it seems inevitable that the existing technologies do not represent the final word on either the nature of the e-book or the technologies for using them. We can also assume that, as the phenomenon spreads globally, new applications will be found and new societal impacts will be felt. For example, an organisation such as Worldreader has drawn upon the increased use of smartphones in a number of African countries, and another 49 countries around the world, to deliver e-books from its own library to, mainly, schoolchildren and students in these countries. Its 2015 annual report records that at the end of 2015 it was serving 300,000 readers a month (Worldreader, 2016).

The societal impact of such an endeavour is unknown at present but one can anticipate more literate, better educated populations emerging in countries that, previously, had difficulty in finding the resources to deliver even simple textbooks to schools.

In the developed world, there is evidence that e-books are increasingly used by older members of the population; for example, a report in *The Guardian* on a study by Kobo, the e-book retailer, noted that:

Around 77 per cent of the most active readers – who make up a 10th of Kobo's 28 million customers – are aged 45 and over, with the largest single group (30 per cent) aged between 55 and 64. Kobo said this makes e-reading 'the first technological revolution being driven by [those aged] 45 and older, rather than younger generations'. (Flood, 2016)

Research by Pew Research Center in the USA appears to validate this claim, since it reports that:

... the proportion of older adults who own either a tablet or an e-book reader is actually larger than the proportion owning a smartphone. Some 27 per cent of seniors own a tablet, an e-book reader, or both, while 18 per cent own a smartphone. (Smith, 2014)

Again, the societal implications of this are difficult to forecast, but perhaps the ageing populations of most Western developed countries will become more self-sufficient in accessing information, which could have important implications for social care and health care.



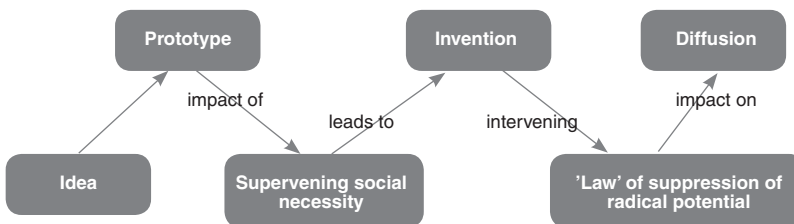
## Chapter 3

# The conceptual framework<sup>3</sup>

The e-book has made an impact in many different contexts, from the way it changes the behaviour of the individual reader, to the impact it has in society at large through its economic implications for the publishing industry and the way it has, in many countries, influenced the development of educational systems. From the point of view of theoretical approaches, therefore, there is not a single perspective, but different perspectives depending upon the context.

Our work has been concerned with the impact of the e-book in a number of contexts: on the work and approaches to publication of the author, on the attitudes and practices in the publishing industry, on the response of booksellers to the phenomenon, on its role in academia and in the public library sector, and on the reaction of individual readers. In this chapter, therefore, we discuss the theoretical ideas that have guided our research in these contexts.

We have, however, adopted one over-arching theoretical perspective, which has been used in all of these contexts: this is the approach to technological innovation of Winston (1998). Winston's historical analysis of the adoption of technology from the telegraph to the Internet is based on a theoretical framework which provides not only a structure for the adoption process (see Figure 3.1), but also two theoretical concepts that are of particular interest for research into the e-book phenomenon. The two concepts are *the supervening social necessity* and *the suppression of radical potential*.



**Figure 3.1.** Model of Winston's theory of innovation

Source: Winston (1998); processed by the authors.

The supervening social necessity is that concatenation of social factors that encourage invention, that is, a prototype sufficiently developed to be used effectively to

3. Parts of the chapter were previously published in: Wilson, T.D. (2016). Theoretical approaches to e-book research. *Libellarium*, 9 (1). Retrieved from <http://www.libellarium.org/index.php/libellarium/article/view/277/3551>

satisfy the social necessity. Winston notes, for example, that the prototype telegraph was not particularly successful until the need arose to control the traffic on the newly established railways which, originally, had only one line of track. The need for one station to communicate with another to avoid accidents by reporting the location and direction of trains led to the adoption of the telegraph by the railway companies.

In the case of e-books, our work in Sweden suggests that the supervening social necessity will vary with the interest group, e.g., academic libraries are influenced by the need to keep abreast of technological developments and to use new technologies to satisfy user demands, and by the potential e-books offer for ready accessibility of study materials. Public librarians perceive a similar technology push in wishing to provide readers with access to literature and study materials in whatever form they may exist (and, indeed, by the latest version of the Public Libraries Act, are required to do so).

In other places, the supervening social necessity may take different forms: for example, in a number of developing countries governments are taking action to implement a policy of e-textbook provision in the country's schools and colleges. The pressure towards this is clearly economic: the relevant ministries of education identify the cost savings in providing e-textbooks instead of paper books and, thus, the supervening social necessity derives from the need to manage the national budget. In both the UK and North America there is pressure from students, concerned about the high cost of textbooks for their courses (Bidwell, 2014; Duggan, 2012).

Similarly, the suppression of radical potential will vary among different actors surrounding the e-book. Just as costs might be a driver in a certain context, they might well be an obstacle in others. Overpriced e-books and disadvantageous agreements could deter both libraries and readers. In a small-language market, like the Swedish one, this leads to little interest among the producers and distributors.

Altogether, several factors are operating as pros and cons for the e-book. As outlined in Chapter 2, e-books need to be understood as both technical and cultural products, and the uptake in different sectors is best explained when taking both perspectives into account. The following sections will elaborate theories that contribute to an understanding of how e-books are perceived and adopted in society.

### The e-book as technological innovation

It takes time for new technologies to become accepted within the sphere to which they are intended to apply. An invention does not immediately become an acceptable, widely diffused technology: a lot may depend upon the practicality of the invention in terms of its application requiring changes in associated technologies. Or, the invention may never find the right combination of circumstances that makes it economically feasible to employ. Or an invention may simply fail to find commercial support to make it available in the market.

Examples of innovations that either took many years to come to the market and be successful, or failed to come to the market at all, abound. For example, the transistor was invented in 1925 by J.E. Lilienfeld (Biography..., n.d.), but its practical application had to wait almost three decades before its best-known application, the transistor radio, could actually be manufactured. Another example, the fuel cell, was invented in 1838 (Grove, 1838), but its application had to wait more than 100 years before its use in NASA's space programme, it still only has niche applications and we continue to await the fuel-cell powered car. Of course, we could also point to the computer, the principles of which were evolved by Charles Babbage and his difference engine, with the first 'program' being written by his correspondent, Ada Lovelace, in the early nineteenth century. The practical realisation of the ideas of Babbage and Lovelace only came about during the Second World War, after other technologies had been developed that made Babbage's mechanical devices irrelevant (Montaqim, 2012).

By comparison, the e-book has had a very short period of time in which to move from invention to widespread application although, again, application of the idea has depended upon the invention of associated technologies for the full realisation of potential to be achieved. Ignoring the rather idiosyncratic and never practicable ideas of Brown (1930), the e-book (necessarily) had to await the arrival of the computer and then the development of portable computing devices such as tablet computers and smartphones. In fact, e-books as they are now generally perceived depend absolutely upon such devices and, while they may still be read on desktop machines and laptops, it is portability that has driven adoption.

Given the general nature of technology, it is not surprising that the study of adoption processes has a fairly long history, although the study of contemporary developments has been mainly a feature of research in the second half of the twentieth century. In the nineteenth century the steam engine was probably the most significant technological development, indeed Ashton (1948: 70) described it as 'the pivot on which industry swung into the modern age', a statement which, today, we might ascribe to the computer. But, although reports were made of the number of steam engines employed and the industry sectors in which they were used, the study of the adoption process was carried out later in the twentieth century and mainly by historians (e.g., Dickinson, 1938; Lord, 1923; Musson, 1976).

A search of Web of Science for 'technology adoption' OR 'technology diffusion' reveals a paper by C. Berenson (1968) as the earliest to use the latter phrase; however, earlier work by Beal and Bohlen (1957) has evaded the Web of Science net, presumably because it was published as a technical report from the Extension Service of Iowa State University. The report used the findings of thirty-five research studies, carried out over a twenty-year period, on the adoption of innovations by farmers and their wives, in various states of the USA. This alone suggests that the interest in technology adoption must extend back to at least 1937 and that the reports have not been captured by the online databases.

Beal and Bohlen's report sets out two adoption frameworks: the first presents the stages in the adoption process as awareness, interest, evaluation, trial and adoption, while the second presents the diffusion curve showing the proportion of innovators, early adopters, early majority, majority and non-adopters, with the demographic and other characteristics of persons at these different stages of the process.

The second of these frameworks is generally associated with the name of Everett M. Rogers who joined Beal and Bohlen in a paper on the validity of the diffusion stage theory (1957) and went on to write the highly influential *Diffusion of innovations* which reached its fifth edition in 2003, shortly before his death in 2004.

### The diffusion of innovation

As noted in the previous section, the work of Rogers has been highly influential in research on the diffusion of innovations. Rogers took the framework of Beal and Bohlen (whom he worked with as a doctoral student) and modified it slightly but, most importantly, perceived that the diffusion process was a general social phenomenon, not restricted to a particular field of application such as agriculture. The Beal and Bohlen categories were, as noted above, innovators, early adopters, early majority, majority and non-adopters, and Rogers changed the last two categories to late majority and laggards. The term *laggards* is probably better than non-adopters because it allows for the idea that the laggards may ultimately adopt an innovation.

Rogers also developed a model of the characteristics of an innovation that may affect its adoption, suggesting that 'innovations that are perceived by individuals as having greater relative advantage, compatibility, trialability, and observability and less complexity will be adopted more rapidly than other innovations' (Rogers, 2003: 16).

In its original form, the theoretical framework was applied to individuals (farmers and their wives) and, therefore, it fits the decision making by individuals referred to in the Introduction to this book. However, it is obviously possible to conceive of organisations and communities being the innovators, early adopters, etc. For example, when electric lighting was made possible from the 1880s onwards, not all towns adopted it at the same time, in fact one of us was born in a house where the only lighting available was from paraffin lamps, and gas lamps would still be found in many places at that time.

The e-book is a recent phenomenon, with its initial growth the result of the development of successful mobile computing devices and, consequently, there is only a relatively small number of research papers on the adoption process. One of these (Jung *et al.*, 2012: 14) used Rogers's framework in a study of e-book adoption in South Korea, concluding that:

The findings of the current study generally support the innovations-adoption literature, in regard to demographic variables (age, education, and income), digital media technology ownership, personal innovativeness (self-efficacy and novelty-seeking),

and Rogers's (2003: 14) five perceived innovation attributes. Almost all variables significantly related to e-book reader awareness, interest, and intention to use.

Walton (2014), in a study of undergraduate students in a small, liberal arts college in the USA, employed Rogers's theory in his analysis of the data, noting that e-books have the relative advantage of convenience and, because academic libraries make e-books available, they offer the possibility of trialability to students. However, Walton added another concept, that of forced adoption, which occurs when the academic library does not offer the choice of a printed version of a book and the students must use the e-book alternative.

In another study, in Latvia, Grenina (2012) employed diffusion of innovation theory in the design of an investigation, focusing on relative advantage, compatibility, complexity and trialability. Relative advantage was reported in terms of the search capabilities offered by e-books, but printed books offered greater advantage for long-term reading, a fact that supports other research on the subject.

Martin and Quan-Haase (2013) used the first two stages in Rogers's adoption process model, i.e., knowledge and persuasion, in their study of academic historians. They found that, because of uncertainty about the nature of the e-book, some of their subjects were using e-books without understanding what they were using. In other words, they had been persuaded to use the technology without having any knowledge of it. The authors note that the two phases may be cyclical and iterative to a degree not explored by Rogers.

While research into the adoption of e-books is at an early stage of development, it is evident that Rogers's theory is recognised as a useful framework for such research. As far as we can discover, however, its use in this way has been restricted to the study of adoption by individuals.

## The technology acceptance models

The technology acceptance models of Davis, Venkatesh and their co-workers (Davis, Bagozzi & Warshaw, 1989; Venkatesh & Davis, 2000; Venkatesh & Bala, 2008; and Venkatesh *et al.*, 2003) have been widely used in organisational research on technology adoption: a search on Google Scholar for the topic results in more than 40,000 hits, more modestly Scopus revealed 3,441 research papers. Given their extensive use as research models, it is not surprising to find that they are well used in research on the adoption of e-books. Usually the research has an organisational context, but, inevitably, because decisions to use new technologies are taken by people, the actual data collection is done at the personal level, rather than the organisational.

The original technology acceptance model was quite simple; it proposed that the two key variables affecting the person's attitude towards using information systems were perceived usefulness and perceived ease of use, both of which were influenced by external variables. Attitude towards using directly influenced behavioural inten-

tion to use the technology, which was further influenced by perceived usefulness, and behavioural intention directly determined actual system use.

When the 3,441 items revealed by the search referred to earlier were filtered by searching for those dealing with e-books, 162 items were retrieved and, of these 37 were found to be useful in actually dealing with e-books or e-reading devices. The most common subjects of research were students and only one of the papers dealt with a business organisation (Yu, Yu & Cheng, 2012).

Hsiao, Tang and Lin (2015) used a simplified version of this first model and added perceived enjoyment as an additional variable in their study of the adoption of e-textbooks by Taiwanese undergraduate, business studies students. They found that both models explained 43 per cent of the variance in behavioural intention, but that their amended model explained 71 per cent of the variance in attitudes towards e-textbooks compared with the 68 per cent of variance explained by the original model. Perceived enjoyment had previously been used by Teo and Noyes (2011) in a study of technology acceptance by trainee teachers in Singapore.

The third version of the model (Venkatesh *et al.*, 2003) is referred to as the unified theory of acceptance and use of technology and is rather more complex. In this version, behavioural intention is affected by performance expectancy, effort expectancy, social influence and facilitating conditions and the influence of these factors is affected by the sex, age and experience of the person, with social influence being affected by voluntariness of use.

Given the complexity of the third version of the model, it is perhaps not surprising that researchers have adopted simplified versions (as in the case of Hsiao *et al.*, 2015), or have chosen to use the earliest version of the model. At the same time, however, there is a tendency to include additional variables (again, see Hsiao *et al.*, 2015) partly in search of variables that will increase the percentage of variance explained by the model.

In a study of e-book use in China, Gao and Deng (2008) modified the model by introducing the variable of perceived cost, but found that this had no effect on use behaviour; however, performance expectancy and effort expectancy had a significant positive impact on behavioural intention and use behaviour, while social influence had a positive effect on performance expectation. In other words, if friends and family had positive experience of e-books or if social media encouraged e-book use, the person's expectation that using e-books would prove useful, would be increased.

Quan-Haase, Martin and Schreurs (2014) also used the unified theory in a study of e-book acceptance by senior citizens (persons aged 60 years and over). They modified the model by using specific instances of the main predictive variables, i.e., convenience of reading for performance expectancy; comfort with technology for effort expectancy; friends and family e-reading for social influence; and established reading habits for facilitating conditions. Their paper reports only preliminary findings, the principal of which is that familiarity with digital technologies (or the lack of such familiarity) is a barrier to e-book use and that senior citizens need information on how they might benefit from the technology.

## The social dimension of adoption and technology acceptance

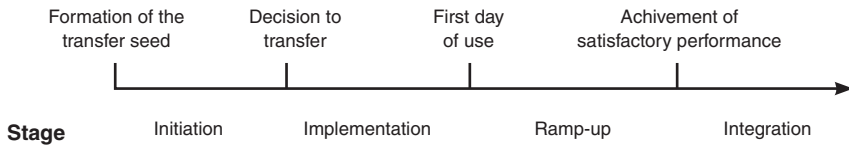
Adoption of media technologies is also embedded in different aspects of social contexts (Hartmann, 2009; Zhou, 2008). Social norms represent a factor that is assumed to have direct impact on perceived usefulness (TAM model), and social influence and the extent to which people perceive that others believe they should use a particular technology might also influence the willingness to incorporate new applications. There are studies pointing to a so-called 'bandwagon effect', meaning that people will adopt technologies simply because other people have done so (Rogers, 2003; Zhou, 2008). Such findings implicate the impact of socialising on Internet use. People included in social networks tend to learn faster by helping each other and providing support in using the techniques (Hargittai, 2004). People who have access to social support when using the Internet also show a higher level of Internet skills than people who do not (van Deursen & van Dijk, 2011).

Social contexts will most likely be of importance both when it comes to the uptake of e-book producing and e-book reading. In a wider context, a bandwagon effect is also expected when talking about both producing and distributing e-books. Authors will follow authors; publishers will follow publishers and each will keep an eye on what the other actor is up to. One could assume, however, that the social surrounding could both emphasise the supervening social necessities and constitute the suppression of radical potential to speak in Winston's (1998) terms. The overall action among the actors surrounding the e-book might well start both positive and negative processes when it comes to e-book development.

## 'Stickiness' theory

Clearly, the technology acceptance models of Venkatesh and his colleagues are concerned with the individual's acceptance of technology, and Rogers's diffusion theory was also developed with reference to individual farmers and their wives. Both are applicable to organisations in that Rogers's theory could be explored with organisations as the units of analysis, and the technology acceptance models could also be used across organisations, showing how staff in the different organisations varied in their acceptance of technology. However, Szulanski's (1996, 2000) theory of stickiness was developed in the context of organisational implementation of innovation (although he refers to knowledge transfer).

Szulanski proposes a four-stage process of innovation, from initiation of the idea, through implementation, ramp-up (or rolling out the innovation throughout the organisation), and integration, where the innovation becomes fully embedded in organisational practice. For each stage, Szulanski suggests a milestone or key event that signals movement from one stage to another and suggests, further, that difficulties may arise in each stage that inhibit, retard or prevent progress to the next stage, which he refers to as stickiness.

**Milestone****Figure 3.2.** Szulanski's 'stickiness' theory

Source: derived from Szulanski, 1996.

Szulanski's theory does not appear to have been applied to the adoption of e-books for any purpose in organisations, but we can envisage the kind of problems that might arise in, for example, the adoption of e-textbooks in a university. For a case in point we can refer to the adoption of e-textbooks by the University of Plymouth. Although the existing accounts of the project tend to be solely descriptive we can infer some points of stickiness as the project developed. For example, Gee (2014) refers to some negative responses from students unwilling to read from computer screens, and such resistance is likely to be found in most such initiatives. Although Gee does not give details of the financing of the project, which initially supplied all first-year undergraduate students with twelve e-textbooks, we can assume that negotiation within the Department on the use of its resources must have, at least, taken some time.

Originally, Gee had intended to work with publishers to provide paper copies of the texts, but later, commissioned Cengage Learning to provide the textbooks. Thus, another point of stickiness was finding the right mode of provision, and in the same direction, difficulties were experienced in determining how to provide the students with access. The university library's e-book contract did not allow the kind of use envisaged and an alternative platform from Vital Source was adopted. Simply at the initiation stage, therefore, we can identify individual preferences, financing, supplier negotiation, and choice of technology platform, as potential sources of stickiness in such projects. Further analysis of the accounts would no doubt enable us to determine the difficulties experienced during other stages. It seems, however, that, whatever the problems, the pilot was successful, since the project has since been expanded to more departments, as Gee (2014: 123) notes:

We launched ebook schemes in marine biology, environmental science, earth science, geography, and computer science in September 2012. In 2013, the scheme expanded even further to biology, biomedical sciences, maths and statistics, and accountancy. I now lead a project exploring the possibility of extending it across all undergraduate programmes at Plymouth, and am seeking funding to share our experiences with other universities.



In terms of Szulanski's stages, Plymouth University is obviously now into the ramp-up stage and there is evidently every intention of achieving integration.

## Attitudes and behaviour

A way to create deeper understanding of the development of e-book reading is to study attitudes to the digital book format. Attitudes and behaviour are related more generally (Solomon *et al.*, 2010), and also in more specific situations such as the e-book (Ajzen, 2005; Miesen, 2003).

An attitude is, according to Ajzen (2005: 3), 'a disposition to respond favourably or unfavourably to an object, person, institution or event'. Attitudes are about differing preferences (Johnson & Boynton, 2010). When talking about how attitudes are related to behaviour, the research field is somewhat inconsistent. The interrelation between the two is sometimes found to be in one direction, i.e., attitudes underlie behaviour, and sometimes found to be the other way around (Ajzen & Fishbein, 2005).

The degree of attitude-behaviour consistency has proven to be affected by the situation in which behaviour is performed and who is performing it (Ajzen & Fishbein, 2005), when attitudes are easily activated from memory and easily reconstructed (Glasman & Albarracín, 2006). The context of the object influences the attitude (Wigfield & Eccles, 2000). The more multidimensional the object, the stronger the correlation between attitude and behaviour. Attitudes can predict behaviour when the measure is representative for the field referred (Ajzen & Fishbein, 2005). Attitudes that are stable over time are also more likely to influence behaviour (Regan & Fazio, 1977). When the discrepancy between attitude and behaviour is large, people tend to turn their attitude to be more consistent with behaviour.

As outlined in the attitude-behaviour literature, attitudes towards objects help to understand behaviour but are not sufficient to explain them. Related to the attitude-behaviour concept is the theory of expectancy-value. Much human behaviour is shaped by our perceptions of behavioural outcomes, that is, by expectations. Media are thought to offer rewards that are expected, based on previous experience. Rewards, or so called gratifications, can derive from media use as such, from genres or specific content. This model is dominated by cognitive constructs and based on a combination of perception of benefits and how these are valued (outcomes). As a result of such an evaluation, one can decide to either avoid using a specific medium or make a positive choice (McQuail, 2005; Palmgreen & Rayburn, 1985).

Studies of children's motives for reading show that attitudes are important factors when predicting intentions to read. Taking a positive attitude towards reading in general, together with previous reading habits, is one of the best predictors for future reading (Miesen, 2003).

Research on attitudes towards e-books and how these relate to e-book reading is still in its infancy. An American study focusing on format preferences in different reading

settings conclude that the printed book is preferred when reading to children and when you want books which can easily be shared with others. E-books, on the other hand, are preferred when travelling or commuting and when you want to be able to get a book quickly. When asked about reading in bed and when wanting a wide range of titles, printed books and e-books are perceived as equally functional (Rainie *et al.*, 2012).

### The e-book as a media phenomenon: substitution and displacement theory

The issue of how new media interact with those already existing has long been studied: scholars have discussed the substitution or displacement of old media since at least the mid-twentieth century (Lasswell, 1948). Basically, there are two approaches: replacement theory, which takes its point of departure in different media having different functions and properties, which in turn affect how they might compete for people's time and resources. Under this proposition one can expect that people decrease their use, or even stop using one medium, when a new one is made available to them (Dimmick, 2003). Replacement theory suggests that existing habits are transferred to new platforms (Chan & Leung, 2005).

The second approach emphasises that people will incorporate new media in a complementary way. The need or motive to use media may be constant, but the forms for satisfying them might differ (Nguyen & Western, 2006). To satisfy your need for reading, for instance, you might use several platforms to be able to read in different situations. One might be complementing previous media with new media to get more access to content of interest. Complementary theory argues that use of new media is added to use of the old (Chan & Leung, 2005).

The displacement or complementary relations are not mutually exclusive, but strongly connected to functions and needs (Dutta-Bergman, 2004; Flavián & Gurrea, 2009). When a new medium is regarded as more functionally desirable than an old medium, the audience may abandon the old one and replace it with the new (Carey & Elton, 2010; De Waal & Schoenbach, 2010; Lin, 2001). The competition relates to finding a niche in a certain context, meaning that the new medium might be suitable in one situation and the old in another (Dimmick, 2003). It has been found, for instance, that printed newspapers are read at home in the morning, online news from the desktop computer at work, and mobile news when on the go (Dimmick, Feaster, & Hoplamazian, 2011). The displacement takes place first when a new medium takes the place of the old in a certain context.

Bolter and Gruisin (1999) argue that networked digital media do not replace older media but join them in a complex convergent environment. Several studies on online news suggest that, in the digital environment, we change from using only a single platform to using two or more in our everyday habits (Chyi & Chadha, 2012; Färdigh & Westlund, 2014; Newman & Levy, n.d.).

As already outlined in the previous chapter, the e-book at this point is, to a very large extent, a printed book transferred into digital format. This means that there are basically two modes of books: the analogue and the digital. The substitution and replacement theory and the niche theory are applicable to the e-book context over the range of actors included in this project.

## The e-book as a cultural phenomenon

The book market differs from other trade markets because of its dealing with cultural production, goods and values. Technological innovations like e-books affect not only the economic market but also the actors in the cultural, literary field. Globalisation and the market economy also affect local cultures characterized by specific ways of life, languages, and value systems. The contribution of research in this area is considerable and widespread (see for example Baron, 2015; Darnton, 2009; Ong 1982; Svedjedal, 2000; van der Weel, 2011), and is expected to increase, both in contributory disciplines and in inter-disciplinary research, in the future.

Literature is a generic term for texts, both written and oral, which fulfil certain aesthetic criteria. Literary fiction is written, linear text mostly based on the structure of a beginning, middle and an end, an entire work of an author and protected by copyright. This structure makes a coherent pattern with human life, placing ourselves in time, and has long been used in story-telling and fiction (Kermode, 1967). Barthes sets aside the notion of the enclosed work as being a never-ending text, 'a system with neither close nor centre' (Barthes, 1977b: 159). A work is then a concrete object, definite and complete, whereas the text is open-ended and cannot be classified into genres like works. Text narrows the distance between reading and writing into collaborative reading. Barthes's construction of 'text' was made long before computerisation, but is an early sign of how structuralism and semiotics treated the dissolution of work and text in literary theory. Almost thirty years later, book historian Roger Chartier (1995: 18) identified the opposite formats, print and electronic, similar to Barthes's notion of work and text: 'in place of the immediate apprehension of the whole work... It introduces a lengthy navigation in textual archipelagos that have neither shores nor borders', and the reader becomes the co-author.

Today, the definition of the e-book is in progress. As Vasileiou and Rowley (2008) show, it still depends on the book analogy, related to its content the most frequent key terms are 'book', 'multimedia' and 'text'. Analogy with printed books is preferred in focusing on e-books as a cultural phenomenon on the book market.

## Tensions in the field of cultural production

Being a cultural phenomenon in society, literature used to be divided into two, overall recognised categories: literary fiction and genre fiction. Literary fiction, or canonical literature with its ‘imitators’, is approved as having high aesthetic value, ‘literariness’, and recognised as prize-winning, unique, and studied in a historical context. Popular literature, or genre fiction, is broadly adopted by its readers because of its effects, escape and enjoyment, often best-selling and widely spread but hardly ever prize-winning (Escarpit, 1970; Hertel, 1997). Pierre Bourdieu shows how the field of cultural production is related to various kinds of capital, and how economic, social, symbolic and cultural capital interfere within production, distribution and consumption or reception of literature in a complicated way, also in tension and struggle between actors, agents and positions: ‘In no field is the clash between positions and dispositions more constant and more uncertain than in the literary and the artistic field’ (Bourdieu 1996: 256).

In *The rules of art*, (1966), Bourdieu claims the antagonistic coexistence of two modes of production and circulation. First, the anti-economic economy of pure art and of the values of disinterestedness, i.e., the non-commercial mode; secondly, the mode of ‘economic’ profit. In the field of cultural production not only authors, but also the ensemble of agents and institutions, participate in the production of the value of art in general, and in the distinctive value of the work of art. This, in turn, leads towards the production of consumers capable of recognising the work of art as such, that is, as a value, starting with teachers and parents. There is what Bourdieu recognises as a homology between the space of producers and the space of consumers: ‘The homology established today between the space of production and the space of consumption is the basis of a permanent dialectic which means that the most diverse tastes find that they can be satisfied by works on offer, which appear as if they were their objectification...’ (Ibid: 250)

Bourdieu takes this further in *The field of cultural production* (1993), emphasising the symbolic production of meaning and the value of the art. Critics, but also a whole set of agents, combine efforts to produce consumers capable of knowing and recognising the work of art as such. The field of cultural production is based on two fundamental and different oppositions. First, the opposition between the sub-field of restricted production of literature with cultural and high symbolic capital, and the large-scale production, related to genre fiction and low literature, i.e., between two economies, two time-scales, two audiences. For the author, the critic, or the publisher, the only legitimate accumulation consists in making a name for oneself, a capital of consecration implying a power to consecrate objects with a trademark, or persons through publication, and, therefore, to give value, and to appropriate the profits from this operation (Bourdieu, 1993).

When it comes to personal ‘taste’, Bourdieu (1984: 243) declares that it is a social phenomenon, like communication between equals and match-making: ‘Taste is a

match-maker; it marries colours and also people, who make “well-matched couples”, initially in regard to taste.’

Bourdieu’s death in 2000 occurred almost simultaneously with the digital explosion in the global community. He actually did not foresee the rise of Internet publishing, blogs and e-books, but would have been sceptical of the promises made in their name. In any event, Bourdieu (1993), pointed to the increasing commercialisation and concentration of the cultural field. To him, this obviously was as if publishers were cutting off more challenging writers from the public space to build their own markets in favour of pre-existing demand for conventional and popular writers (Speller, 2011). Neo-liberal reforms of the global capital market in the 1990s were thought to result in a fragile eco-system (Ibid).

The evolution of digital technologies has rapidly changed the landscape of media and culture. Gatekeepers in the literary field, like professional readers and critics, have lost ground in public space. The notion of culture has moved towards consumption on behalf of aesthetic and intellectual values, i.e., the position of cultural capital has turned into disposition on the field of cultural production, though strongly defended by academics in the humanities (see for example, Guillory, 1993; Nussbaum, 1990, 1996, 2010).

Bourdieu’s theory of tension and struggle between actors and capital in the cultural field is valuable to the understanding of the driving forces of technological innovations like e-books and stickiness in acceptance and diffusion. Bourdieu’s emphasis on both continuity and rupture within any transformation of knowledge, literature or science, in the struggle between flesh-and-blood agents with passions and needs, therefore, is still valid.

Publishers and authors, in general, need to be in tune with the latest developments in the field: to have what Bourdieu calls a ‘sense of placement’ or a ‘feel for the game’, which enables them to anticipate where symbolic and economic profit next will fall, not only where they can now be found. Today, writers and critics have to compete for position on popular-search engines, where symbolic capital is reduced to the number of anonymous clicks, where there is no prospect of economic profit, even in the long-term, and where the boundary between the artist and the general public is becoming once again indistinct.

According to the model of the book, the circuit, publishing and marketing of content of printed books and e-books are related to the field of power, that is, to the publishers’ expected economic outcome. Bestsellers are products of a cultural logic rather than a reflection of popular taste, dependent on a general cultural recognition and the inclusion in a particular market information regime (Colbjørnsen, 2014). What is announced as a ‘big book’ is a ‘hoped-for bestseller’, a creation of the logics of the publishing industry. They are the social constructions that emerge out of the talk, the chatter, the constant exchange of speech among players in the field (Thompson, 2010). Recognition is essential in the cultural industries. Bestsellers are not primarily reported as stand-alone entities, but identified through their relative positions on bestseller lists

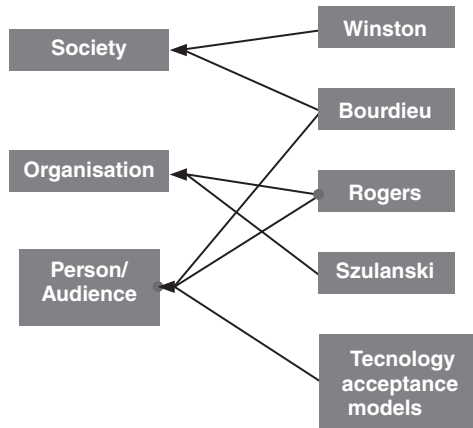
(Colbjørnsen, 2014). Their status is what Bourdieu identified as symbolic ‘consecration’, a prestige bestowed by the dominant factions in the field (Bourdieu, 1993: 38).

Only the State, Bourdieu argued, is capable of guaranteeing the existence of a culture without a market, just as it alone is able to provide public services, hospitals, transport, schools, etc. which are not run simply for profit. Without such state assistance, writers and researchers would have to rely on the goodwill of rich patrons, as they did in the seventeenth century, with the result that it is unlikely that some types of work would ever be written (Speller, 2011). This is also the guarantee for the production of quality literature in a small-language market.

## Conclusion

We have aimed in this chapter to review the theoretical frameworks that may be of help in undertaking research of various kinds in relation to the production, distribution and use of e-books.

Figure 3.3 summarises the analysis by showing the relationship between the level at which we undertake the research, i.e., the personal, the organisational and the societal, and the different theories or models appropriate to those levels.



**Figure 3.3.** Theories and application areas

There are, of course, other factors in the situation that affect the adoption of e-books within the entire production, distribution and use chain. For example, the established patterns of power relationships are shifting: with the rise of online bookselling, and of direct online selling by publishers, the role of the bookshop is diminishing and they are no longer central to the success of a particular author. Similarly, relations between authors and publishers are changing, as the potential of the technology to aid self-publishing is recognised. Through the use of social media authors are now

also able to interact more directly with their readers and, thereby, the readers obtain more influence over the direction of the author's work. We also see a shift in the relations between libraries and publishers, with e-books being licensed, instead of being purchased by libraries, and, in order to access the licensed material, being dependent upon the systems used by the publisher. It is possible, therefore, that other theories, such as Emerson's power-dependency theory (1962) may be applicable in this context.

All technologies have a life-span, during which they move from innovation to the generally applied means of achieving some end, to, ultimately, obsolescence. The e-book is still in the innovation phase of its existence and we do not know whether or not it will come to be the dominant form of the 'book', nor what form it will ultimately take. An exploration of the issues of adoption of the technology, however, within the framework of the theories explored in this chapter, is justified because of the significant impact it has already made in the publishing process and book culture.





## Chapter 4

# The e-book market

### *Global forces and local differences*

The publishing business is composed of a small number of very large international companies and, world-wide, thousands of medium-sized and small companies. In any one country, a description of the industry is problematical because of this diversity. For example, the United States publishing industry is the largest in the world with, in 2012, a total value of €30 billion, representing 26 per cent of the global publishing market (Statista, n.d.). The industry in the US is dominated by the so-called 'big four': Simon & Schuster, HarperCollins, Penguin Random House and Hachette. Three of these companies are subsidiaries of even larger corporations: Simon & Schuster is part of the media company, CBS Corporation; HarperCollins is part of NewsCorp, another giant media company, and Penguin Random House is part of Bertelsmann and Pearson. For decades, mergers and acquisitions have been standard business strategy, first among the publishers themselves (for example, until 2014, Penguin and Random House were two of the 'big five') and, subsequently, among the media giants that have consumed the publishers.

At the same time, however, there are hundreds of small and medium-sized publishers operating in the USA, ranging from tiny 'one man' firms to university presses. The Association of American Publishers represents a relatively small proportion of the total number with a membership of something over 300. However, the 'big four' are not single publishers, but groups; for example, the AAP membership list shows that Simon & Schuster is composed of twenty-three separate companies, while Penguin Random House has fifty-one (the Association of American Publishers, 2015).

This diversity and complexity of the publishing industry, together with the lack of a single agency representing all publishers, means that reported data are often partial and, consequently, misleading of the true situation. An example of this occurred in 2015 when the AAP reported a decline in the sales of e-books resulting in press accounts of the collapse of the e-book and the resurgence of print (Alter, 2015). Other observers, however, were quick to point out that the decline had, perhaps, more to do with the higher prices charged for e-books as a result of a new deal between AAP publishers and Amazon, and that the reported decline was, in fact, compensated for by an increase in the sale of independently published e-books through Amazon (Author Earnings, 2015).

The complexity and diversity of the publishing industry world-wide, and the difficulty of obtaining reliable data from every country, makes pronouncements on the total size of the market and the share taken by e-books rather problematical. In *Global*

*eBook: a report on market trends and developments*, Wischenbart *et al.* (2014: 15) note that it was possible to obtain data from only 23 countries ‘with data in sufficient detail and reliability to build a ranking by total value at consumer prices...’ On that basis, the top six book markets are the USA, China, Germany, Japan, France, and the United Kingdom, which, together are believed to account for 60 per cent of global book publishing. According to the 2014 report, the share of e-book sales in the markets in 2013, where comparable data could be found, are: the USA, 23 per cent; Germany, 10 per cent; France, 4 per cent and the United Kingdom, 20 per cent. These figures point to the significant difference between the English language market and the rest of the world. Deeper analysis suggests various reasons for the different proportions by country: for example, the policy in France of fixed prices for both printed books and e-books, while in Germany, ‘the boost from ebooks comes primarily from the three market leaders in German publishing – Random House, the Holtzbrinck group, and Bonnier...’ (Wischenbart *et al.*, 2014: 35).

In what we have called the ‘small-language markets’, such as the Nordic countries and those of Central and Eastern Europe, the growth of the e-book market has been rather slow. For example, in the Czech Republic e-books accounted for 0.8 per cent of revenues in 2013; in Bulgaria, the share is about 0.2 per cent and in Hungary about 1 per cent (Ibid: 52f). In Denmark in 2011, the market share was 1-2 per cent and in Norway, also about 1 per cent. The situation in Sweden is discussed in more detail below.

## The publishing industry in Sweden

The publishing industry in Sweden is characterised as being composed of one very large media company, three ‘large’ companies, and many small and very small companies, some consisting of only one or two persons.

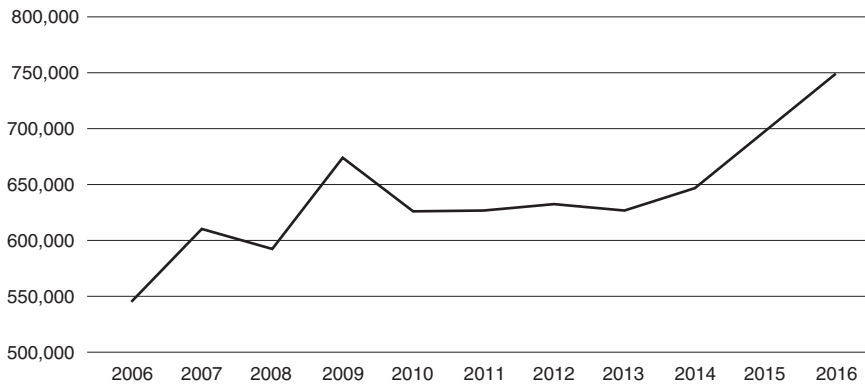
The media giant is Bonnier AB, a holding company for 175 companies, including 93 publishers, operating in 16 countries. Bonnier AB, in turn, ‘is a wholly-owned subsidiary of Bonnier Holding AB, a subsidiary of Albert Bonnier AB, which is owned by more than 85 members of the Bonnier family’ (Bonnier AB, 2015: 12). The trend overall in book sales is shown in Figure 1:

Unfortunately, the annual report does not break down these figures by country of operation. However, sales (mainly in Europe) have increased from the equivalent of €545,000 in 2006 to €749,000 in 2016. For comparison, a paper for the Frankfurt book fair (Frankfurter Buchmesse, 2015) reports total sales in Sweden in 2013 of almost €200,000,000. Given that the Bonnier Group is by far the biggest in Sweden, one must assume that they have a significant share of these sales.

The next largest publishers in Sweden are Norstedts Förlagsgrupp, which was a subsidiary of the Swedish Co-operative Union<sup>4</sup> (whose main business is retail grocer-

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4. Kooperativa förbundet.



**Figure 4.1** Sales of books (world-wide) by Bonnier AB group (Euro)

Source: Bonnier AB, 2015: 51, 2016: 27.

ies), but which was bought by Storytel in 2016; Natur & Kultur, which is a foundation, not a commercial publisher in the normal sense, and Piratförlaget. Financial information for the first two seems to be unavailable, except that Norstedt's website reports annual revenues of about €40 million (370 million SEK). Piratförlaget provides more information, reporting that in 2014/15 its turnover was €6 million (54 million SEK).

The remaining publishers in Sweden are small or very small, totalling approximately 300 (Frankfurter Buchmesse, 2015). Swedish publishers belong to two associations, the Swedish Publishers' Association<sup>5</sup>, whose members account for 70 per cent of the turnover, and the Nordic Independent Publishers' Association<sup>6</sup>, which is composed of mainly small publishers, although some publishers are members of both associations. This means that the statistics on the production of titles, etc. are rather flawed, as they record only the data from the Swedish Publishers' Association. There is a third, specialised, association, the Swedish Association of Educational Publishers<sup>7</sup>, with thirteen members.

Data for Sweden are available in the annual statistics of the Swedish Publishers' Association (2014, 2015). The figures represent only fifty-five members of the Association, but are at least indicative of trends.

Considering the *new titles* published as e-books, the statistics for 2015 are shown in Table 4.1. The total new titles, i.e., printed books and e-books, were, for 2015, 5,336 and, for 2014, 4,957. Thus, the e-book share of the total has grown from 26 per cent in 2014 to 33 per cent in 2015, an increase of 7 percentage points.

In terms of revenue, income from e-book sales was reported to be nearly €3,6 million in 2014, €4,4 million in 2015, and €4,5 million in 2016. These figures correspond

5. Svenska Förläggareföreningen.

6. Oberoende Förlags Förening.

7. Svenska Läromedel.

**Table 4.1** New e-book titles by category, 2014 and 2015

| Type                  | 2014  | 2015  |
|-----------------------|-------|-------|
| Fiction               | 607   | 1,155 |
| Children's literature | 402   | 280   |
| Non-fiction           | 262   | 304   |
| Total                 | 1,271 | 1,739 |

Source: Wikberg, 2016.

to two per cent of total revenue for 2014 and two-and-a-half per cent for 2015, but only one per cent of total book sales in 2016 (The Swedish Publishers' Association, 2017)<sup>8</sup>.

The lower growth in revenues, in spite of a significant growth in the number of e-book titles available, makes this comment from the Frankfurt Book Fair (2015) site relevant:

The e-book business is only slowly becoming established in Sweden. Its market share stands at around two per cent. This is thought to be due to a shortage of available titles, unappealing reading devices, relatively high prices and a low willingness to innovate on the part of the existing providers.

Certainly, the outside observer has the impression that little effort is devoted by Swedish publishers to the promotion of e-books. It may be that the income they now receive from library lending and subscription services is deemed enough to justify their production. The Nordic book statistics report (2014) provides data from the national publishers' associations of the five Nordic countries, as shown in Figure 4.2:

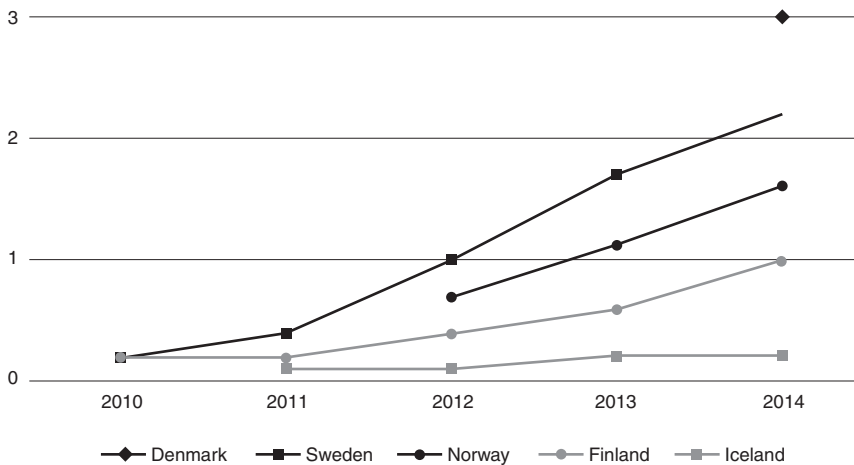
It can be seen that growth of sales in Sweden has been very rapidly increasing, year by year, although from a very low base to only just over two per cent in 2014. Sweden also comes second after Denmark in e-book sales in the Nordic countries.

In a recent report, PwC, the consultancy group, presented a graph showing a forecast of the relationship between tablet computer penetration and the proportion of revenue from e-books in 2019. The graph suggests that the USA and the UK will have about 60 per cent of book sales revenues coming from e-books by 2019. As Sweden has 61 per cent penetration of tablets at present (Norway leads..., 2014), but only two per cent of total revenues from e-books, it hardly seems likely that it will attain the same levels as the USA, the UK and South Korea by 2019. The relation proposed by PwC seems rather suspect, however: when we look at the case of the Scandinavian countries, we find tablet penetration at the same level as the UK, but sales at the same level as Hungary: clearly, some other factor is of more significance in Scandinavia and other 'small-language' markets, and one suspects that it is simply the size of the market.

Some Swedish publishers are investing in digitising their backlists as in the case of Bonnier, which has a department devoted to digitisation. The Arts Council<sup>9</sup> has also

8. These numbers do not include the growth of e-book and audio-book sales through subscription services.

9. Kulturrådet.



**Figure 4.2** E-book sales in the Nordic countries, 2010-2014 (per cent of total book sale)

Source: Nordic book statistics report, 2014.

been making small grants available for the digitisation of specific books, presumably those thought to be of lasting cultural value (see Chapter 5).

Although Sweden has a well-developed ‘reading culture’, with a highly literate population, a significant proportion of which also speak English and/or another European language, e-book sales have not ‘taken off’ to anything like the same extent as in the English-speaking world. According to the *Global eBook* report (Wischenbart *et al.*, 2016), e-books accounted for less than one per cent of sales in 2016, in other words, a very similar situation to that in other ‘small-language’ markets. The report explains that this is partly due to the limited size of the market, but also to the impact of library lending of e-books, an issue discussed later in this chapter.

## Bookselling

For several centuries, publishers have relied on the local bookseller as the main agency for the sale of their products. More recently, the ‘local’ bookshop has been a branch of a national chain, as in the case of Barnes & Noble in the USA, Waterstones in the UK, or Akademibokhandeln in Sweden and truly independent booksellers have been in declining numbers.

Since the arrival of the Internet and, more significantly, the World Wide Web, the rise of the online bookseller has been a major phenomenon. The idea of the online bookseller is probably most closely associated in people’s minds with Amazon, which has grown from one of the first, if not the first, such booksellers into a general online retailer, selling a huge variety of goods. However, although Amazon has a presence in

a number of countries, it has not expanded into all, perhaps because in many countries the small book production, multiplicity of publishers, and small market does not make it worthwhile to go through the negotiation process to get sales agreements.

Amazon, however, is dominant in online book sales in the USA and the UK. In the USA, for example, it had (in 2014) 41 per cent of *all* book purchases, 65 per cent of online book purchases, and 67 per cent of the e-book market (Mozendz, 2014). A rather different perspective is revealed by the UK position, where 72 per cent of those who read e-books purchase them from Amazon (Wischenbart *et al.*, 2014: 27). To say that other online booksellers in both countries play a minor role is an understatement.

Amazon does not operate in Sweden, although it has been rumoured to be about to establish a presence for the past three or four years. However, two online booksellers, Adlibris (part of the Bonnier group) and Bokus account for some 30 per cent of total book sales (Wischenbart *et al.*, 2014: 42).

In the USA and the UK, independent bookshops have declined in numbers, partly as a result of the economic problems faced by all countries over the past eight years, and partly as a result of the impact of online selling. In Sweden, it was reported that 115 out of 290 municipalities had no bookshop, compared with 28 in 1970 (Vogel, 2015), and according to the Swedish Booksellers' Association<sup>10</sup>, the total number of general bookshops (i.e., excluding about 20 specialist bookshops) was 298 in 2015 (Olsson, 2015). In the same organisation's annual reports, Wikberg (2015, 2016) presents the data shown in Table 4.2.

**Table 4.2** Numbers of books sold in Sweden 2013-2016 through different channels

|                   | 2013      | 2014      | 2015      | 2016      | Percentage Channel<br>change 2013-2016 |
|-------------------|-----------|-----------|-----------|-----------|--|
| Physical bookshop | 1,313,174 | 1,391,426 | 1,464,225 | 1,392,639 | +6                                     |
| Internet bookshop | 1,593,317 | 1,579,724 | 1,993,424 | 1,950,233 | +22                                    |
| Other retailers   | 436,978   | 349,383   | 318,346   | 300,380   | -31                                    |
| Total             | 3,343,468 | 3,320,534 | 3,715,995 | 3,643,252 | +8                                     |

Source: Wikberg, 2015: 34, 2016: 16, 2017: 18.

It may be seen from the table that, with a lower proportional increase in sales over the period, online booksellers continued to outsell the physical bookshops. The market leaders in online selling are Adlibris (a Bonnier company) and Dito, which is the e-book sales arm of Bokus.com, now owned by Akademibokhandeln. According to a presentation by Magnus Nyttell (2012), Digital Manager of Bonnier, in 2012, Adlibris had 50 per cent of the e-book market and Dito had 40 per cent.

10. Svenska Bokhandlareföreningen.

## Subscription services

The example of Netflix, the subscription service for films and TV series, has encouraged the development of a so-called 'Netflix for books', or from another perspective, the digital version of the nineteenth century subscription lending library. The first to make any impact appears to have been Oyster, a venture-capital-based start-up, operating only in the USA, which ceased operations in 2015, as a result of the CEO, the two founders and some of the staff having been hired by Google. Oyster was followed by Scribd, also based in the USA, but operating in the UK and Australia and reporting 80 million *users*. Whether all *users* are *subscribers* is difficult to determine because the company does not release figures of either subscribers or income and *users* may include those who access the 'social publishing' part of the site, which was the origin of the service. Another US-based service Entitle, also closed in 2015. One report suggested that:

Entitle was solely reliant on venture capital funding in order to keep the lights on, because the e-book subscription market does not have enough paid readers to make the business model viable on its own. (Kozłowski, 2015)

Entitle also had a graded subscription system: \$9.99 for two books a month, \$14.99 for three books a month and \$19.99 for four books a month. This did not compete with either Oyster or Scribd, which charged a basic rate (\$9.99) for any number of books a month. Scribd, however, has recently changed its terms of service and now limits users to three e-books and one audio book a month, plus any number of books from a selection of titles, labelled *Scribd Selects* (Kozłowski, 2016).

