

# ESTONIAN PUBLISHING SECTOR AT THE TURN OF THE 20TH AND 21ST CENTURIES: EMERGENCE OF E-BOOK MARKET

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*The article includes an overview of the development of e-publishing in Estonia. The treatment is based on the analysis and comparison of existing research, mainly student papers; statistical data from the database of Statistics Estonia and the National Library of Estonia, articles in the periodical press and homepages of various institutions.*

*The beginning of the article presents the description of the publishing industry during the 2000s. In accordance with the development of economy the book production has moved from the peak in the mid-2000s to recession in 2008–2010. The declining market led to the decrease in print runs (since 2008) and book title production (since 2010). The number of publishers, however, increased even during the crisis. The small-language market is of no interest to international companies, so the book industry works on local capital.*

*Estonia is characterised by early adoption and wide use of the Internet. The web publishing by organisations, associations and individuals is widespread since mid 1990s, but commercial publishers remained aside of this trend. As in many other European countries, especially small countries, the publishers were uncertain about the application of copyright in the digital environment and technological skill gaps. These worries were largely overcome by the establishment of e-publishing service providers in 2010, which led to the take off in the publishing of e-books. The number of e-books produced and the sales have increased a number of times, but their share of the book market is rather marginal. The book buyers and readers still hold to traditional book form. The official cultural policy, however, favours e-books and supports different projects that provide free access to Estonian classical literature and modern authors.*

KEYWORDS: *e-publishing, e-book, publishing industry, book title production, e-book market, Estonia.*

## INTRODUCTION

The book publishing has been in the stage of transformation for some time now. The technological and economic changes have led to the emergence of e-book and e-publishing model that exists alongside the traditional paper book and its publishing model. Although this process has been called global, the pace and range of acceptance of e-books by publishers and readers varies greatly in different countries.

The aim of the present article is to give an overview of the development of e-publishing in Estonia, concentrating especially on the actions of commercial publishing houses which produce e-books in the Estonian language for a certain charge. Firstly, the volume and structure of the book publishing sector and the general developments of book title production in Estonia are presented as background information and introduction into the topic. The article continues with the treatment of the initial phase of e-publishing in Estonia in the beginning of the 1990s and its further development, pointing out the main agents, who became active in this field, the choice of texts available as e-books and the reasons for the cautious stand of the established commercial publishers towards e-publishing. The following section of the article examines the turning point in the e-book publishing by established publishing houses in the end of 2010, identifying the factors that stimulated this process. The article also analyses the development of e-book publishing during the two following years, including the selection of e-books in the Estonian language, their reception by buyers and authors as well as the role of e-books in the official cultural policy. The final section includes the discussion and conclusions, characterising the main features of e-book publishing in Estonia and comparing them with the developments in the other European countries.

The overview is based on the analysis of the research conducted on the topic, statistical data available from the database of Statistics Estonia and the National Library of Estonia, articles issued in paper and online newspapers as well as homepages of various institutions. Thus the study makes use of both quantitative and qualitative data. The studied processes are characterised via the analysis and comparisons of statistical indicators as well as through thematic analysis of texts.

The statistical indicators included, for example, the number of publishing bodies in general and the number of publishing houses specialised in book publishing, the number of publishers who produce e-books, book title production and print runs of paper books, the title production of e-books, the sales of e-books and their market share, prices of paper and e-books, users of electronic reading devices, etc. The data from different sources was organised into tables for benchmarking purposes and presentation of the trends and developments.

The thematic analysis was based on the Framework approach elaborated by the UK National Centre for Social Research<sup>1</sup>. It uses a matrix for creating a list of themes and subthemes that have been established in the process of reading the studied texts. The matrix enables the researcher to organise, analyse and synthesise the motives represented in the texts. The framework is applied to the texts that have been first organised by their main themes. The analysis proceeds with the identification of subthemes and cases. Among the main themes were, for example, the production and title output of e-books, the distribution, marketing and sales of e-books. The subthemes were studied in connection with the actors of the e-book market – authors, publishers, conversion agencies and distributors as well as readers/buyers. For example, from the standpoint of the publishing houses the study of the production and title output of e-books included subthemes like hindrances to e-book publishing; impetus for publishing of e-books; the selection of titles for publishing as e-books; production process and its cost. The further analysis combines the political, legal, commercial and social aspects in order to establish the dominant trends in the development of the e-book market.

## LITERATURE REVIEW

The research on e-books and e-publishing in Estonia is quite limited. Above all, the topic has been treated in student research projects and theses – Bachelor's theses and seminar papers.

According to the chronological approach to the research in question, the first relevant study on this topic “Different Forms and Development of Electronic Publishing” was written by Helen Väljaste (2000)<sup>2</sup>. The author gave an overview of the situation in web publishing and the publishing of disks and CD-ROMs in Estonia. It includes the bibliography of the CD-ROMs issued in Estonia in 1998-2000 and registered in the online catalogue ESTER (which is the union-catalogue for 12 Estonian libraries).

The seminar paper by Piret Hanson<sup>3</sup> “Online Publishing and Online Publications in Estonia” (2005) studies the Estonian online publications that had been included in the online catalogue ESTER, presenting the number of titles as well as the analysis of the themes and types of these publications, the structure of online publishers and the formats used for online-publications.

Helen Reiser's seminar paper<sup>4</sup> “The Current Situation in Publishing and Distribution of e-Books in Estonia: Problems and Possibilities” (2011) examines the incentives and obstacles to the development of e-publishing in Estonia. In order to establish the factors that exerted influence on this process, the author conducted

a survey among commercial publishing houses and interviewed the representative of the leading e-publishing service provider as well as an author who is known as a self-publisher of e-books. Thus the paper investigates the standpoints of different actors of e-publishing and compares its arrangement through an intermediary with self-publishing.

Jaanika Vösamaa's Bachelor's work<sup>5</sup> "The Book Market in Estonia and the Possibilities of its Development" (2012) investigates the new trends in Estonian book trade, above all, the emerging e-book market. The author studies the pricing model of e-books in the Estonian Digital Book Center and compares the prices of e-books in the lists of bestsellers of different e-book retailers. The research work also gives a short overview of the publishers of e-books, including the ranking of the publishing houses by the number of e-book titles in the lists of bestsellers of different retailers.

The editor in chief of the publishing house Tänapäev Tauno Vahter<sup>6</sup> treats the issue of e-books in his paper "Books vs e-books in Estonia" presented at the seminar "E-publishing: Production, Marketing, Distribution, Piracy" organised by the Lithuanian Publishers' Association in November 2012. He gave an overview of the development of traditional publishing and bookselling in Estonia. The presentation also provided information on e-publishing of books, especially textbooks and magazines.

Some resources concentrate on special types of e-publications. For example, Marju Mikkel<sup>7</sup> has compiled the bibliographic database "Literary Resources in the Estonian Web: Typology" (2006) including all the webpages, databases and other web documents which contain either literary texts, research papers on literature, bibliographies, webpages of literary institutions or virtual exhibitions. The author presents the typology of these resources and describes the characteristic features of different types.

1 BRYMAN, Alan. *Social Research Methods*. Oxford; New York: Oxford University Press, 2008, p. 554–555.

2 VÄLJASTE, Helen. *Elektroonilise kirjastamise erinevad vormid ja areng* [unpublished Bachelor's work]. Tallinn: Tallinna Pedagoogikakool, 2000.

3 HANSON, Piret. *Võrgukirjastamine ja võrguväljaanded Eestis* [unpublished seminar paper]. Tallinn: Tallinna Ülikool, 2005.

