



Contents lists available at ScienceDirect

The Journal of Academic Librarianship

journal homepage: www.elsevier.com/locate/jacalib

Academic e-Book Publishing in China: An Investigation of Current Status and Publishers' Attitudes

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ARTICLE INFO

Keywords:

Academic publishing
Attitudes
China
Digital publishing
e-Books
Academic libraries

ABSTRACT

This study investigates the current status and attitudes towards academic e-book publishing by mainland Chinese academic publishers through an online survey. This study collected survey data from 49 authoritative academic publishers in China, focusing on their e-book sales profiles and their perceptions of how e-book sales affect publishers and libraries. The data reveals that China's academic e-book industry is still at an early development stage and has a relatively small market. The findings show significant differences in the willingness and attitudes towards e-book publishing between SSH publishers and STEM publishers, and also demonstrate that the enhancement of the demand for e-books by academic libraries promotes the process of the digital transformation of academic publishers. This study then argues that Chinese academic publishers need to further improve the quality of academic e-books, accelerate the transition from academic content providers to academic content service providers, and strengthen their cooperation with stakeholders.

Introduction

China's e-book market has been growing rapidly. The 2015 China Digital Publishing Industry Annual Report (Wei, 2016) showed that e-book titles increased from 1 million in 2013 to 1.7 million in 2015, an increase of 70%, with sales revenue commensurately increasing from 150 million yuan in 2006 to 4.9 billion yuan in 2015. The report also noted that there had been significant progress in digital transformations, particularly in the area of academic publishing. By 2015, there were 556 book publishers in mainland China, among which were 106 university publishers, 180 social science book publishers, 83 science and technology publishers, 35 education publishers, and 19 ancient book publishers, accounting for about 76% of all Chinese publishers (State Administration of Press, Publication, Radio, Film and Television, 2015). Over the past decade, the academic publishing sector has also developed multiple products providing knowledge-based services, such as integrated resource databases, professional online education and professional digital reference books.

Despite the growth of the e-book market in China, academic e-book publishing still lags behind user demand, especially the demand from academic libraries. Qin (2015) investigated the Chinese e-book collection status in academic libraries and found that there was a huge demand by academic libraries for academic Chinese e-books and a serious

shortage of e-books published by publishers. Liu (2015), Deputy Director of the Library of the People's University of China, pointed out that even though the demand was there, there were insufficient Chinese academic e-books available for purchase for academic libraries. Some other studies, such as those of Yuan (2016) and Gu (2016), had similar findings about the imbalance between supply and demand in the academic e-book market in China.

This study aims to explore the current status of academic e-book publishing from publishers' perspectives. Specifically, this study tries to answer the following research questions:

- RQ 1: What is the status of academic e-book publishing in China?
- RQ 2: What are the attitudes of academic publishers towards e-book publishing?
- RQ 3: What are the factors that affect the publishing of academic e-books in China?
- RQ 4: What is the role of academic libraries in the academic e-book market?

To understand the present academic e-book publishing situation in China, an online survey was developed in this study to obtain data directly from the publishers. In the rest of this paper, it provides an overview of the current studies on academic e-book publishing, both in

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China and abroad. It then reports the data obtained from the online survey, focusing on the current status and attitudes of publishers and institutions between publishers and academic libraries. In the end, this paper discusses the current development of the academic e-book market in China, the role of academic libraries, and the attitudes of publishers towards e-book publishing.

Literature review

Development of e-books by domestic Chinese academic publishers

Status of e-book publishing by domestic Chinese academic publishers

The few studies that have been conducted in China have found that academic e-book publishing is not yet mature. Cheng and Lu (2012) conducted a network survey of 80 domestic university publishers and found that most had not yet achieved a real sense of digital publishing, with only 23% specifically focusing on digital publishing, e-books and online reading. Xu (2014) compared the overall e-book publishing, publishing models and sales models of 9 of the top 10 national and academic libraries in 2013 with the top 9 global publishers and found that, in China, the paper version was always purchased before the electronic version and that the paper version was still the main publishing model, with electronic publishing lagging behind. Wang (2011) analyzed the current digital publishing development situation of university publishers and found that due to limits in terms of funds, technology, talent, content and other aspects, there had been minimal investment in digital publication and that there was poor independent research and development capability.