As might be expected, Amazon is also a player in this market, with its Kindle Unlimited service, launched in 2014. This also costs \$9.99 a month (or the equivalent in other currencies in countries in which the service is offered), and is in addition to an existing service for Amazon Prime customers, who are allowed to borrow one book a month, free of charge, from the Kindle Owners' Lending Library. In addition to the USA, Kindle Unlimited is offered in the UK, Italy, Spain, Germany, Australia and India.

The US-based subscription services do not have the world to themselves, however: other national and multi-national services are also operating. For example, the most successful service in Germany is Skoobe, a company founded by two of the biggest publishers in Germany, Bertelsmann and Holtzbrinck and Macmillan (originally a British company, but now owned by Holtzbrinck). Skoobe's CEO is reported as saying: 'more than a quarter of all readers in Germany are reading digitally, and more than 16 per cent are interested in e-book subscription services' (Duffer, 2015).

Turning to the Nordic region, in 2015 Bonnier announced that it was starting up a subscription service, focusing on audio-books, under the name of Bookbeat (Bonnier AB, 2016: 15). As the biggest publisher in Sweden it can obviously take a decision to make its own books available to whatever extent it deems commercially viable, but, in order to become successful, one imagines that it will have to do deals with the other major publishers, and this may not be easy, as other subscription services have found. In

addition, Bookbeat will enter a market with existing competitors: for example, Russia-based Bookmate obtained funding in 2014 to expand internationally and, in addition to its operations in Russian-speaking countries of the former Soviet Union, now has subscribers in Scandinavia, Turkey, Latin America, the USA, Germany, Indonesia and Singapore, and plans further expansion (Cosseboom, 2015).

In addition, the Danish company Mofibo provides service to Sweden and to the Netherlands. Established in 2013 it now claims to be the largest distributor of e-books in Denmark with one million pages being read every day (Mofibo, 2015). In common with other such services, Mofibo provides no information on the number of subscribers: presumably this information is made available to publishers with whom they are negotiating. When queried about the collapse of Oyster, at the Frankfurt Book Fair, Nathan Hull, Director of business development at Mofibo, is reported as responding:

The Oyster news hasn't changed the challenges we faced – if anything, it has prompted more dialogue because more people are keen to learn how we are successful and generating sustainable revenues,' he said. 'Publishers remain intelligent, they could see that story for what it was. Mofibo is at the fair to close deals on existing negotiations and to open dialogues with new territories that have approached us based on our success, model and approach. (Campbell, 2015)

Illustrative of the pace of change in the industry, the Swedish audio-book subscription service Storytel acquired Mofibo in 2016 (Deppert, 2016). In 2015 it had also acquired the publishers Massolit Förlag and B Wahlströms Bokförlag, and in 2016 added Sweden's oldest publisher, Norstedts to its list (Cowardrey, 2016). The strategy is quite evident; it is to achieve a degree of vertical integration in the publishing industry, so that its e-book offer does not depend entirely upon negotiations with other publishers.

Another company, Fabula, based in Latvia, has offices in Finland and Estonia and could fairly readily diversify into other Baltic and Nordic countries. However, its resources are very limited compared with other players in the market, at just over 12,000 books.

Skoobe, in Germany, is probably Bonnier's biggest potential competitor: when established in 2012 it claimed to have no immediate plans to expand beyond Germany but by 2014 it was also operating in Spain (Hoffelder, 2014).

Finally, another competitor exists in Sweden in the form of Readly, which, at present, delivers access to magazines through the same subscription model. Readly operates in the UK, Sweden (its home country), the USA and Germany, and provides access to over 1,200 magazines (Readly, n.d.). In Sweden, until recently Readly also provided access to newspapers and books, but it has now withdrawn its e-book subscription service.

There are probably too many players in the subscription service market for all of them to succeed and more failures seem likely. Only the strongest players who can do deals with the major publishers seem likely to survive.

It is striking that the functionality of subscription services and library e-book lending services are so similar, yet in an interview with a Bonnier representative, it was suggested that the subscription model was more appealing to them.



Newer services may, of course, adopt different payment schemes, in order to win over publishers. In 2014 there were 1.6 million e-book loans from public libraries in Sweden, for a total cost of €3.6 million, of which €1.5 million was returned to the publishers (the Swedish Publishers' Association, 2015), which seems a rather small proportion of the income received by the aggregator, Elib. However, as Elib was owned at the time by Bonnier, Nordstedts, Piratförlaget and Natur & Kultur, those publishers would presumably be happy at the distribution.

Wikberg (2017) notes that the three Swedish subscription services (Bookbeat, Nextory and Storytel) reported sales of €37 million in 2016, an increase of 61.4% over 2015, but what proportion of this total is paid to the publishers is not given.

Our interviews with publishers suggest that the smaller publishers are happy with the e-book lending scheme, while the largest publishers, perhaps for ideological reasons, would be happier with a subscription service. (See Chapter 7 for further discussion of this issue.)

## The self-publishing phenomenon

Self-publishing by authors has existed for almost as long as the invention of movable type and, indeed, may well have been the earliest mode of making one's thoughts and ideas available to others. Until recently, it was termed *vanity publishing* on the proposition that the author was merely feeding his or her vanity and that the product had little to recommend it. Vanity publishing, however, was undertaken generally through publishers specialising in the genre and the author paid, recovering, perhaps, very little of their initial outlay. The *self-publishing* author, on the other hand, prepares the text in the relevant e-book format (which reduces essentially to a choice between the Kindle format and the EPUB format), chooses the distributor, sets the price and receives up to 70 per cent of the income from sales as royalties.

Some self-publishing authors have been extremely successful, either in terms of direct sales from their distributor, or in terms of their book being bought and sold as a printed book by a traditional publisher. In either case, longer term contracts with publishers may result from self-publishing success. According to the May 2016 Author Earnings Report (2016b), 1,340 authors are earning \$100,000 a year or more from Amazon sales. But half of them are indies [i.e., self-publishers] and Amazon-imprint authors. The majority of the remainder? They come from traditional publishing's longest-tenured 'old guard'. The Report goes on to note:

There are now twice as many indie authors who debuted in the past 5 years now earning a six-figure run rate than Big Five authors who were first published in the same time period and are able to do the same.

This suggests that *new* authors are more and more likely to turn to self-publishing, at least initially, in the expectation that they may do better financially than trusting to the selection process of the traditional publisher.

The self-publishing phenomenon has generated an entire sub-industry within publishing: first, there are the distributors, through which the author can get his or her book in front of the public. Wikipedia (List of..., 2016) lists 30 such companies, of which perhaps the best known are Lulu (<http://www.lulu.com>), Create Space (<https://www.createspace.com>), Smashwords (<https://www.smashwords.com>), Bookbaby (<https://www.bookbaby.com>), Kindle Direct Publishing (<https://kdp.amazon.com/>), and AuthorHouse (<http://www.authorhouse.com>).

All of these offer almost the same kind of services, although the terms of service vary. For example, AuthorHouse offers several packages, ranging in price from €800 (\$899) for publishing in paperback and e-book format, online distribution through Amazon and other retailers, to €10,600 (\$11,899) for the ‘Optimum’ package, which includes everything in the cheapest offer, plus hardback publishing and a variety of marketing services and tools. Smashwords, on the other hand receives the author copy in e-book format, distributes to online retailers and library suppliers and retains 20 per cent of the selling price (set by the author) from items sold through its own online store – authors receive 60 per cent of the selling price from copies sold through other retailers.

Kindle Direct Publishing is the self-publishing arm of Amazon and, as such, is a special case in this sub-industry. It operates in much the same way as Smashwords, but offers two royalty rates, 70 per cent of list price for sales to 24 countries, and 35 per cent of list price for sales to anywhere in the world. The big advantage of using this service is, of course, the Amazon’s scale of operations: Author Earnings (2016b) reports that, ‘more than 50 per cent of all traditionally published book sales of any format in the US now happen on Amazon.com’ and, further, ‘roughly 85 per cent of all non-traditionally published book sales of any format in the US also happen on amazon.com.’ Amazon also has ability to offer not only sales but also lending of e-books through its Kindle Unlimited service, as well as promotions at reduced prices.

In Sweden, the choice available to the self-publishing author is much more restricted than for anyone in the English language area. Publit, established in 2008, is the oldest service of its kind in Sweden, offering a variety of services, not only to self-publishing authors, but also to publishers. It operates on a similar basis to AuthorHouse, charging fees for different levels of service. More recently, Bonnier has opened its own self-publishing channel, Type & Tell: here the focus is on publishing paperback books and an example on the website suggests a cost of €5.75 (56 SEK) plus the VAT for a small format paperback, but publication in the e-book format is also available, although only included as a supplement to the printed book packages. Demand drives supply and new companies helping self-publishing authors emerge, such as Recito Förlag, based in Borås, offering authors a full range of services from training to distribution of their books, including service for publishing e-books (<http://www.elbocker.se/>). Over 200 of their e-books can be found on all e-book sales platforms in Sweden.

The Spanish company, Bubok, also operates in Sweden, launching simultaneously in the UK and Norway in 2011 (Bubok opens..., 2011). It too, operates on the basis of offering various services such as cover design, sale through online bookshops, etc., at

standard prices, for example, cover design will cost the author €415 (\$464.25). Although it has been operating in Sweden for five years, it is difficult to find any information on its Swedish language products.

Given the nature of the Internet, the fact that the number of services for self-publishing is limited in any given country is not a problem; Swedish authors can use services such as Smashwords or Kindle Direct Publishing, which publish in many languages, and the products are just as available to a buyer in Sweden as they would be to one in, say, New Zealand.

It was noted above that some companies provide additional services for the self-publishing authors, such as cover design, professional page layout, marketing services, and so on. However, these services are also provided by independent companies and an author can pick and choose among a variety of firms, to get the kind of service they want. So, for example, an author living in Stockholm will probably find small firms that will do cover design, copy-editing and even online marketing and another author living in, say, Malmö, is likely to find the same kind of services there, or just across the water in Copenhagen. Having the service on one's doorstep would be a big advantage from the point of view of face-to-face communication.

### The academic market-place

Our surveys have shown that academic libraries in Sweden are, in effect, part of the English language market for e-books, in that there is a paucity of such material in Swedish, and, given the nature of teaching and research in universities, English language materials are appropriate both for student use and for use by researchers.

The effect of this is that international companies, referred to as *aggregators*, dominate the market. No single aggregator, however, is likely to be able to provide access to all of the relevant resources needed and our survey (described in more detail in Chapter 10) showed that the median number of aggregators used by Swedish higher education institutions was nine. The range, however, was very wide, from one to more than twenty.

As noted above, the aggregators operate internationally and include companies such as ProQuest, EBSCO, MyiLibrary, Gale and Oxford Reference. In addition, library suppliers such as Blackwell and Swets, also provide e-books from publishers and from aggregators (Vasileiou, Hartley & Rowley, 2009). The result of this proliferation of suppliers means that libraries cannot get everything they need from a single supplier and the library user is faced with needing to navigate different systems to obtain e-books from the different sources (Maceviciute *et al.*, 2014; Walters, 2013).

Given the current situation, it is not surprising that academic librarians in Sweden define an optimal system as one that consists of a single, user-friendly platform (or full integration with the library's own platform) and free of digital rights management limitations (Maceviciute *et al.*, 2017).

## The public library market-place

In the UK and the USA, a number of aggregators are operating in the public library market, chief of which is Overdrive. Overdrive has a catalogue of more than three million items, including e-books, audio books, magazines, and streaming video in fifty languages, serving ‘34,000 channel partners [schools and libraries] in 63 countries’ (Overdrive, n.d.). Aggregators are necessary in the market simply because the cost of negotiating with individual publishers for access to e-books would be extremely difficult for public libraries. In addition, the vast majority of public libraries would lack resources and expertise in developing their own delivery platforms.

The situation in Sweden is somewhat similar, in that a single supplier, Elib, dominates the public library market. Elib was established by the four leading publishers in Sweden, Bonnier, Norstedts, Natur & Kultur and Piratförlaget, then sold in 2015 to the Axiell Group, an international group, with headquarters in Lund. Axiell had been a partner, with Publitz, in forming a competitor to Elib, called Atingo, but the purchase of Elib resulted in the closure of Atingo (Första..., 2015).

Loans of e-books through Elib continue to constitute only a small minority of total loans, at about two per cent, nationally. The National Library<sup>11</sup> reports that, in 2015,

E-book use from public libraries, for the first year in a long time, has not increased significantly. One explanation may be that public libraries are limiting the number of e-books that users can download over a certain period, or stop e-book lending during the year when the budget for this is exhausted. (The National Library, 2015: 4)

We can add that an additional reason may be that the new agreement on the cost of lending is a further barrier. Loans, depending upon the age and/or popularity of the book, now cost between €1 and €20 and, as our survey shows (see Chapter 9), many libraries are now restricting loans to books that cost only €2 to €3.

The monopoly situation of supply to the public library sector means that a library wishing to offer e-books must use Elib, on the terms set by the company. Given the tendency towards mergers in industry generally, it may only be a matter of time before there is a single international provider.

## Conclusion

Looking at the developments taking place in publishing, in relation to e-books, it is evident that the major publishers are evolving what appears to be a fairly common strategy – at least in Europe. We can be sure that they do not wish to give up their traditional control of the process, in which they are the gatekeepers between the creation of content and its delivery to the reader. Three factors appear to be influencing

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11. Kungliga biblioteket.

their strategy: the self-publishing phenomenon, the subscription services and the public library market.

Bonnier, the biggest publisher in Sweden, and a global player, is responding to these challenges in a quite aggressive manner by establishing the Type & Tell self-publishing channel and the subscription service Bookbeat. The former has a competitor in the form of new services for independent authors offered by Publit, and the latter, competition from a number of sources, as described earlier. Bonnier, however, has a major advantage in its scale of operations, the size of its backlist, and its ability to direct resources to new initiatives. We understand, for example, that it now has a team of people managing the digitisation of its backlist, which includes dealing with copyright and contract issues. Its position in the library market is now different from the earlier one, in that Elib is now owned by the Axiell group, but with Bonnier and the other original owners retaining a minority interest. However, the company can still decide what it will provide to the public library market and at what price.

In Germany, we see similar developments: the main subscription service, Skoobe, is owned by Bertelsmann and Holzbrinck and the major publishers are involved in cooperation with the main booksellers in the dominant e-book retail service, Tolino.

Control of the delivery chain, whether by sales or loans or subscriptions is clearly central to the publishers' strategy and the ultimate outcome, internationally, could well be that start-up services, highly dependent on venture capital, may ultimately fail against the market dominance of the major, global, media corporations.



## Chapter 5

# Cultural policy and legal issues

Apart from market conditions, the development of e-books in Sweden is affected by cultural policy decisions and the status of an e-book as a product of the cultural industry. Cultural policy is a complex concept that turns into an even more complicated process in its development and implementation. Basically, it means state regulation of cultural activity to achieve 'policy aims of supporting artistic quality, language, literacy, and education' (Colbjørnsen, 2015: 329). It also seeks balancing of the interests of different actors within the area of cultural activities and industries. It can be carried out on the local, national, supranational, and international levels. The instruments of cultural policy can vary from conducting investigation to creating legal, economic, taxation, and other instruments to shape public services and commercial markets of the cultural industries.

It used to be the case that media and cultural policies were clearly separated from one another; however, with the transfer of many cultural activities and products online, policies started to converge, and also to overlap with government innovation policies (Colbjørnsen, 2015). Digital files of films, music, all kinds of texts, visual arts and newly emerging art and cultural products influence the areas within the jurisdiction of cultural policy and complicate the issues with which such policy is concerned. Mainly, cultural policy on the national level remains in the hands of the Ministries of Culture (or equivalent bodies) in most countries, but other ministries, such as those related to communication, market regulation, finance, etc. also implement measures related to cultural policies.

Cultural policy provisions in Sweden have not only a national, but also a European dimension, and to some extent affect the position of Swedish e-books on the international book market. Sweden is a part of most international agreements related to copyright and international trade as well as being subject to European Union legislation. Together with a wide range of different information technologies that have been developed over the last 30-40 years, the emergence of the e-book became disruptive not only to previous economic and market relationships, but also to many previous legal norms and agreements as well as to patterns of consumption and usage of culture, including reading habits. The potential of digital cultural products spreading over computer networks has threatened the usual flows of income and profits of many creators and producers of cultural goods. As we have already illustrated, new relationships between different actors in the book sector demanded new legal approaches. New competition threats required new policies, and different checks and balances, to maintain the existing system

of power distribution. Also, action was needed to retain the interests of weaker actors, especially users, in the commercial consumption of cultural products, such as music, films, newspapers, magazines and journals, and, finally, digital books.

In this chapter, we provide an overview of the cultural policy documents and issues that are relevant to e-book development in Sweden, as a small-language market where State protects local culture and arts. It is by no means exhaustive in any one of the topics and the changes in the market are continuing, therefore, the cultural and political landscape related to Swedish e-books may change within the next few years. Nevertheless, the aim of this chapter is to set the legal and political background to the period of our investigation, namely the years 2012 to the beginning of 2017. In addition, this chapter also maps the areas of cultural political influence and tensions related to e-books that will remain the same regardless of the changes applied by new legal, political, economic or other instruments.

## E-books in documents and projects of the Swedish Parliament and Government

Swedish book production has to be protected by governmental support as many aspects, important for the development of Swedish and minority languages, education or production of certain types of literary work, may not be profitable and interesting for commercial businesses because of the size or buying power of the audience. Roughly every fifteenth year, 1968, 1982, 1997 and 2012, the Ministry of Culture commissions investigations of the state of the Swedish book in all aspects, production, distribution, and consumption, and the necessity for financial support during the immediate future.

The latest such report, *Reading culture* (SOU 2012:65)<sup>12</sup>, has emphasised reading much more than the previous investigations. The main reason to this was the deep decline in results of the 15-year-old pupils' reading comprehension in the PISA-tests during 2009. The assessment and proposal were clearly directed to raise the reading comprehension among children and young adults profoundly by 2018. E-books were included into this reading campaign through schools and libraries as a complement to physical books and support for reading (Pålsson, 2015).

In relation to the investigation, the Government has issued a bill, '*Reading for life*'<sup>13</sup> (2013), a proposal for the Parliament in which several issues related to e-books and their role in the promotion of reading were addressed. The role of public libraries in this matter was emphasised (see below). The Government also has noted several features related to e-books in Sweden, such as the low use of dedicated reading devices in Sweden, parallel publishing of new books in printed and digital formats, and a lack of older titles in digital formats on the market, that distort supply and choice of Swedish literature online.

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12. Läsandets kultur.

13. Läsä för livet.



Among other measures, the proposal suggested that financial support for digitising older titles of quality literature, which began in 2012, should be continued. The goal of this three-year experimental project, 2012-2014, was to broaden the publication of e-books in the Swedish language by digital republication of quality literature to support and stimulate the internal market. The project finally has supported digitisation of older titles under 137 applications from publishers to the amount of €265,000 (2,570,000 SEK) and, according to the Arts Council (2015), it has been successful.

The Culture Committee of the Swedish Parliament<sup>14</sup> also set up an in-depth study of e-books in Sweden and abroad in 2013. Questions related to policy, like market and consumption, laws and regulations, with special focus on reading, integrity, and compensation for library lending are described and analysed in the document by the Culture Committee (2013). This extensive study has taken into account the positions of different actors related to the e-book market and concluded that this complicated phenomenon affects, in different ways, many traditional actors, including readers, publishers, booksellers, libraries, technology producers and providers and many others. The attitudes towards e-books among the actors were split: some believed that e-books were for the future with new and interesting possibilities for communication, while others thought that e-books would turn the development backwards, with loss of ability to read longer texts in full concentration (the Culture Committee of the Swedish Parliament, 2013: 57). The aim of this study was to increase the awareness of the politicians, mainly in the Culture Committee, but others too. It did not produce any clear suggestions or recommendations, but simply stated that, though a printed book and an e-book are complementary, the tensions that occur in relation to them emerge from the impossibility of applying the traditional rules, including cultural political mechanisms and methods (Ibid: 59f).

The Government report '*An overarching media policy: for enlightenment, engagement and responsibility*' (SOU 2016:80)<sup>15</sup> highlights the potential of all content and distribution forms in the modern media society, and emphasises a focus on the democratic aim. A long-term investment in media and in an information literate population is clearly outlined. Culture and media are prioritised areas for disability policies. Access to a variety of media is a prerequisite for citizen participation and to exercise freedom of expression. The report does not *per se* mention the e-book format in any of their analyses or suggestions on changing media politics.

Recently, the European Commission presented a proposal for a Directive for accessibility requirements in products and services, seeking to unify accessibility requirements across the member states and to create better inclusion and participation conditions in Europe. The aim of the proposed directive is 'to improve the functioning of the internal market for accessible products and services' (the Commission, 2015:

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14. Kulturutskottet.

15. En gränsöverskridande mediepolitik: för upplysning, engagemang och ansvar.

4). It also includes e-books (Ibid: 8). The Swedish Agency for Participation<sup>16</sup> has examined the consequences of the proposed Directive to all involved Swedish actors and their report included Annex 6 on e-books (the Agency for Participation, 2016). This Annex emphasised that Sweden has to increase the accessibility of e-books to ensure the rights of people with disability, freedom of expression and opinions, and access to information (Ibid: 5). The Swedish Agency for Accessible Media<sup>17</sup> should, with other national and international partners, proceed to develop an international standard for e-books based on EPUB3. The future Directive should help in developing coherent regulation in the area, which could protect the interests of different actors in the publishing sector, but mainly to ensure that disabled people have increased options for access to e-books.

### Privacy and integrity

Reading e-books raises a number of issues related to personal integrity and protection of personal data. It is regularly protected by several laws: *The personal data act* (the Parliament, 1998) and, in case of downloadable and streamed e-books, the *Electronic communications act* (the Parliament, 2003). The first deals with publishing personal data and protecting privacy from unsolicited intrusion (e.g., of advertising). In addition, when library users borrow books, the provisions of personal integrity in libraries, from the *Swedish public access to information and secrecy act* (the Parliament, 2009, ch. 40, §3), apply to the registration of data on the individual person's loans, reservations, or other library activities. This does not apply to other service providers and, as a result, when e-books are loaned by a third party, raises questions concerning the privacy of library users. *The electronic communication act* protects the data of the users of Internet services, by setting the rules of data collection and preserving the anonymity of consumption. It prescribes that personal data should be protected by a service provider collecting and processing that data by special technological and organisational security measures. Any information about a user, including traffic information, can be kept only to provide access to the service, and must be fully anonymised immediately after, and the user has to be informed about any retained information, its purpose and the retention duration (Ch. 6, section 3).

It would seem that the protection of users' integrity should be solved by these laws, but many questions remain. For example; formal identification is required before protected e-books can be used in any way. Library users may not realise that they are leaving their data not with the library, but with a third party, the e-book provider. In Sweden, Elib used to claim that user data was not sold or transferred to third parties, but there was no information on how it was used in general. At the time of writing this text there is no mention of personal data protection on the Axiell Media website,

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16. Myndigheten för delaktighet.

17. Myndigheten för tillgängliga medier.

nor on the pages that users access through libraries. Though no one disputes the right of distributors, vendors, or rights-holders to collect and analyse the data on user behaviour, like book selection, reading and so on, the question remains whether these data should be used for personal service profiling or other purposes that may affect individual privacy.

The most powerful tools in cultural policy are the laws and legal norms and this is also true of the e-books sector. The most important legal regulation in the sphere of culture relates to copyright. Information technologies have affected the copyright situation worldwide and brought several rounds of revision of national and international norms (e.g., the WIPO Copyright Treaty changed in 2002, and the EU copyright directives in 2001, with further changes in 2006 and 2011). The emergence of e-books has further complicated the matter for all involved in their production, distribution and use.

## E-books and copyright issues

Copyright laws are important in all cultural industries and should balance the interests of the creators of cultural and other intellectual products (copyright holders) in being rewarded for their work and of the users who participate in the re-use of these products for various purposes: spreading and increasing of knowledge and culture, education, increasing social inclusion, enacting democratic values and participation, leisure and entertainment, etc. These purposes of use are usually regarded as beneficial for society at large, but also for reproduction of need and demand for the cultural and intellectual production itself. The need to reward the creators for their work is also regarded as an important motivation sustaining creativity and interest in producing artwork and photography, music, literature, theatrical performances and films, software, and other cultural products (the Parliament, 1960, §1).

The Swedish act on copyright in literary and artistic works (the Parliament, 1960) provides the basis for authors of books to transfer their exclusive right to produce copies of their text or licence it to publishers (§30-38) and to receive remuneration for commercial exploitation or public use of their work (§26), for booksellers to sell books to the public (§8), for libraries to lend books after they have bought them or, in legal terms, ‘when a copy of a work has been transferred, with the consent of its author, within the European Economic Area, that copy may be further distributed’ (§19). This clause is related to the provision by the European Council directive:

The first sale in the Community of the original of a work or copies thereof by the rightholder or with his consent exhausts the right to control resale of that object in the Community. The first sale in the Community of the original of a work or copies thereof by the rightholder or with his consent exhausts the right to control resale of that object in the Community. (The Council, 2001, § 28 of the preamble)

There are also certain limitations of the exclusive copyright (the Parliament, 1960, Ch. 2) when, under certain circumstances, the copyrighted work can be reproduced for specific aims (e.g., for educational purposes, conservation of the work, citation, etc.).

The issues of e-books, however, are somewhat different as they are regarded not as physical items, but as electronic services providing book content. In main Swedish laws e-books are regarded as:

... content of certain other transfers of sound, image or text that occurs as electromagnetic waves... from a database. These are technical recordings contain text, picture or sound that can be read, listened to or otherwise comprehended only using technical aids. (The Parliament, 1991, §1)

In fact, they fall under the definition of software programs or rather electronic services provided by database creators. Therefore, the first sale does not exhaust the right to control the resale or loan of the copy. In fact, one can only license the e-book content when buying this service, not acquire ownership.

Nevertheless, the literary work or the content of the file (and the service) is protected by copyright. As the transfer of book content online technically produces digital copies on several computers (one accessing a server, and at least one acting in transmission), these can be regarded as infringement of copyright. This complexity means that re-sale and further distribution of e-books are governed by different set of rules than those for printed books, which have different implications for different actors. Two sets of legal norms are in operation here: copyright law and contract law. Both are quite controversial, as copyright over time has been changed on the international and supranational levels to protect copyright holders at the expense of content users (e.g., by extension of neighbouring rights duration). This also harms the copyrighted literary works that are under-exploited (e.g., not re-published and not reproduced) during the whole copyright period after the initial exploitation period of several years (Heald, 2014). For the physical, printed work, contractual agreements should not overrule copyright exemptions, but it is the contractual law that governs the licensing of e-resources for users and that can inhibit copyright exemptions and prevent the fair use of e-books (EBLIDA, 2009, 2013).

Copyright of digital cultural products also needs protection from illegal dissemination and copying. Chapter 6 of the Swedish copyright law (the Parliament, 1960) provides for using technical means that 'prevent or limit the copying of items or providing access to the public of a work protected by copyright without consent of the copyrights owner' (§52b). These technical means are known as Digital Rights Management (DRM) and were first applied to digital items disseminated on some physical support, such as CD-ROM or DVD, but not to databases or electronic services. Technical protection of downloadable and streamed content, such as music, films, games, e-books, 'or any other service provided electronically, at a distance and at the request of the recipient' (the Parliament, 2000, §2) are protected according to the Act on prohibition of certain decoding equipment. This act makes it illegal to

circumvent technical protection of digital services, just as the copyright law prevents using any means of removing DRM, protecting digital content on physical carriers (the Council, 2001, Article 6). The issue of copyright is, however, rather ambiguous, as often technical protection prevents users, who have legally accessed content, from exercising their rights, e.g., to access the same item using different equipment that belongs to them, to print out longer parts of text, to use the content, that they have paid for, while travelling in different countries, etc. These distortions are acknowledged and should be taken into account in the new Digital Single Market strategy of the European Union (the Commission, 2017).

It also seems that DRM does not prevent actual illegal dissemination of literary works and many producers have started to use 'softer' means for technical protection or even stopped using them altogether. Other, more sophisticated legal mechanisms of monitoring and taking down the illegal content on the Internet are created and other actors, such as Internet Service Providers, are involved, which causes other problems, such as the expense incurred by those providers in monitoring their services, or the violation of ownership rights of law-abiding users (see, e.g., Raymond, 2013).

The discontent of users and also of some creators who feel that copyright limits possibilities for creative expression and knowledge sharing has led to the development of Creative Commons (CC) licenses (see <https://creativecommons.org/>) that allow open (free of charge) access to creative works, including literature. The creators can license their work using several different types of CC licences, but in general they allow users to disseminate, modify or use in other ways their work in non-commercial and sometimes even in commercial contexts, on condition that their authorship is acknowledged by the users.

The Creative Commons licences in Sweden are managed by a non-profit organisation, which helps creators to choose a proper version and to create a contract for CC or other open access licences (so called Copyleft licences) (see: <http://www.creativecommons.se>). The Creative Commons licences are recommended by the Swedish Research Council<sup>18</sup> in the draft of national guidance for open access to scientific information (the Swedish Research Council, 2015). Among other types of scientific information, scholarly books (monographs, anthologies, extensive reports, etc.) have been badly affected by the diminished financing of libraries (the primary market for scholarly monographs), increased costs of publication, higher status of research articles in allocating research funding and assessing academic merit, and other developments. Many universities and research-related institutions worldwide have begun to consider open access publishing of academic books, seeking to solve the crisis in their production. The Research Council together with other research funders financed a study of open access in book publishing (Bernhardsson *et al.*, 2013), which mapped the situation of open access academic publishing and means of ensuring the quality of academic digital books. This study served as one of the sources for drafting the national guides for open access.

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18. Vetenskapsrådet.

All of these issues with copyright also affect libraries working with e-books, whether acquired from commercial suppliers or produced as open access digital publications.

### Regulation of library work with e-books

Swedish cultural policy is very important for the whole library system in Sweden. The legal and economic basis of library work rests on provisions of the state cultural policy, the position of libraries in social, cultural, academic life and the media system is ensured by cultural policy and a wide range of legal provisions. The work with e-books in Swedish libraries is no exception. For example, if the first-sales right allows libraries to lend physical books to the public, the definition of e-books as services is the basis of e-book licensing agreements with publishers, aggregators and other vendors (Chiarizio, 2013), as the copyright protection act relates only to 'tangible articles' and 'question of exhaustion does not arise in the case of services and on-line services in particular' (the Council, 2001, preamble point 28, 29).

However, nothing is stable in this quickly developing area. In November, 2016, the Court of Justice of the EU ruled that the public lending of e-books 'under the "one copy, one user" model' can be carried out as it has 'essentially similar characteristics to the lending of printed works' (especially, if the authors obtain fair remuneration) (the Court of Justice, 2016: 1). In fact, it acknowledges the right of libraries to lend e-books on the same basis as printed books, under the first-sales right.

The first library law in Sweden came into force in 1997. It provided regulation to all libraries financed by public funds, regardless of the level (municipal, regional or national), on which they operate. It was significantly revised over several years and in 2013 a new act was passed by the Parliament (2013). The new law also confirmed the importance of libraries for the development of democratic society by helping in knowledge transfer and freedom of expression (§2).

Public libraries have provided access to e-books since 2001, when Elib, publishers and libraries agreed that it was time to increase the demand for e-books and help their market expand (Fleischer, 2011). However, in the law of 2013, it was for the first time stated that public libraries should provide access to literature in any format:

In public libraries, the public can borrow or otherwise obtain access to literature for some time regardless of publication form free of charge. (The Parliament, 2013, §9)

This provision is part of a more general role of libraries in promoting the status of literature, education, research and culture (§2). Despite the fact that this particular provision relates to public libraries, the juridical clarification of the act postulates that 'literature' in the law in general includes all genres and technical formats, fiction and non-fiction in physical and digital formats as well as other forms, by which the written word is disseminated, e.g., newspapers and journals (the Swedish Library

Association, 2015: 8). The role of public libraries differs from others as they have to be available to everyone even without regard to citizenship, language, or special needs (e.g., of disabled persons). Free loans of literature in any format (including e-books) are an important aspect of availability in all libraries, but this principle is obligatory only for public libraries and their role in the development of equal and democratic communities. It also connects directly to the provisions of the act that public libraries should work towards improved reading and language skills (especially, for children), better skills in the use of information technology, and increased inclusion into social participation (the Parliament, 2013, §7, 8; the Swedish Library Association, 2015: 19ff).

The duty of public libraries to provide free access to e-books to their readers has been articulated and attended to by libraries, however, it needed more tangible means of support, especially as the increasing demand for e-book borrowing from public libraries began to strain their budgets. In its bill *Reading for life* (2013), the Government has suggested that, besides the strategic direction to achieve higher levels of literacy and proficiency in reading, e-books should become a focus of governmental concern in the future. The actual proposal included two parts based on the previous investigation 'Reading Culture' (SOU 2012:65: 16). First, it was proposed that the National Library should be commissioned to conduct experimental work on promoting e-books:

The National Library should be given responsibility to initiate a pilot project that enables external distributors provide e-books through the national catalogue Libris and ensures that copyright-free digital literature is available through Libris for mediation through public library system. (SOU 2012:65: 36)

Secondly, the Government has decided that e-books should be available and promoted by public libraries and they need support in conducting this activity (the Ministry of Culture, 2013). The problem was the high costs to each library unit, because of the business model used by the aggregator Elib, and the impasse in the negotiations between libraries on one side and the publishers and Elib on the other. Thus, the Swedish Association of Local Authorities and Regions (SKL)<sup>19</sup> has been given the responsibility to represent their members' interests in making e-books available to citizens in municipal and regional libraries (see the Government, 2013: 39). The National Library has conducted an initial study of an overall national system for distribution of e-books and proposed an experiment of e-book provision for libraries (the National Library, 2013). Some years later, it published a report on its pilot project to provide access to non-copyrighted e-books for libraries through the national catalogue LIBRIS. The report stated that the Library has the competence and the possibility to develop and operate a national hub for e-book loans in Sweden, to improve both the possibilities for loans and interlibrary lending of e-books, and can provide a sustainable national platform. To move ahead it needs increased cooperation with publishers and distributors to provide a critical mass of e-books (Stjernvall, 2015).

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19. Sveriges Kommuner och Landsting.

There is another important part of the national cultural policy: the public lending right, a system that compensates copyright owners for the public use of their works in libraries. In Sweden, this dates from 1954 and covers both public and school libraries. The remuneration is collected and administered by the Swedish Authors' Fund<sup>20</sup> according to the regulation of the Ministry of Culture (1962: 652).

The position of authors was negatively affected by treating e-books as services and demanding public libraries to provide access to them, as the Government proposition 2013/14:3 declared that only physical, printed books will be covered by remuneration for library loans. Remuneration for e-book loans needs to be agreed between authors and publishers just as for other sales and use (e.g., through the subscription services). The Writers' Union<sup>21</sup>, therefore, suggested that the Government should investigate the economic conditions of authors, given that e-book production and lending is increasing. The Union had already adjusted contracts between publishers and authors in 2004, and recommended a standard agreement for authors (The Writers' Union, 2004). This includes books, audio-books, commissioned publications, agents' commission, and e-books. The standard provision on making e-books accessible, *Providing rights* (§3), states that the author gives to the publisher the right to transfer the book into electronic format, and to license it further to public libraries that lend e-books to readers. Publishers have to compensate further licensing to the authors for every download by library patrons.

However, changes are happening in this area in some European countries under the pressure of writers' and authors' associations. In February 2017, an amendment to the Digital economy bill to extend public lending rights to remote e-lending was passed by the House of Lords in Great Britain (PLR extended..., 2017).

These changes may in the long run affect the situation in Sweden where the discussions of possible changes to rules relating to public lending right and authors' remuneration continue.

Apart from general issues that are common to all libraries, other legal and political documents regulate specific functions of different types of libraries. Thus, demand for open access publishing of publicly funded research results raises new demands for research and university libraries. In Sweden, many academic libraries have become involved in the open access movement and in investigations of its possibilities for scholarly communication.

Another specific function is legal deposit for the preservation of the cultural heritage, which is carried out by the National Library. Sweden has one of the longest traditions of legal deposit in Europe, but was late with legal deposit for online material. Following a proposal from the Government (2011), e-books and other digital materials have to be delivered to the National Library for legal deposit according to a special law (the Parliament, 2012), which is a supplement to the Legal deposit act (the Parliament, 1993). The law for digital legal deposit was prepared with care and it states

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20. Sverige Författarfond.

21. Författarförbundet.



the ‘obligation to provide copies of electronic material that has been made available to the public in this country by transfer via computer network (legal deposit)’ (the Parliament, 2012, §1), and which relates to Swedish matters (§4). The law makes a clear distinction between ‘electronic material as a defined unit of an electronic recording of text, sound or image that has a predetermined content that is intended to be presented at each use’ (§2), and clarifies other complicated issues, such as, who has to provide legal deposit copies, what actually has to be provided so that material can be preserved, etc. The National Library can only preserve the submitted materials for the future, but access to it is password protected. So far, it is not clear how this material can be made accessible to the public given its copyright status.

As libraries meet difficulties in dealing with all legal complexities, the Swedish Library Association<sup>22</sup> pools the expertise of their members who can advise their colleagues on copyright and other legal issues<sup>23</sup>.

### Legal status of the e-book and the VAT issue

One of the issues relating to national and international legal norms about the status of e-books and e-publications and their definitions as services is the issue of taxation. These legal norms also explain the economic conditions of e-book production and sales in European countries, which in this case retain some independence in applying the EU directives and other regulations. The situation regarding VAT for e-books in Europe is comprehensively discussed by Colbjørnsen (2015). Here we introduce only the most important milestones in the latest developments that are relevant to the Swedish situation.

Until recently, the European Council Directive, *On the common system of value added tax* (the Council, 2006) divided taxable transactions into ‘supply of goods’, meaning ‘the transfer of the right to dispose of tangible property as owner’ (Article 14, 1), and ‘supply of services’, meaning ‘any transaction which does not constitute a supply of goods’ (Article 24, 1). As e-books are not tangible property and physical support (in this case any reading device) is not part of such transactions, e-book provision was classified as a service. The document, *Implementing regulations* (the Council, 2011), claimed that e-books are ‘electronically supplied services’ that ‘are delivered over the Internet or an electronic network and the nature of which renders their supply essentially automated and involving minimal human intervention, and impossible to ensure in the absence of information technology’ (Article 7, 1-2).

The Directive and further documents instructed the taxing of e-books at the normal VAT rate in the countries where printed books enjoyed the privilege of lower VAT as cultural goods. As a result, the prices of e-books became higher, especially, in the non-English speaking countries, which did not have an international market.

22. Svensk Biblioteksforening.

23. see: <http://www.biblioteksforeningen.se/expertnatverk/expertnatverket-for-bibliotek-och-upphovsratt/>

Some European countries (e.g., France and Luxembourg) retained the reduced VAT for their e-books as for printed books. The European Court has confirmed that e-book sales are qualified as supply of electronic service and cannot be taxed at a lower rate VAT. France and Luxemburg were ordered to redeem the situation with regard to the taxation of e-books in their markets (the Court of Justice, 2015).

However, the pressure from the publishing and book-selling communities in many European countries, governments of several European countries, and even the European Parliament, resulted in revision of the EU position. At the end of 2016, the European Commission submitted a *Proposal for a council directive amending directive 2006/112/EC, as regards rates of value added tax applied to books, newspapers and periodicals* (the Commission, 2016b). This proposal suggests that European countries have the right to reduce VAT rates on e-publications. The proposal implies that e-publications become goods rather than services. This proposal is tied up with the VAT Action Plan, by which the European Commission seeks to modernise the whole VAT system 'to support business and help the digital economy and e-commerce' (the Commission, 2016a, 2016c). The European Parliament voted to give member states the option to charge a reduced rate of VAT on e-books, on the 1<sup>st</sup> of June, 2017 (Reducing VAT..., 2017).

In Sweden e-books are taxed at the full VAT rate of 25 per cent, while printed books have a reduced rate of 6 per cent. Nevertheless, publishing, bookselling and other interested communities have demanded the reduced rate for digital cultural products equivalent to printed ones. The Swedish Publishers' Association<sup>24</sup> has led campaigns for reduced VAT on e-books, e.g., in 2007; and for digital audio books in 2010, 2012, and 2015. The debate about the VAT rate for digital books and newspapers is quite visible on the pages of Swedish periodicals. The Parliament has twice (in 2011 and 2012) voted that Sweden should advocate in the EU for e-books to have the same low VAT rate as printed books. As a result, the Ministry of Finance and other governmental institutions participate in negotiations on VAT for digital publications with other European countries and the European Commission (Lindström, 2015). The Government's announcement in January, 2017, that it intends to reduce VAT for digital books and periodicals as soon as the EU decides that member-states have right to do this, has been met with great hopes by the publishing community (the Swedish Publishers' Association, 2017).

Even when resolved by the European Commission, the issue of definition and extent of e-publications is not quite self-evident as they have to be clearly separated from other websites and Internet services, which is quite a problem, especially, having in mind all possible formats of e-books, newspapers, journals and digital audiobooks as well as new services related to e-book provision (e.g., subscription services). These issues need to be clarified by the European Commission and by the Governments that take advantage of the new regulation.

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24. Svenska Förläggareföreningen.

## Conclusion

Swedish State institutions are closely monitoring and supporting issues related to the cultural and democratic development of the country. They have developed strong mechanisms and means of cultural policy. E-books, as a part of the literary field, cultural industries and scholarly communication, fall into this area of interests of the Swedish State. As a digital product (and/or service) provided online, an e-book also falls under regulation of digital infrastructure and online activities, not only on the national, but also on supranational and international levels. In addition, the phenomenon of the e-book is relatively new and the set of rules and regulations pertaining to it is still quite fluid.

In conversations with representatives of the National Library and the Swedish Association of Local Authorities and Regions, a lack of national policy and strategy regarding publishing of e-books by public actors is identified. Their concern relates to both availability through common archives and standardised formats. According to them, there seem to be too many solitary actors and too little co-ordination at the moment. The same ambiguity has permeated our e-mail communications with the representatives of different state and non-governmental agencies (e.g., about changes in public lending right).

At present several developments related to digital market and e-commerce in the European Union indicate that some norms pertaining to e-books can change significantly. The Swedish situation is interesting as the country is evolving a variety of political and legal solutions as a result of interplay between different actors.



## Chapter 6

# The authors and e-books

### *Opinions and practice*

What identifies an author? By definition, anyone who is devoted to writing for a living or just for leisure can call themselves an author. This broad, social approach is not related to values or quality (Steiner, 2009: 26). The chances of being published by a professional publisher are about one per cent, and even lower for poetry (Ibid: 39).

Membership in The Swedish Writers' Union<sup>25</sup> requires an application based on certain criteria (The Swedish Writers' Union, 2016, § 3). First, the applicant should have at least two books publicly available as literary, professional production. Secondly, the applicant shall be elected by the executive committee of the Union.

Since 1970, the Union has had four sections: 1) poetry and fiction; 2) translators; 3) non-fiction; 4) children's literature. The Swedish Writers' Union is the only organisation for authors in Sweden and, therefore, is a strong actor in negotiations on topics such as finance, royalties and other compensations, and law, such as VAT and copyright, as well as freedom of expression and cultural policy (Gehlin, 1993). Membership means having passed the gatekeeper of acceptance to be inside a community of professionals; although some decide to stay outside.

According to a survey conducted in 2007, the Union has 2,000 members, of whom 700 are full-time authors. A group of 130 well-established professional authors receive guaranteed remuneration from the Swedish Authors' Fund<sup>26</sup>. Most of them publish regularly, but few are bestselling authors (Pettersson, 2009). In all, 300 authors are able to make a living from their work. The Swedish speaking part of Finland has a separate publishing industry, with its own publishers, distributors, and audiences. About 200 authors are organised in the Society of Swedish Authors in Finland<sup>27</sup>. Some of them are also published in Sweden by a Swedish publisher.

The relationship between author and publisher is intricate. The gatekeeping function of the publisher in adjusting the author within the publishing process occupies a number of stages, but both actors have had a shared interest in acceptance of the other's specific 'capital' (Svedjedal, 2000). The literary field, in Bourdieu's (1996) terms, has traditionally been seen as an opposition between literary and economic capital. In the struggle, the symbolic capital of both is mutually intensified. This has changed

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25. Sveriges Författarförbund.

26. Sverige Författarfond.

27. Finlands Svenska Författarförbund.

today: highly respected publishing houses might change their publishing policies when new owners set the agenda. The shift from the late twentieth century print publishing circuit with separate, free-standing actors, also shows how authors, publishers and distributors are intertwined and to some extent overlapping in the digital publishing circuit (Murray & Squires, 2013). In any event, the attitudes among Swedish authors and publishers towards the e-book phenomenon emerge mainly from the different situations of the groups in the market (Nilsson *et al.*, 2015).

The rise of Swedish e-book production, distribution, and consumption was a clear fact in 2010. Starting off as experiments and envisioning a future book-culture (Svedjedal, 2001), the role of the e-book in contractual terms was decided upon in 2004 when a separate contract on e-book production was signed between authors and publishers (see Chapter 5). What was produced, marketed, and distributed were mainly titles that already had a large audience, and an audience with a clear interest in digital technology. The landscape was now open for everyone to be an author. Although it is not a new phenomenon, self-publishing of e-books has become an available option for authors to reach the market. Content can be published independently of established institutions, which could be of interest not least for first-time authors (Dilevko & Dali, 2006; Laquintano, 2010). On the Internet, e-book authors can locate an audience for their work and establish a relationship with readers as part of a marketing strategy. Several self-publishing services are available including editors, translators, proof-readers etc., and there are also easily available, free computer programs to aid the production process (Kular, 2006).

Best-selling authors, 'star authors' or 'literary celebrities', are the focus of media today, backed up by heavy marketing (Forslid & Ohlsson, 2011). The author in this segment is sometimes recognised as a 'performer' or a 'brand' in public media (Forslid & Ohlsson, 2009). This tendency shows how economic calculation and competition for the audience's favour, has affected the literary field and authors of literary fiction as well as of genre literature (Forslid & Ohlsson, 2011). In addition, social media have enabled an immediate and spontaneous contact between author and reader, which underlines that a new kind of author is on the rise (Söderlund, 2009).

This chapter is concerned with the authors' position in the publishing circuit. The authors' work is the symbolic heart of the book industry. Without their work, there would be no books to publish, to distribute, and to consume. The authors' position, therefore, differs very much from work being done by other actors in the literary field: it is recognised solely to come from the author's creativity, imagination, and knowledge, although with a certain audience in mind.

## The interviews

The attitudes and perceptions of Swedish authors on e-books were studied through semi-structured interviews with 26 individuals. The aim was to include authors from

various positions in the literary field, based on national and international popularity, reputation, official recognition, productivity, genres in fiction and non-fiction, and modes of production. Sex and age were also taken into consideration. Three categories were identified: authors who had not yet published e-books (4), authors with experience of having self-published e-books (5), and authors who had published e-books as part of the agreement with a publisher (17). Fifteen authors were female; eleven were men. Everyone had published in Swedish: 23 by Swedish publishers, three by Finnish-Swedish publishers and one by both Finnish-Swedish and Swedish publishers. This indicates that although the Swedish language is common to all 26, contexts and agreements might differ slightly.

There were two waves of data collection. The first, carried out in 2014, was based on self-selection of respondents by inviting members of the Writers' Union and from various publishing houses to participate. This led to 17 interviews, five face-to-face and twelve by telephone. In the next wave, in 2015, authors were chosen strategically to meet the criteria presented above and to reach saturation. Another nine authors were contacted and interviewed by telephone. The telephone interviews were generally more concentrated and took about 30 minutes, half the time of the personal meetings. All interviews were recorded and transcribed.

The majority were writers of mainly fiction or both fiction and non-fiction (16 authors), and eight were distinctive non-fiction writers, which includes essays, biographies and journalism. Fiction genres represented were historical novels, relationships, avant-garde prose, political or ethical engagement stories, and crime fiction. Some eight authors had published more than 10 books; five of them are famous and regarded as being of very high quality. Twelve of the authors are translated into other languages, three of them of crime fiction and well exposed to an international audience; two are distributed by Amazon for the Kindle. Four authors with fewer than 10 books in their publication list may be considered *avant-garde*, using Bourdieu's typology. Quotations are marked by invented names with limited use, however, to emphasise some respondents who play a predominant part in the analysis.

The analysis is arranged in eight themes:

- Experiences of and attitudes towards e-books: advantages, disadvantages, self-publishing, the enhanced e-book.
- Marketing, distribution and dissemination: national, international and translations, literary agents, libraries, feed-back from readers.
- Legal issues: copyright and piracy.
- Economics: sales and public library lending, royalties.
- Policy issues: the Writers' Union and cultural politics.
- Reading e-books – attitudes and experiences.
- Effects on writing.
- The future of e-books.

As the results will show, some difficulties arise in maintaining a sharp dividing line between the themes.

## Analysis of interviews

### *Experiences of and attitudes towards e-books*

Authors' attitudes towards e-books were mainly positive, as they were regarded as part of today's society, with digitisation as an overall driving force. Arguments like 'easy to get', 'searchability', 'portable' were frequent, but the most common argument was 'dissemination is important, and this is one of the ways'. None showed engagement or interest in the production phase, except the self-publishers. Only one author was clearly negative towards e-books. His main argument was that recurring new formats will cause trouble in converting the cultural heritage, which is not the case of physical books. Another finds digitisation of the cultural heritage extremely valuable, as the e-pub files in The Swedish Literature Bank<sup>28</sup> are part of his daily work. Some authors found the format convenient and suitable for their production, but several pointed out that audio-books are much more important in dissemination as well as for income. The distinction between printed books and e-books was discussed in terms of stock-keeping. Unsold printed books are destroyed within a couple of years, but e-books are easier to keep in the backlist, which prolongs the life of the book, which will 'show to be an advantage'.

