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DIGITALNI AKADEMSKI ARHIVI I REPOZITORIJI

E-book aggregators: new services in electronic publishing

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Research paper

Abstract

This paper provides the results of the case study conducted on a sample of 17 websites that identify themselves as e-book aggregators, five platforms for content publishing and 16 websites that present themselves as e-book distributors. While conducting the case study, the answers were sought to the questions about location of website, its owners, activities, distribution channels, services, partners, languages, content protection, scope of activities, number of authors and books, publishing areas, formats, etc. Based on the case studies, the results presented focus on the geographical distribution of the analyzed companies, distribution of companies according to the year in which they were established, distribution of companies by activity, the number of different input formats supported by aggregation companies, a separate service of conversion, output formats supported by aggregation companies, distribution on platforms and in bookstores, content protection options, possibilities of editing content in the cloud, models of payment for services, and other identified services. Based on the results of the study, a conclusion is made that e-book aggregation as a business model exists and that its further development will show the extent to which it is sustainable.

KEYWORDS: e-book aggregators, electronic publishing, e-book, academic publishing, e-book distribution platforms, e-book bookstores.

Introduction

The term e-book aggregator in the context of publishing content on various platforms was first used in 2010 on the websites of Apple¹ Corporation that was not enabling direct content publishing to the end user, but only through

1 Available at: <https://itunesconnect.apple.com/WebObjects/iTunesConnect.woa/wa/displayEncodingHouses?ccTy peld=13>

services of the aggregator. Apple’s design of the aggregation model is shown in Picture 1. The term e-book aggregation – as operation set up to help authors and publishers to reach a market – refers to an activity aimed at distributing content to one or more platforms. However, the term is also used in library management to mean, the ability of a service provider to aggregate content from multiple publishers for the needs of a library. Genco (2009) states that Overdrive is the leading (printed) e-book aggregator for public libraries in the USA and Great Britain. The same author states that e-book loan service through e-book aggregator netLibrary was first launched in a public library in 1998. The importance and market of printed e-books aggregators is discussed by Walters (2013) who named the main representatives, among others, Dawsonera, EBL, ebrary, MyiLibrary and representatives of non-profit initiatives JSTOR and Project MUSE. In information sciences, the term aggregation is used to mean integrate a great amount of data (Miller 2013). Furthermore, European digital library Europeana², defines an aggregator as an organization that acquires metadata from various providers for the needs of Europeana.

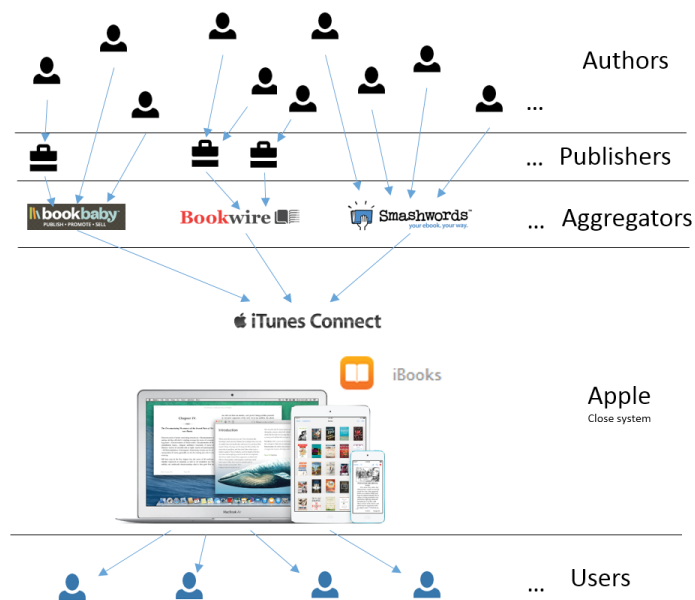


Figure 1. Apple’s aggregation model (elements of illustration are taken from: https://www.apple.com/ibooks/images/overview_hero.png, <http://www.bookbaby.com/ebook-publishing/publish-on-ipad>, <https://www.bookwire.de/wp-content/themes/bookwire/images/logo.png>, <http://cache.smashwire.com/static/1/swlogo.png>)