4 REISER, Helen. *E-raamatute kirjastamise ja leviku hetkeseis Eestis: probleemid ja võimalused* [unpublished seminar paper]. Tallinn: Tallinna Ülikool, 2011.

5 VÖSAMAA, Jaanika. *Eesti raamatuturg ja selle arenguvõimalused* [unpublished Bachelor's work]. Tartu: Tartu Ülikool, 2012.

6 VAHTER, Tauno. *Books vs e-books in Estonia*. PowerPoint presentation of the paper given at the seminar at the Lithuanian Publishers Association, 2012 [accessed 12 December 2013]. Access through Internet: <[http://www.lla.lt/uploads/documents/Book-publishing%20in%20Estonia\\_Vilnius%202012.pdf](http://www.lla.lt/uploads/documents/Book-publishing%20in%20Estonia_Vilnius%202012.pdf)>

7 MIKKEL, Marju. *Kirjandusressursid Eesti veebis: tüpoloogia*. 2006 [accessed 10 December 2013]. Access through Internet: <[http://www.kirjanikekodu.kongress.ee/10toimetus/lingid\\_mikkel.html](http://www.kirjanikekodu.kongress.ee/10toimetus/lingid_mikkel.html)>.

Numerous articles by researcher Piret Viires<sup>8</sup> are dedicated to the development of cyberliterature in Estonia, analysing its different stages and genres used by Estonian writers.

Several resources examine the phenomena connected with e-books among other aspects of study. For example, the Estonian Institute of Economic Research has compiled surveys on the development of creative economy in Estonia under the title “The Research and Mapping of the Situation of the Creative Industries in Estonia”, which include the section on publishing<sup>9</sup>. The latest study analyses the changes in the Estonian publishing sector in 2007–2011, comparing the number of employees, turnover and profit of the enterprises in question. The research also treats the publishing of e-books, presenting the statistical data on the production of e-books by commercial publishers and characterises the main actors of the field on the basis of the indicators provided by the National Library of Estonia.

Thus the existing research mainly defines the state of the art of e-publishing and characterises the selection of electronic resources during the 1990s until 2011. The statistical data, facts and trends, established in the student papers and other research work form the basis for further description and analysis of these developments.

The international trends in e-book publishing have been treated in numerous reports and articles. The present article uses mainly the findings from the report “Global eBook: A report on market trends and developments” compiled and published by Rüdiger Wischenbart<sup>10</sup>.

## THE BOOK PUBLISHING SECTOR AND ITS PRODUCTION IN ESTONIA SINCE 2000

The publishing industry in Estonia is small owing to the size of the country’s population and the low numbers of speakers of the Estonian language. The population of Estonia is 1,28 million people. The Estonian language is the mother tongue for 68,5 per cent of the inhabitants and the Russian language for 29,6 per cent<sup>11</sup>.

At the same time the number of people and institutions who write and/or publish books is remarkably large. The National Library of Estonia provides statistical data that includes all enterprises, organisations and private individuals who produce at least one (paper) book annually. The number has constantly exceeded 800 units during the 2000s (802 in 2003, 936 in 2007, 828 in 2011)<sup>12</sup>. The majority of these actors publish just one book. For example, their share formed 67 per cent of all the publishers in 2010 (552 publishers from the total number of 832)<sup>13</sup>.

The statistical data on the publishing houses that specialize in issuing various types of publications and that have been registered in the national business register is provided by the Estonian Institute of Economic Research. According to their reports, the number of publishing houses, concentrating on issuing books increased from 105 in 2003 to 147 in 2011 (see Table 1).

TABLE 1. The number of book publishers in 2003–2011.

	Number of enterprises					
	2003	2007	2008	2009	2010	2011
Book publishing	105	138	136	151	138	147
Publishing of books and pamphlets	...	122	121	130	126	127
Publishing of textbooks, dictionaries, atlases and maps	...	16	15	21	12	20

SOURCE: KIRJASTAMINE. In *Eesti loomemajanduse olukorra uuring ja kaardistus* (2011). Tallinn: Eesti Konjunktuuriinstituut, 2013, p. 7–7; Kirjastamine. In *Eesti loomemajanduse olukorra uuring ja kaardistus* (2007). Tallinn: Eesti Konjunktuuriinstituut, 2009, p. 5.

The increase and decline of the total number of publishing bodies is in correlation with the general economic situation, which moved from strong growth

8 VIRES, Piret. Küberkirjandusest meil ja mujal. *Looming*, 2002, no. 8, p. 1235–1240; VIRES, Piret. Läänud kümnendil toimus eesti kirjanike hulgas digimodernistlik veebiplahvatus. *Postimees*, 12 December 2010 [accessed 5 December 2013]. Access through Internet: <<http://arvamus.postimees.ee/355634/piret-viires-lainud-kumnendil-toimus-eesti-kirjanike-hulgas-digimodernistlik-veebi-plahvatus>>]

9 Kirjastamine. In *Eesti loomemajanduse olukorra uuring ja kaardistus* (2011). Tallinn: Eesti Konjunktuuriinstituut, 2013 [accessed 15 December 2013]. Access through Internet: <[http://www.ki.ee/publikatsioonid/valmis/7.\\_Eesti\\_loomemajanduse\\_olukorra\\_%282011%29\\_uuring\\_ja\\_kaardistus\\_-\\_Kirjastamine.pdf](http://www.ki.ee/publikatsioonid/valmis/7._Eesti_loomemajanduse_olukorra_%282011%29_uuring_ja_kaardistus_-_Kirjastamine.pdf)> ; Kirjastamine. In *Eesti loomemajanduse olukorra uuring ja kaardistus* (2007). Tallinn: Eesti Konjunktuuriinstituut, 2009 [accessed 15 December 2013]. Access through Internet: <[http://www.ki.ee/publikatsioonid/valmis/LM2009-7\\_KIRJASTAMINE.pdf](http://www.ki.ee/publikatsioonid/valmis/LM2009-7_KIRJASTAMINE.pdf)>.

10 WISCHENBART, Rüdiger et al. *Global eBook : A report on market trends and developments*. Vienna: Ruediger Wischenbart Content and Consulting, 2013 [accessed 25 November 2013]. Access through Internet: <<http://www.global-ebook.com>>.

11 PO0222: *Population, 1 January by Year, Sex, County and Ethnic nationality*. Statistics Estonia: Statistical database, 2013 [accessed 30 November 2013]. Access through Internet: <<http://pub.stat.ee/px-web.2001/Dialog/Saveshow.asp>>.

12 *Eesti kirjastuste arv aastatel 1996–2011*. Eesti Rahvusraamatukogu [accessed 12 December 2013]. Access through Internet: <[http://www.nlib.ee/public/documents/Made/diagr.4.\\_Eesti\\_kirjastuste\\_arv\\_aastatel\\_1996-2011.pdf](http://www.nlib.ee/public/documents/Made/diagr.4._Eesti_kirjastuste_arv_aastatel_1996-2011.pdf)>.

13 *Eesti kirjastuste arv ja osakaal raamatunimetuste järgi 2010. aastal*. Eesti Rahvusraamatukogu [accessed 12 December 2013]. Access through Internet: <[http://www.nlib.ee/public/documents/Made/Eesti\\_kirjastuste\\_arv\\_ja\\_osakaal\\_raamatunimetuste\\_jargi\\_2010.aastal.pdf](http://www.nlib.ee/public/documents/Made/Eesti_kirjastuste_arv_ja_osakaal_raamatunimetuste_jargi_2010.aastal.pdf)>.

