

# **Spanish electronic Book Market: distribution and sales platforms, business models and digital reading**

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## **0. Introduction**

Electronic books are a growing as a consistent reality in the publishing field, where recent changes and movements instructed and reveal their new favorable positions in bookselling market around the world, driven by cultural industries in general and by content production companies in particular. The emergence of Google ebooks, finally called Google Editions, means a significant change to the playing rules, because Google has been moving the business of selling and distributing books, first as a simple intermediary and then as a direct bookseller.

In accordance with known international data publishing industry, the ebook's phenomenon is becoming further strong and solid. In The United States (US), from where are setting trends in the electronic book market development, from January to August 2010 sales increased 193% over the same period last year. According to the Association of American Publishers (AAP) report, "*Sales of books (not including academics) for the period January to August 2010 amounted to 2910 million dollars. The e-book sales reached 9.03% of the total, compared to 3.31% throughout 2009*". In addition, this report revealed a parallel decrease phenomenon in print-book sales.

In Spain, with data from the Ministerio de Cultura and published in the *Boletín del Observatorio del Libro y la Lectura* in December 2010, the domestic electronic publishing reached 12,839 new e-book titles, meaning 97.8% of digital and other publishing media materials and 16.0% of whole book's production in Spain (Ministerio de Cultura, 2010). Over the same period last year, the electronic publishing has increased 40.1%. With regard to the grow experienced, in the Foro Internacional para Contenidos Digitales (FICOD 2009) held in Madrid in November 2009 the experts predicted deep changes in business models relating to print-books and digital publishing.. That was a fact confirmed over 2010, even exceeding expectations.

## **1. New Habits and Ways to Reading in Spain**

In Spain, the practice of reading and buying books and other kind of documents are changing substantially. The main measure to reading habits is the barometer *Hábitos de Lectura y Compra de Libros* by Federación de Gremios de Editores de España (FGEE) and Ministerio de Cultura. With all the forethoughts to be taken to reading surveys (Pouliot, 2009), this instrument is an important and value tool to know the Spanish people attitudes to reading books and readers behavior because has been applied in country every year since eleven years ago.

Since 2006, the Spanish barometer began to measure Internet use and online reading, observing the use of the network for that purpose. But these issues were considered under an ambiguous category: "Other activities and their relationship to reading." From 2008 to present, includes a specific section focused to online reading behavior which questions ~~the~~ about online newspapers reading frequency, e-books downloaded or seeking information about them. But it was until 2010 when ~~it~~ introduces a new variable research. That is, the way that people read in different displays, as PC monitor, mobile devices, e-reader, etc., demonstrating not only the continuing changes in reading habits but also the statistical relevance of these new habits and ways to reading. In addition to this, into the category where they data have been grouped is now called "digital reading", another example of the trend change of terminology in reading research and reflex a shift in reading habits and uses of reading devices.

In recent years, the barometer's data are showing an interesting adjustment in the uses of Internet. In 2005, 3.2% of users did use Internet to buy books; the average of purchased books was 3.7. But 35% did use the network to find information about books and 20% read online newspapers.. The data for 2006 was quite similar. However, in 2007 significant changes begin to occur. The percentage of online book buyers grew at tripled, reaching 11.1%. Online reading, newspapers and magazines, reached 57%. Reading and downloading of Literature on the Internet grew up to reach 17%. We need keep in mind that 2007 was release year of "next generation" electronic reading devices with digital-ink technology, like a Kindle (Amazon) or Sony Reader, who were the first market leaders of the new e-book readers (e-readers). At the same time, the supply in the market of electronic books was beginning to emerge with pushfulness in Amazon.com and other digital platforms (Cordon, Arévalo, Martin, 2010a). The percentages are similar in subsequent years. The online purchase of books reaches 14%, although the data show purchases in general, undifferentiated print-books or e-books. The indicator most directly related to the use of electronic reading devices is "Literature downloads" whose shares have ranged from 10% to 15% in early times.

In 2010, the statistical criteria have been changed by introducing a section about digital reading. Obviously, the methodological modifications have impacted in data even prevents comparisons with the previous series, but is possible to envisage a scenario in permanent transformation. In addition, is necessary to define with accurately what is meant by "lector en soporte digital" (digital reader), a new concept introduced in the Spanish reading barometers. According with this, the "digital reader" is a reader who usually reads frequently or at least once every quarterly on a computer, mobile phone, PDA or e-reader.

In 2010, half of the Spanish population aged 14 or over (48.6%) admitted to being a "digital reader". Of these, an even higher percentage (48%) read on the computer, 6.6% in mobile phones, and 0.8% in e-readers, this percentage rises to 1.1% in the second-quarter survey of 2010. The profile of "lectores en soporte digital" is interesting because illustrates possible trends of reading behavior and future developments. For instance, men who are identified as digital readers (54.3%) outnumber the digital readers average in 13.3 points (41.0%) and by age, the

biggest difference, 70 points, is among 14 and 24 (78.2%) and between over 65 years (7.7%). The educational degree attainment also sharpens the differences between digital readers because 75.2% of those with University degrees use new technology devices to read, while the rate drops to 21.5% among people with Elementary education. The respondents said have been using digital media, especially, to read online newspapers and magazines (36.8%), while only 5% had have read e-books .