It is visible that the authors and publishers in the first version of the aggregator could not independently publish in the iBook system, but had to use the services of a company that provides aggregation services. The reason for this could be the fact that it is easier to do business with a small number of companies than with a million of potential users. Although Apple learned to do business in that manner as well, the direction of management in this case was the opposite: users pay Apple, while by book publishing, Apple has to pay the users (authors or publishers), so it is easier to pay a few companies through the B2B (business to business) model, than pay a million users through the B2C (business to customer) model. Apple, through its closed system, forms a platform through which users can buy and reproduce content. Soon the aggregators, that had at first provided services for Apple, started to distribute books to other platforms as well, thus expanding the visibility of the content aggregated for only one platform. At the same time, a large number of new companies were set up that did not have a distribution contract with Apple, but with other platforms. And while Apple pushed aggregator use, other platforms enabled direct interaction with authors or publishers. Consequently, Apple later enabled its users to publish directly through iTunes account on the iBooksservice, while maintaining the aggregation model. Just because of additional business activities with the aggregation itself, different categories of participants were identified by market analyses: aggregators, distributors and other service providers (Wischenbart 2013). From the authors' and publishers' point of view, those companies became their distribution extension and service providers who put content on different platforms. From the platforms' point of view, those companies became their e-book aggregators. Since these companies offer other services in addition to aggregation and distribution, the categorization in the aforementioned market analyses is quite logical.

E-book aggregators, being either companies that extend services traditionally available from publishing companies, or being publishing companies that expand their scope of services through e-book aggregation, must take into consideration the adequate organization and company management based on scientific insights and following the examples of best professional practice available. Publishing management is subject to the laws of economic sciences. Harold Koontz and Heinz Weihrich (1988) define management as the process of designing and maintaining an environment in which individuals, working together in groups efficiently achieve selected goals. In order for a publisher to achieve his/her goals, s/he organizes a company, its human resources and the flow of publishing processes (Mostert 2004). Thomas Davenport (1993) defines business processes as structured, measurable group of activities. According to Porter's model, processes are divided into primary activities and support activities. Processes of organization and managing publishing companies put an emphasis on specialization and quality performance of primary activities, while for support activities, if there are no adequate resources within the organization, the company searches for external contractors. In the 1970s, Herbert Bailey

(1970) defined six fundamental departments within a publishing company: editorial, design, production, marketing, accounting and administration. Since that time, up until 2014, the need for individual departments did not change; however, the arrangement of activities (processes) changed from individual departments into primary or support activities. Velagić (2013) states that, in contrast to the common publishing company organization, there are also smaller companies that simply cannot reach the most developed publishing organization.

Publishing companies most commonly use divisional organizational structure where divisions represent, e.g. course book department, picture book department, and the like, and functional organizational structure where the company is organized by functions, e.g. text layout, delivery for printing, sales. In today's dynamic business world, a company can also be organized as a project organization; however, as Velagić (2013) emphasizes, such organization is not constant and it is not a permanent solution.

Due to changes, the organization and models of company management change as well. Susan Gagher (2013) provides an excellent list of references that deal with those changes in publishing companies both in terms of organization and management, with a special emphasis on the disruptive influence of technologies on the traditional publishing. Yu Dan and Chang Chieh (2008) talk about difficulties of implementing changes in companies that manage people with years of experience with regard to business functioning. The same difficulties refer to the middle management level. Some authors state that accepting new technologies, that bring changes in terms of organization and management, requires strategic thinking. Dawn DeTienne and Christine Koberg (2002) suggest organizational structure of smaller business units in order to maintain flexibility. Xuemei Tian (2008) states that individual publishers within the existing organizational structure create special digital divisions that are then managed by people with digital competences. Clayton Christensen (1997) suggests that companies transform that new business into an autonomous organization, or that they establish a spin-off in order for new companies to better handle the tasks assigned. Tushman and O'Reilly (1996) suggest a two-sided organization that would enable the development within the company, which would retain the advantages of own resources, while the other side would specialize in the implementation of new technologies. This approach is applied in publishing due to the dual role of content that can be delivered in printed or electronic form. Erin Carreiro (2010) also advocates the dual publishing content delivery (printed and electronic) as long as there is a need for it.