The issue of the enhanced e-book divided the authors into two groups: those who find it a creative challenge, and those who think that traditional books should not be confused with hypertext books or computer games. Interestingly, however, nothing predictably identifies these groups: neither age, sex, genre, productivity, nor fame. Anna, a young female author has, for example, self-published an enhanced e-book on psychic illness with great response in the social media and engagement in public lectures. Her opinion of the phenomenon, however, is overall negative: 'I don't think that the book will become more exciting because of this, enchantment in books is when you use your own imagination.' Peter, with experience from self-publishing through all stages, believes that traditional fiction novels are best suited for the e-book format. Sofia, in her mid-fifties, has published an e-book, but very much wants to do an enhanced e-book. She wants to expand the concept of a novel through interactivity, and new ways of communication and meetings: 'The conventional novel will not be sufficient'.

### *Marketing, distribution, dissemination*

Not all Swedish publishers produce e-books: decisions on this are based on various criteria. Small, niche publishers with a special publication policy and specific segments

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28. Litteraturbanken.



of the audience are fairly unlikely to produce e-books along with the printed book. There is no money in it for these publishers, many of which are regarded as publishing high-quality literature.

Production and marketing of e-books are based on contracts. Today, contracts between publishers and authors also usually include all formats. The assignment implies that the publisher is responsible for marketing and distribution of the book and its streamed versions, negotiations with aggregators such as Elib included (see Chapter 5). Authors usually accept the stipulation of having the book digitised. The main opinion on this is that it is part of dissemination, which is positive for their authorship, and the content of their book. However, not all books become e-books; it is the publisher's decision. High-quality literature, with, usually, a small audience is not generally converted into e-books, not even when there is a match between author and publisher in social and cultural capital: 'I have negotiated on a new book this year with a large company. They have kept the rights to the e-book but let the audio-book go... before they know about the reception, they don't lift a finger to make it an e-book. They only do it with bestsellers.' The author concludes: 'What is an author today? He is a partner in business. He takes the same risks as the publisher, but compensation only if he succeeds.' This was underscored by Dan, a well-known and established critic, currently experiencing difficulties in finding a publisher. He regarded self-publishing as a possibility for him in the future.

The authors' engagement in marketing is only in relation to the printed book. None had been involved in marketing of e-books, which separates the group of contracted authors from self-publishing authors. The latter depend on marketing through the social media. All agree that format is never noticed by the readers, only the content. Self-publishing authors are responsible for all steps, unless they have a contract with a self-publishing company or an entrepreneur. Three authors had produced their e-books by themselves with various results. Peter, for example, regarded this to be a pilot-project he wanted to explore in every detail; Karin, an entrepreneur in e-book production had also produced a text-book on this topic.

Information on the dissemination of e-books in terms of copies sold, or borrowed from libraries is not known to contracted authors. Self-publishing authors, on the other hand, were in full control of distribution and dissemination, selling and downloading. Peter, for example, was fully aware that his e-book had been downloaded 5,000 times; the printed version in hard-back had sold 1,000 copies, and the paperback version 5,000 copies. The issue of distribution for free was not controversial for either category: it was regarded as a personal decision by contracted authors, while some self-publishers, who have decided to upload their e-books to their website, thought that it is better to be widely disseminated than being sold in small numbers. As one of them puts it: 'I very much want people to read my story, I have gone through so many things...'

Dissemination in international markets through translation depends on contracts with literary agents. Translation is highly expensive. Another factor that was stressed

was that the content of their books might not be of interest to an international audience. The attitude towards literary agents was, however, mainly positive and thought to be significant for the future. As Vanja remarked: 'If the importance of publishers declines, the [importance of the] literary agents will rise.' Eva, a bestselling author, who had reached the international market with help from a foreign rights' agent, believes that a small-language area would gain from the e-book in the long run. Not all were satisfied with collaboration with an agent. Anna's experience, for instance, was clearly negative: 'She pushed me all the time, even when I told her that I needed peace to work on my new novel. The atmosphere turned really bad, it was awful... I felt I was an employee during these three years.'

Dissemination through public libraries involves the libraries in collection management and promotion of the reading culture. As library use is free, people choose to borrow e-books with a high cost to the libraries. Some authors think that there might be a risk that the libraries only buy the e-book version of a book. The fear is that there will be lower compensation to authors in general and especially to non-bestselling authors.

### *Legal issues*

Copyright on e-books is a complex topic and the authors' experiences and opinions on copyright and piracy depend on their belonging to different groups. Those contracted to a publisher are highly negative towards piracy: one calls it 'theft'. Self-publishing authors, on the other hand, are relatively tolerant. Like Karin, Peter believes that the market is self-regulated and works quite well. Threats from piracy are overrated, he thinks. Both are also highly negative regarding technical copyright protection, which they believe has negative effects for users. Piracy is of less importance to unknown authors than to well-known, according to Anna. In any event, copyright is a troublesome issue, especially when many originators are involved. Legal issues are highly important to authors, especially when it comes to e-books. Erik believes that this will become a big question in negotiations and assignments in the future:

You cannot sign a contract based on the fact that e-books don't sell very much today, it can easily rise very quickly and leave you with a bad contract. Publishers have to be farsighted. Having invested in a book, they don't want the author to turn to somewhere else with the e-book, but in times of irritation, I have considered to refuse libraries [the right] to handle my books, I don't even know if I can, since the e-book has turned copyright into a very big issue.

Some authors judge publishers' and aggregators' handling of copyright to be ideological, which is the reason why one author has not signed the streaming part of the contract with his publisher. Authors' copyright on e-books also needs to be assured. Vanja explains: 'If I get my rights back for the printed book, the publisher might say that they are still selling copies of the e-book. Then it will never be out of stock.'

### *Economics*

A contract with a publisher generally includes assignment of e-books, royalties from selling and library lending through the aggregator, Elib. Most authors believe the compensation to be €100 or less per year; others have no idea at all. International bestselling authors do receive royalties from e-books sold through Amazon. The economics of self-publishing is different. Karin, a professional producer of e-books, declares that:

You can sell at lower prices if you can do some of the work yourself. Self-publishers don't have to sell as many copies as an author with a traditional publisher, just a fraction, especially if you sell through Amazon where you can get 70 per cent of the profit... You might not get the marketing, but if someone finds your book on the Internet there will be no difference to the reader. The difference in control of what is going on is enormous.

Income from library lending is also very different. Karin believes that she earns quite well from library lending as a self-publishing author: 'To my big surprise I have earned much more from the libraries than from selling.'

All authors agree that VAT on e-books should be equal to that on printed books, i.e., six per cent, and pricing the same as a paperback.

### *Policy issues*

Most of the authors had faith in the way the Union handles policy issues on e-books. Some, however, remarked that the Union has become weaker during recent decades. According to Jonas, this process became clear and distinct when the general agreements between authors and publishers disappeared. Being an author today is much riskier than it used to be.

Policy issues, especially on financial matters, were explicitly discussed by self-publishing authors. Critical views were expressed on negotiations between the The Swedish Writers' Union and the Swedish Publishers' Association<sup>29</sup> on business models for library lending, although the topic was admitted to be problematic. Karin was convinced that the level from royalties should be at least 50 per cent to the authors, especially as the expenses in producing e-books is low. On the whole, copyright on e-books and economic issues were believed to become very important topics for the Writers' Union in the future.

Cultural policy is believed to be 'exceedingly weak', and without respect for artistic work. This is an anxiety for many authors, as voiced by Lisa:

I can see a change during the years I have been active. At this point I can see a risk of choosing e-books instead of printed books. Today, so many authors have been forced to stop writing, not because they are bad but because it is completely impossible.

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29. Svenska Förläggareföreningen.

There is a strong need for a new cultural policy if we really want Swedish authors writing about our experiences and lives in our language.

Erik suggests that e-books in cultural policy should be intertwined with legal issues, to evince values as intellectual products comparable to computer programs and intellectual property rights:

Literature and culture in general will do quite well in the market, if they get the right instruments for stimulation, if conditions are favourable, the consumption of cultural products will increase, but if they are hidden away they will totally disappear.

In a very small-language market like the Finnish-Swedish, there is a drive for digital textbooks and e-books in school because it is a cheaper alternative than printed books. According to Vanja, the Society of Swedish Authors in Finland has succeeded in securing payment for the authors for such use, which confirms her faith in the Union.

### *Reading e-books – attitudes and experiences*

As mentioned above, authors' attitudes towards e-books are mainly positive. A related question, then, is, 'Does this positive attitude affect their behaviour in reading e-books, their overall opinions and attitudes towards reading, whether of print or electronic text?'

Authors are generally professional leisure-readers, some also professional readers as critics or reviewers. Of the 26 authors involved in this study, ten were frequent e-book readers, some in their occupation as critics; five had some experience of reading e-books, and eleven had no experience at all. The reason for this was lack of interest, poor eyesight, or lack of a reading device. A majority preferred to read printed books for pleasure. Some responded to this topic by reflecting on digital reading in general, others on deep reading abilities and cognition, which might be affected; still others referred to personal, professional reading, cognition and the role of printed books in aiding memory.

Anna noted that frequent reading of short texts on the Internet seems to make it hard for people to read longer texts like novels. She also commented on how use of social media and Google, paradoxically make one's conception of the world narrow and self-confirming: 'You know less and less what other people are doing, but very well what you are doing yourself, but ignorant and uninterested in what the rest of the world might do.' For her, using imagination when reading is of great importance, and this she finds in traditional, linear reading, and for her the enhanced e-book cannot, and should not try to compete with games or linear reading.

Karin and Eva also remark on the potential effects of digital reading on future generations. Children today read more than ever, but their language is becoming very poor, they claim. Eva warns of the risks of losing reading competence: 'Reading long, continuous texts will disappear among young people. They can't manage doing it. They are too split... Reading long texts take a lot of time, and a lot of energy, they simply cannot go through massive chunks of words.'

Erik reads e-books in his job as a critic, but says that he prefers printed books as a private reader. He believes that this huge amount of e-book reading has affected his deep reading ability:

I think reading has become poorer. When you read an e-book, you do it faster, skimming, and jumping bluntly... I prefer reading short stories in e-format. Reading extensive novels in print or in e-format is very different. It is a different sensuous feeling having the book in your hand, knowing where you are in it. There is a tiny, underlying dramaturgic twist for the reader, which you catch with your hands in the book and you know when you've come to the middle because you can feel it in your body. This is not appearing with the e-book.

Erik finds his professional reading in e-format inconvenient. His habit in making personal marks and notes in the book while reading is easier in a printed book: 'There is some effort in the thoughts you reach when you simply just cannot copy and save, but need to formulate this with your pen and be much more precise. This is generated by thoughts and cognition.' Lena, who does not read e-books, also remarks on cognitive aspects on professional reading of printed books:

I am eagerly marking in my books, making references, and all those things which make it easier for me to go back and find essential paragraphs in the book when I need them. From my point of view, I could never use a book in the same way in e-format. And this is probably the reason why I will never become a keen e-book reader if this development will ever reach me in my life-time.

Vanja, also an academic, speaks of her plans to explore literary reading and its impact on empathy in future research. She is convinced of this connection, which she shares with Anna. This, she says, is important to understand when there is a risk that people start reading more narrowly, and learn less about other cultures, all things that might disappear in the flood of news in all media. She also finds the impact of bestselling literature, along with e-books in small-language areas, to be a problematic trend, which makes book production even narrower. Some believe that all these influences may well be a threat to democracy in the future.

### *Effects on writing*

The question whether the appearance of e-books has affected or will affect writing and creativity in the future was discussed from both general and personal levels. Some authors believed that language and linguistics will become more simplified, possibly affected by written language in social media or elsewhere; others that the e-book offers opportunities for short-story publishing. Anna thinks that 60 pages is the optimal and preferable extent of a story for today's reader. For her, it affects her creativity in concentrating on the choice of every word.

Some authors show clear interest in the opportunities of the enhanced e-book.

One author declares that her thoughts and expressions have moved her away from traditional, linear-text stories, and is now reaching for new dimensions which she thinks will be better for her content; however, high quality is necessary to attract the readers' attention. Erik, too, finds the enhanced e-book interesting and speaks of new creativity in metaphorical terms:

I am actually writing on a series of books, you can compare with a car-company using one platform for all models, a platform with various ways out, and with a high level of interactivity, texts which are reaching towards a twilight zone to another kind of experience...

Non-linear reading might influence story-telling towards the incorporation of interactivity in e-books. 'Non-linear reading will change literature radically', one author emphasised, 'you need not describe characters or relationships to the reader to memorise, they just use the search function.'

### *The future of e-books*

This domain shows two significant areas of responses from the authors: tensions in the field of production and development of the e-book phenomenon.

The authors are convinced that e-books are here to stay, mainly as a complement to the printed book, along with audio-books; only one author believed that e-book production will ultimately exceed that of printed books. They were also convinced that the market share will continue to expand, especially if prices are reduced, but a majority emphasised that printed books will still be here in the future. One self-publisher believes that the 'the sentimental value' of the printed book will never disappear: 'The classical novel will survive quite well in its traditional form as a text with a beginning, middle, and an end.' Two authors of picture-books with photographs believe that the physical qualities in pictures, graphic form and the tactility of paper, will make them less interesting for turning into e-books even in the future.

Some commented on upcoming changes on the book market, especially small-language markets like Sweden, which might occur in consequence with the global e-book market. Sofia believes that 'big actors, those with technical and economic resources, will fight for the money, fight to secure agreements, distribution channels, and development of reading device'. Others clearly expressed anxiety for the future. Jan, for example, pointed at the exposure of small languages and small-language markets to globalisation and the domination of English and American-English language and book production. Others noted upcoming changes in publishing and demand for certain genres or kinds of literature, which certainly will affect individual authors and their authorship. Authors are convinced that the segment of high quality mainstream literature will diminish in the future. Lena states that she is very pessimistic:

I think I've had a privilege in being active in a time-period when the printed book in Sweden gave me a large audience. This has been very satisfactory and joyful, because

you don't write a book only for yourself, but also for communication with readers. I have been active in a historical period of interregnum and have to be grateful because this increase of literature today is big, but the exclusion of those who will be forgotten and sifted out of history will probably be even bigger.

It is believed that good quality mainstream literature will be shaken-out in the near future, which is a threat to many authors, who do not achieve the sales of Kerstin Ekman (writer of both detective stories and literary fiction) and playwright and novelist, P.O. Enquist, in spite of good reviews and good readership. 'We really have to fight', as one declares. Marketing and entertainment impel the authors to make their books more attractive, and will affect the relation between publisher and author even more in the future, or, as some remark, so as to put the author under tutelage. Bestselling authors will be even more exposed as products than today, and so their authorship will be reduced to brands.

Technical innovations are here to stay, and we have to face 'the understanding of a shift in paradigm' and how this might affect literature, Erik points out: 'International markets will open doors in a completely new way, with a new infra-structure, and possible new audiences and readers in other countries, when you succeed in translation. I also think of new opportunities to read on new devices.' The general author will find it difficult to survive. An answer to this lies in cultural policy, as Dan suggests:

I think we are moving towards a point where we no longer conceptualise a close-knit public, but a variety of small publics. My picture of the future of literature is that we will have different kinds of literature. My suggestion is that we should have a cultural policy which makes it easier for the Swedish literature to survive...

Literary value and space for critical evaluation of literature in public media have diminished. The hierarchy between genres and kinds of literature, like entertainment and serious literature, is becoming narrower. Not only will publication-day reviews disappear, but the importance of reviews and critique will also reduce. The specific value will decline as an equality of values has arisen, according to Dan:

On the internet, Per Olov Enquist and Camilla Läckberg are treated as equal although they are representatives of two very different kinds of literature. Another thing is self-publishing, which might arise dramatically with the e-book, which means that the quality of the texts will go down, and we will find a lot of rubbish on the internet.

Readers, too, might be detected by technology and actors such as Amazon will have a financial interest in what we read and how.

Then what about the future and the further development of the e-book? Interest in the enhanced e-book and cross-media publishing say something of the prospect for future. Some believe that next generation of authors will produce books in a very different way. Today's authors are not good at doing this. It has to become a new form of art, not as an expanded version of the printed book. Even new genres will be developed through the enhanced e-book. Erik believes that the expansion of e-books

will emphasise the capacity of the establishment to understand the artistic value, but it is not the author or the establishment that sets up the value: ‘The frames will burst toward new forms of expression, new artistic definitions, and values.’

Some self-publishers, however, believe that the hypertext novels or the enhanced e-books will be niche products, and that the traditional novel will survive quite well in the future. ‘The importance of personal imagination is great’, according to a male author. Anna underlines the importance of imagination in reading:

I don’t think that an e-book with sound and YouTube-clips will ever compete with computer-games; this would be completely pointless. The fascination with books is that you have to think of it yourself. Using your imagination when reading text... no game can compete with that.

Some authors remark on e-publishing areas that certainly will facilitate uses of literature for study and knowledge development. Johan finds the future of digitisation of cultural heritage to be brilliant. Another male author believes encyclopaedias and reference books will no longer be produced in print. Digital versions will easily be updated, but users will have to pay for access to them. Another area where the use of e-books might be successful is that they will attract younger generations, the laggard readers, especially boys, who generally have an interest in technological innovations. Anna believes that text-books in school will be used in e-book format in the future, whether or not this will have good effects on knowledge development in general.

Asked about the implications for their personal authorship, one of the authors answers that the negative effects on authors’ conditions, including a new system for grants together with the publishers’ wish for fast publishing, will put great stress upon authors, which will end up in bad quality literature. The problem is not the competence of the author, he says:

Say, it might take a year to write a book, if you speed up your work. But if you had three years to spend on it, it would have been a much better and much more competitive book, because this is what quality is like: quality is competitive. Even experimental literature too... at least to some extent.

## Discussion

What is the driving force behind literary writing and authorship? Jean-Paul Sartre suggested in the late 1940s, that ‘One of the most important motifs behind artistic creativity is probably the sense of being essential in relation to the world’ (1970: 38, authors’ translation). Thirty years later, Roland Barthes proclaimed ‘the death of the author’ (1977a) by implanting the production of meaning from the author to the reader. Michel Foucault (1998) envisioned the disappearance of the author function in the future. Although theoretical aspects of an author’s position might be at a distance from the author’s daily work, philosophy shows dimensions of reality that shape our



thoughts. In this study, authors of literary fiction are driven by the idea of 'being essential in relation to the world' which implies qualified, educated readers in the phase of interpretation, estimation, and evaluation. Authors of genre literature might not be driven by the same incentive, but by a wish to provide a good story to be read by a large audience, without deeper notions.

Writing has been recognised as a technology (Ong, 1982), which has changed tremendously during the era of computerisation. Today, authors have switched from using pen and paper and typewriters to computers as their primary tool. Referring to Ong, van der Weel claims (2011: 78) that 'our constant awareness of ourselves as being situated every moment of [our] lives in abstract computed time of any sort is another outcome of literacy'. According to Bolter (2001: 4) the use of computers makes writing more flexible, but it might also threaten the definitions of good writing and careful reading that have been developed in association with the technique of printing. The overall perspective is that digital technology has reduced the distance between the author and the reader by turning the reader into an author. Nevertheless, writing is a highly valued individual and cultural practice; writers regard the mind itself as a 'writing space', a metaphor for the human mind itself and for human social interaction (Ibid: 13). Linear writing and reading are still the most applicable communication strategies, so the best way to understand electronic writing is to regard it as conversion of a printed text to a new medium (Bolter, 2001).

Regarding self-conception, the authors in this study identify with printed books based on linear text, and evaluate their authorship on the same basis. Literature, or a work of art, is connected to the values of a 'double discourse', the aesthetic and the economic (Smith, 1988). The printed book is regarded as combining both the aesthetic and the economic but the e-version is seen as providing less economic value for the authors. Rewards from royalties and income from library lending through aggregators may be very low (although we have noted that one author was surprised that she earned more from library loans than from sales). Some authors find this incompatible with copyright or intellectual property rights (Nilsson *et al.*, 2015). New legislative measures and revision of copyright legislation is identified as a requirement for the future (Hemmungs Wirtén, 2011).

Unlike authors contracted by a publisher, self-publishing authors are in control of the whole process of production, distribution and consumption, including financial and legal issues. This process has been practiced only by two authors in this study; one regarding it as a personal pilot study, the other as professional work. Others have had their self-published books produced with the help of companies. Self-publishing has certain advantages such as royalties of up to 70 or 80 per cent; but the disadvantage is the time-consuming work in marketing and keeping the readers engaged, especially when reaching an international audience, which in a small-language area includes translation. This makes self-publishing a process that takes too much time from authorship (Gudinavičius, 2015). Laquintano (2010), too, stresses the fact that self-publishing authors beside writing books, also were learning to write publicity to

support the circulation of their texts. According to his study, this could often produce more complex rhetorical challenges than writing the book, which is also confirmed by Anna in this study. If self-publishing is to expand in the literary marketplace, there is a need for entrepreneurs and services to support authors. Responding to such needs, Sweden's largest publishing company, Bonnier Media Group, has introduced Type & Tell, a self-publishing service, which also includes e-book publishing. The outcome of this phenomenon has not yet been evaluated in public.

Interest in entering the global e-book market is rather weak, according to the authors interviewed in this study. Some believe that the content of their books is only of interest to a Swedish or maybe Scandinavian audience; others find it much too expensive to have their books translated unless they are backed by a literary agent. On top of this, a threshold might be the complexity of international copyright law (Hemmungs Wirtén, 2011), which might cause great problems for self-publishing authors without support from foreign rights agents. Swedish authors who have reached a global market are bestselling authors supported by a literary agent with professional competence in foreign rights (Berglund, 2014).

Regarding the 26 authors in this study, six were translated and available on Amazon Kindle; three of these six were authors of crime fiction. The most successful author had 29 titles in translation spread over four languages. Out of 47 titles in all, 20 were translated into German, 11 into English, 10 into Dutch, four into Italian, and, finally, two into Spanish. Results would probably have been different from a different sample. It is interesting, however, that statistics on translations from Swedish by other countries show that Germany is number four, after the Nordic countries, and Great Britain is ninth (<http://www.unesco.org/xtrans/bsstatexp.aspx>). It might be plausible that there is some connection between contextual cultural understanding and the translation of literature.

Writing and authorship have been affected by the digital communication circuit and new possibilities like e-books and self-publishing (Murray & Squires, 2013). Further, the distinction between literary and genre literature and public taste is today not related to social class, as Bourdieu (1984) suggested more than thirty years ago. A subsequent change of globalisation is that culture has lost its missionary and educating role (Bauman, 2011; Engdahl, 2006). Today, the influence of literary fiction in society has declined, as the impact of genre fiction has increased. The complexity of works of art requires time and education in order for it to be valued (Guillory, 1993), which is the opposite of genre literature. Yet, 'literary', 'genre', and 'mainstream' refer to categories of literature, with which authors are still associated.

Literary fiction, following the tradition from the classics and the western canon by allusion, dialogue, or parody (Bachtin, 1991; Hutcheon, 1985) is consciously aesthetic. Genre literature mostly refers to popular fiction, and bestsellers; not necessarily by definition (see, for example, Helgason, Kärholm & Steiner, 2014), but by serving demands from the audience other than those served by literary fiction. Mainstream literature is recognised as being of good quality, based on interesting and immediate

topics, attributed to identification and immersion from its readers, but not mainly to knowledge of the classics and canon tradition or of highly aesthetic style. According to the 26 authors most of all of fiction in this study, a fairly rough grouping shows that seven are authors of literary fiction, seventeen of mainstream literature, and two of genre fiction.

Mainstream literature has had a strong impact on the Scandinavian literary audience and public libraries during the last decades of the twentieth century (Smidt, 2002), but some authors fear that this category will diminish in the future, and that e-books also will be a threat to the printed version of their books in public library acquisition. These authors identify themselves as losers in the future landscape of the literary field. This shift will strengthen the position of bestselling literature, which as a fact already has taken place (Steiner, 2014), which also underlines Anderson's (2006) theory of the new marketplace as recognised for a small 'head' of highly popular products followed by a long tail of niche products of low popularity. Anderson's hypothesis of 'selling less of more' does not seem to go well together with mainstream literature, and is probably more appropriate for niche products such as literary fiction in attracting certain audiences.

The results of this study clearly show that the authors find their position changed with the adoption of digital technology in publishing and its effects in fast production and financial results. Furthermore, new technology has affected reading by giving so many choices of formats and media. The medium itself is part of our reading, even shaping our reading. What the digital age has accomplished is, according to Hammond (2016: 4), to defamiliarise the act of reading by offering us choices. Authors, who are dependent on reading in a digital environment, reflect upon their cognition and how new creativity, distributed by the enhanced e-book, will improve their authorship in the future.

## Conclusion

Swedish authors have adopted digital technology in their daily work and, according to the authors themselves, the use of computers has not affected creativity in a negative way. Digital technology also has facilitated their contacts with publishers, for example, in the delivery of manuscripts as computer files. On the whole, computers have made the production of literature much easier, bringing rewards or gratifications to both authors and publishers (McQuail, 2005; Palmgreen & Rayburn, 1985). The digital transmission of manuscripts between author and publisher has also led to acceptance of the e-book phenomenon as a technological innovation, the principal part of Winston's (1998) concept of the supervening social necessity.

On the other hand, authors having e-books produced by a publisher regard them as by-products of the printed book, mainly intended for the dissemination of content, as the financial profit for the authors is very low. This is the opposite of self-publishing

authors for whom diffusion is of strong concern and the profit important. The third group of authors, those who have not yet published an e-book, strongly believe in the e-book as a new way of spreading content, from which they wish to gain. This indicates that authors in the field of large-scale production, who have their books transferred into e-format, together with those authors in the restricted field of production who have their printed books transferred into e-books, independent of symbolic capital, are equal in respect of economic capital (Bourdieu, 1993). Those authors in the field of large-scale production and supported by a literary agent in translation and foreign rights are, together with self-publishing authors, gaining from their e-books.

According to the 'law' of the suppression of radical potential (Winston, 1998), finance and income as well as legal aspects, like copyright, are important issues for authors who have their printed books transferred into e-books. These issues have to be solved to the benefit of the authors in contracts with publishers at the production level, and at distribution level. Although having a positive attitude to the e-book phenomenon, authors hardly read e-books and are strong defenders of the printed book. The correlation between attitude towards e-books and behaviour of reading e-books is rather weak (Ajzen, 2005; Ajzen & Fishbein, 2005). Reading e-books as a personal habit is likely to be a presumption for ideas of how to make use of the enhanced e-book as a creative innovation for authors in the future.

The printed book is fundamental in the literary field. The tension between author and publisher in converting the printed book into an e-book to some extent relates to which category the book might belong, literary or genre literature. Literary fiction is generally produced in small editions and sells fewer copies, but is still regarded as possessing cultural and symbolic capital (Bourdieu, 1996, 1993). Genre literature, on the other hand, is generally related to large-scale production and high sales. According to Bourdieu (1996, 1993), literature with economic and symbolic capital evolves by being profitable for authors as well as for publishers. This kind of literature is heavily marketed and disseminated through various distribution channels to various kinds of audience groups. It is also mainly literature from this genre fiction category that is converted into e-format.

According to Szulanski's stages model of the implementation of innovations (2000), authors still are at the initiation stage, whereas self-publishing authors are at the implementation stage. The sources of 'stickiness' appear mainly from the fact, that authors have a strong idea of books as printed books with linear text for reading. This has to be regarded as narration; a story that is told, which has to be communicated to the reader, and, must engage the reader's understanding and interest. The foundation of the e-book is still the printed book.

Considering the factors that, for authors, constitute the supervening social necessity that results in the adoption of innovations, it is fairly clear from the evidence of the interviews, that those authors who have adopted the e-book see its primary advantage as being in the wide dissemination of their work. Digital publication gives them the opportunity to present their work to a world-wide audience, which local publication

does not. Those who are successful in digital publishing probably benefit financially to a greater extent than would be the case if they had contracts with publishers. An e-book sold for, say, €10, with a royalty rate of 70 per cent and 5,000 sales, would net the author €36,000, while the same book in printed form, with the same number of sales, would probably give the author less than half of that amount at a royalty rate of 12.5 per cent. For the successful author, therefore, the financial imperative also drives adoption.

Those authors who have not adopted the e-book and believe that print publication gives them greater social capital are, in effect, agents of the publishers in their suppression of the radical potential of e-books (see Chapter 7). Like the publishers, they are conservative in their attitudes towards e-books and see their main objective as being to maintain high literary standards, which they believe can only be done through print publication, ignoring, perhaps, the phenomenon of successful self-publishing authors being recruited by publishers for their next books. Concern for high quality appears to play second fiddle when an author has already demonstrated earning power, resulting in lower risks for the publisher.



# Publishers and the e-book

Swedish publishers are the most influential group in the book market. Traditionally and historically they have developed by increasing both horizontal and vertical business concentration. The main players and the present situation of publishing are characterised in Chapter 4 on the Swedish e-book market. The publishing industry performs different functions, many of which are regarded as beneficial to society as a whole (e.g., spreading culture, literacy, and education). Therefore, the Government supports this cultural industry in different ways. However, publishers are far from being a homogenous group of companies. As anywhere else in the world large, medium, and small size publishing companies compete within different sectors of the book market, such as scholarly, consumer, educational, children's literature and others. Each sector can include different business models, dissemination channels, and revenue expectations. This variation has been transported to the realm of digital books in general and commercial e-books in particular. Therefore, this chapter explores how Swedish publishers perceive the drivers and barriers of the development of e-book market in Sweden; and what commonalities and differences we can trace in these perceptions. Some of the results in this chapter have been published as a journal article (Wilson & Maceviciute, 2016).

The chapter includes a review of previous research, a short description of methods used for collection of data, presentation of survey data on general drivers and barriers in the Swedish e-book market, the internal tensions in the publishing industry, and external factors affecting e-book production as identified in the interviews with Swedish publishers, a discussion of the results, and a conclusion.

## Research in the field of publishers and the e-book

Papers on e-books and their effect on publishing are numerous, but few are based on research studies, although more of these are beginning to appear (e.g., Cerdón-García *et al.*, 2014; Ueda, 2014).

One should remember that publishing studies, as a discipline, follows the humanities tradition of publishing monographs. In one of those exploring the publishing business, *Merchants of Culture*, Thompson (2010) presents the opinions of publishers on e-books. One of his respondents explains that the Sony reader and Kindle represented a 'watershed' in e-book production and within ten years the revenues of publishers

from e-books could be as high as 50 per cent of the total income' (Thompson 2010: 317). Most of the other interviewees regarded e-books as a technology that degraded the reading experience. They avoided predictions as, according to Thompson: 'trying to predict the pattern of book sales over the next 3-5 years is like trying to predict the weather in six months' time' (Thompson, 2010: 319). Phillips (2014) produced a book based on literature studies and interviews with researchers and participants in the book trade. His work examines the changes brought by digitisation of cultural production, including e-books, to the English language publishing world, namely, copyright and digital rights management, ownership, lending and piracy, building of digital capital by publishers, and the issues of language, such as emergence of English as *lingua franca*. Kovač (2008) points to the potential threat caused by the many easily produced, free, anonymous digital texts, where the identification of a publication loses its economic value, and the authors may avoid responsibility for their publicly expressed ideas and emotions. On the other hand, Bhaskar (2013) has exposed the difficulty that big companies with high overheads and slow-moving systems face in accommodating digital products.

Surveys carried out and published between 2011 and 2016 include questions requiring expression of opinions, rather than providing factual information. Five such surveys carried out by Aptara (2011, 2012), KPMG (2015, 2016), BookNetCanada (2015), the Association of German Publishers and Booksellers (Börsenverein des Deutschen Buchhandels, 2014), and a publisher, Collinson (2015), present data on e-book production, sales and distribution, challenges and advantages. Several general trends are revealed by these surveys: the growing number of publishers producing e-books, the trend of converting backlist titles to digital formats, the prevalence of simply converted e-books over enhanced e-books, the pricing of e-books at the level of paperbacks and lower, the increasing variety of distribution channels, complaints about the lack of interoperability between formats and platforms, a diminishing concern about piracy and digital rights management, and expectations of expanding e-book production in the future (Wilson & Maceviciute, 2016).

Publishers' attitudes have been studied by Buschow, Noëlle and Schneider (2014) who explored the factors influencing the decisions by German book publishers whether or not to enter the e-book market. The attitudes of managers towards e-books, the support of their managers for e-books and the professionalisation of management processes predicted the adoption of e-books. One unexplained finding was that the innovativeness of a company could be a strong predictor of non-adoption of e-books (Buschow *et al.*, 2014: 74).

The new competitive situation created by technology giants entering the e-book distribution market has been highlighted by Benhamou (2015), according to whom, traditional publishers cannot effectively compete with the vertical integration model of Amazon, or the search and advertising-based model of Google. In both cases, they can rely on courts and governments, which can curb the power of these giants, but only to some extent. Rimm (2014), who has studied the phenomenon of vertical integration



in publishing in Germany and Sweden, came to similar conclusions. Concentration of media ownership results in large international media groups (including Sweden's Bonnier group operating in Germany) consolidating at a fast pace, with more and more links in the value chain of books being taken over by them. Interestingly, one of the 'foremost examples is Amazon, which is established in Germany and fast expanding in Europe, but not yet present in Sweden' (Rimm, 2014: 77). Rimm finds that Swedish respondents, especially small publishers, view the vertical integration of the industry as a threat, while German respondents are not worried. Both regard Amazon as an actor with which it is impossible to compete. There is also a common tendency for small publishers to regard themselves as producers of quality literature, which is their survival strategy in both countries (Ibid: 91).

### The questionnaire and interview surveys

The questionnaire survey was carried out in February and March 2014. The survey population consisted of members of the Swedish Publishers' Association<sup>30</sup> and the Nordic Independent Publishers' Association (NOFF)<sup>31</sup>, totalling, when some publishers had been removed because they appeared no longer to exist, 193 companies. Self-completed questionnaires were sent to all companies, with a reply-paid envelope and the option of completing the online version of the questionnaire. After one follow-up message, 108 responses were received, a response rate of 55 per cent. Three returned questionnaires were not usable, thus leaving 105 responses or a 54 per cent response rate. The initial sample included 137 members of NOFF, 31 members of the Publishers' Association, and 25 members of both associations. The responses were received from 72 members of NOFF (or 53 per cent of the initial number), 19 members of the Publishers' Association (or 61 per cent of the initial number), and 14 publishers (or 56 per cent of the initial number) belonging to both organisations. Thus, more than half respondents from each sub-group answered our questionnaire.

There is no general measure of what a large, medium or small publishing company is, as this estimation varies in different countries or different sectors of publishing. We have judged the size of the companies participating in the survey in relative terms according to the number of titles published a year, annual income, and number of employees, though in some cases the relevant information was missing. Most of the large and medium-sized companies are members of the Publishers' Association, while NOFF includes a larger proportion of smaller companies. The returns from the survey covered large, medium and small companies, and ranged from the large general publisher to the very small, specialist publisher. The returns were entered into the online version of the questionnaire to aid analysis.

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30. Svenska Förläggareföreningen.

31. Nordiska Oberoende Förlags Förening.

The two main concepts in our theoretical framework were based on Winston (1998), i.e., *the supervening social necessity* and the *suppression of radical potential* (see Chapter 3). The first of these concepts was explored by asking what was driving the demand for e-books. The suppression of radical potential was determined by asking about the barriers to the development of the market. Multiple answers were presented to the participants with the scale of evaluation of their significance (from 1 – not at all significant to 4 – very important). The barriers and drivers were derived from reading the previous research and trade publications and from the media news related to e-books.

The questionnaire delivered a rather homogenous representation of the publishers' opinions and attitudes and we pursued our investigations with a series of interviews. We conducted 18 interviews with the representatives of 17 publishing houses, 16 of the interviews were telephone interviews, the other two being face-to-face at the 2015 Gothenburg Book Fair.

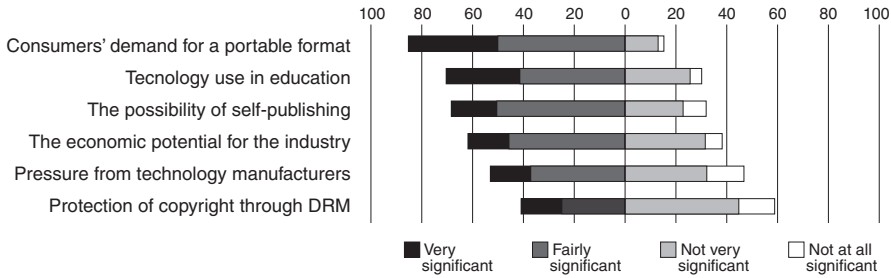
In seeking interviewees an attempt was made to obtain respondents representing small publishers as well as large publishers, general publishers and niche publishers, those who published only e-books, both, or only printed ones, who operated under a variety of business models (financed by supply and demand side, commercial, non-profit, and state funding) and other differences. All respondents of the publishing companies were involved in book production or strategic planning of book production. Their main area of responsibility was e-book production (except in cases when their publishing house has not been publishing e-books).

### General drivers and barriers of the Swedish e-book market

The present level of impact of the e-book on publishing in Sweden can be gauged from the fact that respondents to the publisher survey were almost equally divided, 46 to 54 per cent, between those who had published e-books and those who had not. A majority of the 54 per cent that had not published e-books intended to do so over the next two or three years.

The question used to determine the publishers' view of the supervening social necessity was '*How significant do you consider the following for the development of the e-book market in Sweden?*' In Figure 7.1 combining the 'Very significant' and 'Fairly significant' responses reveals that the demand from readers for a portable and convenient format and the use of technology in education are recognised as the main driving forces for the demand for e-books. Publishers are less sure about the economic potential of e-books or pressure from technology manufacturers. The authors' possibility of self-publishing is not seen as 'Very significant', but its significance in general is acknowledged by 68 per cent of respondents. Only 32 per cent of publishers do not regard self-publishing as making an impact on the e-book market. At the same time, the technology of copyright protection does not figure among strong driving forces. This overall attitude is

supported by some comments made by respondents on the impact of piracy that robs publishers of their income. Publishers regard e-book production as being vulnerable to online theft and do not appreciate the existing means of protection.

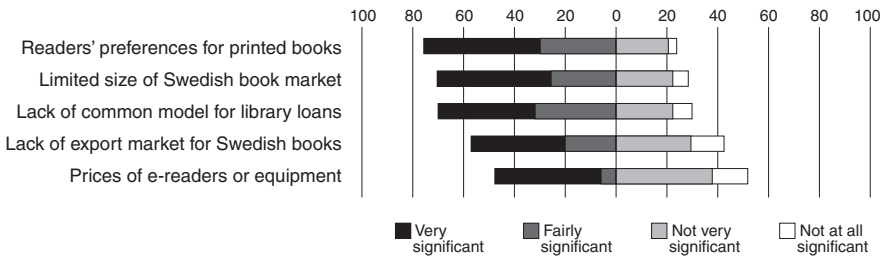


**Figure 7.1** Factors driving the development of the e-book market in Sweden (per cent)

*Comments:* The question was posed: 'How significant do you consider the following for the development of the e-book market in Sweden?' The number of respondents varies between 92 and 100.

The question used to determine the publishers' view of the barriers to the development of e-book market was 'How significant do you consider the following barriers for the development of the e-book market in Sweden?' The same scale for indicating significance was used as in Figure 7.1

When we combine the answers 'very significant' and 'fairly significant' it is clear that readers' preference for printed books is seen as one of the bigger barriers, though their demand for a convenient and portable format has been named as an important driver. The limited size of Swedish book market together with the lack of export market can be regarded as a very important barrier for e-book production and spread. The cost of reading equipment is not seen as making a big impact; however, lack of a 'common model for library loans of e-books' was also rated highly. This issue was explored also in other questions, but one needs to have in mind that the survey was conducted before a new pricing model for libraries had been introduced by Elib.



**Figure 7.2** Barriers to the development of the e-book market in Sweden (per cent)

*Comments:* The question was posed: 'How significant do you consider the following barriers for the development of the e-book market in Sweden?' The number of respondents varies between 92 and 100.

As Swedish publishers depend to a significant extent upon the public library market, we find certain ambivalence about the relationship. For example, we find that 67 per cent of respondents 'Agree' or 'Strongly agree' that e-books should be sold to libraries on the same basis as printed books, but at that time in fact they were not. Publishers used to hold back highly popular books from publication as e-books and could remove them from the catalogue later. In addition, of course, e-books are not sold, but are licensed. A rather smaller majority of respondents (53 per cent) believed that the number of loans of an e-book should be limited. However, 91 per cent of respondents disagreed with the proposition that libraries should not have access to e-books as, presumably, they were aware of the market significance of libraries.

As one can see in Table 7.1, there is a similar ambivalence in relation to author self-publishing: 54 per cent of respondents felt that self-publishing has little relevance for the publishing industry, but 34 per cent believed that it forced publishers to market their products more effectively and 84 per cent thought it helped identify new authors. Only a few agree on the necessity of developing channels for self-publishing within their own businesses. An overall 89 per cent thought that self-publishing was not a threat to their business, but 28 per cent thought that they needed to develop their own self-publishing channels.

**Table 7.1** Publishers' opinions on author self-publishing (per cent)

| Statement  | Agree | Disagree |
|--|-------|----------|
| Self-publishing can help identify new authors                    | 84    | 16       |
| Self-publishing has little relevance for the publishing industry | 54    | 46       |
| Self-publishing forces us to market products more effectively    | 34    | 66       |
| We need to develop our own self-publishing channel               | 28    | 72       |
| Self-publishing is a threat to our market position               | 11    | 89       |

*Comments:* The question was posed: 'The e-book development has led to an increase in author self-publishing: please indicate your agreement or disagreement with the following statements.' A four-point scale was used: Completely agree, agree, disagree, strongly disagree. Answer options 'completely agree' and 'agree' are merged into 'Agree'. Answer options 'disagree' and 'strongly disagree' are merged into 'Disagree'. The number of respondents varies between 94 and 98.

As one can see from the survey data, the attitudes towards e-books differ. How the publishers feel about e-books was further investigated through analyses of the interview transcripts.

### Internal controversy in Swedish e-book production

There are many differences in opinions and perceptions of publishers about the situation of the e-book in the Swedish market. The differences in publishing strategies are related to the size of publishers.

All big publishers have emphasised that they publish all their products in parallel and make e-books available 'side by side', so that anyone wanting to read, buy or borrow an e-book had the opportunity to do so. The other significant feature of strategies in this group was the trend to digitise backlist titles and the aim to have all of them in digital formats in the near future. These strategies are pursued, despite 'slow development', 'low demand', and the 'tight situation' in the market and technological uncertainty. In addition, digitisation of backlist titles was supported by the Swedish Arts Council<sup>32</sup> as a culturally significant activity, and this initiative was welcomed by publishers who used it:

We have a rather large production of e-books. Partly cultural policy resources are important. The Arts Council gives us support to digitise old production. It is very good that a publisher can digitise first of all older titles. There are other possibilities, but digitisation of older titles is encouraged by cultural political input.

Small publishers had a much wider range of approaches to e-book production. Very few were producing only e-books and considered this to be a much cheaper and more effective production, though constrained by conditions in the market. Others were planning to move to completely digital production in the near future, or to publish e-books in the expectation of the development of new reading habits. However, many more were exercising caution and explaining the reasons that prevent them from moving to e-book production, mainly pointing to the lack of demand from readers and authors or to a specific situation with their product, such as complicated legal issues or a concrete competitive situation. There were also those who did not consider e-book production at all. They pointed out the specificity of their product, for example, art books, or were unwilling to invest the time and energy in coping with the new technology, or preferred working in the traditional way.

### *The impact of the divide between large and small publishers*

The divide between big and small publishers was also visible in their interpretation of the development of the e-book market. A medium-sized publisher characterised the existing situation as follows:

There is an extreme rivalry between big and small publishers. The small publishers believe that the big ones obstruct the development and construct the market in different ways. We have big problems in the Swedish book market. First of all, there are very few independent booksellers. That is not good, [as is the fact that] bigger publishing groups are associated with bookselling. Then they have overview and the grip over the totality of it. That is a big problem.

This particular participant did not subscribe to the view that big players shape the e-book market in a particular way. But other small publishers had harsher opinions.

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32. Kulturrådet.

Withholding e-books from media marketing was regarded as a consciously-erected barrier to market growth:

Sweden is small and there is a very small group of media who set the direction of fashion and behaviour and thinking. I have never seen this group promoting e-books in any way. If they start doing this, the demand could be created very quickly. So far, I have not seen an advertisement of a single e-book on the TV, or a celebrity author holding an iPad and showing: look this is my new e-book.

Some thought that the e-book market is restricted through maintaining high prices, the result of there being a small number of dominant publishing companies, which seek to preserve the market for printed books, at the expense of e-books. One representative of a major company agreed with this, admitting that,

We had a strategy to prevent lowering of prices. Maybe it was wise at the beginning, but maybe it is now worth changing this.

Another respondent saw the same problem as a generation and power issue inside Swedish publishing, implying that significant influence has been exercised to withhold the e-book market development:

I think it is also the issue of age, of generation. Publishers are, as a rule, old guys as I am, and they sit in power positions in publishing companies and do not like it [the e-book] at all. Decisions are not always made rationally, but emotionally, on the basis of tradition and psychological factors. If the publishing industry was built now by people of 20-25, it would look different. They would not start with printed paper books, but deal with some kind of publicity. Then publishers' identity would change quickly.

Thus, the internal tension within Swedish publishing industry runs along the lines of company size and power concentration. There did not seem to be any fears of self-publishing authors or open access publishing outlets. Self-publishing was said not to have been successful in the market. The open access activity was even supported by publishers financed by the content creators working within scholarly publishing. In both cases the important factor was the role of a publisher:

I think there is some competition, but I see [the] publisher's role as [that of] gate-keeper. Partly we sell books through our brand, i.e., our imprint, so people know that we have selected a book, maybe made editorial changes. In the open access market, there are no equally clear distinctions...

Many publishers, regardless of their size and position, have pointed out other tensions inherent in the publishing industry that had significant effect of the e-book spread in Sweden.

*Publishers' comparisons of e-books and printed books*

One of the most visible tensions in the collected data relates to e-books and printed books. This issue is closely linked to the economics of book publishing in Sweden. The publishers get the main revenues from sales of hardcover books, to individual customers. The revenues from total sales of physical publications can be seen from the main book sales statistics in Table 7.2.

**Table 7.2** Sales of different formats in 2014, 2015 and 2016 (Euro)

| Format              | 2014        | 2015        | 2016        |
|---------------------|-------------|-------------|-------------|
| Hardcover           | 136,280,000 | 143,387,000 | 146,488,000 |
| Paperback           | 57,543,000  | 56,330,000  | 46,970,000  |
| Other               | 103,697,000 | 103,183,000 | 111,049,000 |
| Physical audio book | 6,590,000   | 5,310,000   | 4,040,000   |
| Foreign publication | 58,058,000  | 58,230,000  | 56,333,000  |

*Comments:* Streaming and downloadable books (digital audio and e-books) are not included in the table or in the category 'Others'. The data change from report to report, presumably the result of them being prepared before all figures are available. In this table, we have provided what appear to be the final figures, but the correct data for 2016 will only be available when the 2018 report is published.

*Source:* Wikberg, 2015, 2016, 2017.

In comparison with other formats, e-book sales remain low, though growing quite rapidly. The report from the Publishers' Association for 2016 shows rather stable sales of e-books in comparison with 2015 (increase of 2.3 per cent) reaching €4.5 million. (Wikberg, 2017: 20), which is ten times less than pocket book sales. For the first time, the report presents the sales value from the use of e-books and audio books through the three Swedish subscription services, Bookbeat, Nextory and Storytel, for 2015 and 2016. Income has increased from €616,000 (6,011 TSEK) to €3,138,000 (30,606 TSEK), or 409 per cent (Ibid: 18). Digital audio book use through these services is more than 10 times higher (Ibid). We also know of the 25 per cent increase in e-book loans from public libraries between 2015 and 2016 (see Chapter 9), but have no data on how this translates into income for Swedish publishers. Despite quite rapid growth, the income from e-books does not exceed three per cent of the income from hardcover books. Therefore, publishers appear to be making no effort to promote digital books: as one respondent said, '[we] live from printed books and wait [to see] what happens with digital [books] without taking responsibility'. Many participants, regardless of whether their company produces e-books, have pointed out the problem of getting equal income from e-book sales:

Possibility to get paid – this is the biggest problem. It is difficult to get the price, which corresponds with the profit we can get in traditional publishing.

Because of this [high income from hardcover books] we are moving slowly in embracing e-books and lowering prices. It is not great art to sell much when one sells

cheaply. The problem is that we must sell enough to get the compensation for that part of decrease from hardcover sales.

The priority given to printed book and high revenues in commercial markets is logical and publishers cannot be blamed for investing in profitable products, though this situation has negative consequences for the development of e-books, namely, the low supply and narrow range of e-book titles in Sweden. The conflict of the formats is also visible in the explanation of authors' and readers' preferences for printed books. These mainly relate to the matters of prestige and spiritual value:

Not many wish to publish something electronically because it looks like blogs, websites and similar. As an author, you want to be seen and visible, but that happens when you publish a paper book, not an electronic book.

The publishers themselves perceive a printed book as something more valuable than a digital product:

We see ourselves as producers of something physical and spiritual. It has psychological meaning to say: 'here is a book publisher and here are the books that we have published.' Compare with saying: 'yes, we are a little book publisher and here are our books' and pointing to a computer screen. The satisfaction is not the same.

On the other hand, one cannot ignore the growth of e-book sales and also the increased interest of publishers in producing e-books. The understanding of some crucial advantages of e-books and expectations of future revenues are present in the strategies of publishers and in the utterings of the research participants, especially, in relation to the possibility of 'long tail' sales:

What is good with an e-book – when it is produced it is for ever. A physical book has a very short life. There is big fixation on novelty in the industry. A book is not an attractive product within a year. An e-book, however, is for ever and has an advantage: we can offer access to books that are older.

