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DIGITALNI AKADEMSKI ARHIVI I REPOZITORIJI

# An overview of the digital publishing market in Croatia

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## Summary

This paper gives an outline of e-book business in Croatia, another European small language market, based on surveys of seven major e-book distributors conducted in February 2013 and February 2014. The research included collecting web catalogues by various e-book distributors and an interview with their representatives, asking them to confirm the established number of e-books. After data collection, researchers analysed and presented the exact number of unique e-book titles, publisher's participation, types of e-book formats and their prices. The findings show that there are 1.654 unique e-book titles by 55 publishers currently available on seven main platforms, the most popular e-book format is EPUB (55%), while the average retail price is EUR 5,86.

**KEYWORDS:** e-books, e-publishing, e-book distribution, Croatia, small market.

## Introduction

The beginnings of the Croatian e-book market date back to the mid-1990s, when a few people with some publishing experience formed a partnership with established publishing companies in order to digitize their materials, or to republish copyright-free material and build their own lists. In both cases they would change the format and offer compact discs instead of printed books. After that, it was only the question of technology. By offering broadband internet, telecom operators paved the way for web-based e-book distribution, which started as an open access movement. In 2001, The Society for Promotion of Literature on New Media (DPKM) launched an electronic-books site, where they offered some popular titles by Croatian and foreign authors – for free. Despite being very small in scope (today they offer 149 titles), they managed to get 760,000 downloads in total, and more than 70,000 for the Croatian translation of Noam Chomsky's works on media, propaganda and systems. These initial efforts did not have a significant impact on the development of e-book publishing.

A new non-commercial project eLektire, aimed at providing the obligatory school reading in e-form, with free access to all Croatian pupils, students, and teachers, appeared in 2009. It was the joint effort of the Croatian Ministry of Science, Education and Sport (which provided the list of titles and readers), Croatian Academic and Research Network (which provided the platform) and one of the young publishers, at that time already well experienced in multimedia publishing, Bulaja naklada (which provided the content). Bulaja naklada, a pioneer of e-publishing in Croatia, started as a family business in 1998. They have been publishing award-winning products, like the CD-ROM's compilation of copyright-free obligatory school reading (three volumes named "Classics of Croatian Literature"). This made Bulaja the obvious choice for the project, which they have been managing ever since. Impero Digital Books is another non-commercial e-book platform launched in 2009 by a group of book lovers whose principal intention was to "digitize and rescue the Croatian literary heritage from oblivion and decay and to make it more accessible to Internet users". Impero also acts as a kind of (self)publishing platform, with expertise and solutions built to help authors in reaching their target audiences.

In 2010, the Croatian e-book market got its first commercial project. Without any intention to deal with publishing, a company called Lamaro digital developed TookBook, an e-book distribution platform containing mainly titles in English – today they host more than 350,000 of them. Since the company was initially focused on the global market, during the first year they had only a few dozen titles in Croatian.

Meanwhile, two Croatian telecommunication operators decided to enter the e-book business and finally turned it into a wide-ranging private enterprise on the national level. The Croatian Telecom followed the example of its parent company Deutsche Telecom and their PagePlace, and launched an on-line bookstore called Planet9. Another operator, Vip (part of the Vodafone group) opened a bookstore Vip eKnjižara (taking content from TookBook and completely developed and powered by Lamaro digital). The difference between the two operators was their payment model – Vip charged customers directly, through a single bill, together with other services (internet, mobile, TV, etc.). Thus, this e-book store is convenient only for users of the Vip network. TookBook and Planet9 aim to cover the entire Croatian market, but interestingly, all three companies offer titles both in Croatian and English. In 2012, Dvostruka Duga, another e-publisher, launched a new distribution platform eLibrika with its own free application for e-book reading on computers (Windows, Mac and Linux). eLibrika's goal is to provide distribution services based on their own platform particularly for various Croatian small and medium-sized publishing houses.