TABLE 2. Book title production and print run in 2007–2012<sup>14</sup>

Year	Number of titles	Print run (millions of copies)	Average print run
2007	4310	8,9	2064
2008	4685	7,3	1558
2009	4551	6,9	1516
2010	3760	5,4	1449
2011	3716	4,4	1192
2012	3971	4,6	1168

(2000–2007) to deep recession (2008–2010). At the same time the number of book publishing houses remained stable, experiencing growth rather than decline. The composition of book publishing firms has changed over the years due to bankruptcies of some established publishers. However, newcomers entered the field of publishing even during the crisis in 2008–2010. Although some media experts have predicted a wave of mergers, the publishing houses chose to preserve their independence. The acquisition of the reference and textbook publisher Ilo by its larger competitor TEA in 2008 remains rather exceptional. Due to the smallness of the market, Estonia has not been attractive to international publishing groups and is based on local investment. Scandinavian media groups, Bonnier and Schibsted, have been among the owners of the two leading Estonian media corporations. However, both of them have been bought out by local investors, and thus the major media groups, both of which also publish books, belong to Estonian entrepreneurs at the present time. There are about ten book publishing houses which may be considered large in the Estonian context, producing more than 90 titles annually. The list includes textbook, trade as well as academic publishers, the largest publishing house being the textbook publisher Koolibri (209 titles in 2011)<sup>15</sup>.

The majority of the publishing houses are operating in the whole range of trade publishing, but some risk to specialize, for example, the art publisher Lagemik, established in 2010. The success in publishing even encouraged the firm to open their book-shop in 2013<sup>16</sup>.

The impact of economic recession becomes visible in the notable decline of annual title output in 2010, whereas the total and average print runs started to decrease already in 2008 (see Table 2).

Thus the book industry reacted to the changes in demand firstly by reducing the amount of copies. As the recovery of the economy tended to drag, further measures to adjust to the declining market involved the decrease in title produc-

tion. And yet, the book industry has reported about the first signs of recovery, for example, the leading bookstore chains as well as many publishers have announced an increase in turnover in 2012<sup>17</sup>. At least partly this was due to the rise in prices.

## THE DEVELOPMENT OF E-PUBLISHING IN THE 1990s AND 2000s: ONLINE PUBLICATIONS AND DISCS

Estonia has taken pride in the early and wide use of information technology as well as in the early adoption of the Internet (June 1992) and its wide penetration. Internet access and usage have increased rapidly since 1995 and thus 80 per cent of people aged 16–74 were using the Internet in 2013<sup>18</sup>, 80.3 per cent of households had Internet connection at home<sup>19</sup>.

Among the first actors of online publishing in Estonia were the periodical publishers who, in order to attract readers to their paper editions, started to publish some of the articles on their homepages. Since the mid-1990s, Internet was already used for publishing and distributing content by a large number of institutions and organisations, who were not specialised in publishing. Research institutions, government agencies and universities were among the most productive web publishers. For example, the Estonian folklorists' server *Haldjas* (Fairy) was

14 Source: *CU12: Books and pamphlets*. Statistics Estonia. Statistical database [accessed 30 November 2013]. Access through Internet: <[http://pub.stat.ee/px-web.2001/Dialog/varval.asp?ma=Cu12&ti=B OOKS+AND+PAMPHLETS&path=../I\\_Databas/Social\\_life/01Culture/16Printed\\_matter/&lang=1](http://pub.stat.ee/px-web.2001/Dialog/varval.asp?ma=Cu12&ti=B OOKS+AND+PAMPHLETS&path=../I_Databas/Social_life/01Culture/16Printed_matter/&lang=1)>.

15 *10 suurimat Eesti kirjastust nimetuste arvu järgi 2011. aastal*. Compiled by the National Library of Estonia. Tallinn: Eesti Rahvusraamatukogu, 2012 [accessed 20 December 2013]. Access through Internet: <[http://www.nlib.ee/public/documents/Made/diagr.5.\\_10\\_suurimat\\_Eesti\\_kirjastust\\_nimetuste\\_arvu\\_jargi\\_2011.\\_aastal.pdf](http://www.nlib.ee/public/documents/Made/diagr.5._10_suurimat_Eesti_kirjastust_nimetuste_arvu_jargi_2011._aastal.pdf)>.

16 VARBLANE, Reet. Lugemik toob maailma koju kätte. *Sirp*, 20 June, 2013.

17 AASMÄE, Kalev. Raamatuäri on kasvuteel. *E24*, 14 December 2013 [accessed 28 November 2013]. Access through Internet: <<http://e24.postimees.ee/2631576/raamatuari-on-kasvuteel>>; JAAKSON, Marta. Raamat on eestlaste seas populaarne. *Äripäev*, 4 April, 2013.

18 *IC32: Computer and internet users aged 16–74 by Group of individuals*. Statistics Estonia: Statistical database [accessed 30 November 2013], Access through Internet: <[http://pub.stat.ee/px-web.2001/Dialog/varval.asp?ma=IC32&ti=COMPUTER+AND+INTERNET+USERS+AGED+16-74+BY+GROUP+OF+INDIVIDUALS&path=../I\\_Databas/Economy/20Information\\_technology/04Information\\_technology\\_in\\_household/&lang=1](http://pub.stat.ee/px-web.2001/Dialog/varval.asp?ma=IC32&ti=COMPUTER+AND+INTERNET+USERS+AGED+16-74+BY+GROUP+OF+INDIVIDUALS&path=../I_Databas/Economy/20Information_technology/04Information_technology_in_household/&lang=1)>.

19 *IC20: households having a computer and internet connection at home by type*. Statistics Estonia. Statistical database [accessed 30 November 2013]. Access through Internet: <[http://pub.stat.ee/px-web.2001/Dialog/varval.asp?ma=IC20&ti=HOUSEHOLDS+HAVING+A+COMPUTER+AND+INTERNET+CONNECTION+AT+HOME+BY+TYPE&path=../I\\_Databas/Economy/20Information\\_technology/04Information\\_technology\\_in\\_household/&lang=1](http://pub.stat.ee/px-web.2001/Dialog/varval.asp?ma=IC20&ti=HOUSEHOLDS+HAVING+A+COMPUTER+AND+INTERNET+CONNECTION+AT+HOME+BY+TYPE&path=../I_Databas/Economy/20Information_technology/04Information_technology_in_household/&lang=1)>.



set up in 1995 by the folk belief research group of the Institute of the Estonian Language (presently incorporated under the Estonian Literary Museum). Beside databases and web galleries on oral heritage, folklore and folk belief the server features two scholarly journals that have been published online and in print since 1996 – *Mäetagused* (Folklore) and *Folklore: An Electronic Journal of Folklore*<sup>20</sup>.

Among the first publishing houses to experiment with free delivery of its publications to the public was Ilmamaa (est. 1992), one of the most prestigious publishing firms in Estonia. Its most significant publication, the series “The History of Estonian Thought” is published since 1995 and includes the most valuable texts on philosophy, economy, arts, politics etc. by Estonian authors. The texts were available on the homepage of the publishing house for a couple of years, starting from 1996. The aim was to provide wide access to the fundamental texts of the Estonian culture, many of which had been forbidden during the Soviet period. Publishing of the series received grants from various institutions and the whole project was not planned to make big profits. These books served as an important reading material at schools and universities. The publishers considered the availability of paper books (although the print run was quite large, 3000 copies) to be insufficient and decided to offer them for reading online<sup>21</sup>.