This understanding lies behind the accumulation of e-books in the market and the efforts of publishers to convert the backlist titles 'which are not selling any more as paper books' and then 'even one bought as an e-book is already fine'. There are also other printed formats such as paperbacks, which at present are holding on, but e-books can compete with them more successfully as:

Economic conditions depend on what kind of book one produces. Pocketbooks production diminishes and becomes worse, and e-books take their place, but that does not happen with other books.

The possibility of getting revenue from e-books is also strongly related to the production costs and sales prices.



### *Costs and prices*

As we have already seen, the issue of the price of e-books is a matter of tension between big and small publishers. But there is also a division of attitudes regarding the costs of e-book production depending on what participants included in the concept: production of the first copy, or overall costs of production and management.

Most of the participants belonging to the big publisher group were convinced that e-book production is not cheaper than production of a printed book and may be even higher for different reasons, because of 'fixed costs that are not lower', costs related to the web and technology, or the need to get rights and especially foreign rights for conversion of earlier titles.

But there were others who were sure that overall e-books cost less, because 'there are no other additional costs to reprint, or store' and there is 'a degree of economy with e-books'. One of the participants was quite eloquent on the item and based his opinion on the experience of publishing only e-books:

No, it is not the same cost at all. First, one does not need paper, which is quite expensive plus one has to count product management, total management. With e-books, there are no return costs, which are very big for publishers, and lost income that was expected. And there is physical handling of a book, which is not necessary with an e-book. It will be cheaper to focus and produce only an e-book from the start without a paper book, then it will be much cheaper.

The cost issue was mainly related to pricing of Swedish e-books as one of the factors that explains its high level, though the necessity to compensate for the income from print was also part of the picture of pricing:

What we hear during meetings with publishers is that many are unhappy that they cannot get the same money from an e-book as from a printed book, therefore the prices tend to reach the same level and digital books cost the same as paper books or almost the same.

However, an overwhelming majority of participants named the difference in the VAT for printed books and e-books as a reason for high level of prices ('If e-books are more expensive than paper books that price depends surely on the VAT'). Very few have doubted that if the VAT for e-books equals that of printed books, the prices for e-books will become much lower. But some pointed out other reasons for having high prices of e-books. The publishers' strategy has already been named. The others were: profit targets that may make producing e-books less attractive for publishers, the wish to collect the same revenues from e-books as from hardcover books, and to avoid the competition with printed production:

We are not very sensitive for prices for our production: those who buy do this because they want that particular book. But it would be difficult for us to sell an e-book for 50 crowns when a printed one costs 100 crowns.

Regardless of the attitudes towards e-book costs and prices, the majority of the participants pointed out that the reduction of prices will stimulate the development of e-book market in Sweden. Some said it directly:

E-book prices had an impact on how the market is developing. In combination with the fact that e-reading does not provide anything better, the prices were perceived as unreasonable.

Others implied the same through pointing out that the breakthrough of e-books in English language markets was helped by low prices:

The biggest factor [of e-books breakthrough in the USA] was Amazon's gigantic number of books for low prices, which attracted many to read digitally. It was also easily accessible and simple to use.

The cost and price issue seems to be quite central both for publishing economics in general and the development of e-book market in Sweden, but at present 'the economic factors do not favour e-books and do not stimulate publishers to invest in e-books'.

### *Technological competence*

Penetration of digital processes into publishing in general has prepared most of the companies for production of digital publications. Many participants were quite sure that they are capable of starting the work on e-books immediately as 'the e-book is very easy to produce already now, that does not take much time if one thinks of pure text files... technology development does not affect it much', despite the fact that it is a new and different product that requires a different development process. One of the participants remembered starting e-book publication as a rather uncomplicated process:

Sometime in 2009 I came upon the term 'e-bok' and did not know what it was. So, I posted a question on the blog and many people answered it. Then we thought, that is interesting, we should have it. And we started publishing e-books.

The others did not regard the process as easy and self-evident and pointed to different technical requirements that must be taken into account and that need specific competence in relation to particular needs of the company. One noted that scale and quality of text digitisation 'might mean that you need scanning and choosing a right format for the book, that is a huge job'. Sometimes e-book production places different demands on the company and one has to increase capacity by 'developing production workflows and relation to other parts of the company we work with for technological development'.

Others need to resolve entirely different and much broader problems before they can apply advanced technology:

EPUB3 provides certain possibilities that require us to define what we mean with accessible literature in this format. That is an international issue about what the e-books and accessible books are when EPUB3 is chosen. We must find the answer and settle it before we start producing.

Sometimes publishers are experimenting with development of new products that require competence, such as combining text and sound, or use 'digital technologies in physical books, such as post codes, GPS coordinates, etc. when it is needed and helps readers using our books better'.

On the other hand, one of the participants emphasised the uncertainty that many publishers feel about e-book technology, different standards or fixed and flowing layouts. The participant stated that 'there are no good publishing services here, and one can get an e-book that is not well coded and done automatically, it is not so nice and has no special functions'. Actually, very few have experimented ('played') with the production of enhanced e-books, though this possibility has attracted some as a most interesting development in the e-book market. The low levels of experimentation and production of enhanced books was blamed on the lack of demand and support:

At present, it seems that we do not have the possibility to sell enhanced books to Swedish retailers. There is no support for their production, so if one cannot sell them, one does not produce. But sure, I see big potential for enhanced e-books. We test how to produce them so that we are prepared...

Educational publishers also produce enhanced books that are in demand, though others believe that present reading devices in general do not cope with enhanced formats, which will develop later with suitable technologies.

Previous failures with the production of digital books on cassettes and DVDs and launching 'e-books by Jan Guillou and Liza Marklund by Piratförlaget 20 [sic!] years ago' were presented as the causes of slow uptake and reluctant investment in e-book production technology without certainty of financial return. And even the most enthusiastic e-book publishers acknowledged that the quality production requiring high level of competence does not sell:

We have found that we can offer hand-coded e-books because we understand the technology behind the book and can use it, e.g., EPUB3 possibilities of tying sound with e-book, produce media books. But as was said, our sales are low.

Several participants pointed out ways to overcome the lack of technological competence in the publishing company by outsourcing the work to technology developers even using 'another supplier from India to convert to XML, to code the pdf files to XML'.

Thus, one can say that the views on the technological competence required for publishing e-books were quite different among our participants.

## External factors influencing Swedish e-book market

In this part, we introduce the results of the interview analysis that pertain to the factors outside the publishing industry that affect it as a whole and the development of e-books in particular. We have identified several such factors: market size limited by Swedish language speakers, impact of the retailing sector, the position of public libraries in e-book distribution, and technology development.

### *Market size and language*

As in the questionnaire results, market size was one of the most often named barriers to the expansion of e-books in Sweden. Respondents often made comparisons with other markets, for example, 'In English-speaking countries and also in countries like Germany, the market for e-books is bigger.' The limits imposed by the 'small-language' market were also referred to, Sweden being typified as having, 'not many readers for a specific product, such as an e-book.'

Other features of the market were also regarded as limiting the possibilities of e-books, such as traditional conservative orientation of most of the actors on it:

I would say that Sweden still is an immature market for e-books. There are sales, but little interest, and the usual printed book is so far very strong. Too many have not wished to change or experiment with e-books.

These limitations have resulted in smaller range of Swedish e-books offered on the market, in comparison to other languages and a smaller choice of reading devices, which, in turn, diminishes readers' interest in e-books. The situation was characterised by some as 'Catch-22': 'if we sell more, we produce more. It goes hand in hand.'

However, the language situation was also regarded as a challenge to developing specific strategies that might expand the possibilities of e-book producers. Swedish is spoken by a very small number of people in the world: 'Therefore, we will invest in translation of books at least to English, but also to other big languages, such as Chinese (some of its versions) or Spanish.' This development obviously will result in facing different competitors on other markets than the local Swedish one.

Regarding the present situation, some respondents have already felt that the main competition Swedish e-books are facing comes from English e-books:

Many Swedes are comfortable with reading in English and choose reading in original language. If we look only at other books, so it will be books in original language.

The market will grow and new formats will emerge. I think that one of the threats can be that English literature takes over some part of people interested in reading. And that has already happened to some extent with English e-books.

The majority of our participants thought that English language books as competitors is nothing new and that they have been competing with Swedish books previously. They can affect some specific areas of publishing, such as translations, professional and research literature, adult literature, or science fiction and fantasy. And there were also those who did not consider any foreign language e-books a threat at all. Some even regarded e-books in original languages as beneficial for later sales of translations as the readers become ambassadors for this production or as helping 'to improve language culture' in Sweden.

### *Impact of retailers on the development of the e-book market*

The assessment of the retail situation on the Swedish e-book market is somewhat ambiguous and uncertain and is discussed in more detail in Chapter 8. Most of our participants have expressed the opinion that the Swedish e-book market has been slow because it was missing a strong retailer that could drive it, as Amazon did in the USA. A single e-reading device, the Kindle, and massive access to cheap e-books were the greatest stimuli of the e-book market development across the whole English-speaking world and Amazon 'stood for the e-book revolution selling one book at a time'. The Swedish e-book market was more fragmented and lacked both a single, widely-used e-reader and cheap e-books:

In the USA, it was Kindle, a device that was subjected to a format and buying behaviour. In Sweden, we failed with this. There were too many actors, devices, sites and different formats.

Despite this situation, which persists, the participants did not perceive Amazon as a threat or a great competitor on the Swedish e-book market, even if it arrived on it at some point, because there are strong actors dealing in e-books:

Amazon and Kindle had strong impact on the American market but they have not succeeded to establish themselves in Sweden and make bigger influence here. Reason for this is that we have strong actors on the market, such as Adlibris and to some extent Bokus.

Some of the participants would even welcome Amazon as an actor on the market as 'it is very welcoming to small publishers and independent authors' or that it might have a beneficial short-term effect on the e-book market, though its influence should be checked to avoid negative consequences in the long-term.

The analysis of the interview data shows that Swedish publishers use a wide variety of sales channels and regard the biggest internet bookshops Adlibris, Bokus, Elib and to some extent Bokon as competitors with each other and also with Apple and Google selling Swedish e-books. Small publishers usually use as many channels as are available, the bigger ones have a preferred channel, usually, one they partially own. Very few sell directly to their customers from websites and explain this either as loyalty to their traditional distributors or convenience provided by e-book platforms:

Amazon, Apple and Elib are so smooth systems to update books. That is also good that one can correct a mistake or update something easily and more often in e-books than in paper books. It is very important that readers have access to the latest version.

A new uncertainty is generated by the emergence and establishment of subscription services that have offered a new business model for commercial distribution: access to many e-books for a monthly fee. Some of the participants thought that it might fit quite well with the behaviour of the Swedish population, noting, for example, that the emerging subscription services, 'can increase e-book reading... when one pays 99 crowns (€10) per month, then one can use the service more'.

However, it is obvious also that conditions these services offer are not equal for small and big publishers. A small publisher complains that Storytel leaves it only with 20 per cent of income demanding 80 per cent for itself, while a big one 'managed to get best conditions possible'. But in both groups of smaller and bigger publishers one can detect anxiety about the impact of these relatively new services on their future:

Now come Storytel and subscription services (Mofibo, Spotify, Netflix, BookBeat) for a monthly fee. What consequences this will have for the publishers' economy I cannot say, but it is an important question.

We are a little cautious here, because other channels function well.

These services are also regarded as a possible alternative to e-book loans through libraries, especially, because it is a new commercial channel.

### *E-book publishers' comments on public libraries*

As Wischenbart *et al.* (2016: 74) point out, public libraries rather than commercial platforms 'kick-started e-books' in Sweden. It is a specific feature of the Swedish e-book situation, as some respondents have pointed out, that, so far, 'very few e-books are sold, mainly loaned, which shows that we have a problem'. The publishers, especially the big ones, see several problems with e-book loans: one copy can be loaned an unlimited number of times to an unlimited number of users; free library loans to library users are negatively affecting e-book sales of new books and diminish income for publishers and authors; libraries are the biggest buyers of e-books instead of individual buyers. Nevertheless, all these participants agreed that the new pricing model for e-book loans (launched by Elib in 2015) is much better, gives publishers more control over their e-books and in general has helped to diminish the discontent of both partners significantly, though the conflict is not yet resolved.

Some respondents regarded libraries as a historically-developed market with specific features and contacts that can be disrupted by e-books:

We can look at what libraries do when they buy books: they buy books in special binding and protecting jacket that makes them sustainable for longer time. The vendors offer additional features useful for libraries. So, books for libraries are sold

more expensively than for other buyers. This is an income resource for many actors selling physical books for libraries. Sure, libraries pay for loans of e-books, but compared with paper books, this is no income.

Others explained the tension between publishers and public libraries as a clash of economic interests and different missions:

There are two interests colliding. Publishers are mainly commercial and want to earn money. Libraries have a different task. They are community services and provide good texts as cheap as possible. The *discussion* is about compensation between libraries and publishers and they cannot agree.

One of the respondents has taken a historical perspective looking at the relationship between libraries and publishers and saw the roots of the conflict in changing nature of both institutions. He suggested that 'earlier when publishers were less commercialised if we go back to early 1900 in Sweden they saw value in public libraries, which kept reading levels high, but at present libraries have lost this function.'

A representative of one of the largest publishing houses, using a different e-book lending model (created by that publishing house) from that used by most of the others, expressed an entirely different opinion:

We thought that libraries were very important in the printed books world and created a generation of readers, which was very good for us. Our main idea was that it is good for us if people read. We have quite a lot of data from 2013 [about library loans and sales of e-books]. From the beginning, we saw that there are loan differences locally and over the year but it grew over time very much and we have found that sales have grown respectively. And further we have confirmed this over the years when we have continued collecting the data. We think by definition that it cannot be bad for books to be available through libraries.

In addition, almost half of the respondents (seven out of eighteen) did not see what all the debate is about. One said that 'people have always borrowed books from libraries, so why should it be different with e-books?' The others regarded access to free books as a main instrument of democracy and promotion of reading, or thought about the libraries as a main channel for marketing and a reliable source of income from e-books:

I am not after big money. The most important thing is to get people reading. Children develop differently when they read.

We are happy with library loans. We are a little publisher, quite new, but libraries take all our books to many libraries. We have no famous authors or something like that, but they take our books regardless. They follow their policy to disseminate broadly.

Thus, this highly debated issue that we have perceived at the beginning, as a conflict between publishing companies and public libraries is not a clear-cut contradiction. The publishers have different attitudes towards both the public libraries and the conflict. So,

it remains to be seen if public libraries are partners or competitors of publishers with regard to e-books. Though many have perceived the conflict as one between free loans and sales, nobody mentioned the role or interests of booksellers in this relationship.

### *The use of e-books and other media*

Customer behaviour in relation to e-books was regarded as another important factor that is affecting Swedish e-book market. The aspects of reading behaviour were many, as was the variety of conditions that affect it, including e-book prices or possibilities of choice and access that were already mentioned.

One of the main features of reading behaviour that negatively affects e-book development is the preference of the reading public for printed books. This preference has two sides: the psychological habit to hold books in the hand, and the economic reluctance to pay the same price for a digital product as for a physical one. But one of the participants thought that the preference for print springs out of the lack of public awareness about e-books:

They also do not understand how one reads an e-book and do not want to use e-readers because they do not understand how they function. The ones we have talked with became very interested in e-books when they have understood how simple it is and how much space it can save, etc.

Some participants saw this issue as more complicated and divided people into e-book readers and non-readers:

Reading requires strong commitment of a person. You do not want to compromise more than is necessary. Investment is big, that is time and attention, and then people want everything else to be just as they want.

The present form of the e-book was also explained as a result of user demand for something similar to a printed book. E-books are used for different purpose and in different circumstances by readers, and because of that 'different usage patterns for different products' emerge in the market. The issue of habits was usually related to generational change and expectations that children growing up with digital gadgets and mobile telephones at schools and homes will start consuming more e-books or at least more digital texts.

On the whole, the participants marked that reading was declining because of high competition from other media for time and attention. Games, videos, films, TV series and social media were named as the rivals to reading on a bus, in the evening, or during any leisure time. Internet texts and reference services were pointed out as a substitute for non-fiction literature. These media were easily accessible using laptops, tablet computers and smartphones and this also places demands for special approaches in publishing:

As a publisher, we are smart in finding, developing and disseminating stories. They have to be produced so that they are accessible. It can be anything: a book, a



parchment role, a paper book, a digital on a screen or listened on a telephone while cycling to work. Our stories must be where the consumers are. Now a new form can be found on telephones and iPads, so we have to be there and offer our literature to readers regardless of format.

Another participant put more emphasis on the changing publishing products according to reading behaviour rather than just reaching the readers where they are:

One can focus more on how behaviour will change, how we will consume e-books in the future. Maybe subscription services will break through: see what happened with music and films. It is possible that e-book goes the same way. Maybe we will adapt whole production so that books fit the form of series. Looking at other media we see that series is a viable format.

Despite competition from printed and other electronic media, the participants were aware of the affordances of e-books, especially, in relation to changing conditions of modern life style, such as saving space and labour:

When you are moving, the books are very heavy. Modern apartments are smaller and shrinking, there is not so much space in them. It is more convenient to have a computer and an iPad and all your books and music on them.

Another advantage is speed of access when 'large amounts of literature that can be accessed digitally and quickly', flexibility and freedom as well as creative possibilities it offers a reader when

... a person can sort and organise, download additional content that one chooses, adapt it and add one's own. That one can get only the parts, chapters or pages that one reads, can adjust content and read it on a telephone and any other device. It will be even more important in the future that one can read on an e-reader, computer, whatever is accessible.

Other affordances mentioned were suitability for psychological comfort of dyslexic children, reluctant readers, or older persons in terms of adjusting fonts, line length, amount of text on screen, or disguising what they were actually reading; children who may be tired of playing games on tablet computers all the time, parents who wish to increase children's reading time on the 'gadgets', etc. On the other hand, the modern life-style can act as a deterrent to reading e-books as people get tired of looking at computer screens all day long. Besides, e-books do not carry visual and tactile quality equal to a paper book, thus becoming 'boring' and 'sexless'.

Our respondents also regarded users as a source of uncertainty and anxiety in relation to free copying and piracy of e-books:

There is also fear to deliver something digital to a customer. It is difficult to control, when one produces an e-book. No one earns money by scanning a book and uploading to the internet, but many do or try to do this. It is sort of area out of legal control.

This fear was more directly expressed by the publishers of certain types of materials, such as e-textbooks that can be copied for a whole classroom more easily than a paper one. The means of protection, such as digital rights management, though justifiable and reasonable, make digital textbooks difficult to use and irritate readers. At the same time, the publishers actively producing e-books were least concerned with this problem. According to them, getting rid of technological protection only increases user satisfaction and does not have any impact on sales, and, in any event, paper books are being copied as easily as e-books.

### *Comments on technology issues*

Our participants talked about technological issues of e-books in different ways. One can see that technology figures in one way or another in all earlier presented issues.

Many publishers noted the general level of development of technological infrastructure and penetration of digital services in Swedish society. The gap between high level of penetration and technology skills and the use of e-books was identified by many participants:

Sweden internationally is regarded as a country that lies ahead in relation to new technologies. It is a fact that we are ahead of other countries in using mobile telephony and other technologies. So, Sweden should have quickly adopted e-books both as a country and as a market.

Thus, the slow acceptance of e-books by Swedish publishers and readers cannot be explained by technological factors, though might be a basis for the future breakthrough. However, the lack of one good quality reading device, similar to a Kindle, was regarded as barrier to the spread of digital reading and the popularity of tablet computers was blamed for distracting their users by the variety of media that could be accessed through them.

In general, the participants made a difference between technology required for e-book production and technology required for digital reading. The first type of technology could be both easy to use and simple or complex and requiring high competence, but it was causing uncertainty among publishers:

Publishers experience uncertainty from different directions: future technology development is linked to investment, to demand for a certain format, and other things.

Technological solutions may be quite expensive, and not always suitable for particular products, but also offer exciting possibilities for others. Digital technologies are also very suitable for production of printed books, helping to reduce costs and achieve better quality. It also can change the act of writing and story creation:

There is Wattpad, where one can self-publish. That is the example when technology goes hand in hand with the development. People can write a serial a little at a

time and get response from readers. An author has direct contact with them. This technology influences how we write our stories.

Technology for e-reading was related to the market of home electronics and the quality of its products that can both increase or hinder digital reading. Smartphones were assessed both as a potential popular reading device and as ‘inconvenient equipment for reading’. Some of the participants thought that enhanced e-books will develop when e-readers are ready to cope with them, but others pointed out that any enhancement only ‘distracts people and disrupts reading’. The actual impact of digital technology on reading still requires comparison with change in other media (music, newspapers, films) and close examination:

With reading it is a question how much reading experience has changed with digital without book binding. What has been broadened? Has the reading experience changed so that it is something different? Have we made something easier or simpler with an e-book?

The technology required for the distribution of e-books was mentioned when talking about easy access and simplicity of download and many different technologies that have to function together to achieve the desired effect:

Then it is also access to e-books – how easy it is to get access to e-books, how they are sold or how one gets access to them, it is also important.

This part of technology was also mentioned while talking about ease and convenience of updating e-books by publishers. But ease of spreading e-books without control was a source of anxiety for publishers as shown in the previous part of this chapter.

Overall, opinions of technology were as varied as about other factors, but its further development was seen as necessary for the future spread of e-books, especially, of enhanced e-books, despite the anxiety and uncertainty that it is causing to publishing industry in general.

## Discussion

A closer exploration of the results reveals a number of interesting controversies in the e-book publishing sphere. Participants rarely express a common opinion and even in the generalised survey results, the ambiguity of answers is quite evident.

According to the participants, the Swedish e-book market should be developing quite rapidly as the country is known for its high level of penetration of digital technologies, but it does not do so because of its size, the low range of e-books offered on the market, the lack of marketing by publishers, and the low demand for e-books. The players in the Swedish market are strong enough to keep away and compete even with Amazon. But some would like it to arrive on the scene and liven up the situation, as they are reluctant or unable to drive the growth of the Swedish e-book market themselves.

Using Winston's (1998) theory to explore the results of our investigation, we can see that the 'law' of the *suppression of radical potential* works in a classical way in the Swedish publishing industry. Dominating industry structures, especially when strongly vertically integrated (Rimm, 2014), with slow-moving established systems (Bhaskar, 2013), erect barriers for the acceptance of the e-book as an innovative product, even if it is not an entirely conscious strategy. The means employed for this end, and visible in our interviews, are high prices that consumers refuse to pay for e-books, preferring to buy the printed book, lack of positive marketing of e-books, and diversion of attention to minor or imagined barriers, such as the VAT levels, or library lending of e-books, which has worked reasonably well for many participants. The reason for this is a natural wish to retain high levels of income for the traditional actors established throughout the whole book circuit who may lose it in the transfer to a new product that does not require all the supporting industry structures.

On the other hand, this suppression of radical potential of e-books happens in the context of high levels of e-book production and backlist digitisation by the biggest actors in the field. They eagerly develop the company strategy of e-book production, despite the refusal to invest in their marketing, and push to increase sales through competitive pricing. There is much less effort to produce e-books among smaller publishers as, overall, they lack resources to invest and tie up in e-books that do not bring sufficient income for them to survive. Even the most efficient and competent e-book producers face the general situation of low e-book demand from the retail sector, which does not attempt to push this product, and consumers who are in general quite unaware of the e-book technology and its advantages. The preference of consumers for the printed book is one of the main barriers preventing rapid development of e-book market as identified by the majority of our participants. Other actors, such as authors, main retailers and publishers themselves also prefer printed books for different reasons, as discussed elsewhere in this book.

The *supervening social necessity* should be clearly visible to explain the slow, but persistent growth of sales and also the activities of biggest publishing companies in producing e-books, despite internal reluctance and external lack of demand. One factor seems to be related to the technological development in the book (and general) retail sector, which has swiftly established itself on the web. The push for accessible e-reading devices and cheap e-books comes from this sector.

Though it is lacking the same strong drive in Sweden from Adlibris or Bokus (as occurred with Amazon in the USA and UK), some regard the new subscription services as an opportunity that might drive the Swedish public towards e-reading. The subscription model, as some suggest, might be more suitable for the traditional reading behaviour that, so far, has been mainly catered for by public libraries in Sweden. Despite all controversy about e-book lending through public libraries, they are regarded as a suitable channel for marketing e-books and to some extent as a conductor of reading into more successful competition with other online media. Thus, the whole book distribution system (public and commercial) with its digital platforms and competence

acts as a supervening social necessity. The other factor may be named as the more mobile life-style of people, including easier change of living and work places, more dispersed family life, shopping and entertainment on open markets. E-books seem to satisfy conveniently many demands and needs brought about by this life-style as well as having the capacity to fit into new habits of Swedish citizens. The publishers participating in this investigation have expressed their belief that changing generations will be even more socialised into this new life-style and connect the future of e-books with their new habits as well as changing values and technologies.

At the moment, the issues of acquiring social and economic capital are quite clearly linked together in preference to printed, hardcover books. They are not only the main source of income for publishers and for booksellers, both online and on the high street, but are also regarded as more prestigious, bringing visibility and authority and separating books from everything else that we encounter on the web. According to some participants, the web, as well as self-publishing and open access, lack the gatekeeping function that ensures the intellectual quality of an e-book as a product. At the same time the e-book is intangible and, paradoxically, lacking the materiality, it appears to lose spiritual and emotional value.

However, we have to note here that in open access, scholarly publishing, peer review does not disappear and the intellectual quality of open-access monographs is no less than that of the commercial publishers' products.

## Conclusion

Swedish publishers, as represented by the participants in our investigation, have identified a number of interesting issues in book publishing industry as a whole and in e-book production and dissemination, in particular. Unsurprisingly, they are often biased in their views and, sometimes, their comments are at variance with the facts (as in the case of the relative cost of producing printed books and e-books). Perhaps as a consequence of these biases the e-book market in Sweden experiences a number of serious tensions and controversies revealing the dialectical character of its development. The same factors are named by many as either barriers or drivers of e-book development depending on the direction in which they work. The same actors can erect barriers, but also drive the development of this specific technological, social, and cultural innovation that we call an e-book.

Overall, however, we have to ascribe to the publishers responsibility for the suppression of the radical potential of the e-book by their failure to promote it by effective marketing campaigns. The comment of one small publisher on the lack of any TV marketing, referred to earlier, is telling in this respect. We understand why this is so: Sweden is a small-language market with virtually no potential for development as an export market, the e-book is a relatively untested innovation in that market, and the industry is firmly grounded in the production of the printed book. Many industries,

in the past, however, have died as a result of being unable to cope with technological innovation and in the digital world it is remarkable how newcomers, with no experience of the traditional industry, emerge as the new giants.

However, recent news from Bonnier suggests that the situation may be changing: towards the end of 2016, a news item on the company (Canoilas, 2016) noted that, in that year, sales of digital books (i.e., e-books and audio books) passed the \$100 million milestone. A representative commented:

We expect this year to sell nearly three million digital books, which was an improbable thought a few years ago when we started our major effort to digitise our production. We have never had such a large and vivid title catalogue as that today.

## Chapter 8

# Selling the e-book

Providing commercial access to both books and e-books is carried out through quite a complex set of organisations. Until the arrival of the Internet, buying a book generally meant that one visited a bookshop, browsed there, perhaps read a few pages of the intended purchase, and then paid for it and went home. The bookshop might be big or small, even as small as a selection of paperback books at the ubiquitous Pressbyrån.

In Sweden, as elsewhere, things began to change with the arrival of the online booksellers. Amazon, of course, is the best known of these and, in many countries has the biggest share of the market. Amazon, however, does not operate directly in Sweden (although readers may buy through Amazon.com, or Amazon.co.uk, or Amazon.de); instead Swedish online booksellers have emerged, which are discussed below.

In addition to the online booksellers, publishers now have a choice either to sell through the usual mediators' services, or directly from their own websites, or to create their own services. Thus, in Sweden, the founding members of an aggregator, Elib, sell their publications through that service.

A more recent development is an e-book (and audio book) subscription service, following the pattern set by the original Oyster (now defunct) and Scribd services in the USA. We now see a pattern developing, explored further in this chapter, of vertical integration, with the biggest publisher, Bonnier, establishing its own subscription service, and with Storytel, the most successful subscription service, acquiring publishers and their backlists.

We can only report here on the present situation as regards this complexity of provision and no doubt further developments await us in the years to come.

### Research on commercial e-book distribution

Mainly research from the Nordic and the Anglo-Saxon countries is discussed here, as the first is of interest for the Swedish e-book market and the latter reflects the situation on the international English language book market that influences all other countries.

#### *E-books and the market*

E-books are still insignificant in the Swedish book market with regard to sales, use of subscription services, borrowing from libraries, and number of readers. However,

the market is growing and the subscription services, especially for audio books, have become popular. Different actors are trying to find their place in the market and it is likely that new actors will turn up and others will disappear.

The digital market has the potential to change the power distribution among the commercial actors. As aggregators, booksellers and subscriptions services are the mediators of e-books between the producers and users, they depend on those users being interested in and prepared to pay for their services. The digital market could pose a threat to these mediators, as the changes brought by technology have led to actors changing their positions by taking on new roles and tasks previously performed by others, e.g., authors and publishers selling books directly to readers. New actors are also entering the digital book market to perform new roles brought on by technological change (Steiner, 2015; Waldfogel & Reimers, 2015; Wilson, 2014). Subsequently, disintermediation has become an issue as mediators are removed or are replaced by other actors in the distribution chain of e-books, with, for example, subscription services providing readers with audio books and e-books (Thompson, 2010; Clark & Phillips, 2014; SOU 2012:65: 232).

As the consumption of media in general moves to digital space, controlling digital distribution becomes increasingly important (Clark & Phillips, 2014). Publishers may be the main beneficiaries of the digital book market as digital content makes it possible for them to bypass all intermediaries in the traditional book supply chain (Thompson, 2010). E-books are advertised and sold online and, therefore, publishers may exclude mediators such as physical bookshops and take on their tasks themselves, or use online booksellers (Lloret Romero, 2011: 175). Online booksellers act as mediators in the book market, in various ways: as distributors for authors who self-publish, as aggregators selling e-books business to business, and as libraries, lending and sometimes renting out e-books to readers (Clark & Phillips, 2014). Consequently, the actors are trying to find their place and act in order to survive the changes brought on by the digital market.

In their report from 2013, The Swedish Publishers Association<sup>33</sup> identified three crucial aspects that need to be resolved in order for the e-book market to be viable and able to grow. First, VAT, which is 25 per cent for e-books and 6 per cent for printed books, has to be lowered for e-books. Secondly, e-book lending in libraries needs to be regulated, as libraries are considered to dominate the e-book market. According to the Swedish Publishers' Association (2013: 5), public libraries account for about 85-90 per cent of total purchases and loans of e-books. And thirdly, copyright must be upheld, so that publishers are able to invest in e-books (Ibid). These three aspects are explained in more detail.

In most European countries, e-books cost as much as and sometimes more than printed books because of the higher VAT on files and digital services. Many agree that this puts readers of e-books into a disadvantaged position and hinders the growth of e-book market (see Chapter 5). Of course, the recent decision of the European Com-

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33. Svenska Förläggareföreningen.



mission to allow lower VAT rates for e-books (Stupp, 2016) may bring about a change in this situation quite quickly, but the change is not mandatory. Individual countries may set their own rates and the rates for printed books and e-books may not be equal. For example, the UK Treasury has already said that:

We do not think that the application of a reduced rate for e-publications is desirable. We do not accept that e-publications and physical books are equivalent and so should automatically be subject to the same rates. There is a clear and simple borderline between physical goods and electronic services, which risks being breached and our assessment is that this would pave the way for more borderline disputes. Wix, 2016

It is possible, also, that publishers may decide that a reduced rate is not in their interest, if the proposition that they are maintaining high prices for e-books, in order to defend themselves against Amazon is valid (Pressman, 2016). Nevertheless, many publishers and booksellers, including Swedish ones, agree that the reduction of the VAT on e-books will stimulate their development.

It is uncertain what exactly the Publishers' Association is comparing when they say that libraries have such a large market share: libraries can directly purchase some e-books, but otherwise simply access an e-book through the Elib platform for a fee, which is not possible for a private user. What is needed is a direct comparison of outright sales of e-books to libraries, and sales to private users, along with a separate accounting of the income from library lending.

Besides, the situation is changing all the time. In another report from the Swedish Publishers' Association and the Swedish Bookseller Association<sup>34</sup>, it is evident that as prices for e-books go up, the sales go down (Wikberg, 2015). It is also notable that in 2015, the ratio of e-book and audiobook loans to e-book and audio book sales was lower than that of printed book loans to sales (Maceviciute, 2016: 63).

Anthony (2012) has noted that for the e-book market to grow in Europe, it is necessary to have affordable e-reading devices, and that publishers need to increase the output of digital books. Amazon's presence in international markets and the influence they have for the increase in e-book sales in those countries in which it operates, is also discussed.

Digitisation has led to easy access to books that can be obtained from many sources, both legal and illegal. Users have several options for accessing e-books, for instance to buy, borrow or subscribe to e-books, but also to illegally download from websites like Pirate Bay, or legally from sites such as Project Runeberg or the Gutenberg Project. Publishers see the need to protect their work and consider every illegally downloaded book as a loss for themselves and for the author (Söderberg, 2008).

Some fear that there is a considerable risk that people get used to accessing free e-books on the Internet and, as a consequence, will not be interested in paying for e-books (Steiner, 2015; Maxim & Maxim, 2012). But Söderlund (2009) argues that free books available on the Internet allow more people access and read them, and this is

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34. Svenska Bokhandlareföreningen.

beneficial for the book industry. Inevitably some people will buy the books they have accessed freely and generate an income for the publishers and authors.

Other effects of digitisation that Steiner has identified are: more self-published titles will be produced, sales of certain genres will increase, and in general the publishing business will expand (Steiner, 2015).

### *E-books and booksellers*

In Sweden, since fixed prices were abolished in the 1970s, physical bookshops have closed down in small towns and have concentrated in larger cities and more densely populated areas. In 2012, every third municipality did not have a physical bookshop, which means that approximately 10 per cent of the Swedish population does not have a physical bookshop nearby (SOU 2012:65: 251, 574; the Government, 2013: 15). Physical bookshops have been affected by deregulation and changing reading habits as well as online bookselling (Maceviciute, Wallin & Nilsson, 2015). Other factors affecting them are price pressures on books, and fewer titles on sale in bookshops. It has also become more common for physical bookshops to cooperate in bookshop chains, perhaps to overcome some of these pressures.

Physical bookshops have also met strong competition from online booksellers, which have grown significantly in the last ten years, and online booksellers have about one-quarter of the total book sales in Sweden (SOU 2012:65: 255; the Government, 2013: 15). Online booksellers have developed a strong sales profile towards organisations and businesses (SOU 2012:65: 257). Sales of course literature have also moved from physical bookshops to online booksellers to a large extent (Ibid: 572). Online booksellers are important to publishers as they offer another channel to sell and market books.

In the English-speaking market the initial technological boost to the take-up of e-books was provided by the Sony E-reader and, a little later, Amazon's Kindle. While different brands of e-reader (Kindle, Kobo, Nook) were initially successful, over recent years they have suffered a decline, with tablet computers and, more recently, smartphones taking over (Haines, 2016; Anderson, 2015). Also, in the English-speaking market, the sales of e-books increased significantly, up to about 20 per cent of total sales, by 2013. Since then, however, sales have declined in the USA and the UK, mainly because the 'Big Four' publishers (Simon & Schuster, HarperCollins, Penguin Random House, Hachette Livre) have deliberately increased the price of e-books in order to curb the influence of Amazon in the market (Pressman, 2016). As a consequence, Amazon has severely discounted paper books and boosted their sales, thereby pulling new buyers from physical bookshops (Author Earnings, 2016a).

In Sweden, Steiner notes that 'there is a gap in the market for a bookseller that offers a wide variety of reading tablets and a broad selection of cheap e-books in English and Swedish' (Steiner, 2015: 15). So far Amazon can only partly fill this gap, as it offers few Swedish e-books: however, if Amazon were to enter the Swedish

book market then, according to Steiner (2015), it would be a significant threat to the existing online booksellers, as they offer the same service. In countries where Amazon is established, its market share is such that publishers have been forced to lower their prices on books sold to Amazon so that it, in turn, can keep down the prices for the customers. Amazon uses its size to put pressure on the publishers, for instance by removing a title from the website if their demands are not met (Thompson, 2010: 44f).

## Commercial actors in the Swedish e-book market

The landscape of e-book sales is changing quite quickly, as new actors enter the market, the old ones change their owners or acquire new companies. Table 8.1 below and the text details the principal actors in the Swedish e-book market in 2016 and no later than the beginning of 2017.

Two e-book aggregators (wholesalers), Elib and Publit, offer business-to-business services to publishers by providing booksellers and public libraries with e-books. Elib is the dominant aggregator on the Nordic e-book market and it was founded in 2000 by four of the major publishing houses in Sweden: Bonnier, Norstedts, Natur & Kultur, and Piratförlaget. In 2015, 70 per cent of Elib was sold to the Axiell Group, an IT company providing library management systems, with the four publishing houses retaining a 30 per cent interest. The company is named Axiell Media but the platform is still called Elib. On Elib's platform publishers can upload e-books, which are then accessed by booksellers, libraries and subscription services.

Publit is a small publisher and e-book aggregator, offering a self-publishing service for authors, print on-demand for backlists and new books, and the sale of e-books for publishers. Publit also offers distribution services and sales channels for the customers through some of the largest online booksellers, and subscription services.

Online booksellers are the main distributors and sellers of e-books to users. The largest online bookseller Adlibris is owned by the publishing house Bonnier. Adlibris opened a physical bookshop in autumn 2015 in central Stockholm (Adlibris, 2016; Laxgård, 2015).

Bokus, owned by Akademibokhandel AB, is the largest bookshop chain in Sweden, and its platform for e-books and audio books is Dito.

Bokon, since 2015 controlled by Piratförlaget, sells e-books and audio books and has a service 'Send to Kindle' for those who wish to read their Swedish e-books on a Kindle. Moreover, there are several other online shops selling e-books as part of their merchandise, for instance CDON, which offers Adlibris's books through CDON Marketplace. Amazon is another large online bookseller even though technically it is not in the Swedish market. Swedes buy from Amazon USA or UK. Since 2014, Amazon has an agreement with Bokrondellen, which means they now have access to metadata on Swedish books from practically every Swedish publishing house.

The majority of physical bookshops do not sell e-books but those that do are usually independent and specialised bookshops. Several independent bookshops are organised in consortia and cooperate in certain areas, e.g., purchase. Bookshops in the large bookshop chain Akademibokhandeln do not sell e-books but refer their customers to their subsidiary Bokus Dito. Some authors and small publishers also act as e-booksellers selling e-books from their websites.

**Table 8.1** Commercial book suppliers in the Swedish e-book market

#### **Aggregators**

*Axiell media/Elib:* Aggregator and online bookseller. Founded in 2000. Owners: Axiell (70%), Bonnier, Norstedts, Natur & kultur, Piratförlaget.

*Publit:* Aggregator, publisher, self-publishing, distribution and print on demand. Founded in 2008. Owners: Per Helin, Hannes Eder, Nille Svensson and Richard Herold.

#### **Booksellers**

*Adlibris:* Online bookseller, started in 1997. Owner: Bonnier AB. Sells e-books from 2000. Started e-book app Adlibris Mondo in 2013, renamed to Adlibris Letto in 2015.

*Bokus:* Online bookseller, started in 1997. Owner: Subsidiary of Akademibokhandeln. E-book platform Dito started in 2011.

*Bokon:* Online bookseller, started in 2012. Owner: Piratförlaget. Has a service called 'Send to Kindle', which makes it possible to read Swedish e-books on Kindle

*Academibokhandeln:* Chain of physical bookshops, started in 1992 (Academus AB in 1977). Owners: Accent Equity (71,7%), Killbergs bookshop, Natur & Kultur, and its own board and management.

*Independent bookshops:* Organised in consortia, e.g., Ugglan, JB gruppen etc., and cooperating in certain areas.

#### **Subscription services**

*Storytel:* Founded in 2005. Owners: Jonas Tellander and Jon Hauksson. Monthly fee: €17

*Kidsread:* Founded in 2015. Owners: Gustav Winberg and Kåre Halldén. Monthly fee: €5. E-books for children 0-12

*Nextory:* Founded in 2013 under the name E2GO. Owner: Frescano Group. Monthly fee: €10, €20 or €25

*Mofibo:* Founded in 2013. Owner: Storytel. Monthly fee: €17

*Readly:* Founded in 2013. Owner: Joel Wikell. Subscription service for magazines and newspapers. Monthly fee: €10

*BookBeat:* Founded in 2015. Owner: Bonnier. Monthly fee: €17

*Bookmate:* Founded in 2007. Owners: Victor Frumkin and Simon Dunlop. Has books in 9 languages including Swedish. Monthly fee: €8 for a premium subscription

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There are several subscription services in the Swedish book market offering audio books and e-books for a monthly fee. The price used to vary with a supplier but has now settled at €17 (169 SEK) for several subscription services. But there are exceptions like Nextory, which has three levels of subscription fees giving the user access to a different number of books depending on the price.

Readly is a subscription services that has had to focus their business and now only offers magazines and newspapers on subscription for online reading. They still offer e-books through Kidsread for children up to 12 years. Mofibo, which is the largest distributor of e-books in Denmark, entered the Swedish market in autumn

2014. Storytel bought Mofibo in order to get access to its international market and to access some of Mofibo's technical systems. The two companies will co-exist to begin with in both Sweden and Denmark, but Mofibo will close down in the Netherlands in favour of establishing Storytel there instead. Storytel, which is a fairly new start-up company, has also acquired the publishers Massolit and B. Wahlström, audio book publishers Storyside and Earbook, and one of Sweden's oldest and largest publisher Norstedts as well as (quite recently) a Danish publisher, People's Press. At Storytel, it is possible both to subscribe to and buy audio books and e-books. Storytel is a fast-growing company and since 2010 it has doubled its turnover every year (Allabolag.se, 2016; Ström, 2016).

### Project survey and interviews

The commercial e-book distributors were studied through a questionnaire survey, which was sent to 152 booksellers in spring 2014. A strategic selection of respondents was made by choosing booksellers from large and small cities spread across the country, from book chains, independent stores and online booksellers. Forty-eight booksellers completed the survey and the response rate was 32 per cent. The majority of the 48 respondents in the bookseller survey were physical bookshops, only a few were online booksellers. Six of the respondents sold e-books at the time of answering this survey.

In 2015 and 2016, seven semi-structured interviews with representatives of booksellers, aggregators and a subscription service, were conducted, including some of the major actors. The respondents represented two aggregators, of which one is significantly larger. Aggregator A provides e-books to retailers, online booksellers and public libraries. Aggregator B offers several different services to their customers of which e-books make up about 30 per cent of its business. Representatives of two online booksellers, A and B, also were interviewed. These companies sold mainly printed books, but two to three per cent of their total book sales were e-books. We interviewed a representative of one subscription service, which offers audio books and e-books to their users for a monthly fee. And finally, two respondents of physical bookshops took part in this round of interviews: one from the Bookshop A, in a small town and a member of Akademibokhandeln; another from the Bookshop B, an independent, specialised bookshop, which has one bookshop in each of the three major cities in Sweden.

The data of the survey and interviews are presented together in two thematic threads: competition and business opportunities. The opinions presented here represent the views of the respondents and not necessarily those of other actors in the Swedish e-book market. Though the data are not representative, the results of analysis are indicative of the issues within commercial distribution of e-books in Sweden.

## Competition in the e-book market

Competition is a normal phenomenon in any market, but the book market is not homogenous: it consists of a variety of sections offering different products and engaging in competition with other goods and services catering to the same needs of customers. In this chapter, we are dealing with the market of the mainstream fiction and non-fiction offered to a general public. The competition here is presented through the eyes of booksellers.

Direct competition between booksellers is perceived in terms of existing monopolies and relationships between different types of sales channels.

For example, online booksellers and subscription services are the greatest threat to physical bookshops. The interviewee from the Bookshop A says that audio books used to sell really well in bookshops and then 'Storytel came along and our sales have plummeted and now I only sell a few audio books'. Subscription services for e-books are just as problematic: customers can read an unlimited number of books for a low price.

An online bookseller says that subscription services are major competitors, but so far they mainly offer backlist books. If the customer wants a new book they have to buy it.

Some booksellers are worried that e-books may be sold directly from publishers or authors to readers. They maintain that producers' involvement in the sale and distribution of e-books will lead to distorted competition in the retail chain. Direct sales to the customers by publishers is seen as a serious problem, and one of the respondents emphasised that, 'if they want to keep bookshops it is not good at all that the publishers do that'. The change in this direction is acknowledged by another respondent: 'We would prefer the value chain to look the same so that we have a role to fill, but we cannot be naive and think that everything will stay the same for ever.'

Even very strong actors are worried by this type of competition. Aggregator A interviewee says that this is a major threat that makes their position as intermediary between the publishers and the retailers very uncertain:

Our position as intermediary serving publishers, retailers and libraries is changing.

The positions are moving. Publishers are moving forward in the chain and want to deliver directly to retailers and want to leave us out. In the same way others are moving backwards in the chain and want to talk directly to the publishers.

On the other hand, a respondent from Aggregator B does not see a problem in the position of a mediator, but in the market dominance of a few media companies that threaten the diversity in the cultural sector at large, and the book industry in particular. He is mainly concerned about the monopolistic position that Axiell Media with Elib have in the Swedish market.

Despite this view on dominance in the market, which is shared by other retailers, the hypothetical advent of Amazon to the Swedish market is viewed rather controversially.

Physical bookshop respondents say that Amazon's possible entry is mainly a threat to online booksellers. But they worry that Amazon can reduce prices on printed books and that would also be a problem for physical bookshops. Online booksellers believe that Amazon would be a difficult competitor if they came to Sweden, as they are best at everything they do, marketing, logistics, prices and they have the largest selection of books. It would cause problems for all bookshops physical and online. They assume that Amazon has not yet arrived in Sweden because the markets in the Nordic countries are too small and it is not worth the initial set-up costs of the business. On the other hand, one respondent claims that Amazon already has a large presence here and is one of Sweden's top booksellers, as a result of people buying through its other outlets in the USA, the UK and Germany.

Thus, our respondents have introduced the issue of international competition, which is a complicated matter and leads to the question of VAT. The respondents point out that varying VAT in the European countries is a problem, as online bookshops can move their business to the country with the lowest VAT and continue selling in the home country. It distorts competition. In the EU, this problem was solved by shifting the payment of VAT to the country of purchase.

But the differences in VAT reveal competition between e-books and printed books: '25 per cent on e-books and 6 per cent on physical books, which, by definition, means that e-books will be more expensive in relation to print books.'

The competition with substitute products and services is a major issue for all our respondents as these are threatening reading as a leisure occupation. The most significant problem according to them is that the number of readers is going down, and the issue at hand is not whether people chose to read print books or e-books, but that they choose to do something else with their available time.

Many in the book industry who think strategically and ahead see that the competition is not between the publishers any more but with other media consumption. To keep the readers and find new ways is a must for the book industry, if they want to flourish.

Online booksellers agree that they mainly fight other means of entertainment and they do not believe that print books will be read to a larger extent than they are today. The competition from social media, computer games and apps are pulling young people's attention away from reading books. 'In the long term the book will lose out. We see continued possibilities to switch readers to digital reading. We believe it will... we *know* it will increase strongly.'

However, some other respondents say that their customers have realised the importance of having balance between reading books and playing computer games, as reading proficiency in children has gone down. In this respect, the emerging perceptions of e-book loans through public libraries are interesting and warrant a separate heading.

## Attitudes on public libraries and free e-book lending

For some of the respondents, libraries lending e-books free of charge belong to the category of the hardest competitors:

Libraries lending out e-books for free is a fine service to society but for us who have commercial interests in e-books, it hits our business model really hard if it is too easy to borrow the books for free. It is not the same with print books as it requires the reader to go to the library to get the book while e-books are just a pressed button away. It is just as easy to borrow a digital book as it is to buy a digital book online.

The respondents of aggregator A, the subscription service, and the online booksellers all say that it is hard to compete with free e-books from the libraries. There is a difference between lending an old printed book from a library and lending a digital file. The e-book will keep the same high quality after many people have borrowed it. If you buy a printed book you can keep it in your bookshelf but if you borrow a printed book you have to take it back to the library. An e-book is not as important or valuable to keep after you read it so it is easier to let go of, and it is automatically returned to the library from the reading device. The respondents point out that they must find a way to convince the customer that it is worth paying for e-books.

Some respondents express the opinion that Elib's new agreement with differentiated price levels on new and older e-books is good, as it gives the booksellers a chance to sell the new e-books before the public libraries start lending them. The Swedish Association of Local Authorities and Regions<sup>35</sup> has an agreement that differs from the Elib's agreement (see more in Chapter 9) and this is a cause of concern for aggregator A, who is the only respondent to bring it up:

The Association of Local Authorities and Regions has one way of handling it, to offer libraries what they want, so they can predict the cost. The agreement is not adapted to publishing business at all or the digital book. Somehow they have tried to squeeze in a predictable model on a phenomenon where it doesn't work.

Several respondents acknowledge that public libraries are driving the market and that they are not suited to do that. They are calling for a strong actor, like Amazon or the German service, Tolino, with more resources, e.g., money and marketing abilities, to drive the market. And as long as there is no such actor on the Swedish e-book market, it will continue to stand still or grow very slowly. They say that libraries have been a dominant actor in the market since e-books took off, but now they are a hindrance and a barrier for other actors and stopping e-book sales from growing.