Several online sources explain, analyse and try to define the term e-book aggregation. McLaren (2011) writes about e-book aggregators as interfaces between authors and e-book stores. He states that aggregators help with the conversion of a manuscript into different formats and its distribution to different stores. The same author (McLaren 2011) states that e-book aggregators can

offer other services related to aggregation and distribution such as design and content formatting, listing the advantages of the authors and publishers using the services of those companies. Dawson (2013) writes about the problem of direct publishing on Amazon and Apple platforms for citizens outside the United States of America and lists e-book aggregators as a practical solution, mentioning also several other companies that offer other services in addition to aggregation, i.e. conversion, design, editing, scanning, etc. Brookes (2013) describes e-book aggregators as companies that take a file from the user, convert it into multiple formats and make it available through multiple distribution channels (platforms, stores, libraries, etc.). Brookes states that those companies make profits by charging a subscription fee or taking a portion of the profits. Ueland (2011) writes about e-book aggregators as a way of approach to retail. He also states that, besides distribution, e-book aggregators can provide other services as well: design, editing or marketing. The company eBookdesigns (2013) defines an e-book aggregator as a company or service provider that will convert the existing manuscript into different formats and distribute it to e-book stores. Besides the aforementioned basic services, e-book aggregators offer other services including help with the book cover, International Standard Book Number (ISBN) acquisition, help with copyrighting, and tracking user payments.

Case study

The case study method was used to analyze websites of business entities who presented themselves in the market as e-book aggregators: Author Solutions, BiblioCommons, BookBaby and CD Baby, e-bookIt, Booktango, Bookwire, FastPencil, Immateriel.fr, Ingram Content Group, INscribe Digital, LibreDigital, Lulu, Mye-book, OverDrive, Smashwords, XinXii and YUDU Pro; platforms for content publishing (in alphabetical order: Amazon, Apple, Google, Barnes & Noble and Sony) and e-book stores (in alphabetical order: BooksOnBoard, Cambridge University Press, Casa del libro, Diesel e-book, e-books.com, Free-e-books.net, GVRL Catalog, Harlequin e-book Store, Issuu Kobo e-books, PubEasy Home, Random House, Scribd, TookBookand Waterstones.com) in the first half of 2014.

The aforementioned business entities are distinct in that they provide services of an e-book aggregator in the narrow sense of the word, and that is the reason why these companies were chosen for a more detailed analysis. For each of the visited websites of the observed system, the answer was sought to the question: which organizational and management model have these e-book aggregators adopted? Website analysis cannot give an unambiguous answer to that question, nor is the definitive answer stated on one particular website in the required form. Therefore to answer this question, the following sub-questions were put:

- where is the website located (city, state),
- who owns it,
- when was it set up,
- what is the primary activity, and what are other activities of the website,
- which distribution channels does it use (for which platforms does it perform aggregation, which retail chains does it use),
- which services does it offer, what are the details of services, which services does it offer on its own, and which in partnership with other companies,
- what does cloud computing enable the users to do, which data can be defined and which activities (processes) can be carried out
- in which languages does it receive the texts,
- how does it protect the content,
- in which countries is use of services available,
- does it bring together a community of authors and other participants in the form of a social network,
- how many books have been published on the platforms of the website,
- how many authors publish using this website,
- is there a bookstore; how many books are offered for sale, and in how many categories are they classified,
- which publishing areas are covered and which areas does it specialize in?