The beginning of the 1990s also witnessed the popularity of electronic books on CD-ROMs in the world, but that trend was quite modestly represented in Estonia. The first CD-ROMs were issued around 1995. The number of discs that were included in the online catalogue ESTER in 1998 till May 2000 was only 29, consisting mostly of legal and statistical publications, maps and dictionaries<sup>22</sup>, issued by organisations and institutions.

The first publishers who started to issue CD-ROMs were map and reference publishing houses. CD-ROMs were and are most widely produced by reference and textbook publisher TEA, who widely attached CD-ROMs and DVDs as supplements to its language textbooks and reference works. According to the data provided by the National Library of Estonia, 21 offline electronic books were registered in the national bibliography in 2010<sup>23</sup> – thus the production of discs still continues on a small scale.

The online catalogue ESTER registered 664 e-books distributed via the Internet at the beginning of 2005, issued mainly by research institutions (29 per cent of all the e-books), government agencies (26 per cent) and educational institutions (11 per cent)<sup>24</sup>. The share of publishing enterprises was limited to only 5 per cent of the registered e-books<sup>25</sup>. The majority of them were delivered by the publishing house Bahama Press, organized by a literary group of young authors in 2001. The texts were published only online and for free downloading in pdf format<sup>26</sup>.

Besides the e-publications of Bahama Press, the reader could find a rather large choice of free Estonian-language fiction online, including both classical as well as new works. Classical literary texts are provided by the Estonian Literary Museum and libraries, for example, the digital text repository for older Estonian literature EEVA, the collection of literature and literary critique from 1924–1925 ERNI, the digital archive DIGAR, etc.

The new texts are primarily collections of poems and stories by young or beginning authors, *issued* mainly in html format by the authors themselves or by literary groups<sup>27</sup>. Although the first hypertextual poem was created already in 1996, the Estonian writers have been passive in experimenting with the technological possibilities offered by computer technology<sup>28</sup>. The established writers became more interested in the web only with the era of blog-writing<sup>29</sup>.

Against the general indifference of commercial publishers towards e-publishing, the project of the anonymous Estonian-language e-book “Milana. The Diary of the Estonian Model” initiated by newspaper publisher *Eesti Päevaleht* in 2009 stands out as an exceptional venture. The book was meant for buying and reading via iPhones. The publisher Margus Küppar, an enthusiast of e-books, was eager to try the newest publishing trends also in Estonia<sup>30</sup>.

At the same time the majority of the publishing sector remained expectant, cautious, relying on the conservative stand of the local book-buyer, who gave preference to paper books. Many publishers did not consider e-books to be an issue in

20 Estonian Folklore: Welcome. *The Estonian folklorists' server Haldjas* [accessed 2 January 2014]. Access through Internet: <<http://en.folklore.ee/>>.

21 TRUMMAL, Mart. Eesti mõtelugu jõuab arvutivõrku. *Eesti Päevaleht*, 20 March, 1996, p. 7.

22 VÄLJASTE, Helen. *Elektroonilise kirjastamise erinevad vormid ja areng* [unpublished Bachelor's work]. Tallinn: Tallinna Pedagoogikakool, 2000, p. 63–64.

23 Kirjastamine. In *Eesti loomemajanduse olukorra uuring ja kaardistus* (2011). Tallinn: Eesti Konjunktuuriinstituut, 2013 [accessed 15 December 2013], p. 7–9. Access through Internet: <[http://www.ki.ee/publikatsioonid/valmis/7.\\_Eesti\\_loomemajanduse\\_olukorra\\_%282011%29\\_uuring\\_ja\\_kaardistus\\_-\\_Kirjastamine.pdf](http://www.ki.ee/publikatsioonid/valmis/7._Eesti_loomemajanduse_olukorra_%282011%29_uuring_ja_kaardistus_-_Kirjastamine.pdf)>.

24 HANSON, Piret. *Võrgukirjastamine ja võrguväljaanded Eestis* [unpublished seminar paper]. Tallinn: Tallinna Ülikool, 2005, p. 30–31.

25 Ibid., p. 34.

26 Ibid., p. 36.

27 MIKKEL, Marju. *Kirjandusressursid Eesti veebis: tüpoloogia*. 2006 [accessed 10 December 2013]. Access through Internet: <[http://www.kirjanikekodu.kongress.ee/10toimetus/lingid\\_mikkel.html](http://www.kirjanikekodu.kongress.ee/10toimetus/lingid_mikkel.html)>.

28 VIIRES, Piret. Küberkirjandusest meil ja mujal. *Looming*, 2002, no. 8, p. 1239.

29 VIIRES, Piret. Läänud kümnendil toimus eesti kirjanike hulgas digimodernistlik veebiplahvatus. *Postimees*, 12 December 2010 [accessed 9 December 2013]. Access through Internet: <<http://arvamus.postimees.ee/355634/piret-viires-lainud-kumnendil-toimus-est-kiirjanike-hulgas-digimodernistlik-veebi-plahvatus>>.

30 Esimene eestikeelne raamat iPhone'is – “Milana. Eesti modelli päevik”. *Eesti Päevaleht*, 22 December, 2009.

the Estonian market. The survey conducted by Helen Reiser in 2011 demonstrated that the main reasons hindering the Estonian publishing houses from moving to the production of e-books were their inexperience in the management of digital copyright and the technological skills gap<sup>31</sup>. Thus the biggest concerns were similar to those of their colleagues elsewhere<sup>32</sup>.

## THE EMERGENCE AND DEVELOPMENT OF E-BOOK MARKET SINCE 2010

The breakthrough in commercial e-publishing started only in December 2010 after the establishment of Eesti Digiraamatute Keskus (The Estonian Digital Book Center) by local entrepreneurs. This company acts as an intermediary between publishers and booksellers, helping publishers to convert the texts to various e-formats, mainly ePub and to organise their distribution via the Estonian-language sales infrastructure that has been elaborated by the center<sup>33</sup>. The company uses the so-called social Digital Rights Management, which adds the buyer's name to the file and makes it possible to identify the customer to prevent copying<sup>34</sup>. The establishment of the center solved the problems with technological know-how and made it easy for publishers as well as authors to enter e-book publishing. The main impetus for established publishers to do it was the desire to be up-to-date and to try alternative ways of publishing<sup>35</sup>. The decision was not influenced by demand, the publishers did not feel pressure from buyers willing to obtain e-books.

The smaller competitor of the Estonian Digital Book Center, Digira OÜ started its activities practically concurrently. Besides books, Digira OÜ is known as the producer of the e-versions of the major Estonian cultural magazines<sup>36</sup>. Its clients can choose between digital watermarking or Adobe DRM. In addition, a couple of publishing houses, for example, Ersen, started to issue e-books by themselves.

About 20 publishers had started to deliver e-books by the end of 2010, 18 of them had become partners of the Estonian Digital Book Center<sup>37</sup>. Initially the center could offer around 150 Estonian-language titles<sup>38</sup>. During the two years that followed the launch of e-books, the title output and sales have increased considerably. The center produced 600 titles of Estonian-language e-books in 2011 and 838 titles in 2012<sup>39</sup>. The bookstore chain Rahva Raamat offered over 1900 Estonian-language e-book titles in January 2014, over a half of which was fiction<sup>40</sup>. About a half of the book publishers have started to release e-books. The largest textbook publisher Koolibri launched electronic textbooks for iPads in 2012<sup>41</sup>. Among the companies which sell e-books are bookshop chains, independent online bookstores, telecommunications companies, companies providing file conversion and

distribution services as well as some publishers via their web pages. So the distribution network is wide and makes the e-books easily available.