Some interviewees are not so sure of the issue. The representative of a subscription service, on one hand, claims that libraries are important from a democratic point of view and give those who cannot afford to buy or subscribe to e-books a chance to

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35. Sveriges Kommuner och Landsting.



access them. But he is also concerned about the contradiction between several notions: an e-book, which is a commercial product, on one hand, and, on the other, the Swedish notions of popular adult education (*bildning*), accessibility of everything to everyone, and the potential of e-book distribution. According to him, the model of free e-books in libraries is not sustainable any longer and another solution has to be found. What this solution entails remains to be seen.

The physical bookshop representatives offer entirely another view on public libraries as does the representative of Aggregator B. Both physical bookshops cooperate with their local public libraries. For them it is predominantly important that people read, as they see that reading people are both book borrowers and buyers.

Aggregator B interviewee regards public libraries as the only answer to the successful distribution of e-books:

Libraries are terribly important. They have funding, and how they use the funding is of no consequence as long as it leads to people reading books. We don't understand the publishers. We can see that the libraries will be their only marketplace in the future, that they will have any sort of control over. And it is a blessing for publishers that libraries exist, that's how we regard libraries.

In general, this respondent is not too worried about the positions of mediators of e-books. He is absolutely sure that how they will be paid for their service will be different from now: 'Digital distribution will be free of charge, it will cost nothing to access digital files, that is what the digital revolution will look like.'

Thus, the issue of e-book lending in public libraries divides our respondents most, as some regard it as a necessary and important service to the public, while others fear that it disrupts the market and their businesses.

### Attracting the customers

The lack of demand for e-books from customers is one of the greatest perceived threats to e-book distribution that surfaced in the survey. Thirty-five of the 48 respondents in the survey say that their customers are not asking for e-books and almost half of all respondents indicate that it is the reason for not providing e-books in their bookshops. Physical bookshops, however, are not necessarily a homogenous group and in the interviews, it became apparent that some bookshops have customers who are e-book readers and ask the bookshop to provide them. The customers of bookshop A have very little interest in e-books and if anyone asks about e-books, a shop assistant refers them to their subsidiary online bookseller Bokus. Bookshop B has customers who are interested in e-books and technology, so this independent, specialised bookshop was in the process of launching a new website for selling print books but also e-books and audio books. This bookshop is becoming both a physical and online bookshop, thus, hoping to satisfy their customers and attract new ones.

Other respondents were also worried about the lack of demand for e-books and explained that they try to boost it and attract readers in different ways.

Online bookseller B says that e-books are insignificant in the Swedish market and many in the population have never tried reading an e-book. His company wants customers to discover e-books and realise that it is a very good format. The company tries to achieve this goal by offering an attractive selection and arranging campaigns, turning buying e-books into fun and adventure. For instance, they work with newsletters and short-term price cuts. The e-book can be seen as a complement to the print book, and different formats are good for different occasions. The respondent believes that e-books definitely have advantages for readers that could become their selling point.

The representative of the online bookseller A is convinced that digital reading will increase. His company sees the opportunity to switch their customers into digital reading. They may also change into a 'bookshop plus' with everything; an extremely well-stocked bookshop that offers and sells products other than books. In his opinion, selling e-books in physical bookshops and other shops as well, if it was possible, would be a benefit as 'it is all about increasing the consumption overall'.

A respondent from aggregator A sees an opportunity to develop services for the future and to create an interface adapted to suit the market. They consider it important to promote and support reading for the future as e-books offer something new.

However, there is some distress among the respondents about the slow uptake of the e-book format. The respondent from aggregator B is exasperated concerning the breakthrough of e-books: why is it not moving at the same pace and to the size of the English-speaking markets? According to others, it is customers' need and demand for e-books that is important, but it is still too small:

There are some functions connected to an e-book that do not exist in a physical book, but then they should be something that a customer wants. It is difficult to create that need, it must be there genuinely.

### Future e-book selling: problems and opportunities

In the light of this impatience with the stagnating demand for e-books and preferences of the public for printed books what are the expectations of our respondents for the future of their business?

In the survey, 42 out of the 48 respondents said that they do not provide e-books to their customers. As the majority that answered the survey were physical bookshops, this response was to be expected. The representatives from online bookshops supported this finding by expressing a belief that physical bookshops have no reason to sell e-books, as an e-book, by definition, is digital and the business of the physical bookshop is built on getting customers into their shops. It is hard to find a natural connection between e-books and physical bookshops selling print books that do not require ad-

ditional technology, but e-books are consumed through a reading device. The lack of demand for e-books from the customers who are not looking for e-books in physical bookshops also seems to confirm that there is no reason for them to sell e-books. At the same time the representative of the bookshop A is sure that, if the e-book sales take off, it is important that physical bookshops sell e-books as 'it concerns our survival'.

Lack of technical resources was pointed out as a reason for not selling e-books by 15 respondents. In the interviews, we have identified that lack of technical knowledge was not among the resources that are missing in the bookshops. While the respondent from bookshop A saw that their customers perhaps lack the skills and experience to use e-books and reading devices, the respondent from bookshop B was sure that both the bookshop staff and their customers have excellent technical skills and providing e-books is a natural progression for them. But they needed investment in equipment and software to sell online. The representative of bookshop A was sure that they would definitely be first in line to try technology dedicated to provision of e-books in the shop. He thought that availability of such dedicated technology could be a solution for physical bookshops.

The lack of agreement with publishers, and other providers of e-books is also considered a barrier, as it means that physical bookshops and publishers need to change their business models to access e-books for sale in bookshops. Strong negotiations would be needed to secure favourable contracts with e-book providers as well.

Despite the existing barriers to e-book selling in the physical bookshops, a majority of our respondents in the survey (22) believed that physical bookshops will be among those who will deal with both kinds of books in the future. However, other responses show the ambivalence of participants: fewer than half believe that bookshops will continue to have a role in selling e-books, but more than a quarter (14) believe that publishers will sell directly (or through the online bookshops they own), and many maintain that e-books will only be sold online (10). One out of four survey respondents (12) pessimistically agree that the role of physical bookshops will diminish as sales of e-books increase. The same ambivalence, which results, perhaps, from the traditional relationship between publishers and booksellers, is found among *publishers* responding to the same multiple-choice question: there, 54 per cent of the respondents believed that bookshops would sell both printed books and e-books in the future, while 47 per cent believed that only online bookshops would sell e-books, and 57 per cent believed that publishers would sell directly to consumers.

Thus, e-books play an uncertain role in the future of physical bookshops, as a threat to their business, but also as an opportunity for development.

The respondents from the physical bookshops point out several survival strategies, which do not necessarily involve e-books. Physical bookshops organise activities increasing their visibility in the community, e.g., book signing by authors, author presentations, and cooperation with public libraries. Both respondents of physical bookshops consider their loyal customers as a great power, and bookshop B has the technical know-how and ability to deal with e-books.

Though many of our interviewees believe that reading is losing out to other means of entertainment, the representative of bookshop A argues that the situation has turned around again and the number of readers is going up, as far as he can see in his town and in his bookshop. Their customers find it important and are vocal about keeping their physical bookshops. 'The future looks positive and we will grow stronger, those are the signals we get from the market now, and people read more again.' However, the same person thinks that there are plenty of e-books available in the Swedish book market and he would be happy if it stays at two or three per cent of the total book sales.

Bookshop B is just about to launch its website for e-books and audio books. They have faith in the growth of e-book and audio book sales and the interest from their customers.

Online bookseller A thinks that it is a great time to be a bookseller and growth of business is good. Their business is already digital and customers can buy a digital book or chose to buy a printed book instead, and as e-books are delivered instantly it is a great benefit to the customer. The online-consumer wants to have a very large supply to buy from, and they prefer to consume everything online as they are used to it. Online bookseller A thinks that the large aggregators of e-books provide a good service and make the distribution of e-books work really well.

Online bookseller B points out that they work hard with marketing campaigns and to activate their customers the whole time by offering good deals. The genres they see selling best as e-books are crime and romance. They have noticed that they sell more e-books when libraries and physical bookshops are closed, at weekends and on public holidays. The good thing about e-books is that they are always accessible and delivered immediately. It is not essential for them that the sale of e-books should increase, as they sell both print and e-books. As long as people continue to read and buy books they are fine.

The interviewee from the aggregator A believes that they provide an infrastructure and order, and also a leading cutting-edge technology to their customers in business and readers. They hope they provide a service everyone wants to use, even with stronger competition. The representative of the aggregator B believes in the digital revolution and the place of the e-book in that revolution.

The challenge, according to the representative of the subscription service, which is also the owner of publishing companies, is to build a large catalogue of e-books, by for instance, digitising backlist books:

From a publisher perspective, the challenge is to make available as many books as possible, as there is a large capital tied to the backlist. That is the primary challenge at the moment, to scale up and make as much as possible available, as cheaply and as quickly as possible. That is a major challenge.

The majority of respondents in the survey believed that the sale of e-books will increase within the next few years, although the growth will be slow. Some think that, if Amazon enters the Swedish book market, it will lead to increased sales of e-books

and other positive things too, as they would invest a lot of money and that would lead to online bookselling growing even more.

Generally, the results of our investigation are somewhat ambiguous, and are well summed up by one of the respondents:

Yes, when it comes to innovations; that is, if we talk about the e-book as an innovation, even if it has been here for fifty years, if you look at it historically, the time it takes for it to break through is underestimated. You would think it will go really quickly and the effect long term is underestimated. I think we are in the middle of it now, so I don't think we have a clue what the impact will be.

It is interesting that the outlook for the future of most our respondents is quite optimistic for all book-selling actors. The optimism is quite cautious and the problems to overcome are outlined clearly, but a positive outlook for the future of booksellers is something most of them share, whether it is digital or not.

## Discussion

### *Opportunities and factors driving e-book selling*

One of the main factors driving the e-book sales and stimulating the willingness of booksellers to engage in them seems to be the e-book itself. As an innovative digital product, it offers obvious advantages. Most of our respondents agree that e-books are a complementary format to printed books. It is possible to direct consumer behaviour towards buying e-books by making customers aware that e-books can be more useful in different situations than printed books, for instance, when a small reading device houses all the books that one might wish to take on holiday. Another advantage is that an e-book satisfies the need of the consumers in an instant as it is delivered directly to their reading devices. There are several channels for distributing e-books and they can be available in different formats, which give the customer a range of options. On the other hand, e-books are also attractive to the producers as backlist books can be converted to e-books for a reasonable cost and increase the offer of the commercial provider.

In line with Anthony (2012), the respondents think that a better e-book reader for the Swedish market could be a driver, and several respondents say that a strong actor like Amazon with enough money to invest is needed in Sweden to drive the format forward. It seems that audio book market has its strong actors and has increased fast over the last few years as a result of the emergence of Mofibo and Storytel.

The e-book market in Sweden is still small but growing, even if it still occupies a very small share of the whole. But e-books have also brought their dividends. During 2015, Bonnier had a 100 per cent increase in sales of e-books (Wikberg, 2016), and between January and September 2016 their income from digital books (audio books and e-books) was 19 per cent. In comparison, Adlibris's sales of e-books increased

between autumn 2015 and spring 2016 from one per cent to two per cent and Bokus had around three per cent e-book sales in 2015. Thus, the growth and the affordances of an e-book drive the bookselling actors to invest significant effort into development of the market.

Elib dominates the business-to-business aggregation of e-books in Sweden and has no real competition, but still looks for new business models and develops its sales infrastructure. The subscription services as well as the online booksellers Adlibris, Bokus and Bokon all offer apps for their customers to download in order to read e-books or listen to audio books on their reading devices. Storytel hopes they can help drive the stagnating e-book market forward as they have acquired several publishers and produce e-books from both new books and backlists. Apart from distributing their own books to the users through their platform and app, Storytel and their publishers also send their e-books and audio books to Elib so that other booksellers, subscription services and libraries have access to them.

We have confirmation of this trend from our respondents, thus, Aggregator A looks forward to having a large assortment and stock of e-books, including backlist books. The representative of this company believes that it is important to digitise the whole Swedish book treasure. The company is also planning to build a larger consumer base with new ventures in institutions such as hospitals, prisons and academic libraries. Having a high level of competence in the field is to their advantage.

The subscription service sees the chance to make as much as possible of their publishers' backlist books available as e-books. It is a good opportunity, as there is a great demand for such books. Furthermore, there is a large amount of money tied to these books that will increase their profit.

Even physical bookshops, though ambivalent towards e-books in general, and preferring to keep sales of e-books at the low level, are ready to start selling them. One of the problems they experience is a short life-span of a printed book, which now is only three to four months, when, a few years back it was three to four years, which meant that it could be sold for much longer. The increased turnover of books in a shop requires additional expenditure and effort. Though this issue is not directly related to the e-book, it may add to the reasons driving physical bookshops into a potentially risky business of e-book sales. One of the respondents assures us that bookshop B already has the resources and customer demand for e-books to make it worthwhile. Another agrees that selling e-books in physical bookshops will be necessary if the e-book market share grows to a larger extent.

Almost all respondents agree that marketing and consumer-based campaigns are needed to help the customers see the advantages of e-books. More marketing, together with attractive business plans and digitisation of more books, is necessary to create a higher interest of readers in e-books.

There is also evidence of complementarity of the e-book sellers, despite clearly expressed competition. Elib does not publicise the lists of their providers or customers, but public libraries are using their services to a large extent, and it seems that

most publishers use Elib for selling or lending their e-books. Some of our respondent booksellers also expressed satisfaction with Elib's services. Subscription services and libraries provide access to older titles, thereby allowing online booksellers to reap the benefits of selling new bestsellers. Steiner (2015) suggests that some genres will sell better as e-books, and online bookseller B has experienced that e-books sales of detective stories and romances are higher than other genres. The more revolutionary actors, like aggregator B, not only gain supporters of their ideas, but also manage to find customers for their product.

### *Problems and barriers in the e-book selling*

On the one hand, e-books cause a number of problems for the established book production and distribution sector. On the other hand, their development and expansion in the market meets with barriers that may be both predictable and unexpected. In Sweden, these barriers are also influenced by the small size of the market where some of the experienced troubles are felt as significantly stronger than in a large market.

One of the unexpected and painful issues is the lack of demand for e-books. In a large market, even a small proportion of e-book buyers will provide enough profit to justify investment in refurbishing the business. Technologically savvy Swedes prefer printed books and appear to be returning to physical bookshops; the booksellers believe that readers are unaware of the affordances of e-books and that there is a need for strong marketing campaigns to change the situation. Those who *are* aware and read e-books (that number has reached almost 20 per cent of the Swedish population, see Chapter 11) find opportunities, which cost less than offers from Swedish booksellers, such as free options on the web or foreign providers, selling e-books cheaper than in Sweden. The threat to e-book selling caused by the habit of accessing free resources on the internet has been identified in earlier research (Steiner, 2015; Maxim & Maxim, 2012), though others have contested this argument (Söderlund, 2009).

It is also clear that the price of e-books is a problem as the publishers set different prices for similar products. The question is really at what price customers think that it is worth buying an e-book, instead of a printed book. Customers will not buy e-books if they think that the price is too high compared, for example, to paperbacks.

High e-book prices are blamed on the VAT difference between printed books and e-books (the Swedish Publishers' Association, 2013), and on the publishers. The latter are regarded the main culprit, which has introduced several barriers in the Swedish book market for e-books in order to maintain the printed book. One respondent ventures saying that publishers are relieved that the interest in e-books has slowed down and they are hoping that it was just a passing fad (see more in Chapter 7).

On the other hand, publishers are feared by their bookselling counterparts because of the risk of disintermediation (Thompson, 2010; Clark & Phillips, 2014), or their power to bypass the aggregator and even retail part of the book distribution chain and provide their own service to customers. According to Lloret Romero (2011),

because e-books are sold online it would be easy for publishers to exclude mediators and take on their tasks themselves. Though these fears are expressed by some of our respondents (e.g., from aggregator A), they do not dominate, most probably, because of strong dependencies between publishers and booksellers through vertical integration.

Several respondents consider the competition from other means of entertainment, like social media, computer games and films as serious threats to reading. They even believe that the number of readers is going down, though no empirical data shows this (see Chapter 11). This is regarded as another threat (in addition to the preference for printed books) that affects demand for e-books and negatively affects e-book sales in the first place. Some relate this problem of easy and convenient digital resource use to the lack of a dedicated high quality e-reading device on the Swedish market as an affordable and convenient device is one of the conditions for e-book market development (Anthony, 2012). Together with the lack of a critical mass of Swedish titles (as the respondent from the subscription service suggests) this is one of technological factors affecting the demand for e-books. The latter can be remedied by digitising backlist titles, but the first will remain a problem, as the Letto e-reader and app offered by Adlibris are inferior to other e-readers on the market (Åberg, 2015).

On the other hand, reading and buying books are two different activities and booksellers are more affected by the latter. Thus, the threat of free e-book loans through libraries is felt acutely among many booksellers who consider public libraries to be a problem for the e-book market as 'it is difficult to compete with free'. They say that public libraries block the e-book market by providing free e-books, because it is just as easy to borrow from libraries, as it is to buy them from an online bookseller or subscription service, though this is not actually the opinion of many e-book readers (see Chapter 11).

The situation with public libraries in Sweden is definitely quite bizarre. E-books they access are not really free of charge, as book lending in public libraries, like their other commitments to the local community, are funded by taxes. Libraries pay between approximately 50 eurocents-20 Euros (5 and 200 SEK) for each e-book loan to the aggregators and publishers, but do not take fee from their users who download the e-books. Thus, public libraries are the customers of publishers and pay for each e-book loan on behalf of their community members. They have no income from their e-book lending, but, nevertheless, are a strong player in the e-book market. Thus, the Publishers' Association's statement that public libraries have 85-90 per cent of the Swedish e-book market is rather unclear. If libraries are bringing this high proportion of e-book income to publishers, then it is no wonder that some of our respondents, though a minority, regard public libraries as allies in increasing reading and book buying and one of them (from aggregator B) goes as far as to claim that libraries will be a sole market for e-books in the future. In this case, public libraries pose a definite, not only hypothetical threat, to the retail part of e-book sales.

Physical bookshops feel competition coming from online booksellers and subscription services as a problem diminishing their sales of print books, audio books,



and even e-books. Bookshops used to sell quite a lot of audio books but now it is next to nothing in sales as the subscription services have completely taken over that part of the market. In addition, using Szulanski's approach, one can trace significant stickiness points for introduction of e-books into physical bookshops, namely, need for additional technological equipment and investment in negotiations with e-book suppliers. However, when they feel that the demand from their customers for e-books starts to grow, they are prepared to overcome these points of stickiness.

Another issue related to competition is Amazon's services that are the same as of Swedish online booksellers. At present, it is mainly hypothetical, as Amazon does not sell many Swedish titles, but it would pose the most problems for them (Steiner, 2015). Whether it would be beneficial for overall development of Swedish e-book market or will affect it negatively, remains to be seen.

## Conclusion

So far, physical booksellers in Sweden have not felt that their businesses are threatened by e-books. Most of them find that there is no need to engage in the business of selling e-books. In the survey from 2014, the reasons for selling e-books are well-functioning routines and personal interest in the product. The reasons for not selling e-books are the lack of demand and technical resources as well as contractual agreements with e-book publishers. Two years later, in 2016, in the interviews, contractual agreements seem to be less of a problem and more concern is about customers not wishing to buy e-books, but not the lack of technical skills and resources in customers and staff. Thus, one can suggest that at present, only booksellers with interest in e-books are selling them. Technical resources for e-book sales, routines, and contracts with publishers are the main premises for this activity. However, it is clear that physical bookshops are interested in selling e-books if their customers demand it.

Those actors that are close to publishers, either owned by them or the owner of them, are more inclined to see public libraries as a problem blocking the market and interfering with their business models. However, the more independent actors, like aggregator B and physical bookshops see public libraries as an essential actor on the Swedish e-book market, but not necessarily the driver of that market.

However, the biggest barriers to e-book sales are the price of e-books compared to printed books and lack of demand from customers. The market has grown and will continue to grow, and e-books are not likely to threaten printed books but rather be a complementary format.



## Chapter 9

# Swedish public libraries and the e-book

This chapter explores e-book issues in the context of public libraries, which are the main non-commercial distributor of e-books in Sweden. The situation of e-books in public libraries in Sweden is unique, which we shall prove by providing a general overview of research and the results of our own investigation. We are interested in the specific features of Swedish e-book distribution through public libraries, and the drivers and barriers to this process in society and in the market.

### Provision and management of e-books in public libraries

Public libraries have had little attention from researchers despite heated debates in the media relating to e-books in public libraries, and the conflicting interests of publishers and public service providers. Gibson (2011), in an investigation of e-book lending in UK public libraries, found only eight studies written during the period 2001 to 2011. Kumbhar (2010), providing a general review on e-book research carried out in 2010, presents two research articles on e-books in public libraries. These studies, of course, are outdated by now and some newer studies are more relevant. A search for 'public libr\* AND ebook' on the Web of Science produces only seven items between 2012 and 2016, three of which are only marginally relevant to the issues discussed in this chapter. However, a general web search returned more studies that are introduced here.

### *E-book business models in public libraries*

Woodward (2013) reviews e-books from the perspective of American libraries, and notes a tension between publishers and libraries. Some large publishers in the USA (Penguin, HarperCollins, Random House) have discontinued or limited drastically their contracts with libraries or raised prices for library acquisition of e-books. For libraries, the biggest problem is that e-books cannot be bought, only licensed and, in the US, the borrowing of e-books through libraries follows the same pattern as the lending of paper books: i.e., only one person at a time is able to borrow an e-book for a particular period (Woodward, 2013). The process for users is very complicated and time-consuming to get access to the e-book titles that are available online or, sometimes, can only be downloaded at the library on to a USB drive.

The report of the American Library Association from 2013 presents different models of contracts for e-books used by public libraries. According to the Association, the contract should include three main conditions: 1) all e-books on sale should be available for loan; 2) libraries should own e-books, not license them; 3) libraries should be able to integrate all e-books on one platform, through which they provide the service (McCallum, 2013: 165).

As one can see from an extensive overview of public library e-book lending models in European countries conducted by Mount (2014), very few of these conditions are satisfied in European countries (see the abundance models below). The report includes an analysis of the situation in the European Union before 2014 and reveals a wide variety of business models applied by publishers and public libraries. It draws attention to affordances and shortcomings of various models and emphasises the need for flexibility in business models as well as for a dialogue between public libraries and publishers and increased investigation of usage to overcome cautious commercial risk projections (Ibid: 12). Huysmans has summarised the rich data from this project into four main business models that are used in European countries and the USA as follows:

- Unlimited use, one-copy-multiple-users models that try to overcome limitations of single-user licence models.
- Title-by-title licensing, streaming models that prevent the download of the content on to the user's device.
- Download models occurring in a tense negotiation atmosphere between public libraries and publishers, and a trend towards offering a medium-sized collection for e-lending.
- Abundance models that have an unlimited number of titles, do not need negotiations with publishers, and libraries (or their consortium) usually owning the platform (only three of these are known: one in Norway and two in the USA). (Huysmans, 2014).

So far, legislation has not provided public libraries with much freedom in competing with commercial providers of e-book platforms, as they have been fully dependent on the willingness of publishers to allow public lending of e-books. In 2016, the Court of Justice of the European Union ruled that e-books are covered by the public lending exception as, 'the operation carried out by a publicly accessible library... has essentially similar characteristics to the lending of printed works' (the Court of Justice..., 2016: 1). In fact, the Court recognised the first-purchase right for e-books as long as they are used in the same way as printed books. The actual impact of this ruling on the situation of e-books in European public libraries is not yet clear. It might be a big step forward in strengthening the citizen-centred library vision that is so strong in Scandinavian countries (Petersen, 2014).

### *Issues in managing e-book collections*

Some researchers have investigated how public libraries manage e-book collections and compared them with the collections of printed books. In an American case study, it was found that e-books were borrowed more times than their printed versions, but the loan cost was higher for e-books than for bought, printed books. At that point HarperCollins publishing house limited the lending of an e-book to 26 times under one licence, arguing that this is the life-cycle of a printed book. However, the authors of the article could find no evidence that paper books are damaged after 26 loans (Gray & Copeland 2011). Cottrell and Bell (2014) suggest that public libraries should actually explore and map the real need of the served users for e-books and plan carefully how to meet it instead of suffering under the conditions of bad contracts, inefficient technology and scarce resources for e-books.

### *Services related to e-books*

Despite problems with e-books, they have made their way into public libraries, many of which prefer to concentrate on developing services and finding readers for the e-books already available. Thus, they concentrate their attention on Ranganathan's third law of library science: 'every book its reader' (Ranganathan, 1931: 299-325). The public library becomes an instrument for marketing e-books and some American public libraries have identified the need to lend e-readers, most often the Kindle, with e-books uploaded to them in advance. A case study in one of them has revealed three types of users who borrowed these devices: those who wanted to test the equipment before making a buying decision, experienced library users who wanted quick access to many titles, and those going on vacation borrowing a Kindle for travelling time (Moyer & Thiele, 2012). Thus, loans of e-reading equipment enable many members of the community to read e-books even if they do not own an e-reading device. Lending Kindle devices also proved a good way to extend and enhance the collection of e-books in a public library (Goodwin *et al.*, 2012). The practice of having e-readers for loan in public libraries is more widespread in the USA than in European libraries (Zubac & Tominac, 2014).

Though American public libraries seem to be more active in conducting experiments with provision of e-book services, they are not necessarily more successful. The experiment of Western Colorado Marmot Library Network to implement the Douglas County Library Model of e-book collection and circulation through a locally-developed platform was closed down in 2015. The main idea was to offer a single discovery service to all library-owned, printed books and e-books (bought directly from publishers rather than from library suppliers) held on one server, thereby improving the user experience in finding and accessing reading materials. The project met huge problems in acquisition (too few e-books were bought, which were too expensive and not popular with readers), and in managing metadata and the collection (most

of the cataloguing and adding e-books to the collection required manual processes). Furthermore, no boost to the circulation of e-books was experienced. The users still had technological problems with multiple apps needed to read e-books. The competition with big vendors and commercial interests of publishers was an insurmountable barrier to the best attempts of a small public library network (Thomas & Noble, 2016).

### *E-book readers in public libraries*

Users, at least in the USA, appear to know very little of e-book services in public libraries, as the Pew Research Center surveys have shown (Rainie *et al.*, 2012), though their awareness is growing. For example, in the USA ‘some 38 per cent say their public library has e-books, compared with 31 per cent who said this in 2012’ (Horrigan, 2015: 15). In 2016 this number increased to 44 per cent, but, having in mind that 90 per cent of public libraries in the USA offer e-books, this is still quite a low percentage (Horrigan, 2016). This awareness is important, as there is a relationship between library use and reading e-books as shown by Bergström and Höglund (2014).

A major investigation of e-book users in libraries was carried out in Derbyshire County Library, in the UK, which revealed that e-book readers were also borrowing printed books. The service was used not as a substitute for physical books, but as a supplement or extension. Some of the users stopped borrowing e-books and explained that the choice of titles was limited or they have experienced technology problems (especially, incompatibility of their devices with the e-book systems). These technology problems prevented many from starting to use this type of library service, and also from reading e-books in general (Martindale, Willett & Jones, 2015). Similar problems with e-book loans from public libraries are revealed in other studies in big cities (Rabina & Peet, 2014).

The potential growth of e-book borrowing from public libraries when most limitations are taken away and some marketing of the service is carried out was demonstrated by Holmsted and Topelius (2015) in a case study of a public library, which had the opportunity to remove the barriers for a short while. A dramatic triple increase in borrowing e-books from the library was experienced following removal of the barriers to e-book borrowing in January, 2015. The price of loans increased accordingly. The loans continued to grow at a lesser pace during the following months. This library has now limited the number of e-books that can be borrowed to three a week, but despite this, the loans of e-books in 2016 grew to 17,513 as compared to annual number of loans of 16,549 in 2015 (e-mail communication with the library director from 2017-02-17).

## The Swedish public library system

Sweden has a population of about 10 million, with a population density of 21 people per square kilometre. The distribution, of course, is highly unequal, with 40 per cent

of the population living in just seven cities with more than 100,000 in population, the biggest of which is Stockholm.

The distribution of libraries in the public library system mirrors the population distribution, with a small number of large libraries, e.g., Stockholm, Göteborg, Malmö, and a large number of small municipalities, giving a total of 290 public library systems.

In addition to the municipal libraries, there are twenty county or regional library systems, which are support services for the rest of the system. Originally, they supported the smaller libraries with interlibrary lending services, deposit collections of additional books, advice and consultancy generally. Today they do more of that consultancy, professional training, and promotion of reading in the community.

A central authority was established for the public library system in Sweden in 1913, a role now performed by the Swedish Arts Council. In addition to the public library system as a whole, there are three lending centres, based on the public libraries in Stockholm, Malmö and Umeå. Stockholm serves the central region, Malmö, the south, and Umeå, the north. In addition to the three lending centres, there is a foreign literature repository in Stockholm, and a national repository library in Umeå, which houses little-used and out-of-print material, which is no longer actively circulating. Material is placed there by public libraries and school libraries, depositing stock that they no longer need in their local library.

### *The legal situation*

The Swedish law relating to libraries is embodied in the Library Act, which covers all libraries that are receiving public funds, including school and university libraries, and some special libraries. It defines the responsibilities of local, regional, national authorities and other bodies for library service provision, funding and maintenance. The original Act was promulgated only in 1997, making Sweden the last Nordic country to adopt such an Act. By 2009 it was evident that the changing nature of book supply and acquisition, including the increased use of electronic material, required a change in the law. Accordingly, in 2012, the Government produced a revised Act, which was circulated for comment, and the new law came into effect in January 2014 (see more in Chapter 5).

The new law affirms the responsibility of public libraries to ‘work for the democratic development of society’ by assisting in the dissemination of knowledge and contributing to the freedom of opinion (the Parliament, 2013). Importantly, from the perspective of this Project, the law also requires public libraries to provide access to materials, regardless of the physical format: in other words, there is a requirement to provide access to electronic materials as well as to printed books (Ibid).

This latter provision would suggest that libraries that do not provide access to e-books are infringing the law but, as far as we can discover, this issue has not reached the Swedish courts. The law also establishes the National Library of Sweden<sup>36</sup> as the organisation with responsibility to monitor the development plans of municipalities

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36. Kungliga biblioteket.

and regions in promoting collaboration in the public library system and it may be that issues regarding funding for and provision of e-book services will figure in such plans.

### *The changing situation in e-book provision*

Two surveys of the public libraries have been carried out within the project, in 2012 and in 2016. One of the reasons for repeating the questionnaire survey was that the terms of e-book provision had changed. In 2012, the main provider of e-books to public libraries was Elib, a company owned by the four major publishers in Sweden, i.e., Bonnier, Norstedts, Natur & Kultur, and Piratförlaget, which was used by 87 per cent of the respondents. For a short period, an alternative provider, the Axiell Group, in association with Publit, entered the market, with a service called Atingo, but, in 2015, Axiell acquired a 70 per cent holding in Elib, and terminated its own activities in the field (Axiell, 2015). The result of these changes is that, as far as public libraries are concerned, there is almost a monopoly situation in the provision of e-books. The company FörlagEtt, through its Mediejukeboxen service, provides service to about forty public libraries, according to its website (<http://www.mediejukeboxen.se>), but they have a very limited range of approximately 150 e-books, and the users have to go to the library to download the files.

In 2012, public libraries were charged a standard €2 (20 SEK) fee by Elib for every e-book loan. This model was once regarded as a most progressive business model for e-book lending through public libraries in the world (Liquid State, 2013). However, not all published e-books were made available for lending, since the publishers placed embargoes on best-sellers and withdrew from Elib, without notice, titles that, presumably, were also selling well. As the number of e-book loans started rising, the fears of sales cannibalisation emerged in the publishing world. The existing situation satisfied neither publishers nor public libraries and, following an extensive period of negotiation, a new model was introduced in the spring of 2014. Now, flexible prices can be set by publishers, reducing as the book ages and libraries can control, to a greater extent, which titles they wish to acquire, with more control over costs.

The libraries using Elib have an option of paying for each loan or buying a licence for a certain number of loans, or combining the two models. Licences are expensive and, in combination with unpredictable usage, do not constitute a popular option for libraries.

The 'flexible prices' range from €0,5 (5 SEK) to €20 (200 SEK), so the notion that newer titles 'cost slightly more' is something of an understatement, although publishers may not apply the highest price. It means, however, that embargo of new titles exists through high prices, although in this case it has to be applied by libraries, which cannot offer expensive books, rather than by publishers withholding them from library collections directly. The price of a new book is lowered after a certain period, usually three months later, and the price gradually drops with the passage of time.



Since 2014-2015, the Swedish Association of Local Authorities and Regions (SKL)<sup>37</sup> has had an agreement about e-book lending in public libraries with six publishers, Natur & Kultur, Modernista, Bokförlaget ETC, Humlan förlag, Melker förlag and Virvelvind förlag. Developed together with Natur & Kultur, this agreement includes no embargos on new titles and three levels of price setting also depending on how new the book is. New titles cost up to €3 (30 SEK), titles that are between 3-24 months old cost €2 (20 SEK) and titles that are older than 24 months cost €1,3 (13 SEK) to lend. All e-books in the SKL-agreement are provided through Elib's platform to libraries. During 2016, the agreement was revised and the next step SKL is considering will be the development of a common agreement for e-books, similar to that which is already in place for printed books.

The Public Libraries of Malmö and Stockholm both host a digital library and are working together to develop a national digital public library service for Sweden. They have already developed a common digital service for children, Bibblix, which is open for children aged 6-12 years, in Stockholm, Malmö and Katrineholm. The aim is that more municipalities will join and open up Bibblix for children at all libraries in Sweden.

The National Library of Sweden is working on a national strategy for public libraries and one of the aims is trying to incorporate e-book titles into Libris, the National Library system and catalogue (see Chapter 5).

### *The scale of e-book lending through public libraries in Sweden*

The National Library statistics for 2015 report that, for Sweden as a whole, e-books constituted four per cent of total loans by public libraries (the National Library, 2016). The range, however, is wide, from one per cent in 39 of the libraries to 10 per cent in Stockholm City Libraries and 18 per cent in the small municipality of Munkedal in Västra Götaland. The percentages can be misleading, however, since, for example, Norrköping's two per cent amounts to more than 16,000 loans, while Munkedal's eighteen per cent is about 15,000. The median value across all public libraries in Sweden is three per cent.

The statistics since 2013 (the National Library, 201) provided data on the number of loans for previous years and these data have been summarised in Table 9.1 below:

**Table 9.1** Loans of e-books from Swedish public libraries

|                            | 2011    | 2012      | 2013      | 2014        | 2015       | 2016       |
|----------------------------|---------|-----------|-----------|-------------|------------|------------|
| E-loans                    | 650,000 | 1,073,581 | 1,543,913 | c.1,600,000 | 1,504,646* | 1,879,363* |
| Annual percentage increase |         | +38       | +30       | +4          | -6         | +25        |

\* Audio books included in the loan data.

Source: the National Library, 2014, 2015, 2016, 2017.

37. Sveriges Kommuner och Landsting.

The report for 2014 notes that a quarter of respondents did not reply to the question on e-book loans, so the figure of four per cent increase over 2013 is rather meaningless, the real number of loans could have been considerably more than 1.6 million, whereupon the decrease for 2015 would be more profound. The 25 per cent increase in 2016 over 2015, given the apparent decline in 2015, is quite remarkable. It may be that some libraries have received increased funding to support e-book loans, and the new agreement with the publishers on pricing may also have had an effect. As a result of publicity regarding the e-book, there may also be increased awareness of the role the public library is playing, in making e-books available. Certainly, the 189 per cent increase between 2011 and 2016 suggests a considerable increase in the willingness of public library users to adopt e-books.

### Conducting the survey

The first survey of public libraries in 2012, surveyed all 290 public libraries, using a questionnaire with only twelve questions, which achieved an overall response rate of 78 per cent (Wilson & Maceviciute, 2012). However, only 185 fully completed and usable returns were received, giving an effective response rate of 64 per cent.

The second survey in 2016 again surveyed all 290 public libraries, but with a much longer questionnaire, which resulted in a response rate of 62 per cent. A number of libraries provided a reason for non-response: several noted that their e-book service was the result of collaboration with neighbours and that they did not have the necessary information to complete the survey; two reported that they did not provide e-books because of lack of financing for the service. One of these libraries had requested funding but had been denied it, and the other had provided e-books in 2012 to 2015 but a need to make savings had led to the withdrawal of the service. It seems likely that similar reasons may have prevented other libraries from completing the questionnaire.

In both surveys the online service SurveyMonkey™ was used: respondents were offered the opportunity of either using that service or returning a printed questionnaire. Data from the printed questionnaire were entered into the SurveyMonkey™ version to enable a rapid analysis.

The analysis of the 2016 e-book survey is presented under the following themes and headings:

- Budget, e-book lending and restrictions
- Sources of e-books
- Optimal system for e-book loans
- Public libraries' management of e-books
- Driving factors for the provision of e-books
- Opportunities and problems of e-book provision

The following section introduces the responding library characteristics.

### *The respondents*

In the 2016 survey, 181 public libraries of 290 replied, of which 88 are in south Sweden, 67 in middle Sweden, and 26 in north Sweden. The response rate is 63 per cent for the south, 70 per cent for the middle and 48 per cent for the north of Sweden.

The respondents are four big city municipalities with a population of more than 200,000; 34 large municipalities with a population up to 200,000; 73 medium-sized municipalities with a population of up to 50,000 and 70 small municipalities with a population up to 15,000. The response rate for big city municipalities is 100 per cent, for large municipalities it is 79 per cent, for medium-sized municipalities it is 67 per cent and for small municipalities it is 52 per cent.

The response rate for big city and large municipalities is very good, and for medium-sized municipalities it is good enough, but for small municipalities it is less satisfactory, as almost half of the possible respondents are missing. The reason for this could be that small municipalities do not have the staff resources of the larger municipalities. But it could also be the fact that several public libraries cooperate with neighbouring public libraries with regard to e-books and they cannot answer the survey properly.

If we look at the regions: middle Sweden is fairly well represented, the south's representation is acceptable while the north is underrepresented with fewer respondents than non-respondents.

The north of Sweden and small municipalities are under-represented in this study and, therefore, the conclusion is that the results apply to the responding municipalities only and it is not possible to be certain that it is valid for all municipalities or public libraries in Sweden. All answers requiring expression of opinion are answered by responding public librarians and do not necessarily represent opinions of all public librarians.

## Findings of the survey

### *Budget, e-book lending and restrictions*

The majority (98) of the responding public libraries, allocate between 0 and 10 per cent of their total media budget for e-books, and 25 respondents allocate between 11 and 30 per cent. It is interesting to note that four public libraries allocate as much as 21 to 30 per cent of their total budget for e-books and that those four libraries represent all four municipality sizes.

In Table 9.2 we see budget allocation, introduced price cap (the highest price for an e-book loan that library permits) and the proportion of e-book lending in relation to the size of served communities. The municipalities' e-book procurement budget is placed under the four categories. The municipality size does not appear to relate to budget size. Three of the four big city municipalities occur in the two higher cat-

egories of the budget allocation and one in the lower half, i.e., 6 to 10 per cent. The large municipalities are mostly in the lower half with the majority placed in the 6 to 10 per cent of budget allocation category, but with a few placing higher or lower. The medium-sized municipalities are also mainly placed in the lower half of the categories, and again the majority belongs to the 6 to 10 per cent category, but it is interesting to see that several also appear in the higher category between 11 and 20 per cent, and one in the highest category. The small municipalities' budgets are evenly spread in the lower half of the budget categories, but also with four placed in the 11 to 20 per cent category and one in the highest category.

**Table 9.2** Public libraries and e-books: size of the served community, e-books budget ratio, per cent of e-book loans and price cap

| City size           | E-book procurement budget (n=123) |       |        |        | Price cap (SEK, n=127) |       |        |         | E-book lending (per cent of total loans, n=137) |          |          |          |
|---------------------|-----------------------------------|-------|--------|--------|------------------------|-------|--------|---------|---|----------|----------|----------|
|                     | 0-5%                              | 6-10% | 11-20% | 21-30% | 20-30                  | 31-60 | 61-100 | 101-200 | 0.1-1.0%  | 1.1-2.0% | 2.1-3.0% | 3.1-6.2% |
| Big city            | 0                                 | 1     | 2      | 1      | 3                      | 0     | 0      | 0       | 0   | 0        | 1        | 3        |
| Large municipality  | 4                                 | 17    | 4      | 1      | 25                     | 2     | 2      | 1       | 4   | 9        | 7        | 7        |
| Medium municipality | 15                                | 27    | 11     | 1      | 41                     | 5     | 8      | 2       | 27  | 17       | 5        | 4        |
| Small municipality  | 17                                | 17    | 4      | 1      | 36                     | 8     | 3      | 1       | 19  | 15       | 8        | 3        |
| Total               | 36                                | 62    | 21     | 4      | 105                    | 15    | 13     | 4       | 50  | 41       | 21       | 15       |

*Comments:* In the budget and the price cap categories, the respondents were free to fill in the exact number. In the e-book lending category, they were given alternatives: 0.1-1, 1.1-2, 2.1-3 and more than 3 per cent; here, they could also choose to fill in a comment box, with a more accurate number for their e-book lending. It was, therefore, necessary to add a 3.1-6.2 per cent alternative in the table.

In short we can see that the big city municipalities have more representation in the top half of the budget categories and the three others, large, medium and small municipalities, have higher representation in the lower half of the budget categories.

Most of the respondents are satisfied with the size of their budget and 140 of them say that their budget is sufficient to meet the demand for e-books from the library users. But 33 maintain that their budget is insufficient to meet the demand.

Two respondents say that e-book lending makes up less than 0.1 per cent of their total book lending. On the other end of the scale, two big city public libraries have 6.0 and 6.2 per cent e-book lending. The majority, however, about two thirds of the respondents, say that they have between 0.1 and 2.0 per cent e-book lending, and about one third have more than 2.0 per cent. All big city municipalities are in the top half of the categories, that is with more than 2.0 per cent e-book loans of their total book lending. Large municipalities are fairly evenly spread between the categories with 13 in the lower half and 14 in the top half of the e-book lending categories. The medium-sized and the small municipalities are mainly represented in the lower half of the categories.

Public libraries have several limitations in place for e-book provision in order not to exceed their budget on e-media. One limitation is the number of loans per user per

week: the most common restriction being two loans a week for each user. Another limitation is the price cap on each e-book loan from Elib's platform. Most respondents have a limit between €2 and €3 per e-book loan, but a few public libraries have a limit of €15-20. In order to be able to lend out expensive new e-books that cost significantly more than older e-books, the libraries must set their price caps high. One would expect that the big city municipalities with their large budgets would have a high price limit on e-book loans but the three of the four responding big city municipalities have a price cap of €2 to €3. One large, two medium-sized and one small municipality have a price cap in the range of €10 to €20. Sixteen of the respondents say that they have a differentiated price cap, with a €3 price cap for the publishers included in the SKL-agreement, and a €2 price cap for the other publishers. Several respondents say that they normally have a limitation of €2 to €3 but, in some cases, they make exceptions for popular books and allow a higher price per loan in order to keep down the queue on printed books.

The number of e-books downloaded during 2015 varies considerably throughout the country, the lowest number in the survey was 25 downloads at one public library and the highest almost 294,000 at another. It clearly shows that e-book lending is not evenly spread in Swedish public libraries.

### *Sources of e-books*

All respondents use the e-book platform Elib, from Axiell Media, as supplier of e-books. 39 libraries state that they also use free e-book sources for the provision of e-books. Some use other suppliers such as Ebsco, Overdrive, Mediajukeboxen and Natur & Kultur. The libraries do not use the online booksellers Adlibris and Bokus or the aggregator Publit for e-book provision.

Two different licences are available for the provision of e-books from Elib, a pay-per-loan licence, and an advance-payment licence for a given number of loans. The most common is the pay-per loan licence, which is used by 140 respondents. Two libraries have only the pay-in-advance licence and 14 have a combination of the two. There is no limitation to how many readers can borrow the e-book at the same time.

The respondents think that Elib's model for e-book lending from 2014 has several advantages but also some disadvantages. On the positive side is that the platform is responsive, modern and easy to administer. The respondents appreciate being able to have a fixed-rate on e-books most of the time but also to be able to add a few more expensive and popular titles to their collection when necessary. This makes it easier to regulate supply and cost. No waiting period for the release of new books and a wider selection of e-books are also seen as positive. On the negative side, many respondents say that new titles are too expensive, some even say unreasonably expensive, that it is difficult to predict the price changes on them, and that it is too expensive to have an attractive e-book collection in public libraries. Other issues are that too few e-books for children are available, and that libraries do not own the e-books, as they do with printed books.

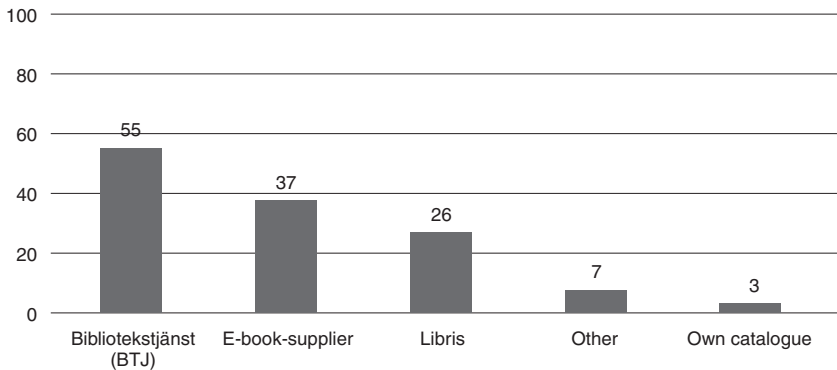
### *Public libraries' management of e-books*

The responding public libraries do not, as a rule, have a policy for e-book management. Only 19 respondents answered that they have a policy, and only two make their policy available on their websites. Forty-six libraries say that they do not display available e-books in their catalogues and several provide a link from their website to Elib's e-book portal for the library visitors to use. However, 128 respondents make library e-books accessible through the catalogues. We have not asked specifically, but it is likely that they use Axiell Media's eHub, which is a means of integrating Elib's e-books with the libraries' search system, thereby enabling the library user to access e-books through the catalogue. The advantage of having e-books in the library catalogue is that it can be used to access all books available to the reader: if e-books are not integrated in the catalogue users may not see e-book collection at all. Only a deliberate search through Elib's website enables one to find the e-book collection of a particular library, but that requires intentional use of a link from the library's website, to Elib. One of the respondents points out:

When the library users look for books in our catalogue they forget to also look for books at Elib. One can lose many readers this way as they don't find the e-books.

Libraries use different sources for acquiring e-book cataloguing data and many will use more than one for this purpose (see Figure 9.1).

The most popular among these sources is the service of Bibliotekstjänst–BTJ (Library Service, the company providing services and supplies to public libraries), which supplies catalogue descriptions to BURK (the company's own bibliographic database for Swedish public libraries) and Libris (the Swedish national union catalogue). The second most-used catalogue entries are provided by e-book suppliers. Libris itself is a source of catalogue entries. Only a minority of public libraries produce their own catalogue entries for e-books.



**Figure 9.1** How public libraries access catalogue data (per cent)

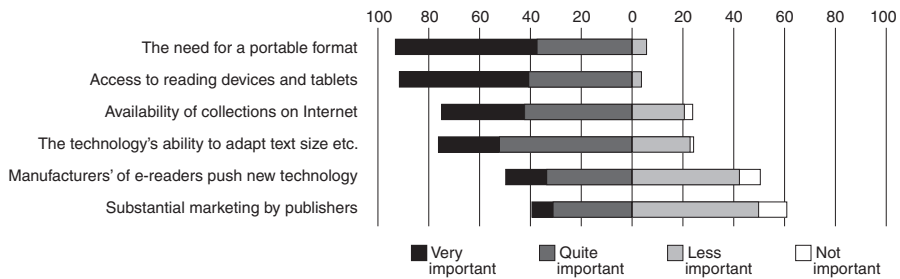
*Comments:* multiple choice question, i.e. shares do not sum up to 100. The number of respondents is 181.

## Factors affecting the provision of e-books through public libraries

The concept of driving factors was used as a surrogate for Winston's concept of a *supervening social necessity* in the questionnaire. Some very general driving factors were visible in the first survey (Wilson & Maceviciute, 2012) and some were found in the literature and previous research as well as in the case study conducted by our students within the framework of the project (Holmsted & Topelius, 2015).

The two main drivers identified by public library respondents are closely connected (see figure 9.2): 56 per cent identify the users' need for a portable and useful format as 'very important', while 53 per cent identify access to a reading device as 'very important'. This, of course, is necessarily the case, since the e-book requires a device in order to be read by the user. One respondent correctly noted that a printed book is also a portable, useful format, but the e-reader or tablet computer makes it possible to carry the whole library collection, or the library user's own collection, and access it whenever and wherever the reader wishes to do so. The possibility of providing easy availability of whole collections to the users is also a highly rated reason for public libraries to acquire and manage e-books (79 per cent rated it as quite or very important). Another driver related to ease of use and accessibility is the ability of the technology to allow users to adapt the text (its size, colour, font, etc.) as they wish.

Substantial marketing from publishers is seen as less important by the majority of the respondents, as is the manufacturers' push of new technology.



**Figure 9.2** Factors that drive the demand for e-books (per cent)

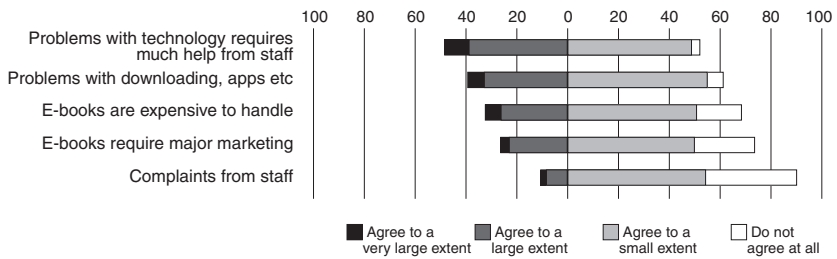
*Comments:* The number of respondents varies between 158 and 162.