In the case of the book we find some forms of communication where the vocation of the universal and totalized message stimulates to spread a decontextualized contents and built their status in order to communication capabilities, and make a diluting effect into a plurality featured by interactivity and hypertextuality. The connections between accessibility, dissemination, and advertising, have being erased, disappearing phenomenological and material boundaries among documents and collections. These replacement priorities have had a destabilizing effect in traditional mediations, responsible to make legitimized texts, such as corporates or editorial boards, and how these are governing the exchanges economy, includes Intellectual Property and Copyright.

The materialisation of all these changes has occurred, into the book's industry, since 2007, in parallel with the release of Amazon's reading device *Kindle* and the dramatic increase in supply led to a deep changes in publishing market trends. A research applied to 1,200 people who have an e-reader (Fowler, 2010) revealed that 40% of respondents had been reading e-books rather than print-books. Of total,, 58% had been reading with the same frequency, while 2% they read less than before. In addition, 55% of survey participants believe that they would use a mobile device to read more books in the future. The survey included owners of three e-reader brands: *Kindle* (Amazon), *iPad* (Apple) and *Sony Reader* (Sony). Amazon, currently the world largest e-books seller, has said that his customers bought 3.3 times more books after buying *Kindle*, this cypher has increasead quickly in the last year thanks to his e-reader price reduction.

An interesting research driven by Harris Interactive (2010) shows that users of electronic readers, buy and read more books after acquiring them, and that owners of e-readers are the most important portion into the intensive book-buyers group, setting them in first place among who buy between 11 and 20 books and those who acquire more than 20 books per year.

## **2. Spain Book Market**

Spain is the fourth world's largest publisher. The average of Spanish's book publishing houses consist of about 1,000 companies (this amount vary each year) ,but most of the new enterprises are small. Moreover it has been assumed that the incorporation of new print and publishing technologies could stimulate the incorporation of new publishing agents. The corporate structure of the Spanish publishing sector is constituted by a elite group of companies (n=34) with a turnover of 18,000,000 euros annually and represents two-thirds of domestic publishing revenue

(65.7%) distributing the remaining third in 855 small publishing houses. Among last group, 540 companies only reach 600,000 euros of billing per year together. This group has a high mobility of ups and downs, although this does not make us forget the relevant contribution of smallest publishing houses to diversity and plurality of the Spanish publishing offer. The publishing business concentration occurring in the country is therefore very significative. In fact 26.8% of all companies, about 238, are part of a holding or mass media powerhouses. Furthermore, 100.0% of the largest companies are part of a group, 95.2% of large, 52.9% of medium and 19.3% of smallest.

As to the issue during the year 2009 (most recent for which data are available) 76,213 titles were published, representing a 4.4% increase in 2008.

- The amount of copies published was 329.83 million, 10.2% less than in the previous year.
- The circulation average of 4,328 copies has been 5,035 titles from last year (2010) which represents a decrease of 14.0%.
- Three areas offer the most number of titles and copies published: Text not university, Literature and children's books. Among the three account for 57.1% of titles published (57.0% in 2008) and 61.0% of the copies (60.6% in 2009). If these are added Social Sciences and Humanities (including within the same Law, Economics and Religion) would be among the four titles by 72.8% and 71.0% of the copies.
- The 78.1% of the books published are written in Spanish, Catalan 13.4%, 1.8% in Euskera, Galician 2.1% and 4.6% in other languages.
- The 27.1% of the publishing houses has been published in "other media than paper", including digital, accounts for 10% of total of revenue, with a different behavior depending on the subjects. In Law and Economics is more than 45%. 27.6% of turnover into the issue "other media different than paper" is obtained from the DVD, and 17.4% of CD-Rom showing a significant drop in sales in these two media in last two years. Increases in digital publishing but the bulk of total revenues comes from the category "Other" (30.4%), in which publishers have certainly included the publication in electronic format as when specifying these "Others" mentioned web, PDF, online, etc.
- In 2009, 6,425 new book titles have been paperback published and retailed 35.8 million copies. This represents 8.4% of total titles and 13.6% of copies published.
- The average print run for paperback books has been of 5,569 copies per title, beating over a thousand copies to the general editing.
- The paperback retailing have been 180.46 million euros, accounting 5.8% of the total trade of the publishing houses.

In 2009 the Spanish billing of publishing industry from sales of print-books was from 3.109,58 to 4 million euros (before subtracting operating discount). There is a decrease of -2.4% in current

euros for the year 2008. Through 2009, were sold a total of 236.19 million copies of print-books, representing 1.8% less than 2008. The average price calculated for the total sample of subjects in 2009 is 13.17 euros. "Literature", with a market share of 22.9% and "School texts" with 27.2%, are the subjects with the highest percentage of the total billing.

As marketing channels should be highlighted: that bookstores and bookstore's chains remain the main channels for book sales and 48.5% of sales are made through these channels.

### 3. The e-book in Spain

In the future, the new Dictionary of the Real Academia de la Lengua Española (Spanish Royal Academy of Language) will include the entry "e-book", deal that has been adopted unanimously by the 22 Academies of Spanish language around the world. "E-book" has two meanings. First, shall refer to electronic reading device and the second, the content it stores. In summer 2010, already includes entry into the electronic version of the dictionary, which will integrate the next version on paper in 2013.

This news attests the relevance of the phenomenon of electronic books and their social impact, which the Academia de la Lengua decision represents an important benchmark because it translates into a consolidated use standardized language between citizens (Cordón, Arévalo, Martín, 2010b). In November 2009, the Fundación del Español Urgente (Foundation of Urgent Spanish) had already been echoed of this movement by proposing a similar use of the term that has made the Real Academia de la Lengua.