The larger number of available titles has had a positive impact on sales. According to the statistical data provided by the Estonian Institute of Economic Research, about 350 e-books issued by the Estonian publishers were sold in 2010, 9532 in 2011 and 40 876 in 2012<sup>42</sup>. Thus the sales in 2012 had increased three times compared to 2011, making the growth rate look impressive. As no statistical data is available on the number of paper copies sold in Estonia or the financial indicators of the book market, it is difficult to compare and relate the sales figures of these two forms of books. However, according to the estimates of experts, the share of e-books was about 0.2–0.3 per cent of the market in 2012<sup>43</sup> and about 0.4–0.6 per cent in 2013<sup>44</sup>. The dominant position of paper books could be further illustrated by the comparison of the sales of bestsellers. For example, the number one fiction bestseller in 2012, the novel “When the Doves Disappeared” by Sofi Oksanen sold

31 REISER, Helen. *E-raamatute kirjastamise ja leviku hetkeseis Eestis: probleemid ja võimalused* [unpublished seminar paper]. Tallinn: Tallinna Ülikool, 2011, p. 50–51.

32 For example, WISCHENBART, Rüdiger. et al. *Global eBook: A report on market trends and developments*. Vienna: Ruediger Wischenbart Content and Consulting, 2013 [accessed 25 November 2013]. Access through Internet: <<http://www.global-ebook.com>>.

33 About us. *Eesti Digiraamatute Keskus* [accessed 2 January 2014]. Access through Internet: <<http://www.edrk.ee/en/>>.

34 For the publisher and author. *Eesti Digiraamatute Keskus* [accessed 2 January 2014]. Access through Internet: <<http://www.edrk.ee/en/>>.

35 REISER, Helen. *E-raamatute kirjastamise ja leviku hetkeseis Eestis: probleemid ja võimalused* [unpublished seminar paper]. Tallinn: Tallinna Ülikool, 2011, p. 48.

36 Ajakirjad. *Digira* [accessed 29 December 2013]. Access through Internet: <<http://www.digira.ee/ajakirjad/>>.

37 REISER, Helen. *E-raamatute kirjastamise ja leviku hetkeseis Eestis: probleemid ja võimalused* [unpublished seminar paper]. Tallinn: Tallinna Ülikool, 2011, p. 47.

38 Eestis on tänaseks müüdnud 3500 e-raamatut.

*Delfi majandus*, 8 August, 2011 [accessed 28 December 2013]. Access through Internet: <<http://forte.delfi.ee/news/digi/eestis-on-tanaseks-muudud-3500-e-raamatut.d?id=55322286>>.

39 Kirjastamine. In *Eesti loomemajanduse olukorra uuring ja kaardistus* (2011). Tallinn: Eesti Konjunktuuriinstituut, 2013 [accessed 15 December 2013], p. 7–9, 7–31. Access through Internet: <[http://www.ki.ee/publikatsioonid/valmis/7.\\_Eesti\\_loomemajanduse\\_olukorra\\_%282011%29\\_uuring\\_ja\\_kaardistus\\_-\\_Kirjastamine.pdf](http://www.ki.ee/publikatsioonid/valmis/7._Eesti_loomemajanduse_olukorra_%282011%29_uuring_ja_kaardistus_-_Kirjastamine.pdf)>.

40 E-raamatud. *Rahva Raamat e-pood* [accessed 4 January 2014]. Access through Internet: <<http://www.rahvaraamat.ee/c/ilukirjandus/4/1/29/et>>.

41 Uus ajastu õppimises. *Koolibri Uudised*, 31 August, 2012.

42 Kirjastamine. In *Eesti loomemajanduse olukorra uuring ja kaardistus* (2011). Tallinn: Eesti Konjunktuuriinstituut, 2013 [accessed 15 December 2013], p. 7–31. Access through Internet: <[http://www.ki.ee/publikatsioonid/valmis/7.\\_Eesti\\_loomemajanduse\\_olukorra\\_%282011%29\\_uuring\\_ja\\_kaardistus\\_-\\_Kirjastamine.pdf](http://www.ki.ee/publikatsioonid/valmis/7._Eesti_loomemajanduse_olukorra_%282011%29_uuring_ja_kaardistus_-_Kirjastamine.pdf)>.

43 ALAS, Askur. Minister Lang paisutas e-raamatute turgu. *Eesti Ekspress*, 10 January, 2013.

44 KAER, Krista. Kirjastaja: e-raamatutelt võtavad suurema tüki ka autorid. *Postimees*, 8 January 2014.

12 009 paper copies and 1672 e-copies<sup>45</sup>. Thereby only about 20 per cent of all the e-books sold more than a hundred copies<sup>46</sup>, making the sales of the abovementioned bestseller quite exceptional.

Besides the wide and diverse supply of e-book titles, their popularity also depends on the prices. The research based on the analysis of prices of e-books that were included in the bestseller lists of the major Estonian e-book distributors in May 2012 established that the average price of e-books was 9,1 Euros<sup>47</sup>. The prices of concrete books, however, could be very different, from 99 cents to over 40 euros. In general, e-books cost about 30 per cent less than their paper versions<sup>48</sup>, but the buyers perceive the difference to be too small. According to the observations of the Estonian Digital Book Center, the rather price sensitive buyer would accept the price around 5 Euros or at least it should not exceed 10 Euros. The books that cost 1–2 Euros sell best<sup>49</sup>. The average wages in Estonia in 2012 was 887 euros<sup>50</sup>. The initial price is set by the publisher, to that the Estonian Digital Book Center and the retailers add their share. The income from the sales is divided as follows: retailers receive 20–25 per cent, the Center 10–15 per cent and the publisher 60–70 per cent of the revenue<sup>51</sup>. The author can count on earnings that form about 15–25 per cent of the price of an e-book, the translator gets 10–15 per cent<sup>52</sup>. The publishers who issue e-versions of translations argue that foreign authors require a greater share from the price of e-books than of paper books. This is probably due to the small sales of e-books<sup>53</sup>. A higher VAT on e-books than paper books also increases their prices. This issue requires a policy change on the level of the European Union.

The allotment of revenues between the actors of this process has aroused discontent. On the publisher's side, the expectation of a low price raises concern about the possibility to earn any profit as it is also necessary to pay the authors, translators and e-publishing service providers. Although *e-publishing could be much cheaper than paper publishing* due to the reduction in printing and distribution costs, the more sophisticated technological solutions can have the opposite effect on the price. For example, according to the estimates of the textbook publisher Koolibri the digitisation of textbooks increases the production costs and they exceed the cost of printing<sup>54</sup>.

One of the bestselling authors of both paper and e-books in Estonia Indrek Hargla in his turn has argued that author's income from e-books is miserable, blaming it on many intermediaries involved in the production of an e-book<sup>55</sup>. Thus, none of the actors involved in the production and distribution of e-books seems to be totally content – the authors feel their income to be insufficient, the publishers worry about reaching the break-even point, the buyers long for a wider choice and lower price and the companies which provide file conversion and distribution ser-

vices count on the increase in sales volumes. The latter have considered the launching of e-books to drag too long and blame it on limited marketing<sup>56</sup>.

Another major driver of e-book development and indicator of its penetration is the use of tablet computers and e-book readers. There is no comprehensive statistical data on the sales of these reading devices in Estonia. However, the media survey “Me. The World. Media” carried out by the University of Tartu in 2011 included a question on the willingness of the respondents to use such devices (see Table 3).