Apart from these drivers affecting e-book development in general, respondents mentioned the affordances of e-books important for providing them through public libraries, such as convenience for the users, for instance, automatic return (no need to remember to visit the library after finishing a book) and access to e-books around the clock. Fitting this library service into the users' general access to everything on the Internet, and adapting to the widespread use of technology were also seen as important. The respondents agree that e-books offer other advantages for public

libraries, such as unlimited number of users for each e-book, and that the users have access to e-books when the library is closed. The fact that e-books are not taking up any physical space in the library or do not need physical handling are less significant in the eyes of respondents. Others believe that new readers, both young and old, may be reached with e-books. The following response shows the opinion of a librarian about all these advantages:

Advantages yes, new target groups are reached. You have room for more e-books on your reading device going on holiday, etc. It is very flexible, and many carry their mobile phones with them all the time and now they can use it in more ways. And with books that have a long waiting list, it is available as an e-book, so everyone can borrow it. It leads to shorter waiting time. I think it is possible to make young people interested in reading, they say ‘I don’t read books’, but at the same time they sit there and browse through their phones. I also have a weak spot for the elderly who have been reading printed books all their lives but now it doesn’t work anymore, and I am really happy when I can continue to give them reading experiences with the help of audio books and e-books.

Public libraries experience a number of problems with e-books caused by suppliers, e.g., the cost of e-book lending, technical problems, the selection of e-books, and the fact that interlibrary loans are not possible. They also may run into internal difficulties working with e-books. Their answers about these potential problems are presented in Figure 9.3 and in some comments.



**Figure 9.3** Problems in provisions of e-books in libraries (per cent)

*Comments:* The number of respondents varies between 176 and 178.

There are few answers that would indicate librarians experiencing a high level of complexity in their work with e-books: merged together, the answers ‘experience a problem to a large extent’ and ‘to a very large extent’ show that technology requires considerable attention from both library staff and users of e-books. Help from the staff to solve technology problems is reported by 48 per cent of librarians, and 39 per cent also point to the difficulties of downloading apps or e-books. On the other hand, more than half of respondents do not experience technology as a problem. Thus, despite



time-consuming individual technical help with e-books to the users, more than half of librarians do not perceive it as an alien or extremely difficult task.

Management and marketing of e-books are even less problematic than the technology. Respectively 32 and 26 per cent of respondents see them as demanding problems. The rest regard these two tasks as fairly straightforward. This unproblematic view of e-books is also confirmed by low degree of staff complaints about working with e-books. The nature of public libraries' access to e-books through only one platform and most of services provided by known suppliers may explain the high level of comfort of working with e-books.

However, not everything is problem free as one can see from the survey data and librarians' comments to the survey questions: 61 per cent of respondents (i.e., 110) think that the availability of e-books in Swedish is inadequate, while 39 per cent (70) think that it is sufficient.

Most respondents agree that it is too expensive to lend e-books and that the price per loan is too high in comparison with a printed book, especially as e-books are electronic files. Some comments to the open questions in the questionnaire include:

The cost is higher per loan in comparison with a printed book, as printed books can be lent out many times for one purchase cost only.

Yes, the prices on e-books are generally high, especially, considering that it is only an electronic file.

Others point out that there is only one major provider of e-books maintaining a monopoly situation and that is a disadvantage to libraries purchasing e-books. The levels and forms of marketing of e-books by public libraries are affected by these costs that might grow in case of marketing success:

We consider it as a problem that we cannot market e-books any more than we do as it would bust our budget.

Nevertheless, one respondent brings an alternative view and says that e-books are cheaper to lend and also points out that the quality of an e-book stays the same while a printed book deteriorates with frequent use, which is a big advantage for a library.

Several respondents provide examples of difficulties in the management of e-book collections:

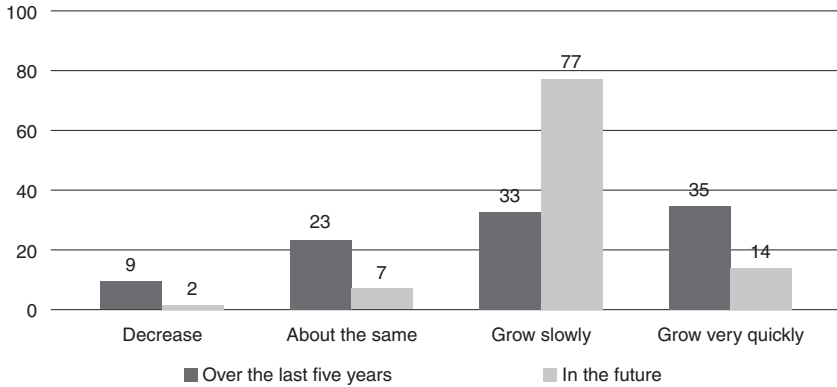
Cataloguing and selection work is time-consuming in relation to the size of the e-book collection and lending.

Digital rights management is also a problem, especially from an ethical standpoint, as the technology enables third parties to access information on the libraries' e-book users (see Chapter 5).

### *Users and use of e-books in public libraries*

We have already introduced some data regarding use of e-books in public libraries, and Table 9.1 above shows substantial increase of e-book loans over five years (2011–2015)

The opinion of public librarians about changes in the demand for e-books during the last five years and in the future, can be seen in Figure 9.4 below.



**Figure 9.4** Demand for e-books in the past five years and in the future (per cent)

*Comments:* The number of respondents is 164 ('Over the last five years') and 167 ('In the future').

These answers show a divided picture, as approximately the same number say that the demand has grown quickly as slowly over the last five years. One third of the respondents were not reporting any growth in demand. The answers show the differences in demand for e-books in different parts of Sweden. For the future, most respondents anticipate that the demand for e-books will grow very slowly with some expecting it to stay at the same level. The respondents appear to be more positive about the future of e-books, as there are fewer who believe that e-book use will decrease or stay on the same level as before.

Figure 9.2 above reports that only 15 responding libraries enjoy e-book loans higher than three per cent of total loans, and 111 have loans smaller than three per cent, out of which 91 lend less than two per cent of e-books in their total loans. Statistical data about e-book borrowers do not exist, but the respondents think that it is mainly middle-aged men and women who borrow e-books from libraries; others say that all age groups borrow e-books, with the exception of children. Their opinions may reflect local differences of e-book usage.

There were a number of other questions in the survey about issues related to the users of e-books.

To the question on complaints about e-books, seventy-three per cent of the respondents indicate receiving complaints about e-books from library users: these are

mainly about the supply but also the quality of e-books, as well as difficulties of using e-books and the technology.

Sixty-eight per cent of the respondents offer training to library visitors in how to use e-books, e.g., how to download e-books, which apps to use, and how to access the library resources remotely. One librarian explained in the open answer window how she sits down with a prospective e-book user and goes through the whole process, from getting an Apple ID, downloading an app to the reading device etc., to setting the text size preference of the user. It is usually older people she meets as, in her experience, they need help and training in how to access and read e-books. Those who manage on their own never contact a librarian with regard to e-books.

Most respondents think that maintaining a printed book collection is just as important as increasing an e-book collection, because printed books are preferred by users. Both formats are needed but the e-book collection should be developed in order to secure the role of libraries in the future. The factors that are stopping the increase of e-book loans in public libraries are the cost and the inadequate financial resources for meeting the demand, but also users' preference for the printed book, note the respondents in their comments.

As publishers and librarians disagree about the provision through libraries of new books as e-books, we have asked if it is important to have them immediately. It was reported that having only older titles as e-books in public libraries would prevent readers who only read e-books from accessing new titles, which are more expensive, and, therefore, less likely to be bought. The readers who can access only backlist titles may be lost due to dissatisfaction with the quality of library collection.

No, it must be new e-books. For library users who don't read printed books but only e-books, what we have on offer is crucial.

Thus, the issue of providing readers with an equivalent selection of both printed books and e-books is brought into the picture. The issue was also influenced by the respondents' opinions on the competition for readers between public libraries and commercial access to e-books through, for example, online booksellers and subscription services. Several have indicated that these are complementary services filling different needs of e-book users. Those who cannot afford to pay for e-books can borrow them from the library, and those who prefer can pay to use a subscription service or buy from booksellers. However, one respondent has a different view:

We lose e-book users to the commercial suppliers. It is inexpensive and easy today. Maybe the libraries have bit their own tail by its 'principle of free' in this case. It is evident that library users are prepared to pay a small sum for a good service.

This opinion indicates some possible ambiguity among librarians about the main principles of public libraries and even the provisions of Library Act.

*An optimal system for e-book loans*

Several of the respondents were unsure what an optimal system could be and others questioned if such thing as an optimal system could exist. There are those who are pleased with Elib's service provision as it is or perhaps with a few improvements, such as, lower prices on new books and catalogue records for e-books. Others are not happy with Elib, as it is considered too expensive and not financially viable for them in the long run. Centralisation and state regulation are also suggested. A common library platform for e-books, owned and managed by libraries, is seen as a tool to implement centralised solutions.

Many respondents point out that publishers and the price models are two of the main causes preventing the achievement of an optimal system. Other problem areas are the lack of central guidance, and Elib's monopoly in e-book provision to public libraries. 'At present, the market and the public libraries appear to have different entry points to the solution to achieve an optimal e-book system.'

In general, the best remedy suggested for sound e-book provision relates to library cooperation and coordination with the National Library as a strong actor, which has power to counteract commercial forces in many respects:

We call for cooperation and coordination nationally. The National Library is an important agency to counterbalance the commercial actors, both with regard to supply and technical platform. And to aid libraries to provide free e-books in an easy flexible way and to access other commercial titles than those Elib offers.

A majority of responding librarians agree that the National Library should have a coordinating responsibility and role for e-books in public libraries:

The National Library could be part of a future solution for e-books and e-book lending when it comes to achieving a collective approach on the national level and to facilitating adequate and qualitative provision of e-books to public library. It could have a regulatory function towards the e-book market and represent good administrative support as well as a helpful resource for the public libraries.

Although the National Library's role is regarded similarly by most, there are respondents who do not believe that it will play a significant part with regard to e-books; some doubt whether the National Library really cares about public libraries at all, because of lack of resources and a number of other issues it has to deal with.

At present, [their role is] non-existent. The National Library is the only agency that can drive these questions, and so far, they have only referred to it by stating that it is not their role.

Despite differences in opinions, the respondents basically agree that the Elib model is not far from the ideal situation, provided prices for new books are lower and the platform is owned and managed collaboratively by libraries, maybe under the auspices of the National Library.

## Discussion

In Sweden, public libraries are the main, non-commercial distributors of e-books. They have been and still are a driving force on the e-book market offering library users e-books for reading free of charge (Wischenbart *et al.*, 2014). Other unique features of the Swedish e-book market are that e-book lending started early with a progressive model that made e-books available to public libraries. Problems occurred when e-book lending from 2012 onwards increased greatly, causing public libraries financial problems and causing publishers concern about their profits.

There are some e-book aggregators operating in Sweden, like Overdrive, which provide e-books directly to public libraries, but most of them, like Publit, use Elib as middle-man for the provision of e-books to libraries. This is virtually a monopolistic situation with one main aggregator, Axiell Media/Elib, providing e-books from publishers to public libraries and booksellers. Despite this, the new model, which has taken away most of the previous restrictions, e.g., embargoes on new books, is regarded more positively by librarians. It still is an unlimited, simultaneous use model, but has introduced more possibilities for public libraries to build and manage their e-book selection and budget. Still, it is far from the abundance models identified by Huysmans (2014), as libraries do not own the platform and depend on publishers' price setting.

The differentiated prices for new and old e-book titles of the new Elib model have made both publishers and most public libraries more satisfied with the arrangements than the previous one. However, most public libraries are not prepared to pay high prices for new e-books, so they set a price cap on e-book loans according to what they can afford, which consequently leads to fewer new e-book loans. Of course, this is contrary to the libraries' mission to make available books, new and old, to the library users, regardless of the format. The public libraries that are dissatisfied with the Elib model think that the price for lending out new e-books is unreasonably high. This opinion corresponds with studies outside Sweden that maintain that prices of e-books in public libraries are higher than the prices of printed books (Woodward, 2013; Gray & Copeland, 2012).

The Association of Local Authorities and Regions' agreement with some publishers, e.g., Natur & Kultur and Modernista, on fixed prices for e-books, offers much more reasonable pricing and is supported by public libraries. Several of them have indicated in the project survey that they do not apply price caps for e-books offered through the Association of Local Authorities and Regions-agreement even if, for e-books from Elib, they set price cap of €2. This is also confirmed by a statement from the digital libraries of Stockholm and Malmö (Petrén & Mattsson, 2014), where the authors suggest that public libraries should support the SKL agreement by not lending 'e-books that are more expensive for libraries than the average price that is the essence of the agreement, which is 20 SEK [€2] per loan'. The reason for this could be that most public libraries agree that it is vital to offer new e-books in libraries but for a reasonable cost. However, e-books in the SKL agreement are still provided through the Elib platform.

A reasonable assumption is that the public libraries' budget should correspond to the number of e-book loans. As can be seen in Table 9.2, the majority of public libraries earmark up to 10 per cent of their budget for e-books, and the rest earmark up to 30 per cent. At the same time, most public libraries say that their e-book lending is between 0.1 and 2 per cent of their total lending. It is obvious that in this case a higher percentage of the budget is set aside for e-books compared to the percentage of actual e-book loans. There are significant contradictions between the costs and number of loans, as fewer loans of new books may become very expensive. Libraries also have difficulties predicting how many e-book loans a public library will have during a year. Some respondents indicate that they sometimes set aside a larger proportion of the budget than is ultimately used while others are forced to discontinue their e-book loans before the end of the year as the budget has been exhausted.

Public libraries need to establish what it is that their library users need with regard to e-books and plan how to meet those needs. If they were able to do this, public libraries would be in better control of the situation and might be able to influence other actors instead of having to put up with too few e-books, inefficient technology, and bad licence agreements (Cottrell & Bell, 2014). With regard to the minute numbers of loans in some of them, it also may be more reasonable to redirect the resources and efforts to other services or find different possibilities for e-book supply (through building regional and national collaboration) in the future.

The respondents, however, think that it is important to increase the e-book collection not only for the benefit of library users, but also in order to secure the role of public libraries in the future. Most respondents believe that e-book use and lending will continue to rise. E-books also help to solve some problems that public libraries have experienced for a long time: an unlimited number of simultaneous users for each e-book shortens the waiting list for popular books and offers instant access for users who are willing to read e-books, even when the physical library is closed.

The barriers identified as limiting the increase of e-book loans, or, in Winston's terms, *suppressing the radical potential*, in public libraries are the cost of e-book loans and insufficient financial resources for meeting the demand of library users. It is also considered a problem that libraries do not own e-books as they do with printed books. Another hindrance is the lack of a national system for e-book lending and a central actor driving the e-book question for public libraries. The respondents also suggest that having e-books in their catalogue is important, as library users will find both printed books and e-books when they look through the catalogue. One can also detect that the major stickiness point in public libraries relates to the inadequate budget for e-books and lack of a platform owned by libraries. Solving these problems might give public libraries a chance to integrate e-books with their other systems and services.

The respondents point out that the bar to beginning to use e-books, especially for older library users, is high. It is time-consuming and requires several steps to be taken before they can start downloading e-books from a public library, especially compared with the services of retailers of e-books.

Most public libraries in the survey state that the choice of Swedish e-books, especially, for children is insufficient. Though backlist books are increasingly converted to digital formats and their number is growing, library users want new titles, and limited number of titles may inhibit library users from borrowing e-books and prevent some from ever borrowing or reading an e-book (Martindale *et al.*, 2015).

## Conclusion

Public libraries are an important actor on the landscape of Swedish e-book market. At the moment, they provide a rather significant income from e-books to their publishers (see Chapter 4). They also have a backing of government cultural policy documents, especially, the Library Act supporting their role in providing access to literature in any format. On the other hand, they lack the resources to drive the e-book market forward and some even lack funding to offer the e-book option.

The main barriers to the successful e-book provision through the public libraries are low demand from library users' side and high price per loan of new e-books from the publishers' side. The two are interrelated, as the libraries cannot develop a Swedish e-book collection suitable to meet their readers' needs because of the limits of their budget and pricing levels set by the publishers. The lack of interesting titles in e-book collections is exacerbated by the technological difficulties that readers encounter in borrowing e-books from public libraries. Technological requirements and restrictions on the use of loaned e-books are higher than those involved in the case of purchase or access through commercial providers. In addition to those two disadvantages (lack of e-book titles and technological barriers) libraries introduce additional limitations to e-book use (e.g., restrict number of weekly loans) to reduce the cost.

Furthermore, public libraries do not own e-books but only license them, therefore their possibilities to manage and preserve collections are limited. At present, public libraries are dependent on Axiell Media and Elib. There is no real competition with other aggregators, especially in the provision of e-books in Swedish. And finally, Swedish public libraries experience the lack of a national system for e-book lending, with a common library interface for e-books owned and managed by the libraries, as well as a central actor driving the e-book question for public libraries.

Nevertheless, the loans through public libraries are increasing (until 2016 the overall growth was rather steep), the Elib business model and the alternative SKL agreement have introduced a certain balance between the interests of publishers and public libraries. The driving forces for these increasing e-book loans are the spread of e-book reading devices and high prices of Swedish e-books on the market, as well as user needs for portable formats and easy access to convenient digital reading materials. Despite prevailing readers' preference for physical books in public libraries, e-books find their borrowers, and the support that libraries provide to readers plays an essential part in the growth of their use.

There is a paradoxical situation related to e-book loans in public libraries with regard to low popularity of e-books among highly literate, reading and technologically savvy users of the Swedish public. Public libraries understand the need for collaboration and cooperation in building a unified library-owned and state-supported e-book platform as a remedy to the existing problems and implementation of the provisions of the Library Act. However, their role as initial drivers of e-book use in the whole country was achieved by using a market solution in a form of an aggregator providing a unified service that is regarded quite satisfactory, though far from problem-free, by most of our respondents.



# E-books in Swedish academic libraries

Academic libraries acquire e-books from a number of distributors and manage e-book collections. Earlier, they have built rich experience working with e-journals and databases of full-text articles. The supply of academic e-book resources in English, mainly scholarly and scientific monographs, treatises, research reports, e-textbooks, and reference books, is prolific on the international market and has great significance for scholarly communication.

The production of e-monographs in smaller local languages is emerging in many countries (e.g., Sweden, Poland, etc.) (Bernhardsson *et al.*, 2013; Kulczycki, 2012) and in different academic publishing contexts (university presses, non-profit foundations, commercial publishing). They exist together with different types of digital educational materials, including open educational resources.

All this production draws attention to the role of academic libraries not only as buyers and users, but also as producers and distributors of academic texts. Academic libraries always were the main buyers of scholarly monographs, which rarely appeared as entirely commercial products. The press on library budgets from the acquisition of other electronic resources disrupts the existing business model of monograph production severely (Svensson & Eriksson, 2013), therefore different actors seek new ways for their production and distribution (see <http://www.knowledgeunlatched.org> or <http://www.oopen.org>). Academic libraries are active participants in these attempts.

This chapter explores the main drivers and barriers experienced by Swedish academic libraries in adopting e-books as resources supporting teaching, learning and research in their institutions. It is based on extensive literature review exploring general issues of e-book collection management and data collected in empirical studies investigating experience of e-book adoption in Swedish academic libraries. A version of the review has been published previously (Maceviciute *et al.*, 2014).

## The role of academic libraries in adopting e-books

Higher education in Sweden is provided by three different types of institution: universities, university colleges (högskolor), and specialist institutions such as the Swedish National Defence College and Stockholm University of the Arts. Three private institutions have the right to offer the PhD: Chalmers University of Technology, Stockholm School of Economics, and the Jönköping University Foundation. The universities and

university colleges differ in that the latter do not offer PhD programmes. This situation is changing, however, with some colleges being granted the right to offer the PhD. Typically, the university colleges are smaller than the universities.

Almost all higher education institutions have a library or at least access to library service through another academic or public library. Not all smaller libraries provide e-books and a few have a very reduced provision of digital services in general. On the other hand, growing research activity in many university colleges requires that their libraries support that activity as well as learning and teaching. Therefore, many smaller libraries' functions are similar to those of big research universities.

Here, we provide an overview of international and Swedish research and projects related to e-books in the context of academic libraries, namely, collection development and acquisition, including business models for acquisition, barriers to access and use, and involvement of academic libraries in e-book production. We exclude literature on e-book acceptance, experience and use by different reader groups (such as, Martin & Quan-Haase, 2013; Ahmad & Brogan, 2012; Wang & Bai, 2016; Hsiao, Tang & Lin, 2015), unless they examine barriers to access and use.

### *Collection development and e-books in academic libraries*

Although early electronic versions of printed books appeared in the 1960s (Tedd, 2005), most researchers date their first appearance in academic libraries only in the 1990s (Armstrong & Lonsdale, 2005; Minčić-Obradović, 2011; Schell, 2010). The years 2007–2009 marked transformation of the higher education e-book market with major growth in both digital textbooks and digital library collections (Nelson & Haines, 2010). E-books occurred in the mainstream of book acquisition for major university libraries when high-quality e-book reading devices increased user demand (Beisler & Kurt, 2012).

Incorporating a new medium into the library can be a challenging task, which requires the development and implementation of specific policies and well-grounded plans (Stamison, 2011). Ideally, collection management issues surrounding the selection, acquisition and promotion of e-books have to be addressed within the institution's collection development policies. However, a new medium creates uncertainties that prevent libraries from documenting the new rules, and a UK study shows that e-book-related policies exist and are included in general collection development policies of the libraries, but separate policies of e-book collection management are non-existent and, in some institutions, not even planned (Vasileiou, Rowley & Hartley, 2012b).

As noted in Chapter 2, there is no standard file format for e-books: some sources have at least six different e-book formats (and even up to 27) listed as being currently in use (Walters 2014). Most of the formats are proprietary and the data encoding format is not released or published but restricted by digital rights management. Thus, the customer can be locked into a certain platform or to a specific e-book reader. In this situation, academic libraries are reluctant to invest in multiple technologies for

e-books, but if content is available on only one platform, they might be obliged to purchase it 'and soon find themselves in the situation of having more platforms than they would have wished' (Thompson & Sharp, 2009: 138).

The differences in formats cause a range of problems for librarians including reduced adoption rates by students and academic staff and learning and usage barriers (Nelson, 2008), and 'serious difficulties for both cross-platform compatibility and long term access' (Walters, 2013: 203). The workflow of libraries is affected, as they have to adjust or create new procedures for handling e-books and staff must handle increasing complexity (Thompson & Sharp, 2009; Morris & Sibert, 2010). Old formats can, and many have already, become incompatible with existing e-readers or, even worse, are left abandoned by e-book suppliers as they merge or go out of business causing major problems for access to and preservation of acquired resources (Walters, 2013).

### *Acquisition of e-books in academic libraries*

Walters (2013) claims that challenges raised by academic e-books are much less known than their real and perceived advantages. E-book acquisition in academic libraries is affected by many factors arising from the e-books themselves and their suppliers, or reflecting the needs and preferences of users and the institutions. Demands of certain disciplines, or the state of distance education, can affect decisions on e-book acquisition (Blummer & Kenton, 2012). Similar conclusions were drawn by Vasileiou, Rowley and Hartley (2012b): there is a two-way process, where the parties interested in e-book acquisition directly influence decisions of academic libraries, and are, in turn, affected by those decisions. At Curtin University Library, Australia, the factors encouraging acquisition of e-books were identified as: technological change and the increasing need for access to resources from anywhere at any time, which is necessitated by the increasing numbers of students and emphasis on research productivity (Wells & Sallenbach, 2015).

The main sources of e-book acquisition are: publishers who supply e-books directly to libraries; vendors offering content from different publishers and providing access to e-books through publishers' websites; and aggregators supplying content from different publishers on their own platforms (Devenney & Chowcat, 2013). Vasileiou, Hartley and Rowley (2012a) suggest that the most important selection criteria for e-books in academic libraries are cost, high usage, demand by library users, licences and business models, platforms, interfaces, subject coverage, and match to course reading lists. Academic librarians must also consider the library's budget and the collection development policies as well as many restrictions imposed by various licences.

***Budget and e-book pricing.*** The cost of an e-book consists of the initial purchase price, and the annual access fees (Bennett & Landoni, 2005). In addition, different ways of acquiring e-books must undergo cost-comparison, and it can be a very challenging task for libraries to decide how to allocate financial resources. Tedd and Carin (2012)

discovered that librarians with limited budgets are very cautious about acquiring e-books when their potential use is unknown. The Australian study demonstrated that the principal limiting factor on the growth of e-book acquisition is the shrinking budget of the University (Wells & Sallenbach, 2015). Burnette argues that the budget is more than just numbers:

E-resource budgeting is an agreement on the financial support allocated for digital collections within a fiscal year. It is also a philosophical agreement to use the staff and information technology required to provide access. The budget is the starting point of a plan for successful access to and sound stewardship of digital collections. (Burnette, 2008: 4)

Various studies have shown the importance of a sensible price regime for e-books when librarians make acquisition decisions, and have explained the reluctance of academic libraries to invest (Blummer & Kenton, 2012; Vasileiou *et al.*, 2012b; Vasileiou *et al.*, 2012a). Lippincott *et al.* (2012) suggest that, in order to achieve sustainable pricing models for e-books:

... they must critically examine costs for single institution purchases and sharing between institutions and consider how existing options – like multipliers over list price for a consortial purchase, multi-user and single-user costs, tiered pricing, and approval plan discounts – can evolve to the mutual benefit of librarians, publishers, and vendors. (Lippincott *et al.*, 2012: 6)

E-books may cost up to 50 per cent more than their print counterparts (Walters, 2012): additional costs can include, providing online hosting, server and network maintenance fees, reformatting for multiple platforms or file formats, customer service and technical support (Vasileiou *et al.*, 2012b; Walters, 2014).

**Business models.** Several business models, which vary from vendor to vendor, are available to academic libraries. Vasileiou *et al.* (2012a: 23) note: '[t]here is a clear indication in the literature that the variety of e-book business models provided by vendors is an issue for librarians who find them complicated.'

The subscription and rental model requires payment of a subscription (usually annual) for access to a collection or subject areas of a collection offered by a vendor or an aggregator. It may also involve pay-per-view in addition to a small initial access fee for the whole collection, which allows for short-term access to individual titles and is sometimes used as an alternative to interlibrary borrowing. This model can be negotiated through library consortia, and is cheaper than other models.

Patron-driven acquisition and evidence-based selection models require to select a set of titles from a vendor's collection. The first use of a title results in a short-time lease and triggers the payment of an agreed small sum. The second (or third) use of the same title will trigger a purchase by the library, which receives notification after the e-book is accessed for the first time and may withdraw it from the collection. New

titles can be added periodically (Medeiros, 2011: 160). This model enables a library to acquire e-books requested by their users. Studies show higher circulation rates of the items acquired through this model than those acquired by library decisions (e.g., Tyler *et al.*, 2013). On the other hand, Fischer *et al.* (2012: 490) raise a valid question about responsible budgeting for selection decisions made by an unidentified subset of all potential users. One of the main concerns for academic librarians regarding this model is building unbalanced and lower quality collections (Bucknell, 2012; Fischer *et al.*, 2012; Walters, 2012, Goedecken & Lawson, 2015). This model reduces the risk of purchasing a package which turns out to be little used. Vendors might be attracted to it because it gives a minimum guaranteed level of income and may also lead to a larger purchase that a library would not have been prepared to make without evidence of use.

***Buying individual titles and collections for perpetual ownership.*** Vassileiou *et al.* (2012a) report that the most popular business model among acquisition librarians is purchase with perpetual access. This model enables a library to buy an individual title or collections of e-books directly from a publisher. Having a perpetual access requires payment of a maintenance fee for ongoing hosting of purchased material on a publisher's platform (Morris & Sibert, 2010; Vasileiou *et al.*, 2012a). Permanent ownership would mean the removal of most digital rights management restrictions on the use of purchased items.

One of the downsides of acquiring e-books as packages is that academic librarians can rarely choose which titles are included, but packages are offered at a more attractive price than individual titles and can save time in selection, acquisition and processing. Acquiring e-books as individual titles is very time consuming, as the acquisition librarian has to find out whether a title is available as an e-book, on which platform(s), and how much it costs if acquired through different models. (Ashcroft, 2011, Vasileiou *et al.*, 2012a)

Even when the e-books are purchased for permanent ownership, the threat remains of losing access because the collection is abandoned by its vendor, or because of changing conditions of access. No permanent digital preservation solutions are built into any of the publishers' platforms, which forms additional problem in handling these resources by libraries. Thus, none of the existing business models for e-book acquisition is ideal and, in any case, the power over the use and management of the books remains with the publisher.

***E-book licensing.*** E-books are controlled not solely by copyright law, but require application of a contractual law through licensing (Müller, 2012): this changes the way librarians work with their collections, compared with printed books. These licences are a huge burden for academic libraries, and the problem is well summarised by the European Commission:

A typical European university is required to sign a hundred or more licences governing the use of digital research material supplied by various publishers. Examining

what each of these individual licenses permit with respect to e.g., access, printing, storage and copyright is a cumbersome process. (The Commission, 2009: 7)

Walters (2012) argues that most e-book vendors have adopted licensing models that prevent users from taking advantages of the benefits that e-book technology might otherwise provide. Librarians need to become familiar with licensing issues and terminology and be able to identify limitations and restrictions inherent in licence agreements (Vassileiou *et al.*, 2012b). Negotiating licence terms through a consortium might be an option for academic libraries. One study (Vasileiou *et al.*, 2012a) suggests that an experienced team can achieve better deals, reduce the effort in negotiating separately with each publisher, as well as obtaining discounts on platform hosting fees. Moreover, sharing books across library consortia reduces the burden of training local staff with new skill sets and also reduces the work of cataloguing, as all these things are done centrally by the leader of the consortium (Schell, 2010). Definition of an authorised user, interlibrary loan restrictions, fair use application, use for scholarly sharing, IP authentication issues, incorporation of e-book content into virtual learning environments are just few of many other issues to consider (Stamison, 2011; Vasileiou *et al.*, 2012b).

### *Barriers to the access and use of e-books in academic libraries*

Looking at the present book market, it seems that there is no shortage of e-books in any area. Most of the big scholarly publishers list e-books in their catalogues and on their websites, but trying to find the newest e-book titles is difficult. E-books have become a regular feature for publishers and vendors of popular titles, but the academic market is still supplied rather poorly (Walters, 2014).

**Embargoes.** In many cases, there are delays in the release of academic e-books to protect print sales, which is the primary revenue driver. According to some authors, this business model annihilates a major advantage of the e-book in reducing the time from manuscript acceptance to formal public distribution (Walters, 2012). The embargo period can vary from three to eighteen months (Hodges, Preston & Hamilton, 2010; Walters, 2014), causing a major dilemma for acquisition librarians, as few academic libraries can afford to buy the same content twice. Thus, they have to decide whether to wait until the e-book is released or buy the printed book. Sometimes, libraries can afford to wait for an e-book, but when a high-profile item is assigned as a reading material or course literature 'such a delay is unacceptable' (Medeiros, 2011: 161).

**Digital rights management (DRM).** Digital rights management is 'access control technology used by copyright holders to limit the use of digital content' (Stamison 2011: 10). Such systems may allow or deny the right to transfer content from one device to another; and also set the maximum values for printing, copying, sharing and downloading for offline reading. Sometimes DRM restrictions are contrary to the licence

terms and, ‘in practice this means, that DRM gives publishers the initial ability to limit use however they choose’ (Walters 2014: 5). These limits frustrate and even infuriate library users. The increasing unpopularity of DRM has led to the development and use of alternative, less noticeable, protective means, such as watermarking (system tracking a personalised copy, see, e.g., Srivastava & Sharma, 2012).

*Limits to interlibrary lending.* Interlibrary loan is one way of enhancing the use of resources developed by libraries. E-books have the potential to ease the process of interlibrary loan, enabling libraries to avoid situations where library users would be left without a book for a period of time when it is on loan to another library. Some e-book licenses impose an outright ban on interlibrary loans, while others allow sharing of chapters of books, with certain limits and restrictions (Radnor & Shrauger, 2012; Walters, 2014). Additional restrictions include requiring use of a specific platform or a proprietary format that limits e-books use to specific devices. ‘As in many other instances, the limitations imposed by vendors negate the advantages that e-books might otherwise provide’ (Walters, 2014: 6). The gradual disappearance of interlibrary loans is especially harmful for smaller academic libraries relying on it to a greater extent than the big ones, and it threatens to decrease access to information for their users. Therefore, librarians are experimenting with different ways of enabling interlibrary loans, at least within the confines of one consortium (Litsey & Ketner, 2016).

#### *Involvement of academic libraries in e-book production initiatives*

Developments are now taking place, especially in the USA, to overcome the high cost of books, especially undergraduate students’ textbooks. For example, Perry (2012) notes that textbook prices in the USA have risen by 812 per cent since 1978, while the consumer price index has risen by 250 per cent.

The ‘open educational resources’ movement has arisen in response to this issue and universities in the USA are promoting the development and use of such resources. While these initiatives are started at the institutional level, librarians can play a significant support role. For example, Chae and Jenkins, reporting on developments in the technical and community colleges of Washington State, comment that:

In several Washington colleges, librarians have become the OER experts on campus. They have served as OER advocates, offering college-wide workshops and consultation to assist faculty in identifying OER in their disciplines. While librarians’ roles in OER adoption vary from campus to campus, many faculty viewed them as potential OER leaders on campus. (Chae & Jenkins, 2015: 32)

A similar ‘open philosophy’ is emerging in relation to scholarly monographs, which sell in small numbers and give low returns to authors. As the author’s main intention in writing such a monograph is to have his or her work made available to other scholars and researchers, the open access model can play a major role in achieving that end.

There are now numerous examples of open access monograph publishing, using different funding models, from sponsorship by funding agencies to crowdsourcing. One of the earliest in the UK is UCL Press of University College London, which now publishes all of its books as open access, both as printed books and as pdf files (Ayriss & Speicher, 2015). They also intend to make the books available, 'on a free browser-based platform that has additional functionality such as the ability to highlight, take notes and share personalised copies of whole books or chapters' (Exclusive..., 2016). Clearly, someone has to pay for such a mode of publication and, for authors from outside University College, the fee (for which waiver may be sought) for a book of up to 100,000 words is £5,000 (€5,700) (UCL Press, 2016).

A SPARC Europe report notes that university libraries in both the USA and Europe, have been active in the establishment of new university presses (including at the University of Stockholm), with a focus on producing open access monographs, noting that:

The press-library partnership has become rather common in the United States, Canada, Australia and in some cases in Europe. The partnership enhances mission-based publishing and is probably a more effective pooling of resources and complementary expertise at a time when both Presses and Libraries are faced with serious financial challenges. (Tsoukala, 2015: 32)

The open access model for scholarly monographs has also been pursued in Sweden and has been given impetus by the report on a study (National..., 2013) which recommended that: 'academic books, particularly those published in Sweden and publicly funded, should be made available via an open access version' and that, 'a national consortium should be set up that organises a peer-review process for academic books and provides guidance on open access publishing', which would, 'work closely with existing publishing channels such as commercial publishers, Acta series and university presses' (the National Library, 2013: 2).

The recommended consortium was established:

Kriterium is a collaborative venture between the universities of Gothenburg, Lund, and Uppsala, with representatives from the Swedish Research Council, Riksbankens Jubileumsfond, the National Library of Sweden, the publishers Nordic Academic Press and Makadam, and the three universities' publications series. Once the three-year pilot Project (until 2017-12-31) is complete, it is anticipated that Kriterium will be put on a permanent footing and the consortium will be extended to include other institutions. (Kriterium, 2017)

Kriterium requires that all books published as a result of its peer review process should be made available as a pdf file for open access.



## E-books as part of the collection in Swedish academic libraries

Most of what is written on e-books in Sweden relates to public libraries and the mass consumer market and the issues of academic libraries are not considered very often or extensively. The differences between the academic, professional and teaching book market and the e-book market is only fleetingly mentioned in the official reports by the Government (SOU 2012:65: 228) and the Parliament (the Culture Committee of the Swedish Parliament, 2013: 14). Partly, this is described by Svedjedal (2012) who, in a short chapter, points to the dominance of international providers of e-resources in university libraries and the realities of e-publishing in the scholarly communication field.

In 2011 a report from the National Library<sup>38</sup> of Sweden stated that there was no problem with the acquisition and provision of e-books in academic libraries (the National Library, 2011): by then most university libraries in Sweden had already accepted the policy that, if there is a choice between a printed book and an e-book, they will buy an e-book (especially books used in teaching) (Gustaf, 2010).

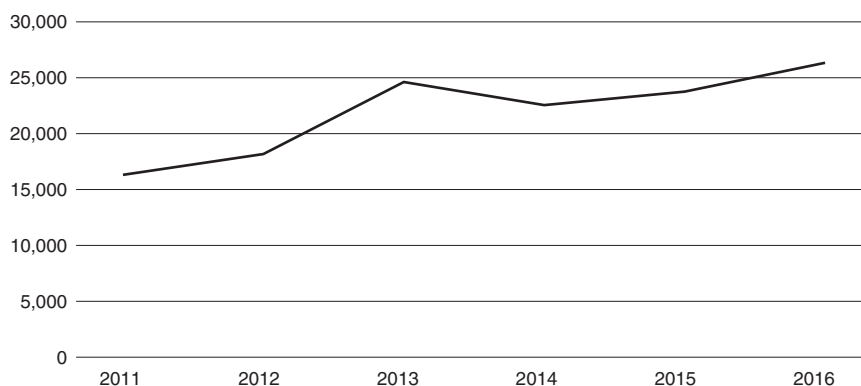
Most research on e-book issues in Swedish academic libraries is conducted by students writing their graduation theses in the departments of library and information science (Bovin, 2014; Hammargren, 2015). Byström (2012) has compared statistics of different e-book packages from different suppliers in the Library of Uppsala University and concludes that these are misleading and incomparable. According to her, the lack of comparable statistics does not allow acquisition librarians to make sound decisions on access renewal, and makes it impossible to justify the purchases or to evaluate the cost-benefit of use (Byström, 2012: 220). However, as Söderback (2011: 38) has noted: 'discussions with libraries suggest that e-books take up no more than 6 per cent of money spent on acquisitions. From this perspective, e-books are highly used and seem to be a good investment for academic libraries.'

Agreements on the provision of e-resources (journals and e-books) and databases are negotiated with the major providers by BIBSAM, a consortium of 79 Swedish libraries and other organisations. E-books were first included in the statistics in 2011 and the number of titles available increased slightly until 2014, when there was a marginal reduction, with increases again in 2015 and 2016 (see Figure 10.1). BIBSAM usually negotiates only with existing providers of other digital resources, with e-book provision included in the general negotiations, but there are some individual agreements on e-books, e.g., with Thieme Medical Publishers (personal communication, Annica Wentzel).

When the total number of titles of e-books in the digital collections of university libraries is produced, it becomes clear that most of the libraries negotiate e-book agreements individually, in addition to the provision by BIBSAM (see Table 10.1).

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38. Kungliga biblioteket.



**Figure 10.1** Total number of e-books negotiated through BIBSAM agreement

Source: Bibsamkonsortiet, 2015: 12, personal communication with Annica Wentzel (the National Library), 2017.05.29.

**Table 10.1** Physical and e-book collections at Swedish university libraries, 2015 and 2016

|           | Physical books 2015 | Physical books 2016 | E-books 2015 | E-books 2016 |
|-----------|---------------------|---------------------|--------------|--------------|
| Books     | 19,614,095          | 17,582,017          | 5,695,211    | 7,504,325    |
| Textbooks | 326,448             | 338,448             | 185,420      | *)           |

Comments: \*) no comparable data available.

Source: Kungliga biblioteket 2017: 70. Book collection in number of titles. Data from 28 academic libraries for December 31, 2015 and 2016.

It is obvious from Table 10.1 that the number of e-books in general is more than a quarter of the total collection of books.

On the other hand, e-book databases amounted only to 17 per cent of all subscription databases in 2016 (Kungliga biblioteket 2017, p. 69). This is in line with the general development of the collections in university libraries, which use the largest part of their information resource budget for journals and other types of documents or databases. Thus, though a growing resource, e-books do not dominate other digital resources of academic libraries.

The presented tables relate to the provision of mainly English e-books from international providers. Swedish e-book titles rarely figure in their offers. The issues of Swedish e-books in academic libraries are complex. Byström (2015) presents the main problems of acquiring Swedish e-books by academic libraries: lack of suitable academic e-book titles produced in Sweden and in Swedish, lack of e-book platforms and models for licensing them to academic libraries (the Elib model is not suitable because of the price and mode of login for users), lack of forums for discussions between librarians

and publishers, lack of incentive for publishers to abandon profit from printed book sales, and a low level of knowledge about the needs and activities of the other party (both publishers and libraries).

### *The Project survey*

In 2013 and 2014 two case studies were conducted in a big research university library and a medium sized new university library to identify Swedish academic library experience of e-book provision (Maceviciute *et al.*, 2014). Their results served as a basis for a questionnaire survey of Swedish academic libraries that was undertaken in March and April, 2015, to determine the extent of provision of e-books and the factors affecting their use. Those libraries whose websites did not show that e-books were available were excluded from the study, leaving a total of 31 institutions to be surveyed. Respondents were contacted directly by telephone and asked if they would be willing to participate and all those approached agreed to do so. As a result, the response rate to this questionnaire was 100 per cent.

A shorter questionnaire was sent out to 22 other libraries owned or used by higher education institutions, which did not show e-book collections on their websites, or which had subscribed to their first collection only very recently. For these institutions, the questions focused on the opinions and expectations of librarians. Six replies were received and, where appropriate, the responses were added to the main survey data.

### *Swedish academic libraries' work with e-books*

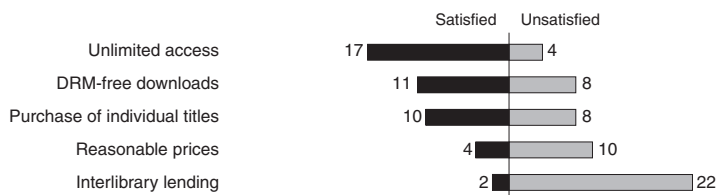
The results of the survey are presented in four parts: the first refers to the data on the acquisition and management of e-books that are commercially subscribed to or bought; the second presents the data about the conditions of e-books' use; the third introduces an ideal system for e-books presented by the respondents; and the fourth reveals the activities of academic libraries related to open access digital books and those produced by the universities and libraries themselves.

***Acquisition and management of e-books.*** Swedish academic libraries need to attend to budgetary restrictions and choose suppliers of e-books carefully, as well as plan access to the acquisitions. The responses show a variety of strategies applied by responding libraries. There was very wide variation in the proportion of the resource budget assigned by librarians for access to e-books, from 0.6 to 25 per cent. Notable is the fact that, while one library used publishers for 98 per cent of its acquisitions, eight libraries used aggregators for 100 per cent of their acquisitions.

Overall, the median values were that libraries used publishers for 20 per cent of their acquisitions and aggregators for 80 per cent, which may be a consequence of lower-cost subscriptions provided by aggregators. Two-thirds of the libraries believed

that the proportion they spent was likely to increase, while one-third believed it would remain the same. It is also worth noting that the percentages can be quite misleading as one per cent of a big university library's budget may be much more than 20 per cent of a small library's budget. The percentages indicate a library's e-book acquisition strategy, rather than the amount of allocated resources.

An American librarian (Bivens-Tatum, 2014) has suggested five criteria that a supplier should satisfy when a contract is negotiated and respondents were asked about the extent to which these criteria were satisfied in their negotiations with publishers.

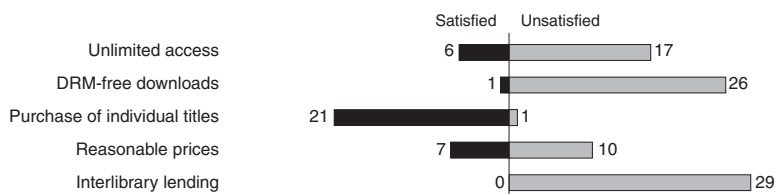


**Figure 10.2** Extent to which supply criteria are satisfied by publishers (number of responses)

*Comments:* Question posed: 'An American university librarian has suggested that deals with publishers should meet the five criteria shown below. Can you indicate how far each criterion is met in your dealings with publishers overall?' 'Satisfied' includes merged answers '5 – completely satisfied' and '4 – satisfied'; 'unsatisfied' merges '1 – not satisfied at all' and '2 – mainly unsatisfied'.

Figure 10.2 shows that most dissatisfaction is experienced with the inability to use e-books in inter-library lending and that there is greater dissatisfaction than satisfaction in relation to the pricing of e-books. On the other hand, more respondents are satisfied, rather than dissatisfied with the terms of access to the e-books, with DRM-free downloads and with the ability to purchase individual titles.

The results relating to supply by aggregators (Figure 10.3) show that libraries are much less likely to find the criteria satisfied. The reason for the small number shown for the 'reasonable prices' criterion is that fourteen respondents chose the mid-point of the scale, suggesting a neutral opinion on the issue.



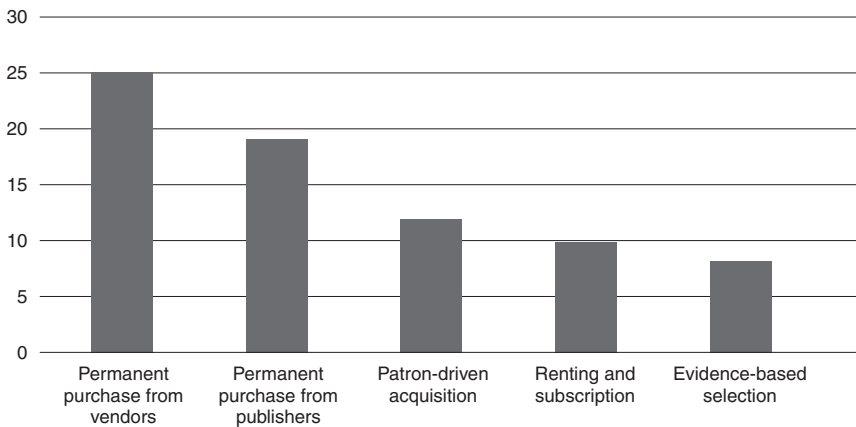
**Figure 10.3** Extent to which supply criteria are satisfied by aggregators (number of responses)

*Comments:* The question was posed: 'Can you indicate how far each criterion is met in your dealings overall with aggregators?' 'Satisfied' includes merged answers '5 – completely satisfied' and '4 – satisfied'; 'unsatisfied' merges '1 – not satisfied at all' and '2 – mainly unsatisfied'.

Overall, the results from this pair of questions suggests that, ideally, librarians might prefer to deal with individual publishers because better terms of use can be negotiated. However, the selection and negotiation processes are so time-consuming that they are more likely to negotiate deals with aggregators.

Libraries were asked to identify the main and subsidiary business models they employed in the acquisition of e-books. The data show that the dominant model is the use of subscription services, such as EBSCO or Dawsonera, employed by 16 responding libraries. Patron-driven acquisition used in six libraries follows the subscription model, but permanent purchase from publishers (4 libraries) and vendors (3 libraries) is equally used, while only one library has evidence-based selection as the main business model.

Respondents were able to say whether or not they used other business models in addition to the main model and Figure 10.4 shows that virtually all of them did so (only one library did not report on this item.)



**Figure 10.4** Number of libraries employing additional business models (number of responses)

*Comments:* Multiple choice question posed: 'Which of the models do you use in addition to the main model? Check all that apply.' The number of respondents was 30.

It can be seen that the most popular option was to buy e-books for permanent retention in the libraries resources. This is not surprising, given the problems experienced with licensing access, which is dealt with later.

Respondents were also asked how many suppliers were providing access to e-books, how many collections and what number of titles they acquire. Almost half were unable to give a figure for the number of collections, but most were able to provide answers to the other two parts of the question. The number of providers ranged from one to thirty-nine. More than half of the libraries (16) used fewer than ten providers; five libraries, however, used twenty or more and one library, used thirty-nine. Thirteen respondents did not say how many collections they had access to, and the remainder varied from one to 100, with a median value of forty-six collections. The number of

titles to which access was provided ranged from 155 to over 700,000. Only two libraries reported the same number of titles (50,000); the median value was 135,000.

Respondents were asked approximately what percentage of their e-book resources were in Swedish and the modal (or most common) response was zero, reported by seventeen respondents. A further nine libraries reported having less than five per cent of its e-books in Swedish. Only three libraries reported having more than five per cent.

Only one library reported that the percentage shown satisfied its needs for Swedish language titles, somewhat surprisingly, this was not the library with 20 per cent of its collection in Swedish, but one that reported having only one per cent. This response most probably shows lack of demand for Swedish e-books in this institution.