Although in 2009, the Spanish market of digital content experienced a setback in terms of turnover from 11.7%, there were two sectors that marked an opposite trend: the digital publications, whose sales grew by 31.8% and Internet, an increase of 7.2% (Digital Contents, 2009). The emergence of electronic books has been determined to produce the increase. The number of titles published in the new format, according to the Overview of the Spanish edition of Books, has grown by 48,1%, reaching 12,514 titles (Panorama, 2010).

According to Comercio Interior del Libro report (Comercio Interior, 2010) is the first time that this section includes more detail in the research but the data is still scarce in the entire publishing industry.

By the moment, the data shows:

- The titles published in digital format in 2009 were 5,960
- Digitized titles back catalog: 17,293

- The titles released in digital format: 10,590. Revenues from sales of books in digital format (x 1,000): 51,259

About the types of reading devices that have been marketed the different plays these have been distributed by 12.6% to e-readers, 0.6% to mobile phones, 67.7% to computers and 19.1% to “Other”. The most abundant format is PDF with 48.4%.

The revenue of e-books published shows a greatest importance in the same scientific books of Sciences and Humanities and Law and Economics, accounting for 69.7% of sales of books this format.

Internet as a marketing channel has experienced a steady decline from 0.7% of sales in 2005 to 0.5% in 2009, in absolute terms, from 20.05 million to 16.05 million euros. Its importance as a channel primarily affects the small publishers representing 2.2% of sales compared to 0.4% in large ones.

In November 2009, was presented the research of the Spanish book digitization and the use of social networking in the publishing industry driven by Dosdoce (2009). Second edition of a similar one that the company made in 2008. It is believed that the digitization of the book will be one of the most strategic decisions that will be taking the publishing houses in the coming years and will involve a general transformation publishing, its production and distribution strategies, its future marketing policies and marketing and sales books. The publishers who answered the Dosdoce survey said that they posed to analyze trends in digitization in the coming years will not fail to be significant when we met. 57% of respondents felt that both "technology" (paper and electronic) will be coexist. Only 15% of professionals think that electronic books will come to prevail over paper books. 44% of the professionals books the main income source of Spanish publishing in 2020 will remain print.books. 28.2% of respondents think that electronic books will become the second track of income in 2020. This percentage has increased 12 points compared to the 2008 survey in which only 16% of publishers consider that digital content will become the second track of income. 69% considered the main priority of the publishers to the challenge of digitization of the book is the definition of its business model. Following this ranking of priorities, 48% think that the second most important decision to be taken by publishing houses in next months is invest in their employees training to catch up on the impact of new technologies in publishing business. Future negotiation of digital Copyrights of the plays belongs to their respective funds ranked third in the ranking of priorities in the book industry professionals. Only 21% of respondents consider the design of their web sites an "important" or “very important” priority, while for international publishers, this is one of the decisions of online marketing and sales of any major cultural entity. 44% of professionals surveyed believe that the main beneficiary of the digitization of the book is the reader but the bookstores will be negatively affected.

In February 2010, the Federation de Gremios de Editores de España (Spanish Publishers Guild) in collaboration with Fundación Germán Sánchez Ruipérez have published a report on the digital book which questions to publishers on the following topics (Federation, 2010):

- 1) Existence of a digital project;
- 2) Impact of digitization in the catalog;
- 3) Formats and reading devices;
- 4) Sales and distribution channels;
- 5) Pricing policy.

Of the 254 publishers surveyed, 80% of women say make or have planned activities in the digital domain during the period 2009-2011. At the end of 2009, nearly half of publishers (44%) had less than 5% of its digital catalog, but by 2011 they expect to have between 50% and 100% fully digitized. The small publishers are showing a greater willingness to digitize their catalogs, so that at the end of 2011, a third of them (33%) expect to have scanned between 50% to 100% of their catalogs in 2011, 19% of these publishers are planning to get full catalog in digital format.

One of the basics to development of scanning software is related with marketing. In this regard, about 20% of surveyed publishers will market between 50% to 100% of its new releases in digital format, in addition to the print-books. This is an extremely interesting because it indicates of neglect of the fear of cannibalization from digital to print, attitude that has characterized the book publishers in the past.. In fact, the publishing houses show a clear inclination to publish only in digital over the next two years. Thus, the largest publishing houses (with over 10,000 titles in their catalog) plans to produce an average of 405 and 538 new titles designed exclusively in digital format in 2010 and 2011, respectively.

Another issue of concern and controversy among publishers, for the variety of standards, is about the formats. For them, the PDF is predominant, because 80% of publishers will use it in 2010. But wich will have a higher growth is epub, that will be selected by 24% of publishers in the 2009 to 60% in 2011. This is good news for consumers because this format is open-access and allows for greater exchange and transfer of information. One third of the publishers are favor to *Mobipocket* software.

Are very important the publishing houses forecast in order to sales and distribution channels that they will try to use. The powerhouses are betting to joint platforms with other publishing houses and for sale through bookstores and even on platforms created themselves specially to sales books but rule out making sales from the company website. However, the trend in the medium sized publishing houses is by selling from their websites, through online bookstores and generic

commercial platforms. It is the same trend in publishers. Undoubtedly, the joint platforms with other publishing houses have an important weight, always above 30% in these companies.