For each platform website visited, the answers were sought to the following questions: what defines a platform for content publishing and distribution and what is the nature of its relationship with e-book aggregators?

To answer the question posed, it is necessary to ask the following sub-questions:

- where does the platform come from,
- who owns it,
- when was it founded,
- what services and products does it offer to users
- where is it available; does it appear in the market as an independent company or in partnership with other companies, and finally
- is the platform open or closed to competition?

For each e-book store website visited, the answer was sought to the question: what is the relationship between e-book aggregators and e-book stores?

To answer this question the following sub-questions were put:

- where is the headquarters of the store located,
- who owns it,
- when was it set up,
- what services/products does it offer to users,
- where are those services/products available,
- how many units of material does it possess,
- how are books categorized,
- in which formats are books available,
- does it use protection, and if so, which one?
- what else do bookstores offer besides the core business of selling books?

Results

Although, before the research, the analyzed companies were grouped according to their public name into e-book aggregators, platforms and stores, the analysis shows that placement into a specific category is not tenable. It was concluded that, regardless of their name, the analysed companies perform similar and, often, identical activities. In the past 5 to 6 years they have positioned themselves between the author and the reader in the publishing chain and have cooperated intensively. Therefore all analyzed companies will be approached equally in the presentation of the results. Attention will be given to their geographical distribution, year of founding, their activity, input formats, possibilities of content conversion, output formats, distribution to platforms and bookstores, methods of content protection, methods of defining metadata, editing content in the cloud, payment models, and other services they offer.

Figure 2 shows the distribution of analyzed companies according to their headquarters. Most companies are based in the USA and Great Britain, i.e. 72% in total. If we add Australia and parts of Canada, the predominance of English-speaking countries is evident. Paul Richardson and Graham Taylor explain the predominance of English in publishing by its widely spread use in the countries of the “British empire” and by the former leading role of Great Britain in the international trade and industrial technology. When the British power was weakened at the turn of the 20th century, the USA became the new superpower, ensuring continuous use of English as “an international medium for communication in trade, culture, science and technology” (Richardson and Taylor 2008). The analysis conducted in this research confirms the continuous predominance of English.

From Figure 3 it is evident that the majority of the companies (64%) were founded after the year 2000, which makes them very young. Thus, we can say that, through their conduct in the market they act as a disruptive technology in regard to companies in the so-called traditional publishing chain.

Figure 4 shows the analyzed companies' activities in the market. None of the companies concentrated on a single activity, i.e. they normally perform more than one activity. Elements characteristic of e-book aggregation were found in 17 companies. The most common type of activity is a bookstore, which is logical because companies already possess content distributable to other platforms and bookstores and their own bookstore is a logical source of additional profit.