## Current state of the Croatian e-book market

For the purpose of this paper, a pilot study was conducted at the beginning of February 2013, examining and comparing web catalogues by the seven leading e-book players in Croatia. The results were published as a blog post on the e-books research project funded by the Swedish Research Council (<http://projectebooks.wordpress.com/2013/02/28/an-overview-of-e-book-market-in-croatia/>). The project 'The case of the e-book in "small language" culture: media technology and the digital society' aims to investigate the impact of modern information and communication technologies, like the electronic book, in the book publishing and distribution system in Sweden and the changing book culture in the Swedish digital society. Since Croatia is another European small language market, it was a natural choice to join Swedish efforts to get a comparative perspective and possibly develop and apply the same methodology in future e-book market research.

In February 2014, the same methodology was reapplied, only with more caution and rigour during the data collection and cleansing stage. The purpose of the present study was to investigate and offer an insightful analysis of the current Croatian language e-book market on the national level. The study contains key statistics on the size, growth, prevailing pricing models, and publishing trends of the digital publishing market.

## Materials and methods

The data presented in this study is derived from web catalogues of seven major e-book distributors in Croatia. XPath query language was used to locate specific parts of HTML documents containing the data necessary for further analysis, like e-book title, author and publisher name, retail price, format, etc. After specific parts of book distributors web pages were located, XPath was used to extract, parse, transform and store retrieved data into a structured format suitable for analysis. In the next step, several data cleansing tasks were applied:

- content fields collected from different sources were normalized into a single, unique format,
- missing data was complemented,
- duplicates were identified and corrected.

To ensure the integrity and credibility of research data obtained by web harvesting, representatives of e-book distributors were contacted and asked to confirm the number of e-books found. One distributor did not respond to the e-mail inquiry and differences between the number of harvested and existing e-books were recorded for only two distributors. The collected research data, with a difference rate under 3% between the number of existing and harvested e-books, confirms to be highly accurate and reliable (Table 1).

Table 1: The number of harvested and existing e-books in Croatian

Distributor	No. of harvested e-books	No. of verified e-books	% of missing e-books
Digitalne knjige	238	238	0.0%
DPKM	149	149	0.0%
eLektire	340	340	0.0%
eLibrika	582	582	0.0%
Planet9	810	N/A	N/A
TookBook	544	559	-2.8%
Vip	784	766	2.3%

## Results

The 2014 study has shown that four main commercial distributors (Planet9, Vip eBookstore, TookBook and eLibrika) offer 2,720 e-books in Croatian. Three major non-commercial platforms (eLektire, Impero Digital Books and The Society for Promotion of Literature on New Media – DPKM) offer 727 e-books in Croatian. During a one-year lag, the number of e-books increased 28.6% from 2,461 extracted in February 2013 to 3,447 in February 2014 (Figure 1). The average yearly growth recorded for all investigated distributors was 25.1%.

It is important to note the high growth rate in commercial platforms (Vip, Took Book, Planet9, eLibrika), while growth is much slower in those with free access (or non-commercial), which could be a sign of acceleration in Croatian e-book business.

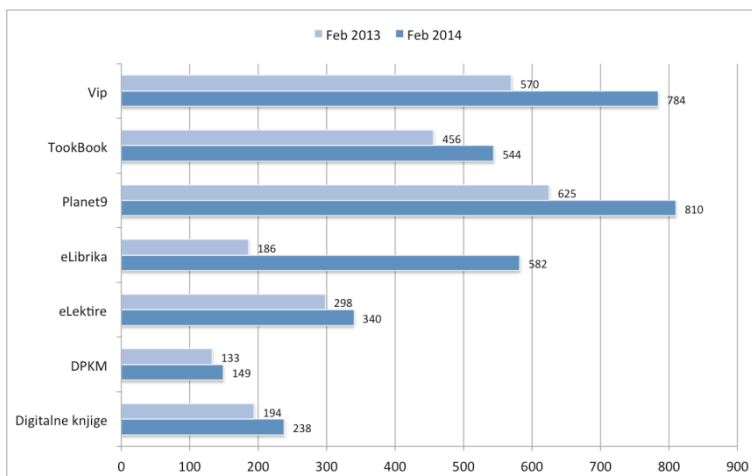


Figure 1: Croatian e-book distributors: increase of assortments in a one year period