The pricing policy, one of the sticking point of the publishing industry into the digital context and a sensitive fact towards developing a sustainable market niche, varies considerably from other publishers. Although a majority of lower than expected price of the print-books, as only 8% of the publishers kept the same price in both towers, only 24% of the editors pose significant discount (about 50%) respect to the print-books.

Dealers, also aware of the imminence of the phenomenon, note the need for innovative strategies that focus on the digitization of plays, incorporate new forms of marketing, not replacing, but complementary to traditional marketing models. And the publishers begins to think digitally and explore all possibilities, not just those relating to the sale, but also those related to the promotion of plays on social networks coordinated between book's intermediaries: publishers, booksellers and distributors (The e-book, 2010).

The interesting thing about these trends is to check the attitude change among publishers about electronic books (López Suárez et al., 2010), which are beginning to be assumed as a reality not only inevitable, but with real business opportunities for the sector. Its viability will depend on the development of appropriate marketing strategies and pricing policies that make these products attractive to digital readers. In January 2011 the website Anatomía de la Edición (Anatomy of Publishing), developed by Alberto Vicente and Gozzer Silvano specializes in publishing sector in Spain, with particular dedication to the electronic publishing. They have published the book "64 Answers: publishers and digital strategy" on that professionals when ruling on publishing and the future possibilities on digital (Anatomía de la Edición, 2011). The answers vary widely, from publishing houses like *Atalanta*, who is publishing only print-books, and others like *Goose* who believe that his publishing project has only purpose in the digital realm. But the significance of the survey is the widespread conviction that change has occurred in the sector since the advent of the electronic book, whom everyone regarded as an unavoidable reference for future business.

This attitude change also affects the authors are aware that they are facing a radical transformation of the traditional publishing industry and the consequences that entails for the visibility of their plays and negotiating their Copyrights.

The Asociación Colegial de Escritores has created a technology committee charged with developing a proposal to reflect the new circumstances of Copyright in the digital context. This will move to the publishers with the aim of including the new conditions in business deals with authors.

In this proposal, they consider the following issues (Rodríguez Marcos, 2010):

- New licenses. This is not a new publishing contract, but is a license for digital Copyrights assignment or public availability that could be made in new and different document from



previous publishing contract or other than the above, in the cases of print-books that have been digitized later. These Copyright assignments should not be for more than two years.

- Account aside. In the case of scanning a print-book, the transfer of Copyrights for downloading should not apply into the amortization of the payment agreed by that publishing and should be a separate account.

- Minimum for downloads. In the case of the new publishing or new translation, it should be negotiate the guarantee of a minimum of downloads. The amount could be paid to the author in advance.

- Settlements. The author should require access to the download counter of his work and receive settlements of these lower frequency to annual.

- Percentages. The percentages by electronic book must be higher than the agreed for the print-book, so that, although the download price is lower than the print-book, the author's earnings do not be adversely affected. These percentages should respect a minimum of 30% to authors and 25% to translators.

In this line, the associations of translators also require modifications of existing contracts in case of digitization of plays in terms similar to those set forth above (El Libro Electrónico, 2010):

- Differentiate contracts between commercial exploitation of plays made originally to print-books and the new contracts that could be signed from now including multimedia and digital formats;

- Reviewing the transfer Copyrights for the e-book to gain at least 2.5% in applied transfer Copyrights in the print-books;

- Review the duration of the digital transfer to stand at values lower than or equal to those established in the digital publishing contract signed by the author, in no event longer than;

- Incorporate the positive settlement from the first operation (download, online reading, etc.).

Positions are also produced from the viewpoint of users, who demand the preservation of their basic rights because of the emergence of new media materials, languages and formats, in some cases have produced irregular consumption practices. The researchers of Dosdoce.com have proposed the following Dodecalogue (2010) in order to protect the rights of users:

- 1) The access platforms and selling e-books must not trade with purchase history readers without their consent.

- 2) Those platforms that want to reuse for commercial purposes the purchase profiles and custom historial of users in order to improve their book recommendations and generate advertising revenue associated with purchases, must first inform the reader what type of information stored in their platforms, how long and what commercial purposes.
- 3) The digital book reader can access to information at any time and delete his historial of online behavior if it deems appropriate.
- 4) The access platforms and e-books selling must ensure that property acquired are those who have purchased them. After the controversial decision to Amazon to enter their user accounts and delete digital copies sold of the book of George Orwell's *1984* (because of disagreements with the provider), it is justified that we demand that e-books marketing platforms committed to respecting the consumers rights. No one platform or online bookstore should be able to delete the member's accounts or limit their access without express agree with the owner of the account and the e-books its contained
- 5) If rental, pay per read or subscribe to any digital content, the user should have an option to purchase perpetual.
- 6) As in the analog world we can provide a book bought from a friend in the digital should preserve the right to borrow books in any format without additional cost.
- 7) We must ensure the ability to read any book from our library in the cloud or platform on any device without restrictions or limitations on systems, rights, boundaries, etc., and always in a friendly and readable.
- 8) The access platforms and selling e-books should allow people who want to shop in a private fully able to do so without their purchasing data to be stored at any time or sold to third parties.
- 9) The digital book buyers will delete their records of purchases or lease and destroy their own books purchased at any time and definitely without a trace of his previous existence in any virtual memory.
- 10) Readers can give away or resell any eligible book that no want to keep in their digital library.
- 11) Readers may underline, mark and annotate anonymously in their books purchased. Those readers who want to share with others their personal notes should be able to do so, but if at any time change their minds, they may also withdraw contributions lent.
- 12) In the same way than the people can keep mobile phone number if we change the provider of services, the platform will ensure the portability of user data. If for any reason a player leaves a platform must be able to transport the books purchased, notes and purchase history to the new platform easily and effectively.