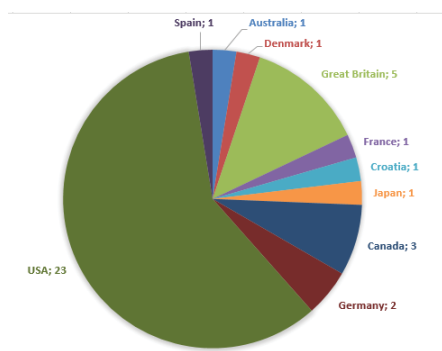


Figure 2. Geographical distribution of analyzed companies

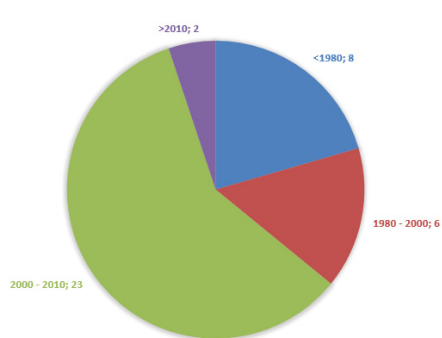


Figure 3. Distribution of companies according to the year of founding

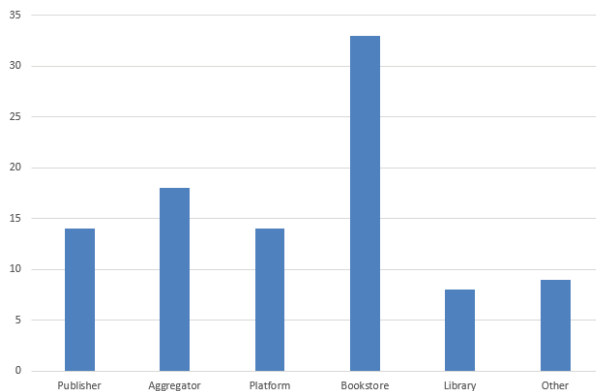


Figure 4. Distribution of companies according to their activity

The characteristics of each of the aforementioned activities were shown in the former analyses, and the results of e-book aggregators are analyzed in detail below.

Input formats

According to information available on the companies' websites, the companies that perform aggregation state that they receive different input formats whose number is shown in Figure 5. In cases where companies have not listed acceptable input formats, that does not mean that they do not support them. It just means that, in order to accept data, it is necessary to have a B2B relationship. The focus of this activity, in the context of academic publishing, is oriented towards the B2C model, where C is the user (employee of the academic community) who wants to publish his/her content. The number of accepted formats ranges between 1 and 9. Larger number of accepted input formats does not necessarily have to be an advantage, because with the help of other online services or locally installed software, it is possible to convert content into a supported format.

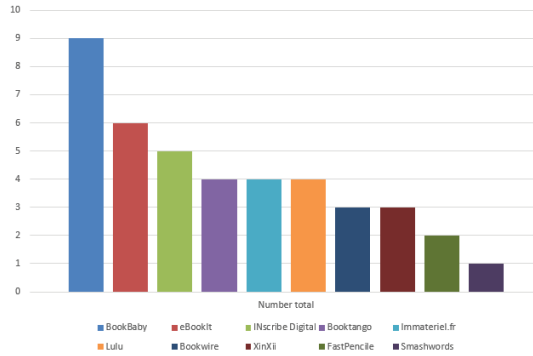


Figure 5. Number of different input formats supported by companies performing aggregation

Content conversion service is offered by 10 out of 17 companies (Figure 5). In the remaining 7 companies, the service is not listed due to B2B model, which does not mean that the service does not exist.

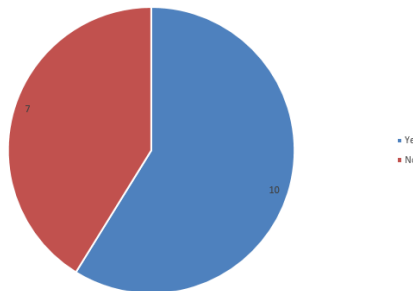


Figure 6. Separate conversion service

Output formats

All companies included in the analysis offer conversion to ePub and mobi formats, and only some of them to PDF, as shown in Figure 7.

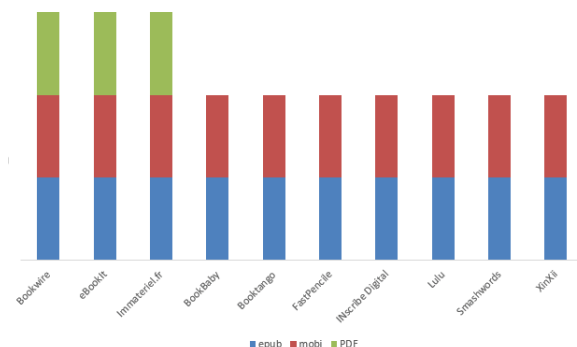


Figure 7. Output formats offered by aggregation companies

Although the sequence input format – conversion – output format should be representative of services offered by some companies, these companies must also be able to convert content into all other formats accepted by platforms or stores. In order to finalize content conversion (with input formats on one side and output formats on the other), one must take into consideration the platforms which the mentioned companies distribute their content to. Table 1 shows the distribution to five platforms with the index of the total number of various distribution channels.