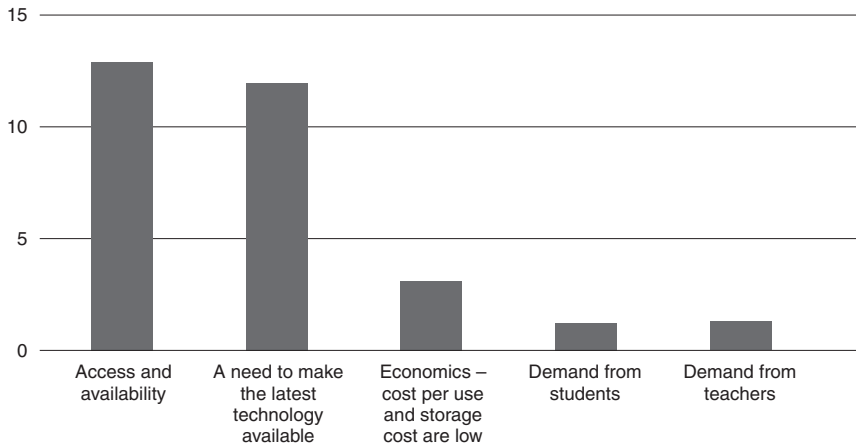
When asked, what could be done to improve the situation, the written-in responses suggested a limited number of strategies. The most common response was that the academic libraries needed to negotiate with Swedish publishers and persuade them to develop *library-friendly* business models. Secondly, and sometimes in combination with the first, it was suggested that academic libraries in Sweden should work together to negotiate with publishers. Two respondents specifically suggested trying to reach agreement with the publisher Studentlitteratur; one suggested that Elib might be persuaded to include more course textbooks in Swedish in its offering; two suggested that publishers should simply change their practices and one suggested that nothing could be done by libraries and that the market had to change. One respondent pointed out:

University libraries in Sweden have recently initiated a working group that is trying to improve communication with Swedish course book/academic publishers. We need to know more about each other's business.

Only one library reported using Elib (the main supplier of e-books to public libraries) for the acquisition of Swedish language e-books and only three reported needing to acquire e-books in languages other than Swedish and English. All three reported a need for e-books in French, Spanish and Italian, with individual libraries reporting an additional nine languages. The suppliers used for foreign language materials were Ebrary, Dawsonera, EBSCO and the Italian company, Casalini.

In the greater majority of cases (25 libraries or 83 per cent) the library's e-book resources were recorded in its online catalogue and in most cases (14 out of 25) this was done not automatically but by downloading MARC records from various sources, or by manually updating the records.

More than half of respondents (16 or 53 per cent) had discontinued subscribing to specific collections or had changed from one aggregator to another (Ebrary to EBSCO, for example). The most frequently discontinued collections were those from Oxford University Press, with a total of four unsubscribing from Oxford's Art, Music, Medicine, Reference and Scholarship collections. In most cases (11 respondents) the reason was related to economics, often associated with low usage.



**Figure 10.5** Number of libraries by forces driving the adoption of e-books

*Comments:* The question was posed: 'What has been the main driving force in the move to acquire e-books? Please select only one response.' The number of respondents was 30.

As a surrogate for Winston's concept of *supervening social necessity*, respondents were presented with four potential *driving forces* for the adoption of e-books: cost per use and storage costs are lower (economics); demand from students; demand from teachers (user needs); and a need to make the latest technology available (library's responsibility). The possibility was offered to write in any other driver. Twelve libraries opted to write in a different driver, which, in most cases can be represented as 'Ready access and availability'.

From Figure 10.5, it is quite clear that the two additional forces perceived as driving the adoption of e-books are the need to keep abreast of new technologies and the opportunity technology gives to make information resources available and accessible. User demand was the least important category, though user needs are taken into account in the access and availability category.

*Use of e-books.* The respondents to our questionnaire also expressed their opinions on the managing access and services to users as well as the conditions of e-books' use.

As noted earlier, 16 respondents reported using fewer than ten suppliers. This means that almost half were using more than ten and, when asked whether there were problems in using many suppliers, two-thirds (20 libraries) responded, 'Yes'. The problems can be summarised as arising out of the differences between one supplier's platform and another. Respondents explained that difficulties were related to differences in 'technical solutions', 'interfaces, acquisition methods', 'ways and rules for accessing and printing from the books', 'business models, platforms', and 'licensing conditions'. One of them commented:

It makes the overall view of ebooks negative. It is so complicated.

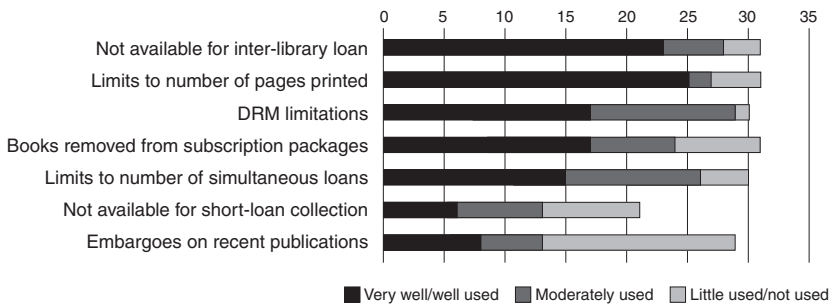
Nineteen respondents also reported that the users of their systems had problems as a result of the multiple suppliers and their different platforms. The nature of the problems was very similar to that experienced by the libraries, e.g.,

Different conditions for different suppliers, it's not always clear what material is on which platform.

Users also met with additional difficulties, for example: lack of access due to limited number of simultaneous users, different possibilities of borrowing and downloading books, limitation of printing texts to one page at a time.

Publishers put in place a variety of barriers that inhibit the full use of e-books by libraries, some of which have been referred to as problems above. Respondents were given a list of such barriers and asked to indicate how little or how much these barriers were used by publishers and aggregators. Figure 10.6 shows the result.

The most significant 'barriers' are readily identified from the figure: taking scale points 4 and 5 – very well used and well used – the limits to the number of pages that can be printed is perceived as a barrier by 25 respondents, the lack of the ability to use e-books in inter-library lending by 23, digital rights management limitations by 17, the removal of books from packages by 17, and limits to simultaneous loans by 15. Only two additional problems were presented by respondents: limited access to attractive books and lack of access by mobile devices.



**Figure 10.6** The barriers to effective use of e-books (number of responses)

*Comments:* The question was posed: 'Do your suppliers put in place any of the following barriers to the full use of e-books?'

From some responses one can understand that a long-term consequence of an increasing dependence on e-books could be that the system of inter-library loans will suffer significantly. As noted earlier in this Chapter, this would affect smaller libraries, which are highly dependent on this service in order to satisfy the demand of their users. E-books not being available for inter-library lending will pose a significant problem if larger libraries buy fewer printed books; smaller libraries will not be able to get rarely used or old titles and will have to send out a lot of requests even to



smaller libraries, which will increase costs for handling, postage and packaging, etc. Some state genuine consequences, which usually relate to user satisfaction: e-books not available when needed, confused and dissatisfied users 'turned off' by e-books, loss of access to publications, uncertainty of availability of certain texts.

In responding to this item one librarian noted how the library is dealing with this problem:

We say no to licences with bad terms regarding content, simultaneous users, administration, prices, etc., consequently not giving access to e-books when terms are not met.

We were aware that asking about the relative proportions of loans of printed books and e-books would be a problem, because an e-book is *accessed*, rather than borrowed and logs record the occasions upon which a section of text has been accessed. Ten libraries failed to respond to the question, citing the difficulty of comparing *oranges and apples*. However, twenty did make the attempt and, overall, the median value was 65 per cent printed books and 35 per cent e-books.

The users of e-books among academic staff did not differ by discipline in 50 per cent of the libraries, but the other half reported such differences, finding that those most accepting e-books were in science, engineering, computer science and medicine, with an occasional respondent citing social science, economics and business administration. The disciplines least accepting of e-books were in the humanities, social sciences, nursing and teacher education, and in one case, physics. The variation by discipline was even less among students. 75 per cent reported no variation by field of study. One of the two saying that there was variation did not respond to the question on the most accepting and least accepting fields, while the other cited medicine, economics and behavioural sciences as the most accepting, and humanities and teacher education as the least accepting. In relation to the latter, the respondent made the important point that it was the lack of Swedish texts that caused the problem for these students.

Respondents were asked whether they ever received complaints from academic staff about having to use e-books, rather than printed books, and 87 per cent (28) reported that they did. The same question was put in relation to students and here 79 per cent reported complaints. Eleven respondents said that they were aware of technical problems experienced by distance learners

The problems experienced were generally resolved by communication with students, by e-mail, phone or chat. Access problems were resolved by buying more copies of a text, or by trying to find texts that allowed an unlimited number of users,

*Optimal system for reading e-books in academic libraries.* Respondents were asked: 'In your opinion, what would be the optimum system for access to e-books in universities?' Given the problems that are currently experienced and the barriers that publishers put in place, it is not surprising that an optimum system would be one in which these problems and barriers were not present. Typical responses on this theme included:

One single, user-friendly platform for all accessed e-books, with an easy account management for end-users. And DRM-free, of course, with guaranteed long time preservation.

National e-book platform, the same conditions for all books, the same interface, read easily on all types of devices – PC, mobile. DRM free.

A system that is as easy as possible for the user. The book will be searchable via our Discovery service. When one clicks directly to the book's front page/title page. But one should be able to choose to read the book online or download it.

One national system in which all students can find, download and use the books they need. Universities pay a lump sum based on disciplines and the number of FTE students (not on usage) and then we share all the e-books.

Of course, the librarians are aware that the notion of an optimal system of the kind they describe is probably a utopian ideal and, in the responses to the follow-up question on what prevents the attainment of the ideal they identify competition in the market place by both publishers and aggregators as the main factor preventing attainment:

I presume the publishers' need to make money and the fear of losing money.

Costs and lack of cooperation among vendors.

Publishers' business models. Economic reasons.

The publishers and their restrictions.

Publishers need to have their own platforms for branding purposes. Fear of piracy (publishers). Fear of loss of income (publishers).

The features of the optimal system can be summarised under the headings:

- conditions of use (content free of digital rights management, downloadable on different devices, possible to print and annotate)
- technical conditions (single, user friendly platform, easy to search, use and manage accounts, one technological solution, titles available through library catalogues, correct linking to the full-texts)
- library management (lower prices, procurement via Bibsam, owned by the library, available for interlibrary loan and long-term preservation)

As one can see our respondents were mainly concerned about the rights and convenience to their users rather than their own internal workflows and workloads. Nevertheless, we can summarise their vision as follows:

The optimal e-book system for users should allow unlimited simultaneous use of the DRM-free content required for studies (including Swedish language content), without limitations on printing and downloading, easy search and use of the platforms and full texts with annotation possibilities and other advanced features.

The optimal e-book system for a library should be affordable, procured through a consortium (or central agreement), owned by a library or libraries, with standardised technological features (platforms and interfaces) on the national level, and automatic upload of metadata to the library catalogue, with guaranteed long-term preservation.

*Open access and locally produced resources.* Commercial e-books are not the only digital books that can be used by academic libraries. Therefore, we tried to establish to what extent they utilise these resources.

Respondents were asked whether they provided links to free digital books such as Project Gutenberg, Project Runeberg, or Hathi Trust and 63 per cent (19) said they did so. Overall, the advantage perceived by the respondents was that this provided access to potentially useful literature and, in some cases, to texts that were required for courses. However, very few kept any record of the extent to which these links were used: three reported that they were rarely used, and two that they were regularly used.

Eighty per cent of respondents (24) reported that they did not digitise any print materials for the purpose of preservation or replacement of stock. The six that reported digitising materials made those materials available to all through their website. This answer was unsurprising, given that, normally, only old university libraries with rich historical collections get resources for digitising.

On the other hand, fifty-three per cent (16) of respondents reported that their university produced its own e-textbooks: four reported that the books were published in Swedish, the rest reported publishing in English, or, in some cases, in both Swedish and English. Two universities sold these textbooks, while fourteen made them available through open access and, when this was done, they were openly available to anyone, not simply to academic staff and students in the local university.

Thus, free, digitised and open access e-books of various kinds are available through academic libraries, but only as an occasional resource.

## Discussion

Experiences of working with e-books by Swedish academic libraries are quite similar to those in English-speaking countries.

Regarding Winston's (1998) supervening social necessity, the principal driver named by Swedish academic librarians is the ease and simultaneity of access to many readers of the same e-book, and timeliness of availability. But one can also name long-term experience in dealing with e-resources and expertise in information technologies acquired by academic libraries over the last 40 to 50 years. E-books, in principle, can be managed in the same way as any other digital resource known to academic libraries. Swedish academic libraries are adept in acquiring and managing e-books for their communities, use most advanced and multiple business models and tools, and help

their users to solve emerging technical problems. Therefore, the number of e-books is slowly increasing, especially, in the e-textbook collections.

However, the law of suppression of the radical potential sets e-books significantly apart from other digital resources. Providers of e-books of various kinds put in restrictions and limitations to e-book use to protect their economic interests and income from the sales of physical books, while most of those restrictions have already been softened by e-journal providers. These limitations unquestionably slow down the development of e-book services in academic libraries and prevent the rise of the user demand, which does not play any significant part in libraries' decisions to acquire e-books.

Academic libraries are also burdened with multiple platforms, interfaces, conditions of use, and multiple licences and so far, have not found an efficient way to deal with this complexity. To some extent this may be prevented by the suppliers and publishers who in fact only license e-books even in cases of selling 'for permanent ownership' and have vested interests in selling e-books on their own platforms with a brand name. On the other hand, possible solutions would require considerable financial investment (e.g., for the development of a common library platform) or significant increase of effort (e.g., for consortium licensing of e-books from multiple new providers) on the part of academic libraries. These possibilities are constrained by limited resources.

Not many academic libraries can even afford to use the least restrictive business model of purchasing into permanent ownership as it requires separate dealings with many publishers and e-books sold this way are much more expensive than those accessed through subscription services.

What sets Swedish academic libraries apart from English speaking ones is the lack of local language (Swedish) literature in e-book format, which can be seen as a common problem for their counterparts in other Nordic countries (Byström, 2015). Swedish publishers are very reluctant to supply scholarly books, especially academic textbooks in digital formats. On the other hand, libraries will not be able to buy separate Swedish e-books from willing publishers (as there are small scholarly publishers in Sweden ready to supply them with e-books for good prices, see Chapter 7) as there is no common non-fiction and academic e-book platform to access them.

Academic librarians are playing an active part in putting significant effort into organising communication with publishers and looking for viable solutions. Publishers in this case seem to be a reluctant partner and point out that there is no demand for their e-books (Chapter 7), though they should be aware that academic libraries simply cannot subscribe to the only existing e-book platform Elib and bring their highly desirable product to their communities. Swedish publishers are not offering any other business model for academic libraries. Thus, librarians are concerned about the loss of Swedish as learning language and the competition from possible commercial e-textbook renting services (Byström, 2015).

On the other hand, open access educational resources and e-books can become a remedy to the lack of Swedish books. There are initiatives on the part of scholarly community involving academic libraries of producing open access e-monographs,

e-learning platforms and open access repositories provide learning and scholarly materials produced by local academic staff. If these developments grow in scale, they might move the big commercial publishers to consider the proposals of academic librarians to learn about each other and to find appropriate solutions for providing Swedish e-books to academic libraries on mutually beneficial basis.

## Conclusion

It is possible to argue that, though the main principles of acquisition and collection management have not changed with the advent of e-books in academic libraries, the conditions of their purchase, maintenance, access and use for libraries and library users have become rather complicated, though advantages seem to be more attractive and outweigh the complications.

Academic libraries possess adequate tools and competence as well as incentives to drive the acceptance of e-books at higher education institutions in Sweden. Apart from the common barriers to this acceptance, Swedish academic libraries face the shortage of e-books in their mother tongue. It may be beneficial for them to explore the possibilities of organising the production of open access Swedish learning resources. Among other consequences, this development might move the position of Swedish publishers to start considering business models suitable for academic libraries.



## Chapter 11

# Reading and readers

The global diffusion of e-books has been rapid during the last decade, and especially after 2010. However, there are large differences between countries and language areas in growth rate and market penetration. As mentioned in previous chapters, in the United States and other English speaking countries e-book reading is more widespread, and developed earlier than in other markets. For example, it was estimated 2012 that 23 per cent of the population in the US had read e-books in the previous 12 months (Perrin, 2016). In Scandinavia and many other European countries, the e-book was at this time still in an early diffusion stage.

In Sweden, only about nine per cent reported e-book reading in 2012, but the growth rate was impressive. Whether the growth soon would level off was unknown when we started a yearly survey of e-book reading in the Swedish population in 2012. The potential for e-books seemed rather large considering Sweden's well-educated population, with a very high penetration of information technology and with book reading established at a high level. However, there were also limitations due to the small size of the language market, and uncertainty regarding future supply and pricing of e-books in the local language. Since 2012, the dramatic increase of e-book reading in the USA has diminished slightly and, during 2014 to 2016, the figures for e-book reading in the previous 12 months seem to stabilise at about 28 per cent of the population (Perrin, 2016; IFLA, 2014). There is an on-going discussion about the future for printed and digital books. As we show later in this chapter we have found that the growth rate for e-books also in Sweden has declined. In early 2016 the proportion of e-book readers in the population seems to have stabilised at about 18 per cent. However, this may be a temporary plateau. The long-term effects of digitisation are powerful, as we have seen for other media.

In other countries e-book reading is still increasing. In 2014, a mere five per cent of the French population over 18 admitted to having read an e-book during the previous 12 months. Another five per cent considered doing so. Only half a year later, 14 per cent of the adults had in fact read an e-book at least in part, plus another eight per cent would at least think about doing so. As in most countries, the strongest segment of the reading population has started to embrace digital first (Wischenbart, 2014).

Another difference between markets is that, in the USA and many other countries, most of the e-books read are bought by the reader; in the USA, only 12 per cent of the e-book readers borrowed an e-book in the previous year (Zichur *et al.*, 2012) but in Sweden, Denmark and Norway e-books are mainly freely acquired through

library loans and the pricing model used for this is frequently discussed. This difference between countries may change over time, as increased borrowing of digital books during 2015 in the USA is reported (Berkowitz, 2016), but the difference is still remarkable. In Sweden, it is estimated that libraries have more than 80 per cent of the e-book market (Svedjedal, 2012; the Swedish Publishers' Association, 2016). The relationship between publishers and libraries, the pricing of e-books and taxes on e-books are factors specific for Sweden and other Scandinavian countries, which may have a strong impact on the rate of adoption by readers.

In this chapter, we address the following questions:

- Who are the readers of e-books in Sweden?
- What are the reading habits for fiction and non-fiction e-books in the population?
- To what extent can background factors contribute to the understanding of e-book reading?
- How do e-book reading habits differ among different demographic groups?
- How is e-book reading related to print book reading and other digital reading habits?
- How can we illuminate the sometimes-complex relationships between attitudes and behaviour regarding e-books?

The chapter starts with a review of literature and previous research that specifically relates to reading of e-books, followed by a methods section where the reader studies are described. Then follows empirical sections focusing on how demographic factors and attitudes are related to the reading of printed and digital books and reading and attitudes to e-books. The chapter closes with discussion and conclusions.

### Factors related to e-book reading

To explain the diffusion of e-book reading in the population, it is necessary to combine knowledge about more general book reading habits with the uptake of required technology and the relation of both to demographics (Jung *et al.*, 2012). Cultural socialisation theory suggests that the more experienced people are in a certain cultural genre, the more they will participate in this genre later in life (Verboord & van Rees, 2003). The more one reads worthwhile books, the more one gets out of reading, the more one is able to appreciate the context, and the more one develops an appetite for the activity (Van der Ploeg, 2004). Reading is a practice that grows with repetition. Having read literature in the past is one of the best predictors of the intention to read literature in the future (Miesen, 2003). A vast majority of those who read e-books also read printed books. Even in the USA, only about four per cent of the readers read only



e-books (Zickuhr & Rainie, 2014). It is difficult to estimate the impact of e-books on total book reading. Some authors found that people who read both print and digital books on average read more books than print only readers (Rainie *et al.*, 2012).

However, one must be aware that reading habits differ when comparing demographic groups in a given society. The appetite for books is, according to Van der Ploeg (2004) unevenly spread among the population, although in many countries the majority read at least some book yearly or more often. For 2013 total book-reading in the USA was estimated to be 76 per cent of the population (IFLA, 2014). In Sweden, the percentage of book-readers was even higher, at about 80 per cent in 2013.

Sex is an important factor in predicting both the amount and type of reading material an individual pursues. In Sweden, as in many Western countries, women read a greater variety of books and spend more time reading than men. In particular, the gap is striking when we examine fiction reading, (which might be explained in part by differences in reading proficiency). Socialisation, reading proficiency, and work status account for some of the variation in fiction reading between men and women (Tepper, 2000). Other factors explaining book reading in addition to sex, include: level of education, library use, household income, and age (Clark, 2013; Höglund, 2012; Verboord & van Rees, 2003).

As for printed books, demographic variables such as sex, age, and level of education have been shown to affect the use of e-books. In the American book-reading population, those most likely to read e-books include people with college or graduate degrees, those who live in households earning more than \$75,000 (€67,000), and those whose age falls between thirty and forty-nine (Rainie & Duggan, 2012). In the general population, women reported reading more e-books in the past year than men, well-educated Americans read more than the less-educated, and those aged sixty-five and older read fewer e-books compared to younger age groups (Rainie *et al.*, 2012). A 2013 survey shows that in the Danish population of Internet users, the proportion of e-book users is about one fifth of the proportion of users of print books (Hjarvard & Helles, 2013).

Just as for reading habits, digital habits differ in demographic groups. It is evident that technology acceptance and use is strongly related to socio-demographic factors such as age and sex (Helsper, 2010; Rogers, 2003). Further, people with a higher level of education are more likely to be early adopters of technological innovations (Rogers, 2003). Social outcomes such as higher status in the community or being unique in the group may be important additional drivers of use (Venkatesh, Thong & Xu, 2012).

From existing theory and from the results of earlier research in other countries, we can expect that the reading of e-books will vary a lot between individuals and groups in the Swedish population. Results will relate partly to studies of book reading in general and partly to studies of the use of the Internet and new information technology. However, we cannot anticipate the extent to which factors related to the adoption and use of technology will affect the existing patterns related to book reading in this case. The empirical results below indicate that factors related to the access and use of technology are necessary, but insufficient, conditions for e-book reading.

## The surveys and the interviews

The reading of books and e-books and attitudes towards them was captured in quantitative mail surveys and in semi-structured interviews. The surveys are representative samples of the Swedish population in the ages between sixteen and eighty-five years, in the Swedish national SOM (Society, Opinion, Media) surveys conducted in the autumn and winter of 2014, 2015 and 2016. The survey has been conducted by the SOM-institute at University of Gothenburg as an annual national mail survey since 1986.

The survey design has altered somewhat over the years, and is now made up of three to five slightly different questionnaires. The project questions were posed in one of these questionnaires each year, and administered to 3,000-3,400 persons with a net response rate varying between 57 per cent (in 2012) to 51 per cent (in 2016) (see Vernersdotter, 2016 for details on research design and quality of data). The questionnaire consists of approximately sixteen pages and eighty to ninety questions, most of them with fixed answer options.

The question about e-book reading was built into a combined set of questions in the questionnaire: *How often during the last 12 months have you read the following types of books?* The answering options were divided into fiction and non-fiction with three distribution forms: as a printed book, as an audiobook, and as an e-book. A seven-grade scale was used: *never, once during the last 12 months, once during the last 6 months, sometime in the quarter, monthly, weekly, and several times a week.*

The attitude questions were constructed as two different batteries of questions. In the 2013 survey, the questions were formulated in line with the affective dimension of attitudes, and also tried to capture attitudes towards the object on a more general level (Ajzen and Fishbein, 2005). The question was posed, *Which is your assessment of the following statements about e-books?* An 11-point scale between 0 (Completely wrong) to 10 (Completely right) was used. In the 2014 survey, a question similar to that posed in the Pew Internet & American Life Project was designed (Rainie *et al.*, 2012), which captures the cognitive dimension of attitudes (Ajzen and Fishbein, 2005). The question was posed, *Which is better for these purposes, a printed book or an e-book?* Three answering options were used: 'Printed books', 'E-books' and 'No opinion'.

The explanatory factors, as outlined in the theoretical section, are listed as follows: Traditional demographics such as age, sex, level of education, and household income, which in different ways, have been proved to affect both book reading and the uptake of digital devices. Book reading habits are already mentioned and found in the same set of questions as e-book reading. Household access to reading devices is captured in a single question as either 'yes' or 'no'. (For results on access, see Chapter 2.)

An interview study was conducted to get more in-depth insight to e-book reading and what drives or hinders people using the digital format. Semi-structured interviews with a total of 34 respondents were carried out in somewhat different ways. Three interviews were conducted in groups, 14 were individual interviews, and four were

done by telephone. The first two interviews were conducted by a group of researchers to evaluate the interview guide and to achieve consistency for the following interviews. All interviews were recorded and transcribed between February and October 2016 and the transcriptions have been analysed thematically in order to give in-depth knowledge to the presentation of the survey data.

According to sex, there were 28 females and 6 males. The age of respondents ranged between 19 and about 80 years. Eight respondents were between the ages of 19 and 30, six respondents between 30 and 50 years and 20 respondents were older than 50 years.

The interview guide consisted of questions on access to reading devices and e-books, e-book reading (or non-reading), motives, format and platform preferences for different genres and places, the strengths and weaknesses of different book formats, reading experience, pricing, personal integrity and copyright protection.

### The prerequisites for e-book reading – reading devices

As outlined in Chapter 4, the prerequisites for reading e-books are good in Sweden. Just as in other parts of the world, there is an increasing access to reading devices like computers, tablets, and smartphones. In the USA, about one third of adult Americans owned some kind of device for e-book reading in late 2012 (Rainie & Duggan, 2012), in 2015, tablet ownership reached 45 per cent (Anderson, 2015). Tablets seem to be preferred to smartphones for e-books (Rainie *et al.*, 2012) and, unlike in Scandinavian countries (Hjarvard & Helles, 2013; Facht, 2012), Americans to a larger extent prefer specialised e-readers like the Kindle for reading. This is predicted to change since reports suggest that American teenagers tend to turn to multipurpose tablets and smartphones for reading (Madden *et al.*, 2013).

The interviewees report different experiences of reading devices: basically, all of them can access e-books, at least theoretically, by computer and only one or two do not have any digital devices at all. Two interviewees saw technical obstacles which made them opt out of using e-books. It is evident that the preferences for different devices vary widely. Although e-books are available on cell phones, the mobile screen is commonly considered as too small for reading. It is usually used only in cases of 'emergency'. Laptops and desk-top computers are also seldom used for e-books among the people we have interviewed, the latter being viewed as unwieldy.

Thus, some kind of tablet computer is the most-used device for e-reading among the interviewees. This is the device perceived as most like the printed book. Some prefer tablet computers like the iPad, whereas others prefer specialised reading devices as they can be used easily outside home or office. Which kind of device is chosen is mainly a matter of habit and individual preferences for certain functions. iPads are perceived to be heavy and not all readers are fond of the back-lit screen. Others find them favourable because of the screen, since they can be read without turning on the light in the room. One reader found specialised e-readers rather limited since they

support only one format and are affiliated with certain online stores. Although it is possible to convert, the reader finds this rather complicated.

Access to e-books not only includes the reading device: it also includes access to the books. In our interviews, we find two dimensions of access: one is what books you can get and the other is what you have to pay. Available titles and price are both of importance, but in different ways for different readers.

In the survey data, it is evident that most readers access their e-books through public libraries. Many interviewees confirm this, but they are also aware that e-books can be accessed in several other ways. Two readers found the public libraries' stock inadequate, the number of titles for lending being rather limited. Others refer to the advantage of e-books being always available, and never having to wait for another reader to return the book. The interviewees also mention the possibility of borrowing books without having to visit the library. It does not necessary mean they never go to the library, but in certain circumstances, when ill for instance, when a library visit is not possible, downloading e-books is an option.

Several readers refer to a certain interest in specific genres and that printed books in these genres are not always available in the Swedish market. The e-book format makes foreign literature easily available and immediately accessible. Two interviewees stated that e-books are their second choice, but that it is the better choice if the alternative is to wait for a desired title in print.

The suppliers of e-books vary: people refer to Storytel, Dito, and online book shops such as Adlibris or Amazon, but also to services provided by, for instance, newspapers. When subscribing to a daily newspaper one is sometimes offered extras in terms of e-books.

Pricing has been discussed elsewhere in this book, and the price of e-books is also discussed by the interviewees. Some of the respondents find e-books expensive. They believe that the price should be much lower for e-books than for printed books, especially hardbacks. Many refer to the price of a paperback and think this would be a reasonable level for e-books. One objection to paying for e-books is that you do not really get anything: you can put a printed book in your bookshelf, but the e-book is not visible in the same way. The e-book is 'perishable' as one reader puts it.

Some of the respondents also relate price to value. If the book is very desirable and not yet available on the Swedish market they are willing to pay a rather high price. As one of the interviewees expresses: 'the pain threshold is controlled very much by curiosity'. One of the interviewees spending much of her time abroad differs from the others in that she finds Swedish e-books rather cheap in comparison. She does not mind paying the Swedish prices for fiction books, whatever those prices might be.

Although e-books are theoretically accessible because of the high penetration of reading devices in Sweden, it is evident that the availability of e-books is perceived differently depending on your genre interest and how you value the digital product. There is no simple answer to the question: In what ways e-books are desired? This is

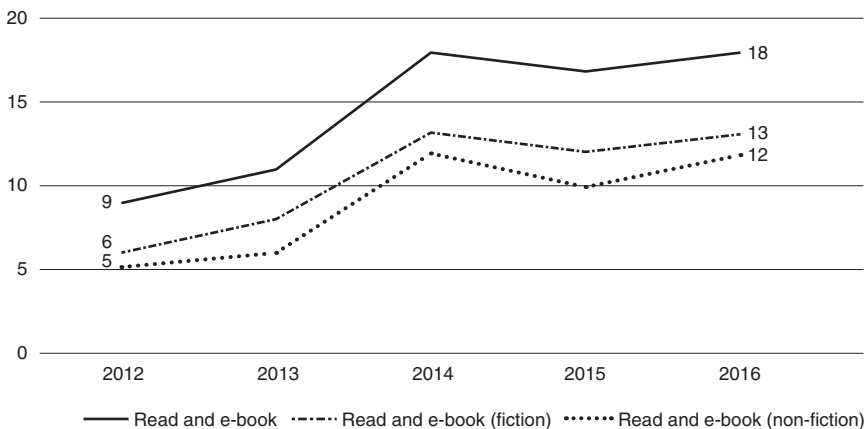
probably similarly difficult with printed books and other cultural products. To agree with Bourdieu (1984, see Chapter 3), it is a matter of individual taste and preferences.

## E-book reading

In spite of the fairly high level of penetration of reading devices in Sweden, there may be some challenges in using e-books, aside from the access issues. For example, the number of e-books available in Swedish and from the public libraries is still limited.

Beyond access and available titles, there is also the cultural dimension of books (see Chapter 3) which means that a book is something more than text or a message. The physical materiality can affect the meaning of a text and how it is interpreted by the reader (Littau, 2006; Rao, 2003).

The first five research questions deal with the development of e-book reading and who is reading e-books. E-book reading is not very common in the Swedish population, but has doubled between 2012 and 2014. In 2012, about nine per cent had read an e-book within the previous 12 months, compared to 18 per cent in 2014 (Figure 11.1). A similar result (17 per cent) was were found in 2015 and 2016, indicating a (possibly) temporary stagnation in the diffusion process. The largest increase was found between 2013 and 2014. The differences between reading fiction and non-fiction are small, and not statistically significant. The growth after 2012 is seen among both frequent and occasional readers (Figure 11.1).



**Figure 11.1** E-book reading in total, fiction and non-fiction, 2012-2016 (per cent)

*Comments:* The question was posed: 'How often have you during the latest 12 month read the following types of books?' E-book is divided into fiction and non-fiction. The scale runs from some time the latest 12 month to several times a week. Answers here include all reading the latest 12 month or more often.

*Source:* The National SOM Survey 2012-2016.

Several factors contributing to the overall understanding of e-book reading have been identified. First, there are patterns related to printed books, including a general orientation toward books in terms of reading, and both physical and online visits to libraries; secondly there are patterns of innovation diffusion related to socio-demographic variables.

Since many of these factors correlate, a regression analysis with data from 2015 was conducted for fiction and non-fiction e-book reading and for the total reading. The explanatory value of all these variables together ( $R^2$  0.14) is significant but still not high.

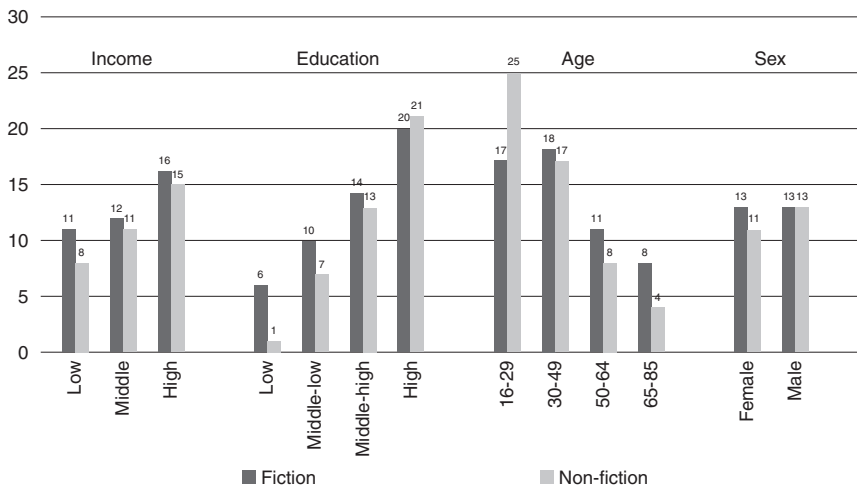
The impact of different factors varies somewhat for type of e-book. To be young or a student is more significant for non-fiction literature, as is level of education. The impact of tablet access is somewhat less significant for non-fiction, indicating that this type of e-book more often is accessed through computers (see Chapters 9 and 10). The highest and most significant correlations in a regression analysis with eight variables is found for online library visits, which is a precondition for use among a majority of readers, and reading of printed books indicating a general interest in reading.

When combining all e-book reading, the pattern is more similar to the results for fiction. Library visits are important for both fiction and non-fiction and somewhat stronger related to fiction. This further emphasises the importance of libraries for e-book distribution. The fact that there is a strong impact of public libraries online seems highly relevant since, in Sweden, these are the main distributors of e-books.

Even though correlations are weak, it is interesting to note that, overall, e-book reading is equally common among men and women (Figure 11.2). This differs from what is known of reading of printed books, which is significantly higher among women (Tepper, 2000; Höglund, 2012). One possible explanation to this is the higher access to media technology among men, and in the process of diffusion of digital media applications, men have turned out to be earlier in adopting several technological tools (Rogers, 2003).

However, when we combined two annual surveys, we found that a higher proportion of the more frequent readers are women in the age group 50 to 75 years and that men tend to read less frequently. This result is similar to a study from the e-book retailer Kobo, reporting the most active readers to be women over 45 (Flood, 2016).

In sum, it is evident that e-book reading to a large extent is a part of book reading habits in general and the availability of e-books through established, free, channels. Given that socio-demographics only to some extent correlate with e-book reading, one can assume that reading in general is a culturally-related habit, unconnected to digital habits. The differences between men and women, age groups, educational level and household income are shown in Figure 11.2. There are differences to be found for all these factors even if correlations are modest. The biggest differences are between age groups and different educational levels.



**Figure 11.2** E-book reading in different groups the previous 12 month (per cent)

*Comments:* Based on reading of e-books, fiction and non-fiction the latest 12 month or more often.

*Source:* The National SOM survey 2016.

Sometimes the decline in traditional media, such as the printed book, is ascribed to new forms of media. An in-depth analysis of the relation between reading of printed books and e-books clearly shows that the contribution of e-books to the total percentage of book reading is very limited (Table 11.1). Among those who have read e-books within the last twelve months, the majority also read a printed book. Hardly anyone in the survey claims to read only e-books. About two thirds, 68 per cent, of the population claim to have read a printed book but not an e-book within the last year. An additional 14 per cent have not read any type of book last year.

The contribution of e-books to the overall scope of book reading is similar to the borrowing trend in Swedish public libraries, where, as mentioned above, two per cent of the total lending consists of e-books. In academic libraries, the situation is very different since provision of access to digital material now dominates their activity.

It is difficult to interpret those findings since we are in the beginning of the diffusion process. Given the low figures for e-book reading, it is expected that overlaps will be great and that the old form will continue to dominate use. This might change, however, with the diffusion of e-books to a larger majority and with the future development of both content and reading devices. This is what happened with newspaper reading, for which digital distribution forms are more and more common and have replaced the printed paper, especially among younger generations (Bergström & Wadbring, 2010).

To conclude, it seems that factors explaining the reading of printed books are only partly relevant when explaining e-book reading among early adopters. E-book reading also seems to be an expression of technology access and digital library habits. It was

**Table 11.1** Contribution of e-books to book reading, 2016 (total per cent in the population 16 to 85 years)

|        |                                     | Printed book                        |                            |
|--------|-------------------------------------|-------------------------------------|----------------------------|
|        |                                     | At least once<br>the last 12 months | No time during<br>the year |
| E-book | At least once<br>the last 12 months | 18                                  | 0                          |
|        | No time during<br>the year          | 68                                  | 14                         |

*Comments:* The number of responses was 1,512.

*Source:* The National SOM Survey 2016.

also expected that the differences between fiction and non-fiction e-books might be greater than found here. All correlations are weak and the reasons for this are partly due to the small number of e-book readers. Future data collection will enable a better, large-scale analysis.

## Readers' reflections on e-book reading

The reader interviews contribute to an in-depth understanding of e-book reading on a general level and in different demographic groups of the population. As shown in the statistical analysis, age is an important factor explaining e-book reading apart from those significantly related to general book reading, library habits and access to reading devices. Reader interviews are presented below in three age groups: people older than 50 years (three group interviews and four personal interviews, 20 respondents in all), adults between 30 and 50 years (individual interviews, six respondents), and young adults between 19 and 29 years old (individual interviews, eight respondents).

### *Adults reading e-books*

The adult group of readers has normally reached stability in life with working careers and family, often with children. This implies reading for various purposes: reading connected with work, reading during leisure time for enjoyment, and reading with children. The questions, then, are: *How do mature people regard reading books in print and in e-format with various aims, specific for their life span? And, How do they reflect on the advantages and disadvantages according to these aspects?*

Most adult respondents read both printed books and e-books, but two out of six have turned to e-book reading during leisure time. One male respondent declares that he has not read a printed book since a couple of years ago. This has mainly to do



with his work which involves being ready for alarm turnouts. E-book reading is easy, smooth, and the portability of the device is perfect to his daily life. He also has a great interest in technological innovations. This interviewee reads solely American genre fiction in English, which means that he buys books from Amazon, Google Play, and Apple Store. Regarding factual information, he prefers reference books in print for his job. He knows how to use them and would not exchange this familiarity with searching and clicking in electronic versions. He also stresses the importance of reviewing when it comes to facts. Although he reads both printed and electronic books to his children, he doesn't believe that any breakthrough of e-books has come. Therefore, he believes, both formats will stay parallel in the future. A female respondent who reads only e-books during leisure-time borrows only from the public library. She is highly negative about the selection of books, because it does not satisfy her taste for genre fiction, books she anyhow does not want to buy or keep.

A male respondent reads American fantasy solely in e-format '... because curiosity forces me to do so. I have no patience if there is something I want to read'. This is the only genre or category of literature that he reads in e-format, as he suffers from dyslexia, which makes it hard for him to read in English as well as in e-format. So, he prefers printed books, but is a heavy user of books in all formats, five in parallel all the time. He estimates the proportions to be 70 per cent printed books and 30 per cent e-books. He describes the advantage of printed books as follows: 'One knows when to start fearing that the book will come to its end... Turning pages backwards to understand the whole thing and to concentrate... having dyslexia is sometimes confusing.'

Being a librarian, one woman started to read e-books because she thought she had to know the format from inside. Today, she reads novels only in e-format simply because she prefers it. Although her reading of fiction has turned to the e-format, she believes that factual content is even more suitable for this format, especially when searching for precise information. There are some categories of books she prefers to buy in print: encyclopaedia, dictionaries, and classics, because they are aesthetic and fit in well in the book shelves at home. Reading aloud for children is important in her family, and reading with children is only from printed books. Her conclusion is that libraries should advertise e-books more, and also should supply reading devices for lending to help the customers to get over the threshold.

Another woman has been reading fiction in e-books regularly during the last four years, but prefers printed books, i.e., factual content, at work. She finds it easier to orientate herself among facts in printed books: 'I often know exactly what the opening looked like, so I know how to find it again'. Up to 85 per cent of her leisure-time reading in e-format is borrowed from libraries, the rest of it she buys. This is fiction that will not be translated into Swedish and distributed through libraries. The main drivers and advantages to her are that reading e-books in bed is restful to the eyes and a good transition into sleep. Regarding non-fiction for study purposes, the advantages are great, she thinks, because of the ability to search and to carry it with you everywhere. The disadvantage is that not much is accessible yet, but also that online

bookshops and device are so closely interrelated. Personal integrity is a problem today, she thinks: 'This is the reason why I don't want to buy e-books from shops, because they want information on what you read, and certainly could gain money from selling this information to others...'. A third negative aspect is the high expenses for libraries for their e-book lending. Publishers make big money as the cost of production is low. The fact that buyers of e-books cannot do what they want with their property she finds strange: 'It's not fair that a company has such an impact on your life'. She is fully aware of the existence of different financial models. Some give support to authors, Flattr [a Swedish micro-donation site] for instance. She is well-informed of the e-book phenomenon and her views are both critical and ethical:

Do libraries always have to receive all kinds of technical development? ... This is an interesting issue, which should be discussed all the time... what is the worth or value compared to peoples' needs? I can pay for my e-books, but other people need much more basic things from the libraries.

Another woman among the adults divides her life living in Sweden and living on the other side of the globe. This makes her life here special, but also symptomatic of today's global society. During her education, she had to rely completely on e-books and digital material in the 'cloud' to be able to split her life between Sweden and her family-life abroad. For work she has continued using e-books, but she also adopted e-book fiction some years ago.

This respondent definitely prefers reading fiction in print, but she cannot buy or borrow printed books in Swedish where she lives, and keeping up with Swedish culture is very important to her, which is why she now reads Swedish literature in e-books. This has some disadvantages for her: having a mental image of the pages in a printed book is important to her, and she cannot maintain this when reading e-books. Another comment is that she cannot fill her home with all the books she would like to have: 'It looks a bit dull and boring in a home without books, it doesn't look educated.' However, she finds no difference in experience between reading print and digital and she uses apps in teaching her child to become bi-lingual.

Many readers in this age-group are retired or near retirement from regular employment. These people have more time to spend on leisure-time reading, which includes fiction, biographies, and other genres. Reading factual material is often related to special interests and hobbies. Engagement in reading-groups is a popular activity among the interviewees. The groups are chosen according to personal interests, and for social sharing, and discussion, mainly among women. Some respondents have become frequent readers of e-books after retirement.

In one of the group interviews, all but one read e-books on tablets. They found it pleasant, practical, and convenient. One member had taken the role of informal leader and inspired the others to read e-books. In another group of two men and three women, it is obvious that interest in new technology was split between the sexes. Both men used tablets for various purposes, and one of them was convinced that he would never

go back to print. On the other hand, the women in this book circle had no interest in new technology, and only one had tried reading e-books once.

In yet another group, a reader circle of four women led by a librarian, there was no interest in new technology, although some had been using computers as part of their work. Now, they consciously turned their backs on screen-reading, even though children and grand-children encouraged them to try. The librarian took on the role of informant about the advantages of e-books, by citing examples from her personal experience. The overall comment from the group members was that reading e-books belongs to the new generation. Other interviewees with no interest in new technology or its advantages, though being avid readers said: 'It's not my thing.' Turning their backs on computers after retirement is a relief to these interviewees.

The advantages and disadvantages of e-books presented above were discussed in the groups. One reader was always looking for interesting new books at the library, which she then borrows and reads on her tablet to avoid queuing. She was introduced to e-book reading from her daily newspaper, which provided e-books as a bonus for subscribers. Her interest in new technology is obvious and she finds reading e-books pleasant and useful, especially for the future, with the possibility to enlarge text. Font size was emphasised among several of the older readers. To another woman, in her 80s, e-books were something completely new, and the interview turned into information about the advantages for elderly people, like enlargement of text, no carrying of heavy books, or need to return borrowed books. To one member of a book circle, e-book reading on a tablet is a necessity, as she suffers from eye disease, although she would have preferred reading print.

One woman who did not read e-books found library visits and browsing among the shelves such a pleasant activity, that she wants to continue it. Contrary to this, others found advantage in not buying more physical books to store in their homes. As with so many other things, there are two sides of the coin also in this respect.

One male respondent who has a great interest in new technology, which is a part of his work, but also a private interest, points out the low cost and ease of delivery of e-books. The book circle leader who had encouraged his group members to read e-books claims to be prepared to pay a small sum for loans from the library. When discussing pricing and sales of e-books, one older man reflects: 'The publishers are not interested in generating a market for e-books, because they recover all their costs of production through the price of the printed book. So, there's a problem which is not going to be resolved easily.'

There are also perceived hindrances along the way to e-book reading. One disadvantage recognised by an older woman is that her library allows her to borrow only two e-books per lending-period of four weeks: this annoys her. In any event, she does not want to buy books either in print *or* in e-format: 'This is something that might change with the next generation.'

Two elderly readers also discussed the e-book format in relation to different genres. One man, with a collection of five tablet computers at home, believed that picture

books do not fit the e-format. Another elderly reader identifies the disadvantage is that highly illustrated books like art books and photographic books cannot be satisfactorily transferred into e-format and cannot compete with printed books. He comments on the enhanced e-book: 'I don't have much faith in the notion of enhanced e-books. I think we read to, in part, stimulate our own imagination and the enhanced e-book replaces our imagination with the interpreters' imagination.'

Other topics discussed are integrity in reading and copyright protection for the authors, but one of the interviewees believes that this is not a big problem. A Kindle text could easily be converted into an e-pub file, so DRM is nonsense, not a matter for the reader to be concerned with, he argues. Copyright and royalties are issues to be agreed upon between publisher and author in the contract. Sweden, being a small-language culture, allows no high sales of e-books whatsoever. Further, it will still remain a small proportion of the global market, he says. On the other hand, it might be an increase in less developed countries where the trend to use e-books in education is strong.

### *Young adult readers*

E-books are described with one word by all young adults in the study: the adjective 'smooth'. *Smooth* and *easily accessible* are the most frequently mentioned advantages related to e-books. All young adult respondents had experienced reading e-books, mostly on an iPad or iPhone. Some also possessed a dedicated e-reader.

Young adults in this study are avid readers of genre literature such as fantasy and 'chick lit'. This is the main reason why they read e-books: this literature is often produced in serial form in the USA, and the respondents are eager to read the latest parts as soon as possible, and therefore buy them from Amazon. They prefer reading in the original language because these genres are not easy to translate: 'too much will be lost in translation.' The focus on genre fiction and sub-genres imply that these respondents do not use public libraries to provide this type of e-book, simply because public libraries in general do not distribute them. Buying e-books is not a problem for the young adults in the study, as they are cheaper than printed books.

By coincidence, one interviewee read *Crime and punishment* by Fjodor Dostojevskij as an e-book as she needed it quickly. Her conclusion was that *Crime and punishment* is the best book she ever had read and the format had no influence on her reading experience.

Although eager to get their hands on specific genres and newly released literature, no matter what the format, overall, most of the respondents prefer reading fiction in printed books because of the haptic and physical contact. They like the touch and the smell of the book, they like it as physical objects, something you can see and follow visually during the reading process: 'It's more peaceful to read a printed book.' They like to store their best reading experiences in their book shelves at home. Another advantage is the design and the para texts of the printed book, which are not easy to convert into e-format. As one declares:

I believe this has an effect on my unwillingness to read e-books. I know that the books are written to be read in print; maybe the cover is adjusted to format and content. I once read a book with black edges, which had been very difficult to transfer into e-format. But this is also part of the reading experience and to the understanding of the book.

For reading of non-fiction, the approval of e-books and digitised material is more pronounced than for reading fiction. Easy search ability is the main reason for this preference among the young adult respondents.

A clear difference between the young adults interviewed and other age-groups is that their reading of e-books is focused on American fantasy in its original language. They buy these books, but hardly any other fiction genres or classics, and they do not borrow e-books from the public library at all. The appreciation of printed books is evident when it comes to literary fiction, but non-fiction is preferred in digital format. Many young adults avoid reading e-books during holidays and travels, because they are afraid of losing their iPads or dedicated reading device, which are expensive for them; instead, they prefer to read paperbacks when traveling.

### *General reflections on e-book reading*

The perceived experience of reading e-books differs somewhat among the interviewees, and some experiences cut across the age-groups. One person claimed that he finds the digital format somewhat confusing since he easily gets lost in the digital text. Another has a technique when reading printed books, of not reading all words on a page, a strategy which does not work on a screen, she says. One woman suggests that printed books are written to be read as printed books, and also that cover and other markers are part of the reading experience. Therefore, she claims, printed books should be read only in print.

Others really cannot tell any difference when it comes to reading experience in different formats, or that, for instance, it would be easier to recall what you have read in a printed book than in an e-book. An older woman talks about an 'habituation process'. Another interviewee defines reading experience as 'when you have time to read and really can go into the book and don't want to be disturbed'. She has not experienced quite the same intensity in reading experience from e-books as from printed books, but reflects on whether this is a question of habit.

One respondent, a librarian, has even read the same title in both formats and cannot trace any difference in reading experience. Yet another interviewee says that the reading experience is important and that reading on the cell phone is limiting in that sense.

If the content of the book captures you as a reader, the format does not matter, says one of the older women, and an older man also experiences reading and immersion as independent of formats: 'You are lost in a text, absorbed. Everything is going on in your head.' Personally, he now reads more e-books than printed books.

A female reader raises the question of distraction and relates it to reading experience. She says that she finds it 'quieter' to read printed books because you do not get

the light from the screen. She also says that the tablet distracts her with all the applications available, that it is easy to open Facebook for instance, to check something, and she perceives that as a distraction. Another woman mentions how easily you can be interrupted from text messages and other things when reading digitally.