After the data collection and analysis phase, the next challenging task was to find the exact number of unique e-book titles offered by the distributors. After duplicate catalogue entries were removed, through a simple exact string matching algorithm based on the normalized values in the title field and by concatenating the title values with a unique author and publisher name, a list of ca. 907 (760 in 2013) unique e-book titles, with DRM and with a set retail price, was extracted. After applying the same data cleansing procedure, we have spotted that 747 (580 in 2013) e-book titles in Croatia are freely available as part of three major non-commercial platforms. E-book titles with a minimum price set as 0.00 HRK (Figure 2) were defined as non-commercial or freely available. According to the results, the total number of unique e-book titles available in Croatia, scattered across seven distribution platforms, is 1,654 (approximately 1,200 in 2013).

Figure 3 shows the EPUB format is the most widespread e-book format followed by e-book applications, Hypertext Markup Language (HTML) and Portable Document Format (PDF).

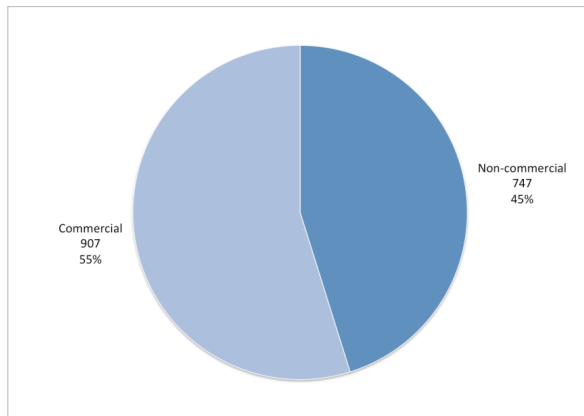


Figure 2: Ratio of commercial vs. non-commercial (free) unique e-book titles

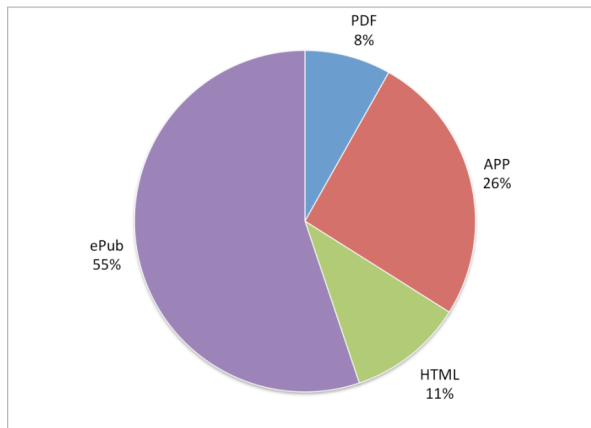


Figure 3: The most popular e-book formats

Three out of four commercial platforms prefer ePub and PDF with Adobe DRM protection over other e-book formats. Only two platforms, eLibrika and Impero Digital Books, offer self-developed e-book applications meant for computer, tablet or smartphone reading. Two major non-commercial platforms, eLektire and DPKM's e-book site, prefer the combination of non-protected PDF and/or HTML file formats (Figure 4). An interesting finding is also that the majority of platforms prefer the concept of single over multiple distribution formats. Only the non-commercial project eLektire offers free obligatory school readings in four different reading formats. Obviously, this has to do with the fact that an experienced multimedia publisher, aware of different user expectations and behaviours, is in charge of designing end products.