#### 4. Plataforms and online bookstores in Spain

From a business standpoint, the supply in Spain is still weak. The largest project is represented by Libranda, a platform for sharing and disseminating electronic books in Spanish that gives publishers and online bookstores a set of comprehensive services to manage the digital environment.

Libranda is incorporated initially for 7 Groups Editorials: Metro Group, Random House Mondadori, Grupo Santillana, Roca Editorial, Grup 62, SM Group and Wolters Kluwer Group. Libranda currently has signed agreements of cooperation with Anagram, Salamandra, Maeva, Siruela, Cliff, Quaderns Cream, La Galera (Grup Encyclopedia Catalana), Edebé, Ediciones B, RBA, Parramón. Bosch and is in negotiations with other publishers. The publishing offer, although the publishers have more weight in Spain is very small, amounting 2614 titles on offer, less than 10% of the analog supply of publishers represented. The only publisher with a presence greater than 10% of your catalog in digital format is Alfaguara. But major publishers such as Anagram only contribute 3% of its catalog, like Target or Metro with no less than 5%. Seix Barral offer only 6% of it. The inclusion of publishing catalogs is limited not only its own interests but also to the assignment of Copyrights by the publishing houses staff or authors, so there are writers such as José Saramago, whose works are being digitized, and others like Arturo Pérez-Reverte, who has assigned such rights.

With data retrieved in February 06, 2011, the distribution of publishing houses in Libranda online bookstore are :

**Table 1 Distribution of titles by Publishers**

Publisher	Titles	Stamp Collections (No titles Libranda)
Atril	14	Tempus (1); Terciopelo (13).
Cálamo Producciones Editoriales	2	
Columna Edicions Llibres i Comunicació S.A.U.	39	Columna (16); Planeta (6)
Distribuidora Mediterránea de Ediciones Multimedia	10	
Ecos Producciones Periodísticas SCP	9	Ecos Travels Books (9)
Edebé (Ediciones Don	4	

Bosco)		
Ediciones B, S.A.	41	
Edicions 62, S.A.	11	
Editorial Anagrama	77	
Editorial Bosch	19	
Esteban Galisteo Gámez	9	Galisgamdigital (9)
Grup 62	538	Columna (67); Destino (9); Península (72); Edicions 62 (133); Editorial Empuries(82); Editorial Selecta (1); Educaula (1); El Aleph editores (36); Estrella Polar (9); La Butxaca(5), Luciérnaga (11); Mina (20); Planeta (6), Portic (9), Proa (69), Salsa Books (7); Talisman (1).
Grup Editorial 62, S.L.U.	51	Ediciones Península (2); Editorial Empuries (3); El Aleph editores 1); Estrella Polar (14)
Grupo Planeta	436	Alienta Editorial (19); Austral (1); BackList (17); Booket (4); Destino Infantil & Juvenil (45); Deusto (7); Ediciones Destino (23); Ediciones Martínez Roca (33); Ediciones Paidós (7); Ediciones Temas de Hoy (16); Editorial Ariel (29); Editorial Crítica (10); Editorial Planeta (61); Esencia (17); Espasa (30); Gestión 2000 (9); Libros Cúpula (7); Minotauro (15) ; Para Dummies (2); Seix Barral (56); Timun Mas Narrativa (2); Zenith (26)
Grupo SM	129	Cruïlla (34); Ediciones SM (65), PPt (30)
La Galera, SAU Editorial	5	Bridge (4); Luna Roja (1)
Maeva Ediciones	17	
Parramon, S.A.	10	La otra orilla (6); Verticales (4)
Quaderns crema, S.A.U.	6	Acantilado (4); Quaderns Crema (2)
Random House Mondadori	557	Caballo de Troya (21); Cisne (15); Debate (30); Debolsillo (109); Grijalbo (99); Lumen (35); Mitos (1); Mondadori (58); Montena (43); Plaza & Janes (126); Rosa Vents (15), Sudamericana (5)
Raval Edicions, S.L.U.	4	Portic (1); Proa (3)
RBA Libros, S.A.	18	Bolsillo (15); RBA (3)
Roca	64	

Roca Editorial	7	
Santillana Ediciones Generales...	291	Aguilar (32); Alfaguara (211); Alfaguara Juvenil (15); Punto de Lectura (8); Suma de Letras (30); Taurus (9)
Siruela	44	
Wolters Kluwer	217	CISS (12); El Consultor (26); La Ley (133); WK Educación (33); Wolters Kluwer (13)

Source: Own Elaboration

The representation of these titles with respect to the overall volume of the publishing houses board is possible compare in the following table.