Table 1. Distribution to platforms and bookstores

Company	Distribution to					
	Amazon	Apple	Barnes	KOBO	Google	Σ other
BookBaby	X	X	X	X		6
e-booklt	X	X	X	X	X	3
Booktango	X	X	X	X	X	1
Bookwire	X	X	X	X		50
FastPencil	X	X	X	X		66
Immatériel.fr	X	X		X		6
INscribe Digital	X	X	X	X	X	12
Lulu	X	X	X			
Smashwords	X	X	X	X		5
XinXii	X	X	X	X		17
Harlequin e-book Store	X	X	X	X		4

Content protection

Information about content protection is available within metadata as the level of protection. Table 2 shows which protection methods, if any, the aggregators use. It is worth noting that only one company on the list uses watermarking, while DRM and delivery without DRM protection are the predominant options.

Table 2. Options of content protection

Company	Protection		
	Without DRM	DRM	Watermark
BookBaby	X	X	
e-bookIt	X	X	
Booktango	X	X	
Bookwire	X	X	
FastPencil	X	X	
Immateriel.fr	X	X	X
INscribe Digital	X	X	
Lulu	X	X	
Smashwords	X	X	
XinXii	X	X	
Harlequin e-book Store		X	

Editing content in the cloud

Table 3. Possibilities of editing content in the cloud

Company	Editing content in the cloud		
	Cover design	Book editing	Metadata definition
BookBaby			X
e-bookIt			X
Booktango	X	X	X
FastPencil	X	X	X
INscribe Digital	X		X
Lulu	X	X	X
Smashwords	X	X	X
XinXii			X

The companies included in this research offer the service of content editing in the cloud. However, different companies interpret this service differently.

All companies allow input of metadata which are divided into basic (author, publisher, title, subtitle and ISBN) and other: prices, dates of publishing, descriptions (short and long), keywords, categories (one, or more commonly, more categories) and the aforementioned types of protection. Most companies also offer cover design and editing services, as shown in Table 3.

Payment models

Two payment models are predominant: free use of services with the collection of a commission, and fixed price per book. In deciding which model would be best for them in terms of sales and profit, users of aggregator services are faced with a business risk. If a book is expected to be profitable, a more desirable model is a fixed price per book. On the other hand, if the outcome of sales is uncertain, commission per sale is a better model to choose. Table 4 shows companies and payment models they offer.

Table 4. Payment models

Company	Payment model	
	Free + commission	Fixed price per book
BookBaby	X	X
e-bookIt	X	X
Booktango	X	X
FastPencil	X	X
Lulu	X	X
Smashwords	X	
XinXii	X	X

Other services

In addition to the aforementioned services characteristic of e-book aggregators, all of the examined companies offer other services, such as cover design, adaptation of printed books, author's website creation, editing, book scanning and marketing, image design (custom and premium), editing (adding finishing touches to the cover design, editor's assessment, basic and advanced text editing), creating electronic table of content (NCX file) compatible with e-book readers, adding a page with copyright data, access to book cover gallery, public relations services (printed editions, press conferences, marketing campaigns – online, video and social networks), book reviews, making and distribution of book advertising videos, business cards and other advertising material; participation in book fairs (regional, national and international), book preparation for screen adaptation, etc.

Conclusion

From the conducted research it is evident that e-book aggregation is a process that continues and develops and that the companies involved in the process continuously seek for optimum business models. Different companies combine different services and activities. It is important to note that book aggregation may be just one of the services offered by a company, or it can be a company's primary activity.