The findings demonstrate that, as elsewhere, the younger generation is more interested in the use of electronic devices than the average result. According to the survey, 36 per cent of the respondents in the age group 15–19 and 29 per cent in the age group 20–29 would like to use electronic reading devices<sup>57</sup>. Bookshop chains reported of the increase in the sales of reading devices in 2013. For example, in one of the two leading bookshop chains Rahva Raamat the sales of e-book readers in-

45 Kirjastamine. In *Eesti loomemajanduse olukorra uuring ja kaardistus* (2011). Tallinn: Eesti Konjunktuuriinstituut, 2013 [accessed 15 December 2013], p. 7-30-31. Access through Internet: <[http://www.ki.ee/publikatsioonid/valmis/7\\_Eesti\\_loomemajanduse\\_olukorra\\_%282011%29\\_uuring\\_ja\\_kaardistus\\_-\\_Kirjastamine.pdf](http://www.ki.ee/publikatsioonid/valmis/7_Eesti_loomemajanduse_olukorra_%282011%29_uuring_ja_kaardistus_-_Kirjastamine.pdf)>.

46 VAHTER, Tauno. *Books vs e-books in Estonia*. PowerPoint presentation of the paper given at the seminar at the Lithuanian Publishers Association, 2012 [accessed 12 December 2013]. Access through Internet: <[http://www.lla.lt/uploads/documents/Bookpublishing%20in%20Estonia\\_Vilnius%202012.pdf](http://www.lla.lt/uploads/documents/Bookpublishing%20in%20Estonia_Vilnius%202012.pdf)>.

47 VÕSAMAA, Jaanika. *Eesti raamatuturg ja selle arenguvõimalused* [unpublished Bachelor's work]. Tartu: Tartu Ülikool, 2012, p. 37.

48 KÜPPAR, Margus. Eestis ongi e-raamat p-raamatust odavam. *Eesti Päevaleht*, 31 July, 2012.

49 KÜPPAR, Margus. E-raamatute turg Eestis. *Emakeelne e-raamat raamatukogus*: seminar Tartu Ülikooli raamatukogus 13.09. 2011: Video Recording [accessed 4 January 2014]. Access through Internet: <<http://dspace.utlib.ee/dspace/handle/10062/18818>>.

50 WS5211: Average monthly gross and net wages (salaries) by economic activity. Statistics Estonia: Statistical database [accessed 27 December 2013]. Access through Internet: <[\[web.2001/Dialog/varval.asp?ma=WS5211&ti=AVERAGE+MONTHLY+GROSS+AND+NET+WAGES+%28SALARIES%29+BY+ECONOMIC+ACTIVITY+%28EMTAK+2008%29&path=../I\\\_Databas/Economy/36Wages\\\_and\\\_salaries\\\_and\\\_labour\\\_costs/09Wages\\\_and\\\_salaries/02Annual\\\_statistics/&lang=1\]\(http://web.2001/Dialog/varval.asp?ma=WS5211&ti=AVERAGE+MONTHLY+GROSS+AND+NET+WAGES+%28SALARIES%29+BY+ECONOMIC+ACTIVITY+%28EMTAK+2008%29&path=../I\_Databas/Economy/36Wages\_and\_salaries\_and\_labour\_costs/09Wages\_and\_salaries/02Annual\_statistics/&lang=1\)>.](http://pub.stat.ee/px-</a></p>
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51 VÕSAMAA, Jaanika. *Eesti raamatuturg ja selle arenguvõimalused* [unpublished Bachelor's work]. Tartu: Tartu Ülikool, 2012, p. 43.

52 VAHTER, Tauno. *Books vs e-books in Estonia*. PowerPoint presentation of the paper given at the seminar at the Lithuanian Publishers Association, 2012 [accessed 12 December 2013]. Access through Internet: <[http://www.lla.lt/uploads/documents/Bookpublishing%20in%20Estonia\\_Vilnius%202012.pdf](http://www.lla.lt/uploads/documents/Bookpublishing%20in%20Estonia_Vilnius%202012.pdf)>.

53 KAER, Krista. Kirjastaja: e-raamatutelt võtavad suurema tüki ka autorid. *Postimees*, 8 January 2014.

54 Digi ei tule paberi asemele, vaid kõrvale. *Koolibri Uudised*, 31 May, 2013.

55 HARGLA, Indrek. E-nõõrimine. *Eesti Päevaleht*, 30 July, 2012.

56 For example, in LÕUGAS, Hans. E-raamatu revolutsioon tõmbas tugevalt pidurit. *Ärileht*, 12 June, 2013.

57 ALAS. Askur. Minister Lang paisutas e-raamatute turgu. *Eesti Ekspress*, 10 January, 2013.

TABLE 3. Would you like to use the electronic reading device (e-reader, iPad)?

Age group	15–19	20–29	30–44	45–54	55–64	65–74	75+	All
I do not know anything about it	3	7	15	28	22	39	52	20
I can not say	9	11	10	8	11	13	16	10
I have heard about it, but I am not interested in it	47	46	45	46	51	38	28	45
I have not used it, but would like to	36	29	26	18	15	9	4	22
I have used it or I am using it at the present time	4	8	3	1	1	1	–	3

SOURCE: MEDIA survey “Me. The World. Media” conducted by the Institute of Journalism and Communication of the University of Tartu, November 2011. Copied from: ALAS. Askur. Minister Lang paisutas e-raamatute turgu. *Eesti Ekspress*, 10 January, 2013.

creased by 60 per cent. The other large chain Apollo launched its own e-reader brand in cooperation with PocketBook and doubled the sales of e-book readers<sup>58</sup>.

Still, the demand in e-books and correspondingly their market share has remained relatively low. The survey of the newspaper *Postimees* demonstrated that 64 per cent of the respondents preferred paper books in 2012<sup>59</sup>. The younger age groups, who are more receptive to e-books lack the habit of regular book-buying. The data gathered by the Estonian e-book distributors indicates that e-books are bought and read by women aged 30 years and older – that is, the same group who are the most eager buyers and readers of paper books<sup>60</sup>. The reading platform does not seem to make a big difference. According to the results of the survey “Me. The World. Media” the share of regular book-buyers decreased to 6–7 per cent of the respondents in 2011. In the youngest age group the majority of respondents (80 per cent) lack the habit of book-buying altogether<sup>61</sup>.

The issue of e-books attracted wide media attention at the end of the year 2012, when the Minister of Culture Rein Lang expressed his strong support to e-books<sup>62</sup>. Among other standpoints he argued that the state subsidies for printed books as well as funding for public libraries for the acquisition of paper books should disappear, although later his words were rephrased to “disappear in the distant future”. The Minister also questioned the relevance of the lower VAT on books. His stand was met with astonishment by writers, publishers, librarians, teachers, etc. who expressed their concern for the possible subversion of the foundations of the Estonian book culture and libraries.

The state has already supported various digitisation programmes and the subsidies for e-publishing are going to continue. For example, the Ministry of Culture allocated 13 000 Euros for publishing free e-publications of Estonian literary classics that are in the public domain in 2013<sup>63</sup>. The list of works including 165 titles was compiled by the Association of Estonian Language Teachers and published by e-publishing service provider Digira<sup>64</sup>. These works can be accessed, for example, through the digital archive Digar, e-bookshops or webpage of Digira.