On the whole, the transformation to digital publication in China has been extremely slow, which has, in turn, limited digital academic publishing. In the face of the challenges brought by the digital publishing revolution, research institutions and academic publishing institutions have begun to examine the possibilities of working together to promote academic digital publishing. In July 2015, the 'China Academic Digital Publishing Union', jointly initiated by the China Press and the Publication Research Institute, the National People's Congress Book Center, Zbook.com and RUC Digital Media, was established to promote the development of China's academic digital publishing system, achieve the international transmission of excellent academic achievements, and promote top quality Chinese research (Wang, 2015). Some major academic publishers have also sped up their digital transformation efforts; for example, the Economic Science Press has launched a digital library for academic libraries, public libraries, enterprises and institutions to allow for an integrated and unified search service of all digital resources, and the Science Press has launched an offline digital reading product, 'science e-study', and an online product, 'scientific library', for libraries and other institutional users.¹

Barriers to the development of e-books by domestic academic publishers

(1) Immature business model

An important reason for the development of an industry is whether the business model is mature. Qin (2015) found that because most publishers were unfamiliar with the marketing of digital products and did not have a mature profit model, they lacked the enthusiasm to publish academic e-books. Qi (2014) found that the main reason for the slow development of academic e-books was that publishers were

delaying the sale of e-books and restricting the number of concurrent users of the e-books to be sold and that there were contradictions between the authorization scope limitations and library procurement demands. Dong (2015) found that current e-book market pricing was mainly a low-cost strategy, and although this effectively developed an interest in e-book reading, it also made readers believe that e-books were cheap. Xu (2012) found that the academic e-book market demand was limited, and while rigid demand was strong, price elasticity was small; therefore, academic publishers could meet their profit targets through on-demand publishing while strengthening their core competitiveness. Yang (2016) pointed out that the current digital transformation of academic books lacked a profit model and survival paradigm. Zhu, Wang, and Wang (2015) found that digital publishers had problems related to obscure strategic positioning, product positioning, and industrial chain positioning. Li and Liu (2016) found that international academic publishers had begun to compete with domestic publishers in terms of author resources, the acquisition of digital rights, and the strengthening of competition for the digital rights of domestic books, as the digital rights obtained by domestic academic publishers have proven difficult to control.

(2) e-Book copyright issues

e-Book copyright issues have hindered the publication and development of academic e-books; the author fails to authorize the work, the copyright income mechanism is not clear, and copyright protection technology has not been perfected.

Serious flaws in e-book content authorization have created many obstacles to e-book copyright. Hao and Huang (2011) found that publishers generally seek combined authorization for both the printed book and the e-book; however, there are still a small number of authors who do not understand e-book copyright and either assign the digital rights to other units or are reluctant to grant digital licenses to publishers. Zhu, Li, and Che (2014) found that mainland publishers were willing to cooperate with Taiwan for digital copyright but were also worried that as the e-reading market was immature, the market rate of return could not be guaranteed, and there could be a risk of copyright loss. Zhu (2012) commented that authors had a lack of trust in the e-book copyright authorization process as the e-book copyright licensing procedure was unclear; specifically, publishers authorize few digital copyrights and e-book copyright interests were unclear. Liu and Wei (2015) argued that the copyright issues for e-book borrowing services contradicted the interests of the copyright owners and the public.

Another issue related to copyright has been DRM, which is a digital technology for the protection of the rights of parties in the publication, distribution, sale and use of digital content. He (2014) suggested that the marginal discount effect of DRM on genuine e-books would increase, which would reduce the marginal suppression piracy effect. Therefore, there is a possibility that DRM may no longer be used in the e-book industry. Qi (2014) also found that DRM made it impossible for libraries to maintain long-term e-books as publishers could only be accessed remotely through their servers. Liu Xiao et al. believed that publishers needed to use DRM technology to protect copyright by taking user experience as the premise.

Research methods

The survey was conducted over six months from April 2016 to September 2016. The design of the questionnaire was based on *e-book publishing in Lithuania: the publisher's perspective* questionnaire developed by Gudinavičius, Šuminas, and Maceviciute (2015). The questionnaire included the conditions of the publishers' e-book sales, the impact of e-book sales on publishers, the impact of e-book sales on libraries and 1 subjective question (the reason for failing to publish e-books). The questionnaire was created using the 'Questionnaire Star' online survey platform, and then a link was sent through e-mail to the publishing

¹ 'Science Library', based on the high-quality content resources of science publishers, provides online reading and downloading of e-books for libraries and other institutional users, using DRM digital copyright protection technology, which is the content resource of the library, an online, full-text publishing platform. At present, there are nearly 35,000 e-books on the platform, which are categorized under six subjects. They support computer, mobile phone, PAD and other terminal devices to browse, some books can be downloaded.

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