Based on the analysis, the following companies can be considered e-book aggregators at the time of the survey: BookBaby, e-bookIt, Booktango, FastPencil, Lulu, Smashwords and XinXii.

It is necessary to emphasize that the discussion refers to the defined time of the survey; its downside is the impossibility of generalizing the conclusions, and its advantage is the analysis of a new publishing phenomenon at a given moment in its development. Without such analysis, the state of electronic publishing in general would be impossible to reconstruct in a few years.

E-book aggregator is a company or an organizational unit within a company that collects content from different sources, converts it and adapts it, and finally distributes it to multiple systems which enable the sales or content access. The service is charged to the user from whom the content is received. E-book aggregator has all the characteristics of a distributor, with an addition of conversion services and content adaptation to different formats in which e-books are distributed. An aggregator uses only computer technology and network to download and deliver content, and the precondition for its creation was the development of information and communication technologies. From the perspective of publishing, e-book aggregation can mean an expansion of activity, but it is, according to the research results, more commonly a service for which a publisher uses external companies.

The reasons for the development of e-book aggregators are twofold and it is possible to distinguish two development stages. In the early stages of market development, companies needed mediation in the publishing process, which opened the space for mediators, as in the case of Apple Corporation. Mediators who consequently developed are e-book aggregators. In the next stage, publishers, started combining business processes, which was facilitated by technological development, focusing on the development of their own content distribution platforms as is evident from a number of analysed cases, best example being Barnes & Noble who supplemented their business with new models and services. The fact that the number of platforms and stores has been growing enables aggregators in the second stage to prepare content for distribution to a larger number of business entities.

Data on the observed companies' year of founding show that predominantly young companies were established as start-up companies, a model which is characterized by focus on the work and the desire for market success. Such companies are prone to management improvisation and guerrilla marketing (as evident from a large number of services offered alongside basic services). Human resources of such companies do not pay attention to the organizational structure of management. However, as they develop, these companies need to consolidate and reorganize, define their mission, vision, and long-term goals. Market turbulence, which is evident in the large number of new companies being established and the existing ones closing their business, speaks in favour of this observation. E-book aggregator management requires excellent knowledge of business processes involved in e-book aggregation. E-book aggregation as a business model exists and its further development will show the extent to which it is sustainable.

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Sažetak

Agregatori elektroničkih knjiga: nove usluge u elektroničkom nakladništvu

Rad donosi rezultate analize studije slučaja provedene na uzorku od 17 mrežnih mjesta koji se identificiraju kao agregatori elektroničkih knjiga, 5 platformi za objavljivanje sadržaja te 16 mrežnih mjesta koja se predstavljaju kao trgovine elektroničkim knjigama. Tijekom istraživanja traženi su odgovori na niz pitanja: odakle je mrežno mjesto, tko mu je vlasnik, što su mu djelatnosti, koje distribucijske kanale koristi, koje usluge nudi, što omogućuje korisniku, koji su jezici zastupljeni, kako štiti sadržaj, koliko je autora i knjiga dostupno, koja nakladnička područja pokriva, koji su formati i oblici zaštite dostupni i sl. Rezultati predstavljeni u radu prikazuju geografsku raspodjelu analiziranih tvrtki, raspodjelu tvrtki prema godini nastanka, raspodjelu tvrtki prema djelatnosti, broj različitih ulaznih formata u tvrtkama koje obavljaju djelatnost agregacije, zasebnu uslugu konverzije, izlazne formate u tvrtkama koje obavljaju djelatnost agregacije, distribuciju na platforme i knjižare, opcije zaštite sadržaja, mogućnosti uređivanja sadržaja u oblaku, modele naplate usluge te ostale identificirane usluge.

KLJUČNE RIJEČI: agregatori elektroničkih knjiga, elektroničko nakladništvo, elektronička knjiga, akademsko nakladništvo, platforme za distribuciju elektroničkih knjiga, knjižare za distribuciju elektroničkih knjiga.