The document “The fundamentals of the Estonian Cultural Policy till 2020”<sup>65</sup>, compiled by the Ministry of Culture declares that the state creates preconditions for the increase in the number of e-books and for their wider distribution, providing financial support for the e-publications of the Estonian high-quality literary fiction and works that are recommended for reading at schools.

The policy document also includes the plan that the state will acquire licenses from the Estonian authors for publishing their new works as free e-books<sup>66</sup>. Thus the readers can count on wide access to e-books containing both Estonian classical and modern literature, while a lot of it will be available free of charge. The possibility to read large amounts of diverse books free of charge is, of course, welcome and positive for the public and could stimulate reading. At the same time the initiative could start to erode the role of publishers and further transform the traditional publishing model.

The official stand on acquisitions for libraries has become more lenient and the document declares that the Estonian-language books should be available to everybody regardless of the format of the book<sup>67</sup>.

58 AASMÄE, Kalev. Raamatuäri on kasvuteel. *E24*, 14 December 2013 [accessed 28 November 2013]. Access through Internet: <<http://e24.postimees.ee/2631576/raamatuari-on-kasvuteel>>.

59 KAER, Krista. Eesti, ingliskeelne maa. *Eesti Ekspress*, 8 December, 2012.

60 AASMÄE, Kalev. Raamatuäri on kasvuteel. *E24*, 14 December 2013 [accessed 28 November 2013]. Access through Internet: <<http://e24.postimees.ee/2631576/raamatuari-on-kasvuteel>>;

LÓUGAS, Hans. E-raamatu revolutsioon tõmbas tugevalt pidurit. *Ärileht*, 12 June, 2013.

61 ALAS, Askur. Minister Lang paisutas e-raamatute turgu. *Eesti Ekspress*, 10 January, 2013.

62 LANG, Rein. Raha ja kultuur – intervjuu kultuuriministriga. *Postimees*, 9 January, 2013.

63 LÓHMUS, Alo. 13 000 euro eest jõuab tasuta e-raamatutena lugejateni vaid näputäis teoseid. *Maaleht*, 27 September, 2013.

64 PORS, Merje. Kirjandusklassika teosed nüüd e-raamatuna tasuta kättesaadavad. *Koolielu: Haridusportaal*, 3 October 2013 [accessed 5 January 2014]. Access through Internet: <<http://koolielu.ee/info/readnews/339387/kirjandusklassika-teosed-nuud-e-raamatuna-tasuta-kattesaadavad>>.

65 *Kultuuripoliitika põhialused aastani 2020*. Kultuuriministeerium: Kultuur 2020 [accessed 23 December 2013]. Access through Internet: <<http://www.kultuuripoliitika.ee/files/Riigikogu%20otsus.pdf>>.

66 *Ibid.*, p. 9.

67 *Ibid.*, p. 13.



The present overview demonstrates that the Estonian e-book market is only emerging. However, the comparison with the other European countries, with the exception of the UK, proves that Estonia is not lagging behind in this development, but rather moving at the same rate as the rest of Europe. According to the report on e-book market by Rüdiger Wischenbart, the situation was similar in Poland, Slovenia or the Nordic countries. For example, although Sweden has a significantly high Internet penetration, the take off of e-book development took place only in 2011<sup>68</sup>. Even in larger European countries, the first emergence of the e-book market was not much earlier and the market share of e-books was still marginal in 2011 – 1.9 per cent in Germany, 1.8 per cent in France, 1.5 per cent in Italy<sup>69</sup>. As a small country, Estonia should be studied first and foremost in the context of the other small countries. As Elena Maceviciute<sup>70</sup> has stated in her blog post “Publishing and the small languages”, the publishers catering for small countries and small languages “seem to be looking for the possibilities to delay the process as much as possible”. The same applies to the Estonian publishing houses that had been confused and slowed down primarily by copyright issues and lack of technological know-how until 2010.

The concrete circumstances of the take off of the e-book market in different countries have varied. In the Estonian case the decisive impetus came from the establishment of the firms which provide e-publishing services – convert the files, organise the distribution and marketing of the e-books and deal with the issue of copyright. Thus the major concerns of the publishers were taken care of. In anticipation of the digital explosion the publishers gradually started to increase the number of available e-books, preparing for the growth in demand. The Estonian Digital Book Center has predicted that the market share of e-books will grow to 2–3 per cent by 2015<sup>71</sup>.

At the same time, due to the cultural policy favourable to e-books, the reader can read more and more Estonian-language texts free of charge. Thus, the access to the national book culture becomes less dependent on the actions and decisions of publishers, further boosting the transformation of the traditional role of a publishing company. The readers, however, only benefit from free and wide availability of the most valuable works of the national literature.

Still, the readers of e-books are hardly content only with the Estonian classical literature or even with the works by present-day Estonian writers. They often prefer to buy the English-language e-books that can be bought faster and cheaper than their translations into Estonian. This trend can be observed in all the other small European markets, but according to the data from the British booksellers it

is especially notable in Estonia and Lithuania<sup>72</sup>. Thus, on the one hand, the e-book development offers new possibilities for promoting and accessing the national literature, but on the other hand it might deepen the concerns about the future of the book culture in small languages.

In the light of this issue, there is no point in opposing the paper and e-books. It is obvious that the share of the latter will grow and find its niches. The reading public will gain an opportunity to choose between different formats in compliance with their needs and preferences. Still, the e-book development should evolve naturally, without forceful boost that pushes people involved in book culture to move to e-books at a heightened pace.

The more important question seems to be, who will form the readership of books in the future and who will bear the book culture of tomorrow. As in other countries, reading books becomes an increasingly less attractive pastime for young people in Estonia. According to the results of the survey “Me. The World. Media” from 2011, 25 per cent of respondents in the age group 20–29 had not opened a single book during the previous year<sup>73</sup>. This ties in well with the lack of book-buying habit, which was treated above. The international PISA test from 2010 established that young people in Estonia are active and skilful users of the Internet, but the joy of reading is unknown to many of them – nearly 39 per cent of the 15-year old were not in the least interested in reading for pleasure<sup>74</sup>.

Such findings put the issue of (e-)books and publishing into the wider context of the changing patterns of the consumption of texts in the digital environment – unpredictable changes, the speed, range and direction of which it is not possible to determine in detail.

68 WISCHENBART, Rüdiger. et al. *Global eBook: A report on market trends and developments*. Vienna: Ruediger Wischenbart Content and Consulting, 2013, p. 9 [accessed 25 November 2013]. Access through Internet: <<http://www.global-ebook.com>>.

69 Ibid., p. 8, 12, 17.

70 MACEVICIUTE, Elena. Publishing and the small languages. *The e-books research project*, 16 December, 2012 [accessed 27 December 2013]. Access through Internet: <<https://projectebooks.wordpress.com/2012/12/16/publishing-and-small-languages/>>.

71 VÕSAMAA, Jaanika. *Eesti raamatuturg ja selle arenguvõimalused* [unpublished Bachelor's work].

Tartu: Tartu Ülikool, 2012, p. 41.

72 VAHTER, Tauno. Lärmakas hiir või tärkav hiiglane? *Raamat: Eesti Kirjastuste Liidu ajaleht*, 24 October, 2013, p. 1.

73 LAURISTIN, Marju. Raamatukunstist failideni. Raamat, riik ja Lang. *Eesti Päevaleht*, 28 February, 2013.

74 TIRE, Gunda, et al. *PISA 2009 – Eesti tulemused*. Tallinn: Riiklik Eksami- ja Kvalifikatsiooni-keskus, 2010, p. 49 [accessed 25 January 2014]. Access through Internet: <[http://www.ekk.edu.ee/vfiles/0/PISA\\_2009\\_Eesti.pdf](http://www.ekk.edu.ee/vfiles/0/PISA_2009_Eesti.pdf)>.