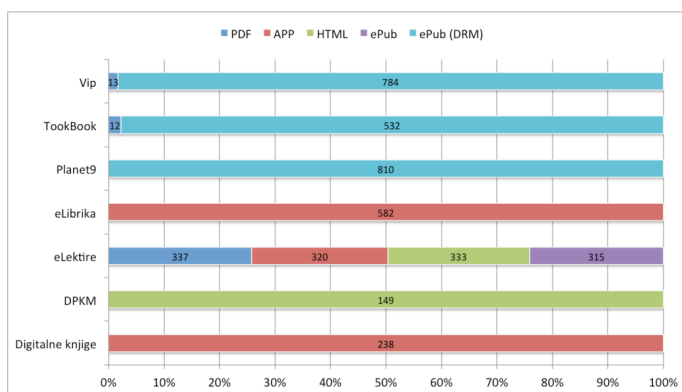


Figure 4: E-book formats distribution across different platforms

So far, Croatian publishers have been very cautious with regard to investing in digital distribution. Unfortunately, this negative trend continued throughout the analysed period. It has been found that 49 publishers were active in 2013, compared to 55 in the 2014 study. Regarding the attitude of Croatian “traditional” publishers towards e-books, particularly if we speak about the big ones, we can only cite Elena Macević (2013), who stated that “the publishers catering for small languages seem to be looking for the possibilities to delay the process as much as possible. The smaller the language, the greater the eagerness of publishers to apply the brakes”. Figure 5 shows a list of ten most “productive” publishers with ≥ 20 e-book titles made available through one of the seven platforms. Noticeably, the non-commercial publishers take the lead (Bulaja naklada and Digitalne knjige), while commercial publishers, with the exception of Znanje, are closer to the bottom of the list. What is even more instructive, non-commercials do not publish their own content – they either participate as key partners in large-scale projects (Bulaja naklada and eLektire) or aim to freely distribute copyright-free materials (Impero digitalne knjige, DPKM).

The share of the “Big Five” Croatian e-book publishers is 73.3% and the “Big Ten” share for the both analysed years is 89.9%. Figure 6 suggests that the majority of active players in the digital market arena tend to distribute their titles across three or even four platforms.

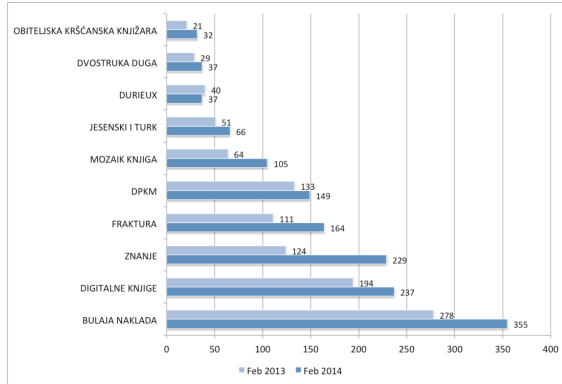


Figure 5: Major Croatian e-book publishers represented across commercial and non-commercial platforms

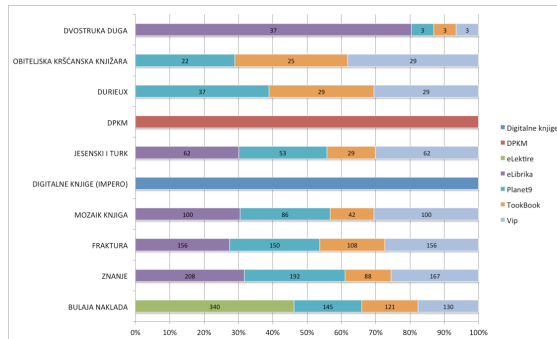


Figure 6: Distribution of major Croatian e-book publishers across different platforms

The average retail price of 44.55 HRK, i.e. 5.86 EUR in 2014, compared to 40.58 HRK, i.e. 5.34 EUR in 2013 (difference due to change of currency exchange rates), per e-book title is stable across four commercial distribution platforms and very close to the average price of US best-selling e-books (compare Greenfield 2013) (Figure 7 and Figure 8). Considering the relatively low number of available titles, the average e-book price of 45.55 HRK is still too high.