**Table 2 Libranda Publications and editorial publications**

<b>Publisher</b>	<b>Titles on Libranda</b>	<b>Total titles of publisher</b>
Atril	14	14
Cálamo Producciones Editoriales	2	56
Columna Edicions Llibres i Comunicació S.A.U.	39	4127
Distribuidora Mediterránea de Ediciones Multimedia	10	
Ecos Producciones Periodísticas SCP	9	19
Edebé (Ediciones Don Bosco)	4	18901
Ediciones B, S.A.	41	15899
Edicions 62, S.A.	11	7072
Editorial Anagrama	77	5951
Editorial Bosch	19	2726
Esteban Galisteo Gámez	9	
Grup 62	538	21597
Grup Editorial 62, S.L.U.	51	
Grupo Planeta	436	104.036
Grupo SM	129	19626
La Galera, SAU Editorial	5	7033
Maeva Ediciones	17	1270
Parramon, S.A.	10	2805
Quaderns Crema, S.A.U.	6	840

Random House Mondadori	557	36984
Raval Edicions, S.L.U.	4	
RBA Libros, S.A.	18	2928
Roca	64	
Roca Editorial	7	1040
Santillana Ediciones Generales...	291	40716
Siruela	44	2344
Wolters Kluwer	217	5832

Source: Own Elaboration

Its business model aims, as contained in the website, "respect the book value chain, promoting the cultural work of the authors and agents, publishers and book sales channels." In this sense, Libranda do not sell directly to final consumer. The task of develop sales is from online bookstores "And this is the root of the problems associated with the website, which has sought to replicate the performance of the analogue distribution in the digital model.

The referral system is complex, when looking for a work platform refers to the libraries that presumably have, and almost half of them plays but do not see the catalog of the bookstore, so you have to redo the search. The information in bookstores system is equally poor. Many of them are not informed about the format of the e-books, or DRM, and almost none, on compatible devices.

The web portal is little care. In the search for publishers fonts are different for different publishers, appearing in capital cities and some others in lower case, include the same publisher twice like different publishers (ie Roca and Roca Editorial Edicions 62, Group Editorial 62 and Group 62); it includes the same label multiple times within a group (ie youth and Alfagurara Alfaguara Juvenil). Appear as independent publishers who belong to a group already included, in addition to the name wrong, such as Stand, which is not found as such in the ISBN database is actually Lectern Books belonging to the group Roca Editorial. Lectern has actually managed a single ISBN and Velvet and Tempus contained in Libranda Stand included, are in fact different labels belonging to the group also Roca Editorial.

Leaving aside for the data of the works of key information such as date of publication of the work, essential for trial or scientific qualifications. Will go to the web store to verify this. But in these we find misleading information that is not conducive to proper functioning of the information to the reader. Take for example a landmark editorial in the Spanish test. The publishing house Taurus belonging to the powerhouse Santillana, with over 30 years in business publishing. Taurus has a 2,044 titles in its print catalog titles but in Libranda just has 9 titles . These are: *Caída Libre*, *Como hacer que la globalización funcione*, *El malestar de la globalización*, *Los felices 90* by Joseph Stiglitz; *Mater Dolorosa* by José Álvarez Junco, *Naciones rebeldes* by Manuel Lucena Giraldo, *Ejemplaridad pública* by Javier Gomá Lanzón, *Historia de las dos Españas* by Santos Juliá and *Isabel II* by Isabel Burdiel. If we consult the

dates of publication in the online bookstores to which it refers Libranda we find that the date are different from the original date of publishing digitalized, which may mislead the buyer unnoticed. The following table can be checked both ends.

Table 3 Comparison of dates of publication paper and online versions

Author	Titles Libranda	Date of publication in libraries associated with Libranda	Original Release Date according to the ISBN database
Joseph Stiglitz	Caída Libre	2010	2010
Joseph Stiglitz	Como hacer que la globalización funcione	2010	2006
Joseph Stiglitz	El malestar de la globalización	2010	2002
Joseph Stiglitz	Los felices 90	2010	2003
José Álvarez Junco	Mater Dolorosa	2010	2003
Manuel Lucena Giraldo	Naciones rebeldes	2010	2010
Javier Gomá Lanzón	Ejemplaridad pública	2010	2009*
Santos Juliá	Historia de las dos Españas	2010	2004*
Isabel Burdiel	Isabel II	2010	2004

Source: Own Elaboration

Anatomía de la Edición (2010) conducted an interesting research comparing prices appearing on Libranda and other platforms. 15 were randomly selected from different ebooks genres and international impact in a Spanish electronic library (Leqtor), and compared the price of that title on Amazon, the most successful online bookstore in the world, at Barnes & Noble, competition from Amazon in the United States in Waterstones, the largest bookstore chain in the UK, and in Buch.de, one of the largest online libraries of Germany. They also tried to compare prices on the French market but the books consulted were not available in any French platforms, which is no less surprising because, although the e-book takes a lot longer in operation in the French market appears have not yet released international titles. After the analysis reached the following conclusions:

- The average price of electronic books circulated by Libranda is similar to that of the same titles offered by Amazon. They are somewhat cheaper than in the German bookstore and more expensive than in Barnes & Noble and Waterstones.

- The international platforms only had titles of authors in Spanish language Castilian, which are precisely distributed Librandia cheapest and most expensive, when there was, on the other platforms (with the curious exception of El Juego del Ángel).
- Unable to compare developments since there was no title that was new to all platforms.
- The price of electronic versions of trade books (ie, no paperback available) are significantly more expensive than other platforms. On the other hand, the paperback books are cheaper than those offered by Amazon or Buch.de.
- Amazon has the highest price in 7 degrees compared to 6 of the Spanish library.
- We found that Barnes & Noble, in its competition with Amazon, is setting a really aggressive pricing with an average of more than €2 difference with respect to their direct rivals.

**Table 4 Comparison of prices of electronic books in the world**

**A COMPARATIVA DE PRECIOS DE LIBROS ELECTRÓNICOS EN EL MUNDO**  
Comparación del precio del mismo título de un ebook en distintas librerías online.