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4. Ajakirjad. *Digira* [accessed 29 December 2013]. Access through Internet: <<http://www.digira.ee/ajakirjad/>>.
5. ALAS, Askur. Minister Lang paisutas e-raamatute turgu. *Eesti Ekspress*, 10 January, 2013.
6. BRYMAN, Alan. *Social Research Methods*. Oxford; New York: Oxford University Press, 2008.
7. *CU12: Books and pamphlets*. Statistics Estonia. Statistical database [accessed 30 November 2013]. Access through Internet: <[http://pub.stat.ee/px-web.2001/Dialog/varval.asp?ma=Cu12&ti=BOOKS+AND+PAMPHLETS&path=../I\\_Databas/Social\\_life/01Culture/16Printed\\_matter/&lang=1](http://pub.stat.ee/px-web.2001/Dialog/varval.asp?ma=Cu12&ti=BOOKS+AND+PAMPHLETS&path=../I_Databas/Social_life/01Culture/16Printed_matter/&lang=1)>.
8. Digi ei tule paberi asemele, vaid kõrvale. *Koolibri Uudised*, 31 May, 2013.
9. E-raamatud. *Rahva Raamat e-pood* [accessed 4 January 2014]. Access through Internet: <<http://www.rahvaraamat.ee/c/ilukirjandus/4/1/29/et>>.
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## ESTIJOS LEIDYBOS SEKTORIUS XX IR XXI AMŽIŲ SANDŪROJE: SKAITMENINIŲ KNYGŲ RINKOS RADIMASIS

*Aile Möldre*

### Santrauka

Straipsnyje pateikiama skaitmeninės leidybos plėtros Estijoje apžvalga, sutelkiant dėmesį į komercinių leidyklų skaitmeninių knygų estų kalba leidybą.

Situacijos analizė paremta rinkoje atliktais tyrimais ir jų lyginimu; daugiausia tai studentų darbai, Estijos statistikos departamento duomenų bazės statistiniai duomenys, periodinės spaudos straipsniai ir įvairių institucijų svetainių duomenys.

Straipsnio pradžioje siekiama pristatyti teorinę situacijos apžvalgą. Įvade apibūdinama leidybos industrijos padėtis šalyje XXI amžiaus pradžioje. Knygų leidybos plėtra Estijoje susijusi su bendra ekonomine situacija, kuri po spartaus augimo pačioje XXI amžiaus pradžioje patyrė recesiją 2008–2010 metais. Dėl besitraukiančios rinkos visų pirma sumažėjo leidžiamų knygų tiražai (nuo 2008 metų), o vėliau, krizei užsitęsus, sumažėjo ir leidinių pavadinimų skaičius (nuo 2010). Vis dėlto nepaisant krizės leidėjų skaičius nuo 105 (2003 metais) išaugo iki 147 (2011 metais). Maža estų kalbos rinka nedomina tarptautinių leidybos grupių, todėl šalies knygų industrija plėtojama vietos kapitalo pagrindu.

Estija apibūdinama kaip šalis, kurioje anksti įsigalėjo internetas; šiandien interneto skverbtis šalyje yra didelė ir plati. 2013 metais 80 proc. šalies gyventojų, priklausančių 16–74 amžiaus grupei, naudojami interneto paslaugomis; 80,3 proc. estų buvo įsivedę internetą namuose.

Elektroninė leidyba paplito tarp organizacijų, asociacijų ir pavienių asmenų nuo paskutinio praėjusio amžiaus dešimtmečio vidurio. Nuo 1996 metų leidykla „Ilmamaa“ ėmė teikti gyventojams ne-

mokamą interneto prieigą prie vertingos jos leidžiamos serijos „Estijos minties istorija“ (angl. *The History of the Estonian Thought*). Leidyklos tikslas – kuo plačiau paskleisti visuomenėje šios serijos turinį, naudojamą mokyklose ir universitetuose. Jaunų autorių, nemokamai leidusių savo kūrinius tik skaitmeninėje terpėje, grupė sukūrė interneto leidėją „Bahama Press“.

Išskyrus kelis eksperimentus, komerciniai leidėjai liko šios tendencijos nuošalyje. Kaip ir daugelyje kitų Europos šalių, ypač mažųjų, leidėjams trukdė su autorių teisėmis susiję klausimai ir technologinių įgūdžių spragos. Be to, jie nelaikė skaitmeninių knygų plėtros aktualia problema Estijoje. Jų manymu, perkantieji knygas buvo labiau linkę įsigyti popierinių knygų.

Situacija pasikeitė 2010 metų pabaigoje, įsikūrus kelioms elektroninės leidybos paslaugas siūlančioms įmonėms. Jos teikė leidėjams ir autoriams failų konvertavimo, platinimo ir rinkodaros paslaugas. Šios naujos įmonės savo klientams siūlo ir skaitmeninių teisių valdymo (angl. DRM) sprendimus. Visa tai rodo, kad anksčiau egzistavusios kliūtys galiausiai buvo įveiktos; jau 2013 metais pusė leidyklų užsiėmė e. knygų leidyba.

Per ateinančius kelerius metus elektroninių knygų antraščių skaičius išaugo nuo 150 antraščių (2010 metais) iki 838 (2012 metais). Didesnis knygų pasirinkimas pagyvino pardavimą – nuo 350 skaitmeninių egzempliorių 2010 metais jų prekyba išaugo iki 40 876 egzempliorių 2012 metais. Vis dėlto skaitmeninių knygų rinka šalyje šiuo metu tesudaro apie 0,4–0,6 proc. Esama situacija nepatenkina nė vieno skaitmeninės leidybos verslo dalyvio. Autorių netenkina iš elektroninių knygų leidybos uždirbamos pajamos; leidėjai nerimauja, kad bus pasiektas lūžio taškas; pirkėjai tikisi pigesnių elektroninių knygų, skaitmeninės leidybos paslaugų teikėjai laukia paklausos augimo, kuriai trukdo vis dar vilkinamas skaitmeninių knygų pateikimas rinkoje ir nepakankamos rinkodaros kampanijos.

Oficialioje kultūros politikoje, kuri įteisinta dokumente „Kultūros politikos pagrindai iki 2020 metų“, įvardijamas skaitmeninių knygų palaikymas ir parama įvairiems projektams, užtikrinantiems nemokamą prieigą prie Estijos klasikinės literatūros ir šiuolaikinių autorių kūrinių. Tikimasi, kad tokių galimybių sudarymas teiks naudą skaitytojams ir skatins skaitymą. Sykiu būtina pažymėti, kad Estijos skaitytojai neapsiriboja tik vietinių skaitmeninių knygų skaitymu; jie dažnai perka anglų kalba išleistas skaitmenines knygas, siūlančias skaitytojams greitesnių ir pigesnių galimybių jas įsigyti. Taigi, skaitmeninė leidyba skatina nacionalinės literatūros kultūros prieinamumą ir jos išsaugojimą. Antra vertus, ji gali suardyti šios kultūros pamatus. Knygos kultūros ateitis priklausys nuo jaunesnės kartos atstovų, neturinčių knygų pirkimo ir skaitymo įgūdžių, elgsenos. Skaitmeninė aplinka sudaro sąlygas kintančiam tekstų vartojimui, kurio detalės daugiausia lieka nenuspėjamos.

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