A couple of interviewees relate reading experience to place and find it difficult to create the same reading environment with digital platforms as with printed books. They claim you cannot curl up on the couch with a computer or tablet, but others find it great that you can put the tablet in front of you, not having to hold it like with printed books, and find this favourable.

Altogether, both survey and interview data indicate that capturing e-book reading is complex. It relates to the experience and interest in reading as well as the experience of necessary technology. These experiences in turn are diverse and hard to capture in single dimensions. Not least, it is evident that attitudes towards the e-book format are at stake here.

### E-book attitudes – the affective dimension

The last research question deals with the affective and cognitive dimensions of attitudes towards e-books and how they relate to use and to background factors (Ajzen, 2005). Affective dimensions are captured in a 2013 survey distributed to a representative sample of the Swedish population. The first question in a battery of four is a more general assessment of the e-book hypothetically replacing the printed book. A mean of 7.24 out of 10 clearly indicates a strong position for the printed book (Table 11.2).

**Table 11.2** Attitudes to e-books and e-book reading, 2013 (mean, std and per cent)

|   | Mean | Std  | Share scoring 8-10 (per cent) | Number of responses |
|---|------|------|-------------------------------|---------------------|
| E-books can never replace the feeling of the pages of a printed book    | 7.24 | 3.21 | 58                            | 1,547               |
| To read e-books are as yet too complicated                              | 4.96 | 3.56 | 29                            | 1,524               |
| The e-book format is best suited for shorter books                      | 5.34 | 3.43 | 31                            | 1,504               |
| The ability to read e-books means that I buy/borrow fewer printed books | 3.89 | 3.81 | 24                            | 1,520               |

*Comment:* Percentage shares of respondents answering 8-10 on an 11-grade scale from 0 to 10 are presented. Respondents who have taken a position on each item are included in the analysis.

*Source:* The National SOM Survey 2013.

The respondents also took a stand on three more e-book-specific issues. It is evident that we are not dealing with technical issues or handling of technical devices. E-books are only to some extent perceived as too complicated (mean 4.96). Nor does it seem

to be a matter of format and length of books that prevent people from reading longer e-book texts (mean 5.34).

Another dimension of attitudes measured is about how e-books affect the purchase or borrowing of printed books. It turns out that the possibility of reading e-books does not, to any great extent, mean that people say they are buying or borrowing fewer printed books (mean 3.89). However, there is a group of readers who tend to agree that the possibilities to use e-books reduces their acquisition of printed books and among more frequent e-book readers this group is larger than among those who read e-books less often.

Even though a majority support printed books rather than e-books, there is also evidence for e-book support. It is probable that attitudes to e-books will follow a similar pattern to the reading of them, when it comes to socio-demographics, reading habits and library visits. Studying the impact of different factors on attitudes to e-books clearly suggests that the overall experience of reading books in different formats is strongly related to support for the format you are used to, but the strongest impact on the general attitude is for frequent reading of printed books.

A few significant, but small sex differences are found for the replacement item and for the items regarding format and length of books. Women are slightly less positive towards e-books and more positive towards printed books. Tablet access and attitudes covariate, but the correlations with attitudes are very weak. It is also evident that frequent library visitors more often suggest that the e-book format is best suited for shorter books, and that they, to some extent, might buy fewer printed books when e-books are available.

Thus, we find that support for the e-book is stronger in groups with experience of digital reading and with access to, or current use of, digital tools like tablets and smartphones, and also among those with experience of library use through the Internet and those with experience of reading literature or non-fiction in digital form. Considering the high level of access to tablets, the factors holding back the diffusion of e-books seem to be more related to structural constraints in the book market, habits and attitudes than access to technology (Bergström & Höglund, 2014).

Related to the affective attitudes studied in the survey, are the discussions among the interviewees regarding cultural aspects of the different book formats. Some perceive that the codes set out in a printed book are missing. You cannot see the front page, the title and the author to the same extent as with a printed book. This makes you forget title and author easier when reading e-books. The visual memory seems to be of importance for some readers. But not all interviewees point out these cultural aspects of book reading. One reader says that the visual markers characterising printed books are not necessary when reading fiction, which is why the e-book format is very suitable for fiction reading. Further, you can browse and you can see how far you have read in the print format. Especially the importance of a marker to see how much there is left to read seems to be important. But it is not only the codes that matters, there is also an aesthetic dimension of books: 'printed books are... [more pleasant] with the cover and how they look in the shelf.'

A few persons also mention the tactile dimension of a book, the feeling of holding or browsing a printed book. No one can define that feeling, but they find it very important that a printed book creates a certain feeling. Also related is the smell of a printed book which cannot be achieved from e-books. It is the feeling of something physical which is lost in the digital format. One older man who only reads e-books nowadays also mentions the tactile dimension of books and says that he likes to go to bookshops to look at books, and sense this.

Some of the interviewees express a feeling of ‘well-being’ from having books on their book shelves or on the coffee table. One woman mentions that she has even bought a book in print which she first read digitally because she wanted it on her bookshelves. ‘I think one wants one’s favourite books on the shelf because it is part of your personality’ she claims. To one Swedish woman living abroad, Swedish books are part of her identification and by keeping them at home they tell her friends that she has a Swedish nationality. Others find the e-format better because they do not want to keep the books after they have finished reading.

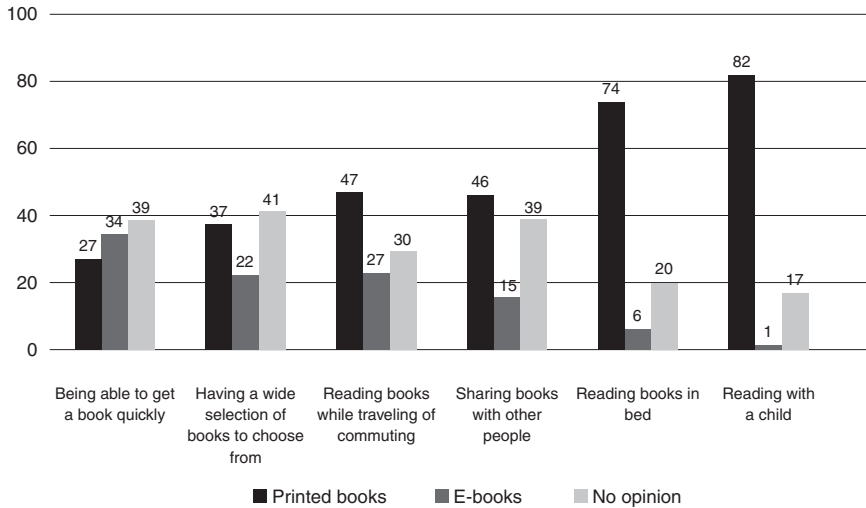
A few of the people in the interview study mention different technical obstacles with digital reading. One woman mentions that she has experienced from reading news online that content may simply disappear. But rather than mentioning technical obstacles with e-books, some of the interviewees say that they are uninterested. It has never crossed their mind that the digital book format would be an option for them, but they do not see this as a problem. If they want to read a book they simply turn to a printed copy. So they identify a threshold, but have no interest in crossing it.

All in all, the interview data confirm what is found about affective attitudes in the survey. First and foremost, the attitudes express a kind of cultural perspective, where the e-book is not even near to competing with the printed book. Although a more general technical reluctance can be traced among the persons who do not read, it is not an argument based on experience, but a more general technical resistance. Among the readers, technical facility with e-book devices is seen as meritorious, and contributes to their more positive attitude towards e-books.

### E-book attitudes – the cognitive dimension

The cognitive dimensions of attitudes to e-books were captured in a 2014 survey. An American study from 2011 was replicated (Rainie *et al.*, 2012). Also in this respect, the overall impression is of strong support for the printed book, when functions are studied (Figure 11.3). This is especially evident regarding reading with a child. Printed books are also undoubtedly perceived as better when reading books in bed. When sharing with others, and when reading books while traveling or commuting, printed books are still in favour, but the differences are smaller. Also, regarding having a wide selection of books to choose from, differences are small, whereas the e-book is perceived to be better when you want to get a book quickly.





**Figure 11.3** Format preferences in different situations (per cent)

*Comments:* The question was posed: 'Which is better for the following purposes, a printed book or an e-book?' Respondents who have answered each item are included in the analysis. The number of respondents vary between 1,663 and 1,698.

*Source:* The National SOM Survey 2014.

It is important to note that many respondents do not take a standpoint on the issues. For four of the items, the share of 'No opinion' answers is between 30 and 40 per cent, for two of them about half as many. It seems that some situations are harder to evaluate than others and of course it is difficult when you lack experience of e-books in a specific situation. The share of respondents who do not take a position on the matter vary when comparing different groups. It is larger among older people than among younger. The share with no opinion also decreases with higher levels of education, and persons with access to tablets have a lower share of no-opinion answers than those who have not. Book readers and persons who visit public libraries and online libraries also have significantly lower shares of no-opinion answers than people with less contact with books and libraries. Also on this matter, a multivariate analysis will reveal factors that might have impact on the attitudes.

A linear regression including the same independent variables as in the previous analysis was conducted. It is evident that reading of printed books is the single most significant factor also when we try to explain format preferences. This is evident for all situations asked for in the survey. The more frequently you read a printed book, the less the support for e-books. For three of the situations, e-book reading has a significant, but weak correlation with format preferences. E-book readers are more positive towards reading e-books in bed, but less positive towards e-books when wanting a wide selection of books and when sharing with other people. It is also evident that habits and experience to some extent affects assessments, but that the habit of reading

e-books is not yet as settled as the reading of printed books. The cognitive attitudes are more strongly related only to reading habits, whereas the affective attitudes presented above have a somewhat broader range of explanatory factors.

There are rather strong correlations between different sets of attitudes and book reading. Especially if we look at respondents with the most positive attitudes, we reach a proportion near the actual proportion of readers, which for the whole population studied was 11 per cent 2013 and 18 per cent in 2014. Even in the groups most positive towards e-books the proportion reading printed books is much higher than for e-books but diminishing as the support for e-books increases. Whether the attitudes precede behaviour or come as a result of trying e-books may vary. It seems to go both ways and we can assume that attitudes become more favourable with more frequent use of e-books.

The interviewees confirm what is found in the survey: one of the most mentioned benefits with the e-book is the availability, the convenience of access to the resource. E-books are perceived as easily accessed. You do not have to visit the library or bookshop to get your hands on a desired book. If you are in a bus or train or in some other situation, you can always get an e-book, provided the reading device has Internet access. As already mentioned above, you can also obtain literature not yet released in Sweden, mainly American or British books. Niche genres which might not be released at all on the Swedish market might also be available in the digital format.

Another function of e-books, revealed in the interviews, is portability and the possibility to download many books to one device, and not having to carry a heavy load of physical books. This is perceived beneficial, for instance, while traveling. As one interviewee says: 'Well, the iPad is not light, but it is lighter than a thick book.'

When talking about reading to children, the interviewees agree that printed books are preferred. Just as with the reading experience in general, many do not have a clear argument for this, it is just the way it is. The notion of literacy and reading skills often seem to be associated with printed books according to the interviewees. Reading an e-book for the grandchildren is simply out of questions: 'Children's books shall be real books.' One interviewee mentions that it is hard to find picture books for tablets. Another argument for not reading e-books to children is that they already spend so much time with different screens that they need other contexts. The printed book and reading with them gives one such context.

The pros and cons of e-books are revealed in all data material. There are preferred situations for both e-books and printed books, although the overall support for the printed book seems to be strongest when measuring attitudes on both affective and cognitive dimensions. Just as with reading, the context of e-book attitudes is complex and diverse and includes both experience and interest from the readers' point of view.

## Attitude indexes and reading

The two sets of attitudes from the 2013 and 2014 surveys were summarised in indexes. The four items of affective attitudes were summed into low, middle and high positive attitudes. The cognitive attitudes were summed into three groups based on the number of situations where e-books were preferred before print. Both of these indexes are related to reading of literature in print and as e-books. The highest correlation is between the affective index and reading of e-books (Table 11.3).

**Table 11.3** Proportion reading literature in print and e-book after attitudes towards e-books and format preferences (per cent and Gamma)

| Affective attitude index                    | Not at all positive         | Moderately positive         | Highly positive             | Gamma    |
|---|-----------------------------|-----------------------------|-----------------------------|----------|
| Read e-books                                | 1                           | 3                           | 19                          | 0.82 *   |
| Read printed book                           | 49                          | 43                          | 27                          | - 0.23 * |
| <i>N</i>                                    | 520                         | 498                         | 166                         | 1,158    |
| Format preferences in different situations: | E-books better in 0-1 cases | E-books better in 2-3 cases | E-books better in 4-6 cases | Gamma    |
| Read e-books                                | 6                           | 16                          | 21                          | 0.46 *   |
| Read printed book                           | 67                          | 57                          | 41                          | -0.32 *  |
| <i>N</i>                                    | 335                         | 203                         | 109                         | 647      |

*Comment:* \*  $p < 0.001$ .

*Source:* The National SOM Survey 2013 (attitudes) and 2014 (format preferences).

The attitude indexes are clearly related to reading literature in print (negative correlation) as well as reading literature in the form of e-books (positive correlation). The correlation for e-books is somewhat stronger than for print. This suggests that after trying e-book reading the attitudes may be more positive, but also that the dominant way of reading in print will stay for a long time.

To sum up we will repeat the regression analysis on e-book reading, now including the cognitive attitudes to e-books. It is evident that attitudes to print and digital formats in different settings can contribute to the understanding of e-book reading (Table 11.4). The explanatory value of the model now increases to 0.18 compared to 0.14 for an analysis without the attitude variable.

Attitude towards print and digital books is the single most important factor in the model, when taking all the other factors into consideration. Habits of book reading and library visits also contribute to the overall understanding of e-book reading, but to a smaller extent. The effects of background factors, income and tablet access are rather small in the presented model.

**Table 11.4** Factors explaining e-book reading (OLS, std. beta)

|  | Std. beta | Sig. |
|--|-----------|------|
| Sex                                    | 0.04      |      |
| Age                                    | -0.05     |      |
| Level of education                     | 0.07      | *    |
| Household income                       | -0.06     | *    |
| Tablet access                          | 0.04      |      |
| Reading printed books                  | 0.17      | ***  |
| Library visits                         | 0.17      | ***  |
| Online library visits                  | 0.02      |      |
| Functions of printed books and e-books | 0.28      | ***  |
| R2                                     | 0.18      |      |
| n=                                     | 1,202     |      |

*Comment:* \*  $p < 0,05$ ; \*\*  $p < 0,01$ ; \*\*\*  $p < 0,001$ .

*Source:* The National SOM Survey 2014.

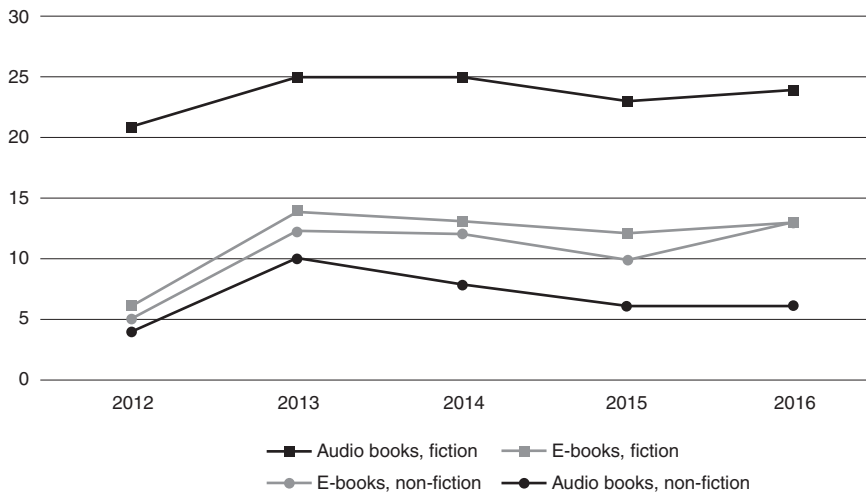
## E-book reading in a broader reading context

In this project the e-book has been considered as an innovation and one aspect of digitisation in society with a possible impact on traditional reading. However, the e-book is not the only alternative to print as in recent years we have also seen an increasing number of readers using audio books. Digitisation allows new ways for dissemination of these, which seems further to stimulate this alternative to print. Digital audiobooks are recently reported to increase significantly (Graham, 2016). Thus, while the proportion reading printed books at least to some extent seems comparatively stable at a high level, new alternatives have increased their share of total reading. If we calculate the proportion of readers of any kind of book whether in print, as e-book, or as an audio book, in 2015 it was about 81 per cent of the Swedish population according to our survey, while print alone accounted for 72 per cent.

The use of e-books and audio books is compared in Figure 11.4: both increased during the first two years measured, i.e., between 2012 and 2013, especially for non-fiction. The differences between other years are small and not significant. It is obvious that use of audio books in the form of tape or CD was established earlier than the digital forms of audiobooks and e-books dominating today. This is also reflected in the curve showing fiction, which here starts at a higher level than the other three curves. As the question is about audiobooks not specifying type of audiobook, all the different formats for audiobooks are reflected in the data.

Figures on reading in Sweden can be compared to similar data on reading the previous 12 months in the USA. The Pew Research Centre (Perrin, 2016) reports a share of US adults reading printed books which is lower than in Sweden (63 per cent compared to 72 per cent 2015), but the figure for e-book reading is much higher in the

USA (27 per cent compared to 17 per cent in Sweden) but the proportion who listened to an audio book in US (12-14 per cent) is considerably lower than the Swedish figure.



**Figure 11.4** Reading of e-books compared to audio books the previous 12 months 2012-2016 (per cent)

*Comment:* The question was posed: 'How often do you read the following?' Reading at least once the last 12 months is presented in the figure.

*Source:* The National SOM surveys 2012-2016.

Changes in book reading are often discussed and there are repeated reports saying that book reading is declining, which is considered especially dangerous as reading and reading skills are important for learning and for society as a whole. However, the presentation above also shows that total reading is changing very little over time. There are also different ways to measure reading. The proportion reading at least once a year is of course just one limited indicator. Reading frequency, reading time and several other aspects can be considered over longer time periods. With new formats like e-books, streamed audio books and other types of e-reading, previous time series for 'book reading' are suddenly less easy to continue to measure and to interpret. Having said this, it seems obvious that e-books and audio books offer alternatives to print and also that they add some to the figure for total book reading.

## Discussion

Longitudinal, representative surveys combined with in-depth interviews with readers give a quite clear picture of the complex situation of e-book diffusion and reading in the Swedish population. First and foremost, one can conclude that we are still in the

beginning of a diffusion process, meaning that we are in the early adoption phase (Rogers, 2003). Although the number of e-book readers in the Swedish adult population has increased between 2012 and 2015, the pace has stalled when less than 20 per cent of the population read an e-book during the last 12 months or more often. If we consider only more regular readers, for example those who read e-books at least monthly, the proportion in 2016 is still less than 10 per cent. However, this can be expected to change over time, partly as a result of the high proportion of readers among younger citizens (Figure 11.2).

One likely explanation for the rather modest number of e-book users despite the high penetration rate of tablets, compared to, for instance English speaking countries like Great Britain and the USA, might be that Sweden is a small-language market. The high tablet penetration indicates a great potential for e-book reading to expand and reach beyond the group of early adopters. Still, the development is also a question of available titles in Swedish, not least in public libraries, as well as the policies of publishers and the future pricing of e-books.

The early adopters revealed in this study are similar to the groups identified in the diffusion of innovations theory (Rogers, 2003), technology acceptance model (Davis, 1989), and the unified theory of acceptance and use of technology (Venkatesh *et al.*, 2012). The use is more even between men and women than expected from what is known from book reading in general, but this is in line with the fact that men more often tend to be early adopters of technology. Women, on the other hand, read literature and visit libraries more often. It can be assumed that these two tendencies currently are in balance and that the proportion between men and women may change in later stages of the adoption process.

Added to classical demographic explanatory factors, it is evident that interest in and access to technology matters. Income is of importance in the bivariate analysis but loses some of its explanatory power in the multivariate regression analysis. The differences between those with high and low levels of education, between age groups, and between library users and non-users are also initially striking, but, in the multivariate regression, access to tablets and smartphones stand out together with library visits and library visits online. Other digital reading habits like reading the newspapers and blogs show only a weak correspondence with e-book reading. Instead, attitudes and previous experience of e-books stand out as exceptionally important predictors of e-book reading.

The relatively great importance of digital library habits is probably explained by the fact that public libraries dominate the Swedish e-book market. Direct sales to users have been rare until today and the terms for library access of e-books in the future are frequently discussed between libraries and publishers. Those not using libraries may also have limited knowledge of library services for e-books. In the USA, it was found that large groups were not aware of the possibility of borrowing e-books from their library (Zickuhr *et al.*, 2012).

Turning to theories on substitution and displacement (Chan & Leung, 2005; Dimmick, 2003; Nguyen & Western, 2006) it is obvious that e-books fill a complementary

role, as even frequent users of e-books also read print frequently and the print format still is preferred by a majority. For many readers, replacement of the printed book is not an issue; rather, parallel activities are taking place. Some readers explain, however, that they might replace the printed book under some circumstances, in some situations, and for some genres. Such conditional replacement indicates that we are far from seeing printed books being replaced by e-books.

The set of affective attitudes towards e-books tested in the survey show a general correlation with e-book reading for all measured dimensions. Two of them were also related to reading printed books. The explanatory power of age, sex, level of education and library visits together with book reading is still limited, partly as a result of the small proportion of e-book readers. It is reasonable to assume that attitudes may change with increased use of e-books. The reading of printed books is, however, an important factor indicating a need or an interest in reading.

When comparing functions of print and e-books in different reading situations, the impact of print experience is also evident, as is previous experience of e-books, level of education and experience of online library visits. When adding attitudes to the explanatory model, it is evident that there is an interrelation between attitudes and behaviour, just as suggested by Ajzen and Fishbein (2005).

Attitudes can stem from different sources. We have mentioned habits and earlier experience as important aspects, which also seem to be relevant here. However, attitudes can also be related to taste and social status and the social circles you belong to (Bourdieu, 1984), which were not studied in the presented survey, although mentioned by some interviewees. Nor did the interview study reveal such status-related implications in e-book reading. Interpreting the interviews, the format is not of any great importance on this dimension, and simply does not seem to override the content.

Up to now, the e-book format has to a large extent resembled that of the printed book. Some of the interviewees also emphasise that it is the content rather than the format that captures you when reading fiction, and that matters. This might be explained by reading strategies related to literary or genre fiction, or to different purposes when reading fiction compared to non-fiction (Baron, 2015). Others report on difference in immersion related to different formats (Mangen & Kuiken, 2014), or stress the importance of the sensuous and emotional experience, haptics, in reading on paper (Baron, 2015; Gerlach & Buxmann, 2011; Mangen, 2013). Some prefer the search function in e-books when reading non-fiction for studies, while others prefer printed copies for cognition and in-depth learning (Wolf, 2007; Wolf & Barzillai, 2009). A few respondents, however, go beyond the linear text and talk about the enhanced e-book (Constanzo, 2014) and find it to be unfavourable for the digital format since photo and other art are perceived not to be easily transformed into e-format. It is evident that we have not yet seen the full potential of e-book in this respect, and it is just as evident that this might not appeal to all the readers.

## Conclusions

Referring to Winston (1998) and the supervening social necessity, it is evident that several necessities are surrounding the e-book from the readers' point of view. Portable format, content accessible around the clock, through space and across markets are characteristics identified by readers in surveys and interviews. However, besides access to technology, availability of books and general interest in reading, the importance of personal experience and attitudes are found to be essential for e-book reading in the analysis.

The 'law' of suppression of radical potential can also be traced in different circumstances. First, it is evident that a lot of people are simply not interested in digital books, no matter availability and other potentials. They express that they have no need for e-books; their reading needs are met by printed books. Although introducing the idea of the e-book might create some interest, it is less likely they will take up reading digitally.

Among those who are reading there are several obstacles surrounding the e-book experience. Unwillingness to pay for e-books, with a few exceptions, directs readers to libraries where supply is limited. There are simply insufficient numbers of titles to choose from unless you want to pay for the e-books. Here is where a paradox might occur: it seems that people want popular titles easily available for free whereas there seems to be a willingness to pay for rather unusual content provided by non-Swedish actors especially in the English-speaking contexts.

The printed book as an artefact, physical and tactile, to a more distinct degree than the virtual e-book, is connected to various forms of "capital", such as economic, cultural, social and symbolic (Bourdieu, 1993). The notion of ownership, taste, and identity might be more evident with books as artefacts (Bourdieu, 1984). Also, the reluctance in the audience, perceived by the publishers, can be a fact when releasing new titles. This seems to be easier as long as they are not made available for free through public libraries at the same time. There is certainly a tension between all the actors in the field related to their different interests (see Figure 1.1, Chapter 1).

There are also social and/or cultural factors holding back the e-book. As Littau (2006) and Mangen, Walgermo and Brønnick (2013) argue, form is inseparable from content, and the book as both medium and message contribute to the overall experience of reading (Rao, 2003, see Chapter 2). Both survey and interview respondents clearly express their preference for the printed book just because it is printed. They can sense it with all their senses and, without being able to further explain why, they claim that this is important to them. Such a cultural expression is difficult to contest, and it will most likely take two or more generations before the e-book format is seen as natural as the printed book.

It is safe to assume that the future development of supply and pricing of e-books will contribute to the pace of future diffusion. But there are also other changes on a societal level that might influence e-book reading habits. National plans for an e-book platform within the existing public library organisation might also change the pre-



conditions for e-books on the Swedish market, which in turn will affect the readers' willingness to become e-book readers.

Considering the importance of reading in general and the ongoing changes in the book market there seems to be a need for future research to study more in detail different aspects of digital reading and reading for different purposes, for entertainment as well as for learning.



## Chapter 12

# Conclusion

The e-book is the most recent member of the family of digital media: digital music and digital films, along with online magazines and newspapers, had already made an impact on their relevant industries before the e-book emerged and showed signs of revolutionising its industry in the same way as these forerunners.

When the e-book began to make its influence felt, the usual prognosticators of doom voiced their forecasts for the virtual disappearance of the printed book; for example, even Nicholas Negroponte of MIT's Media Lab, suggested, in 2008, that the physical book would be replaced as the dominant form by the digital version, in five years (Siegler, 2010; also, see Ruppel, 2010). That has not happened and, indeed, the forecasts are now for a resurgence in the sales of printed books, and a revival of the independent bookshop. At the same time, we have reports of the greater benefits to childhood learning of the printed book (Parish-Morris *et al.*, 2013; Krum, 2015), and, contrariwise, of the e-book (Chiong *et al.*, 2012). University students' dislike of e-books and their preference for the paper form, with its reader capacity for highlighting and annotating has also been noted (Swain, 2010; Wu & Chen, 2010; Baron, 2015).

Within the industry, broadly defined to include publishers and booksellers (both online and bricks-and-mortar), the response to and adoption of the e-book has been varied. The battles between publishers and Amazon have been extensively reported (Amazon's battle..., 2014; Christensen, 2014; Ulin, 2014), the rise of the self-published author, and the transition of some to the traditional publishing world, has been documented (Colbjørnsen, 2014) and Amazon's dominance of online e-book selling and its impact on the traditional bookshop through its sales of printed books is also well recorded (Wasserman, 2012; McNees, 2016).

Making sense of these developments, globally, is not easy: reports tend to focus on the English-speaking market and, within this, on the market in the USA, and, when comparisons are available, the statistics are fragmentary and/or biased. For example, the quoted statistics for the decline in e-book sales are those of the American Publishers' Association (see Chapter 4), which do not include non-members of that Association and, crucially, do not include the sales of self-published authors, mainly through Amazon, but also through companies such as Smashwords, Lulu, and Author House (Author Earnings, 2015). Statistics on e-book sales in Sweden, if available at all, suffer from similar problems.

## Overview of the e-book situation in Sweden

The aim of this project has been to make sense of the impact of the e-book in the Swedish book market, not only from the perspective of publishing, but also from the points-of-view of authors, booksellers, librarians and readers. Our objectives have been to explore the impact of e-books in Sweden throughout the entire book production chain, from creation by the author, to the reader. In doing so, we have used as our primary theoretical framework that of Winston (1998), whose ideas of the 'supervening social necessity', which drives adoption, and the 'suppression of radical potential', which delays it, have proved fruitful in the analysis.

Our conclusions have been presented in the individual chapters that have dealt with the principal actors in the production, distribution and use chain and, here, we shall simply summarise those conclusions and add our own speculations about the impact of the e-book and its future in the book market generally.

The first thing that we have learned about the situation that the e-book is creating within the Swedish book market is the great variety of reactions within the groups of actors that we have examined. This is, of course, explained by the heterogeneity of the book sector itself, and it ensures that the stories and myths dominating the media do not represent the variety of strategies, behaviour and attitudes within each and every group. Even the most unified actors, state financed libraries, display a variety of approaches to e-book issues. This statement, however, does not mean that there are no dominating powers in the field or common trends of the strategic approaches within and across the groups of actors.

The tensions are visible among all the groups of actors: authors and publishers, publishers and librarians, libraries and booksellers, booksellers and publishers, consumers and publishers, etc. Tensions are also visible between the same types of actors not only because they are competing with each other, but also defending their ideologies, choices, and habits.

### *The authors' perceptions of the e-book*

First, considering the authors, it is evident from our work that a number of factors distinguish the different response from different members of this community. On the one hand, those authors seeking to make a successful career are receptive to, and, to an extent, using, the e-book format to present their work, voicing such sentiments as that it is better to be seen and read than to make money from one's writing. On the other hand, the established writers, successful in the market and acclaimed critically, are happy to depend upon the traditional format. We might present this as a contrast between 'exposure' and 'reward' as the driving forces for authors using, or not using, e-books.

The implications of these differing positions for the future of the e-book would seem to be that emerging authors are more and more likely to use self-publication

with e-books, while the established authors are likely to continue with the traditional mode of publishing. It seems that the one thing that could push the established authors towards e-publishing would be an increase in the number of readers choosing to read e-books; perhaps together with increased use of the author's backlist through library lending and subscription services.

### *The publishers' view*

Turning to the publishers, we must first recognise that the term 'publisher' is no longer a term of limited definition: Amazon, the world's biggest online retailer, is now a publisher; Storytel, starting as an audio-book subscription library service, is now a publisher; thousands of authors are now, also, publishers. In other words, the term no longer defines a gentlemanly, scholarly occupation, located in Stockholm's old town, or in the vicinity of the British Museum in London, but, on the one hand enormous multimedia businesses such as Bonnier, Sony, Bertelsmann and the rest, and, on the other hand, micro-publishers, operating out of their living rooms or bedrooms.

This diversification leads to a situation rather analogous to that of the authors: the emerging 'publishers' choose e-publishing almost as a default mode, while the traditional giants seek to depress the market for e-books through their pricing policies – and, while their e-book sales continue to decline, sales from Amazon of the self-published books of its authors continue to grow.

The major publishers blame their lack of commitment to the e-book on the lack of demand from readers, but this argument falls when one considers the evidence. It is well-known, for example, that e-book sales in the English-speaking world were continuing to grow, fuelled mainly by Amazon's pricing policy, until the publishers, through legal action, established the so-called agency pricing model, which meant that they, and not Amazon, set the price for the product. A fall in the sale of their e-books followed immediately, while Amazon's own products continue to sell in increasing numbers. After this also the yearly increase in number of e-book sales was reported to have ceased (Perrin, 2016) and, in our studies, we found a similar stagnation in Sweden in 2015 after a new loan pricing model for e-book lending in public libraries came into effect.

We are forced to the conclusion, therefore, that the reason for the low take-up of the e-book in Sweden is a direct consequence, not of poor reader demand, but of the lack of marketing by the publishers. As one of the small publishers we interviewed commented, 'so far, I have not seen an advertisement of a single e-book on the TV, or a celebrity author holding an iPad and showing – look, this is my new e-book'.

In other words, it seems that Winston's 'law' of the 'suppression of radical potential' is being invoked by the established publishing business, in order to maintain the profit levels they obtain from the printed book.

### *Bookselling and the e-book*

The next commercial agency in the chain is the bookseller, both online and on the high street—and this distinction is significant, since the online bookseller has the technology (or access to it) to distribute not only the printed book but also its electronic equivalent, while the high-street bookseller is more likely to lack such access and may lack the skills to implement e-book retailing, or the financial resources to buy those skills.

However, the high-street bookseller also divides into two types: the independent bookseller, whose outlet may be restricted to a single bookshop, and the bookshop chain, which, generally, also has a web presence. It is this web presence that is likely to make the difference in the future. We have seen a decline in the English-speaking world in the number of independent bookshops (and in the USA, the disappearance of the big, Borders, chain), mainly, it is supposed, because of the advent of Amazon and online bookselling and, if that pattern is repeated in Sweden, we can envisage the emergence of a major online retailer (possibly through the expansion of one of the existing players, possibly through an extension into the Scandinavian market by Amazon). If that happens, the impact on the small, independent bookseller is likely to be severe and only the online retailers are likely to survive, whether selling e-books or printed books. However, it seems that main commercial players on the Swedish book market are well-prepared to meet the challenge from Amazon, while smaller publishers and independent authors might even welcome it. Even independent booksellers are ready or preparing to go online and compete with giants supported by their loyal customers.

### *The role of libraries: public and academic*

The major players in the distribution of e-books in Sweden are not the bookshops, but the public libraries, who have adopted e-books as just another medium of publication which, by law, they are required to make available freely, as with printed books. However, the libraries do not have a competitive market in which to select what they will buy and from whom. The control of the supply of e-books to libraries is in the hands of Elib, which has, essentially, a monopoly position. Further, Elib is still partly owned by the four largest publishers who established the aggregator, enabling them, to control the pricing model, and e-book prices.

This presents public libraries with a problem: on a straight cost/benefit calculation, libraries would probably refuse to provide e-books, since they account for only about 2–3 per cent of total loans, country-wide, and the cost of those loans means that fewer traditional resources can be bought. The economic argument for dropping e-books, therefore, is strong. However, the professional ethos of the librarian, together with the legal requirement means that they are impelled to provide them. As shown in Chapter 9 public libraries tend to offer mainly e-books in the lowest price segment, avoiding the more expensive new books.

The larger publishers argue that library lending cuts into their profits from book publishing generally, while the smaller publishers welcome the income they obtain from loans. The claims of the big publishers are difficult to support, since, were it not for library loans, there would be almost no market at all for e-books in Sweden. Besides, one big publisher has experienced a totally opposite outcome of public library loans on its sales and supports a different lending model (see Chapter 7).

Historically, and globally, since the emergence of public libraries in the nineteenth century, publishers and booksellers have claimed that public library lending harms sales, while the evidence from then until now, is that borrowers are buyers, and that public library lending has stimulated the book trade to a far greater extent than it has harmed it (Baddeley, 2015).

It is true, of course, that the electronic format changes the potential for distribution (legal and illegal) of the product. We have seen this in the music industry, when the MP3 versions of pop songs began to be pirated on rogue websites, but the music industry has adapted to the new medium and one hears much less today about music piracy, than one did ten to fifteen years ago. There has been a similar concern in relation to online news reporting and the future of the newspaper industry: a contest that is still in play, and in Sweden, local newspaper publishers argued that SVT should not be allowed to report local news on its website (the Public Service Commission, 2016).

Most traditional news media provide digital opportunities to access their journalism, but business models are still lacking after about 25 years. With increasing news distribution on social network sites, it is evident that professional news distributors are losing control over the diffusion process. Although much news is now digitally distributed, it is, however, still the traditional distributors, public service broadcasting and newspapers, that most people turn to, and rely on for news about current affairs. Publishers and book sellers opposing the existing powers, regard e-books as a revolutionary force of digital society expanding online public spaces through public libraries and similar outlets, but it is likely that in time all possibilities will find their place in the complicated fabric of modern media.

The academic libraries are in a very different situation: digital resources, in the form of e-journals and access to online databases, have been a feature of information provision for decades and the e-book is simply a further extension of this trend. In Sweden, as in so many other countries, the main providers of e-books are the international publishing companies and aggregators and the dominant language is English. Sheer number of providers, e-book platforms, formats and different licenses act as serious barriers to organic integration of e-books into their collections and threaten to disrupt continuity and coherence of these collections.

Two more issues arise in academia: first, the printed book format is preferred by the majority of students, particularly those studying in the humanities and social sciences. They find the affordances of paper (the ability to highlight, make marginal notes, rapidly skim a text, etc.) more appropriate for their needs than any similar affordances provided in electronic texts. Secondly, in Sweden, the lack of material

in the local language is a severe disadvantage for some academic institutions and, at present, apart from the move to create native language virtual learning resources and to produce open access monographs, there is no answer to this problem.

Both public and academic libraries dream of the future, in which they own their e-books and can manage their effective use on a single platform.

### *Readers and the e-book*

Finally, we turn to the reader and, as with the authors we find two main categories (with numerous subdivisions of each!). First, there are the ‘traditionalists’, for whom the printed book is not simply a source of entertainment or enlightenment, but a valued cultural object in itself. Such readers regard reading not simply as the absorption of meaning from a text, but as a total experience involving the situation in which the book is read, its weight, its smell, its para-textual elements, and the texture of the printed page. They are likely to be buyers of books as well as library borrowers and are unlikely to be e-book readers, although there is a subdivision of this category, members of which will read an e-book, if a copy of the printed book is not available for lending from the public library. Access to the text, for them, is more significant than the nature of the medium.

On the other hand, we find a small number of readers (whom we might term the ‘innovators’), who very frequently turn to the e-book. The reasons may vary: In some cases, their special genre interest is a strong motive. For others, the portability of the device and its built-in storage capacity, which obviates the need to store the physical book, leads them to support the choice of e-books. We have also found that those with experience of e-book reading tend to have a very positive attitude towards e-books. But availability in a broad sense is important and still many do not even know about what the libraries offer. A survey in the USA found that even among library users a majority did not know that their library offered e-books (Zichur *et al.*, 2012). However, this route to the readers only works when the supply is interesting enough. This leads to the problem of pricing. If the relative advantage is perceived to be modest and the innovation is not much cheaper than the traditional way to satisfy a need, change of behaviour is expected to be slow. Thus, there are restrictions also from the readers’ point of view. E-book providers should also be aware of the impact of that ease of use has on customers and readers. That is the strongest factor that allows pirate e-book sites to win even over free of charge library services, not to speak of other outlets of DRM-protected e-books (Nielsen Holdings and Digimarc Corporation, 2017).

The debate on the benefits and threats of the e-book format for the reader continues, with much rhetoric on both parts, but little in the way of definitive research on the matter. It is argued, for example, that so-called ‘deep reading’, is inhibited by the e-book format, and some evidence from research in neuroscience and interdisciplinary research in laboratory settings has been presented to support this proposition (Mangen & Kuiken, 2014; Mangen, Walgermo & Brønnick, 2013; Wolf & Barzillai, 2009; Wolf,



2007). However, the great diversity of readers means that it is virtually impossible to determine which persons are likely to be inhibited in this way.

Some readers argue that, for them, there is no discernible difference between reading a book on a portable screen and reading a printed text, others claim to be readily distracted by using a tablet computer with the opportunity to be distracted by playing games, or checking one's e-mail, or the latest Facebook friend's posting. One answer to this, of course, is to use a dedicated e-reader, rather than a tablet, which would present no opportunity to be distracted. A further point, is that if one is so easily distracted from reading, perhaps one is not sufficiently motivated to read!

## General conclusions

Presenting a general conclusion to our work is virtually impossible, given that this innovation is at, in the term used by Rogers (2003), the 'early adopter' stage. Furthermore, the bundle of technologies that constitute our experience of the e-book undergoes constant development and it is virtually impossible to determine what will happen next. It is quite possible, for example, that the e-reader in the future, will look more like a single sheet of paper than the way the iPad or the Kindle looks today. Developments in screen design, lighting, e-ink, battery technology and more, will all change the nature of the reading device.

At the same time, what constitutes a 'book' may change: although the enhanced e-book has not yet achieved much take-up, it may yet become the dominant mode of publication in some sectors. For example, books based on computer games are likely to be enhanced e-books and virtual reality technology would allow the scenes described in a text to unfold before the reader's eyes. The potential of such technology for changing the nature of science fiction and fantasy novels is clearly enormous.

Given these technological uncertainties, we envisage two longer term outcomes: on the one hand, the printed book is likely to persist as the dominant mode for the presentation of mainstream fiction and of much non-fiction; on the other hand, the disruption caused by this technology is likely to continue to affect the publishing industry and the other players in the 'book circuit' for at least the next decade, as newcomers find new opportunities for whatever the 'e-book' has become, and as the use of this continually renewed technology increases.

Two further factors may drive the adoption of the e-book: first, an ageing population may find that the conveniences of the e-book, i.e., its portability, internal lighting, ability to change the font size, etc., outweighs their preference for the printed book. Already, we see that, according to one study of users of the Kobo e-reader, among the most frequent readers the proportion among women aged 50-64 is higher than among men or younger readers (Flood, 2016). This trend may well increase. The second factor is the use of the e-book (along with other digital learning resources) in schools: this is creating successive generations for whom the e-book is just another tool for

acquiring information and, as these generations move through life, they may have an altogether more receptive view of e-books than did their parents and grandparents.

Looking at small-language areas and markets, one can see that even tiny incremental factors may affect spreading of e-books and modes of their use: a change in price may send readers to borrow e-books from public libraries or buy printed books, one successful channel of distribution may take away customers from all others, even a small rise in customer numbers can save small independent actors in the market. Though at present no one believes that readers of Swedish language literature will disappear, the e-book market is especially vulnerable to online competition with suppliers of foreign language books, which may be not only cheaper and easier to access, but sometimes the only possibility for satisfying specific tastes. Thus, it would be worth investing in the variety of Swedish (or other local) language books for all market participants and public institutions interested in supporting Swedish language and literature.

We should also note that the acceptance or rejection of the e-book as innovation is related to other values in society. An e-book is regarded as both eternal and perishable. Publishers and booksellers emphasise the longevity of an e-book, especially, as related to short and still shortening life-cycles of printed books within this novelty-oriented industry. But readers are not willing to pay too much for a file that is not only intangible, but can be easily deleted from their devices by a flick of a finger. An e-book is associated, on one hand, with 'low' genre literature and, at the same time, is suggested as salvation to the most intellectual production of scholarly monographs. It is woven into the thick tangle of our notions about culture and cultural institutions that are already too commercialised to accept and exploit such an innovation as e-book that could revolutionise and democratise them, and at the same time e-book is dreaded as ruining the last bastion of high culture – the printed book.

Taken together, the findings of our studies within the project clearly suggest that the e-book has not found a mature position within the system of books. It seems that the different actors in the e-book context are blaming each other for some kind of lack of success. Some actors are certainly more powerful than others, but the overall system surrounding the e-book phenomenon carries a legacy from the context of the printed book. The development that has taken place during the project suggests that the future of e-books might lie in hands of other kinds of actors not traditionally related to book production or distribution.

### The theoretical perspective

In terms of Winston's (1998), theoretical framework, we find that the different actors have, to some extent, different views on what drives the use of e-books and what suppresses the radical potential of the format. Considering the *supervening social necessity*, it is clear that nothing equals the phenomena that Winston draws attention to in his examination of various technological innovations. Clearly, the ongoing digitisation of

all modes of communication in society will continue to influence the development of the e-book and the reading devices, and, consequently, technology-push will always be a factor. The human need for novelty in this regard means that new devices will always find a market, even for prototypes.

Beyond this, the factors vary: for new authors, not yet established in the culture, the e-book and self-publishing support the drive to be published and to be recognised, when established routes are either blocked or slow to support those needs. For the traditional publishers, on the other hand, rooted in the printed book culture, knowledgeable about the area and dependent for their profits on success in the printed book market, the push towards the e-book appears to be driven simply by a need to keep abreast of the technology. The smaller publishers may be more innovative, but the small share of the market gained by e-books does not encourage them to adopt the medium wholeheartedly.

Turning to booksellers, there are clearly two types: the online bookseller and the high-street, 'bricks and mortar' bookshop. The former is, again, technology driven, since the e-book format offers them significant economies in terms of distribution and delivery. The latter are almost entirely out of the picture in terms of selling e-books, since the majority lack the necessary technology. We have examined two major types of library: public libraries and academic libraries. In the former, the drivers appear to be internal, not external: they are required by law to make material available in all formats, and the professional ethos of their staff demands that they satisfy the needs of all in the community, whether reader of printed books or of e-books. The main pressures experienced by the academic libraries are economic and technological: e-books reduce the need for physical storage space and, at the same time, satisfy the users' need for ready access and availability of resources. Finally, all actors appear to agree that changing life-styles, along with increased mobility and the higher cost of living spaces, constitutes the supervening social necessity for readers who appreciate the availability and portability of the e-book. For the older reader, the flexibility of on-screen presentation of the text, may be a critical factor in the supervening social necessity.

Considering the matter more globally, in many countries where there is a strong reading interest the e-book may be the best, or perhaps the only, alternative means of promoting reading, learning and shared experiences. As indicated in Chapters 4 and 10 this is already the situation in many developing countries, suggesting that there might be a radical potential in need of support.

Turning to Winston's 'law' of the suppression of radical potential, we first have to consider what that 'radical potential' might be and for which actors in the field it might be 'radical'. The e-book is characterised by a number of elements: 1) it occupies very limited physical space on a computer hard disc; 2) it can be reproduced extremely quickly – creating one more 'copy' of a text is done in milliseconds; 3) it is extremely portable – a thousand e-books will occupy very little space inside an e-reader or an iPad; 4) it can be transferred from the source, say an online bookshop, to a reader on

the other side of the world, almost instantaneously and virtually cost-free; 5) the text can be manipulated to provide alternative fonts, font-colours and font-sizes, to meet the requirements of the reader; and 6) the text can be enhanced by the addition of video, sound files and animations.

Overall, therefore, the *radical potential* of the e-book is its possible *replacement* of the printed book, for almost any existing purpose.

A number of factors prevent the realisation of this potential: first, although many readers of printed books are happy also to read e-books, they are mostly reluctant to switch entirely to the digital format, although we have come across one or two in our interviews with readers who *have* made the switch. Reader reluctance leads to a limited market for the product and publishers point to the limited market as a factor that prevents them from seizing upon the radical potential of the e-book as a future direction for the business. On the other hand, the publishers globally, and perhaps particularly in Sweden, have done little to promote the e-book, suggesting that they are happier with the traditional format and the traditional ways of doing business. Public librarians tend to believe that the publishers inhibit the growth of demand for e-book loans through the pricing policy for loans and cite economic factors that limit what they can do in this respect. Academic librarians, on the other hand, have adopted the e-book as an answer to problems of space, access and availability and see the potential suppressed by the lack of a single platform through which to access e-books.

In other words, just as there is no agreement among the different actors as to the supervening social necessity, so there is no single factor that constitutes a ‘law’ of suppression of radical potential.

### A final word

Over the course of this four-year research project, we have seen, in Sweden, first a decline in e-book publishing, then a resurgence. At the same time, we have seen the players changing in various ways: particularly in the market, where Storytel, originally a subscription service for audio-books now offers e-books and has bought publishing companies, including Norstedts, Sweden’s oldest. Bonnier has acknowledged the potential of self-publishing by providing a ‘channel’ for authors wishing to take this route. The loan-price model for public libraries has changed, the library law requiring digital resources to be made available has been introduced. Nationally, the Government is on the point of changing the VAT regulations that should see this being the same for e-books as for printed book. It is even quite possible that further changes will occur between the time this manuscript is submitted to the publisher and its publication date. Whatever the future holds, however, this is certainly an interesting time to be an observer of Sweden’s book culture!

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- ***Trends and Developments in the Media Sectors in the Nordic Countries***

Nordicom compiles and collates media statistics for the whole of the Nordic region. The statistics, together with qualified analyses, are published in the series, *Nordic Media Trends*, and on the homepage. Besides statistics on output and consumption, the statistics provide data on media ownership and the structure of the industries as well as national regulatory legislation. Today, the Nordic region constitutes a common market in the media sector, and there is a widespread need for impartial, comparable basic data. These services are based on a Nordic network of contributing institutions.

Nordicom gives the Nordic countries a common voice in European and international networks and institutions that inform media and cultural policy. At the same time, Nordicom keeps Nordic users abreast of developments in the sector outside the region, particularly developments in the European Union and the Council of Europe.

- ***Research on Children, Youth and the Media Worldwide***

At the request of UNESCO, Nordicom started the International Clearinghouse on Children, Youth and Media in 1997. The work of the Clearinghouse aims at increasing our knowledge of children, youth and media and, thereby, at providing the basis for relevant decision-making, at contributing to constructive public debate and at promoting children's and young people's media literacy. It is also hoped that the work of the Clearinghouse will stimulate additional research on children, youth and media. The Clearinghouse's activities have as their basis a global network of 1000 or so participants in more than 125 countries, representing not only the academia, but also, e.g., the media industries, politics and a broad spectrum of voluntary organizations.

In yearbooks, newsletters and survey articles the Clearinghouse has an ambition to broaden and contextualize knowledge about children, young people and media literacy. The Clearinghouse seeks to bring together and make available insights concerning children's and young people's relations with mass media from a variety of perspectives.

The music and film industries have long come to terms with the digital, and now the traditional printed book is challenged by digital formats. The e-book has become established in most countries, but is still a small part of the book industry. In this book a group of researchers follow the actors involved in the Swedish e-book market, from authors and publishers to libraries, booksellers and readers during 2012-2016. Using surveys, interviews and other sources the main actors were researched and it is shown how they act and react towards the e-book and towards each other. While the main focus is on Sweden as a small language country, several international comparisons are made.

Are printed books disappearing soon? How are reading habits changing when the book becomes digital? Which forces are driving radical change and which are holding it back? The book discusses these and related questions and shows that after a period of rapid increase in the production and use of e-books, several factors slow down the rate of adoption, but digitisation of the book is an ongoing process and the current e-book is not the end of the story.

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