Precio más bajo (verde)      Precio más alto (rojo)

Título y autor	Leqtor (España)	Amazon (USA)	Barnes & Noble (USA)	Waterstones (Reino Unido)	Buch.de (Alemania)	Tipo de libro
<i>La reina en el palacio de las corrientes de aire</i> Stieg Larsson	11,99 €	8,80 €	7,73 €	6,49 €	8,99 €	Bestseller Policiaca
<i>Brooklyn Follies</i> Paul Auster	8,6 €	9,52 €	7,73 €	7,56 €	8,8 €	Longseller Narrativa
<i>Los Pilares de la tierra</i> Ken Follet	9,99 €	9,6 €	5,41 €	8,5 €	9,99 €	Longseller Novela histórica
<i>Tu rostro mañana / 3 Veneno, sombra y adiós</i> Javier Marías	5,99 €	15,13 €	-	-	-	Longseller Narrativa
<i>El Juego del ángel</i> Carlos Ruiz Zafón	10,49 €	9,47 €	6,68 €	7,56 €	10,99 €	Bestseller Policiaca
<i>Álbum de boda</i> Nora Roberts	13,49 €	9,62 €	10,05 €	7,56 €	-	Romántica
<i>Eragon</i> Christopher Paolini	7 €	8,94 €	5,41 €	6,75 €	5,99 €	Juvenil de fantasía
<i>La fortaleza de la soledad</i> Jonathan Lethem	7,99 €	10,67 €	7,73 €	-	-	Narrativa
<i>El pergamino de la seducción</i> Gioconda Belli	7,49 €	9,6 €	7,73 €	-	-	Histórica
<i>El traje del muerto</i> Joe Hill	7,99 €	9,62 €	7,73 €	7,56 €	7,99 €	Terror
<i>Economía de la depresión y la crisis actual</i> Paul Krugman	13,99 €	11,02 €	8,03 €	-	21,2 €	Ensayo
<i>En mis propias palabras</i> Dalai Lama	6,99 €	10,67 €	7,93 €	-	-	Espiritualidad
<i>La aprendiz</i> Trudi Canavan	9,99 €	9,62 €	6,18 €	7,56 €	8,99 €	Fantasía
<i>Caballeros</i> Klas Östergren	15,99 €	10,67 €	-	11,33 €	14,5 €	Nórdica
<i>Oscuros</i> Lauren Kate	12,99 €	10,67 €	7,65 €	9,66 €	-	Vampiros
Precio medio de los libros electrónicos	10,06 €	10,24 €	7,38 €	8,05 €	10,82 €	

El guión (-) significa que el libro no estaba disponible en la librería. Títulos elegidos de forma aleatoria. Fecha de toma de los datos: 17/07/2010 - Cambios aplicados: \$1 = 0,77 € - 1€ = 1,18 €

A NATOMÍA DE LA EDICIÓN www.anatomiadelaedicion.com

Source; Anatomy of books and reading

The comparative international sites serves to contextualize the distribution platform among its equivalent in other countries. But more interesting is to see how they are applying pricing policies with respect to their references in the paper. For this we have undertaken a study of one of the best publishers represented on the platform, Seix Barral



Table 5 Comparison of the prices of securities of the publishing house Seix Barral

AUTHOR	TITLE	PAPEL	EBOOK
Adolfo García Ortega	El comprador de aniversarios	8,95 €	4,49 €
Adolfo García Ortega	El mapa de la vida	20,00 €	13,99 €
Amy Hempel	Cuentos completos	24,00 €	16,99 €
Ángeles Mastretta	El cielo de los leones	14,95 €	5,99 €
Ángeles Mastretta	Mal de amores	19,50 €	13,99 €
Ángeles Mastretta	Maridos	7,95 €	6,49 €
Ángeles Mastretta	Mujeres de ojos grandes	5,95 €	4,99 €
Antonio Muñoz Molina	Beatus ille	7,95 €	6,49 €
Antonio Muñoz Molina	Beltenebros	6,95 €	5,99 €
Antonio Muñoz Molina	El invierno en Lisboa	6,95 €	5,99 €
Antonio Muñoz Molina	El jinete polaco	10,95 €	8,99 €
Antonio Muñoz Molina	El Robinson urbano	6,95 €	5,99 €
Antonio Muñoz Molina	El viento de la Luna	8,95 €	7,49 €
Antonio Muñoz Molina	La noche de los tiempos	24,90 €	17,49 €
Antonio Muñoz Molina	Los misterios de Madrid	6,95 €	5,99 €
Antonio Muñoz Molina	Sefarad	10,95 €	8,99 €
Antonio Muñoz Molina	Ventanas de Manhattan	9,95 €	7,99 €
Craig Silvey	Jasper Jones	16,50 €	11,99 €
Elvira Lindo	Lo que me queda por vivir	18,00 €	12,99 €
Elvira Lindo	Una palabra tuya	6,95 €	5,99 €
Ernesto Sabato	El túnel	5,95 €	4,99 €