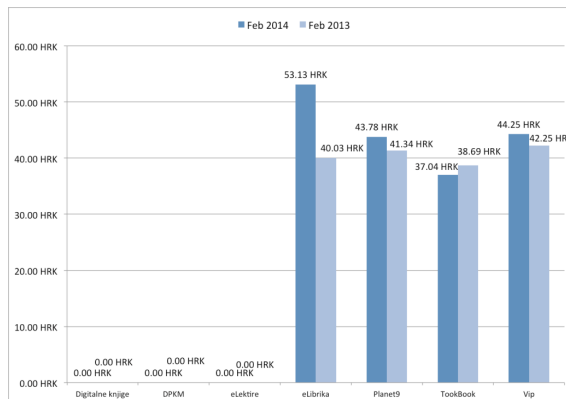


Figure 7: Average e-book price in Croatia



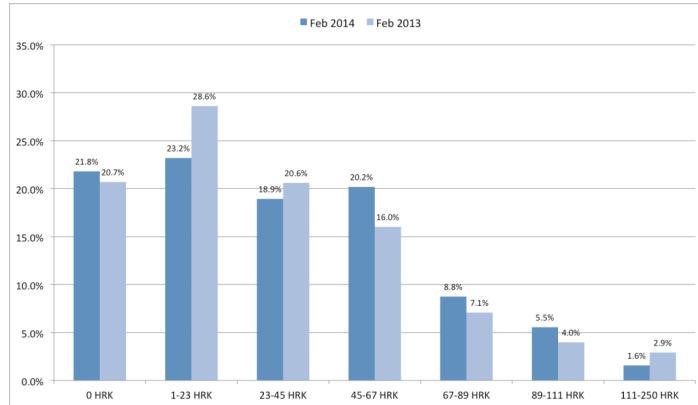


Figure 8: Price range of e-books in Croatia

## Conclusion

This short overview offers an insight into various features of e-book publishing in Croatia based on the best information available. The e-book business in Croatia, although small in scale, has been shaped during the last decade. A number of elements indicate the key role of non-commercial publishing in developing the Croatian e-book scene. Early projects and initiatives started mainly with the intention to digitize elements of Croatian culture like literary works and obligatory school readings by making them available in electronic format for free. This is still the case today since three non-commercial publishers – Bulaja naklada, The Society for Promotion of Literature on New Media (DPKM) and Impero Digital Books –publish 45% of all e-books in Croatia. The emergence of commercial e-book market dates back to 2010, when telecom platforms Planet9 and TookBook were launched. These platforms, together with eLibrika, signed agreements with 53 domestic publishers; today they represent 55% of the Croatian e-book market.

Regarding common market characteristics, we can summarize the findings as follows:

- the number of e-books available from seven leading Croatian distributors increased from 2,461 in February 2013 to 3,447 in February 2014
- the number of unique e-book titles increased from approximately 1,200 in February 2013 to 1,654 in February 2014
- the number of publishers present on e-book distribution platforms increased from 49 in February 2013 to 55 in February 2014
- the most widely represented e-book format is EPUB (55%), followed by e-book applications (26%), HTML (11%) and PDF (8%); the majority of platforms prefer the concept of single over multiple distribution formats

- the average retail price of Croatian e-book is 44.55 HRK *i.e.* 5.86 EUR in 2014, compared to 40.58 HRK *i.e.* 5.34 EUR in 2013 (difference due to change of currency exchange rates).

In conclusion, considering the small language market and the reluctant publishing industry, e-books are still a small and new niche to be considered more of a perspective for future developments than a present reality.

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## Sažetak

### Tržište elektroničkih knjiga u Republici Hrvatskoj

U radu se daje pregled razvoja tržišta elektroničkih knjiga u Republici Hrvatskoj, još jednom europskom malom jezičnom tržištu. Pregled se temelji na istraživanju sedam najvećih nacionalnih distributera e-knjiga koje je provedeno u veljači 2013. i veljači 2014. Istraživanje je uključilo prikupljanje podataka iz mrežnih kataloga navedenih distributera, a vjerodostojnost prikupljenih podataka potvrđena je intervjuima s njihovim predstavnicima. Nakon prikupljanja podataka utvrđen je broj jedinstvenih naslova e-knjiga, udio nakladnika, vrste formata e-knjiga i njihove cijene. Rezultati pokazuju da je na sedam obrađenih platformi trenutno dostupno 1654 jedinstvenih naslova e-knjiga izdanih od 55 nakladnika. Najpopularniji format e-knjige je EPUB (55%), dok je prosječna maloprodajna cijena 5,86 EUR.

**KLJUČNE RIJEČI:** e-knjige, e-nakladništvo, distribucija e-knjiga, Hrvatska, mala tržišta.