Ernesto Sabato	España en los diarios de mi vejez	16,00 €	11,99 €
Ferenc Máté	Un viñedo en la Toscana	7,95 €	11,49 €
Gioconda Belli	El infinito en la palma de la mano	7,95 €	6,49 €
Gioconda Belli	El pergamino de la seducción	8,95 €	7,49 €
Gioconda Belli	Waslala	19,00 €	13,49 €
Isaac Rosa	¡Otra maldita novela sobre la guerra civil!	20,50 €	14,49 €
Isaac Rosa	El país del miedo	7,95 €	13,99 €
Isaac Rosa	El vano ayer	18,00 €	12,99 €
Javier Moro	El pie de Jaipur	6,95 €	5,99 €
Javier Moro	El sari rojo	12,95 €	10,49 €
Javier Moro	Pasión india	6,95 €	7,99 €
Javier Moro	Senderos de libertad	10,95 €	8,99 €
John Carlin	El factor humano	8,95 €	13,49 €
Jorge Volpi	El fin de la locura	5,00 €	4,49 €
Juan José Millás	Laura y Julio	7,95 €	6,49 €
Juan José Millás	Lo que sé de los hombrecillos	17,50 €	12,49 €
Juan José Millás	Los objetos nos llaman	8,95 €	7,49 €
Kirmen Uribe	Bilbao-New York-Bilbao	19,00 €	13,49 €
Manuel Mujica Lainez	Bomarzo	11,95 €	9,99 €

Mattia Signorini	La sinfonía del tiempo breve	17,00 €	11,99 €
Michael Greenberg	Hacia el amanecer	18,00 €	5,99 €
Pere Gimferrer	Interludio azul	18,50 €	12,99 €
Ricardo Menéndez	Salmón Derrumbe	6,95 €	12,49 €
Ricardo Menéndez	El corrector	6,95 €	12,49 €
Adolfo García Ortega	El comprador de aniversarios	8,95 €	4,49 €

Source: Own Elaboration

The pricing policy to electronic book is vary too much. Keep in mind that, depending on the type of books offered, this percentage may suffer enormous variations:

- If the offers includes new titles or books that are not already in paperback, the saving in digital could be around 28%.
- If books are found in paperback, the saving could be between 10% to 12%.
- Also, some e-books are more expensive than print-books.

The addition of titles still remains precarious, so it is difficult to find a newfangled supply of total overall dimension. In December 2010 the researchers conducted a survey to verify the presence in the portal of the best books of 2010 according to the opinion of renowned critics specialized in publishing and books and who works in mass media industry. Not one of the selected titles were in Libranda, neither the title nor sought any work of that author. Made especially acute in the case of Vargas Llosa and Herta Muller, both Nobel laureates, whose other books in digital format that can be found on Amazon or Barnes & Noble in Spanish.

On the other hand, the built-in e-books are of very poor refresh rate.

Other initiatives are being developed by traditional publishers to launch a collection in digital format, including publishing and the Institut Catalan Grup62 Cambo, who have launched a collection of classic ebook formats, digital libraries that sell works of new authors or titles distributed publishers who lack their own platform, as Leqtor, personal websites of authors who sell their own works, companies selling devices, which, following on the success of electronic books and related technology, has launched the sale of online content, such as Read-e or Luarna, and platforms for sale and distribution of electronic content as Todoebook. All these companies should add the addition of mobile phone operators, with Telefónica in the lead, have begun to evaluate business opportunities around the e-book and reached agreements for the digitization

and distribution of digital books through of their platforms. Telefonica plans to launch in the second half of 2010 with a service of selling e-books and other publications available from the mobile computer or reading device. Telefonica and Vodafone have entered into agreements with Publidisa, the National Library and Todoebook for distributing digital content via mobile. Platforms have also emerged selling eBooks with a territorial basis. Such is the case Gurebook is born of the entrepreneurial initiative Plazagunea technological development, linked to Elkar, and Libenet, driven by publishers and Erein Alberdania. Gurebook offers the possibility to access the ebooks from seven publishers: Alberdania, Erein, Pamiela, Elkar, Tarttalo, Sua and Txertoa. About 60% of the items are in Euskera and the remaining 40% in Castilian. For its part the group distribution of cultural products Elkar Megadendak has launched the first comprehensive electronic library of the Basque Country, where consumers can find over 300,000 products, including 4,000 electronic books. The new store adds to the traditional network of 15 libraries in the group divided by the Basque Country, Navarra and southern France and is located on its website ([www.ellkar.com](http://www.ellkar.com)).

Along with this private system, it offers a huge of digital content through the public and research libraries system and the services that local governments have being articulated This digital libraries offers free collections managed by the public administration or nonprofit companies, in some cases, with a long tradition and experience, such as Project Gutenberg or Biblioteca Virtual Cervantes. These libraries have a significant portion of their information resources available in digital format (PDF, doc, ePub, Mobipocket, etc.), accessible to Internet. The significance of these libraries is the ease of access to collections, the possibilities of networking and the universality of benefits. They are centers where the traditional character documents are being added different digital objects. Among these the Biblioteca Virtual Cervantes, the Biblioteca Digital Hispánica and digital libraries that have implemented the different local governments.

We could expand the cases and countries, but the features are very similar: a sector in constant transformation with a publishing offer increasingly large, distributed among multiple stakeholders ranging from multimedia platforms by largest publishing houses interested in a long tradition, which objective is to occupy a significant niche gradually incorporating a catalog of highly developed and consolidated fund, to incoming without any publishing experience, from the field of technology, who function as distributors and service companies for publishers seeking to place their funds in an unknown market for them, through initiatives of a particular author and publishers who venture into the digital domain using knowledge they have of social networks and their resources.

It is a continual effervescence context in which the evolution of devices, lower prices, expanded content and progressive familiarity of users with them will determine the final drawing of what is now no more than a simple draft.

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