



E2 “Digital education for Enhanced Editorial products”

WP5 Research & Didactics

National Research Report

SPAIN

by **Fondo Formación Euskadi**
7th of May 2012

a project coordinated by



FOR.COM.
Formazione per la Comunicazione
Consorzio Interuniversitario



Education and Culture DG

Lifelong Learning Programme

This project has been funded with support from the European Commission. This communication reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.



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Executive Summary

A report by the Centre of Reading and the Book of the Ministry of Culture provides a great growth in the digital book market in Spain.

Spain can boast of having one most powerful publishing industry of the world. According to data provided by the Federation of Publishers of Spain, the publishing market moves in our country about 4,000 million Euros, a figure that represents 0.7% of GDP in an industry that generates about thirty thousand jobs.

This strength is due to strong domestic market and rely on the nearly half a million Spanish speakers that make the book one of the great assets of Spanish economy.

However, the reality is quite different when analyzing the numbers of so-called digital book or ebook. According to the report Current status and prospects of digital books in Spain, developed by the Centre of Reading and the Book of the Ministry of Culture, the e-book sales was 51.2 million (2009 data, last updated) ie only 1.6% of total sales of the book.

Devices vs. Contents

Despite the numbers, the digital book market has only two years of life, since 2010 was the first in which the consumer has had before it a wide range of devices and content. And it is this relationship between media and books from which depends the future of the sector.

According to the report, there is an imbalance between the boom experienced supply shortages devices and digital content.

The responsible of the study detected other difficulties to launch the ebook market, such as "the incompatibilities arising out of the formats" and offer prices of digital content, although it clarifies that these obstacles are common to "virtually all markets publishers, not only in Spain".

The study exemplified several times the U.S. market, where the e-book accounts for 8.3% of total turnover in the sector, a figure that contrasts with the 3% projected for the Spanish market.

According to the report, part of the strength of the market in the United States is derived from tax policy, "where VAT is zero e-book", and partly from the fact that "Europe is still in the beginning of the digital edition while the United States is already in the third year of developing this market.

For the near future, the report predicts a dynamic e-book market and a "significant increase" in sales. This quantum leap will have much to see the imminent arrival of Amazon to Spain, landing yet "does not seem too clear" by factors such as the aforementioned incompatibility of formats, access limitations of Kindle, doubts about the privacy user and the fact that Amazon has only 1% of its catalog in Spanish.



1. Context and background

In the last years have been big changes in the publishing industry, such as the appearance and popularization of the e-book, the emergence of self-publishing platforms and distribution platforms, the possibility of short runs with the "print on demand", reading in digital media, or the birth of electronic publishing limited.

As most significant statistic number of the year 2010 we can highlight the rise of the production in 3.9 % comparing to the last year, from 110,205 ISBN registered in 2009 to 114,459 ISBN registered in 2010. Even if the books published on paper has fallen a 1 %, the issue in other media have grown 39.6 %, being an increase in the electronic edition of 45.6 % and in the file format from the Internet 155.0 %. The number of ISBN registered by the public published edition has fallen a 3.0 %, from 8.6 % in 2009 to 8.0 % in 2010; while in the private edition increases the number of ISBN registered by 4.5 %, from 91.4 % in 2009 to 92.0 % in 2010.

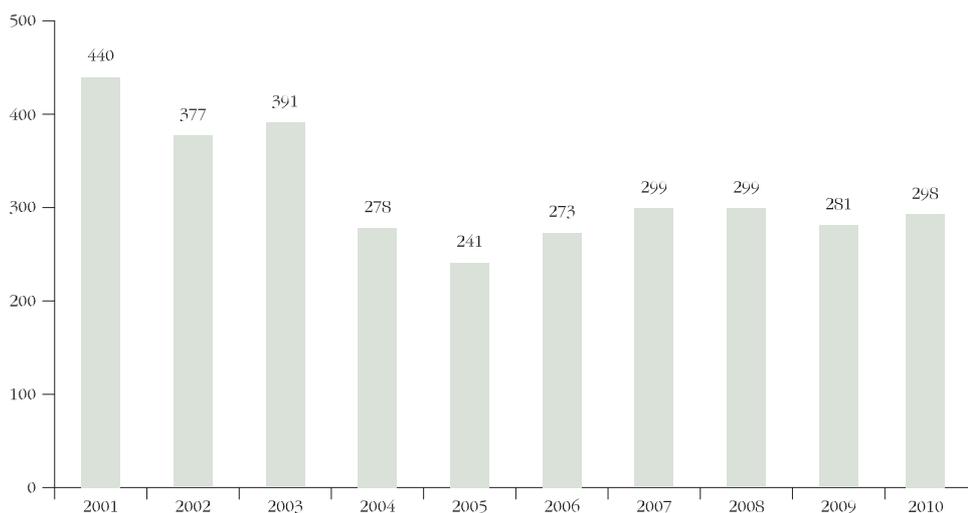
Concerning to the subject there were increases in creative writing books (21.2%), science books and technology (17.7%), children's books (5.5%) and social science books and humanities (1.4%). Observed decreases in leisure books (13.1%) and in textbooks (11.0%). Regarding to the publications in different languages, 94.0% of the books were published in Spanish different languages, emphasizing a great distance, the Castilian edition (84.5%), followed by the Catalan edition (10.0%), Galician (2.4%) and Euskera (1.7%). The translations represent 22.1% of production, with the English language 48.7% more localized. With respect to the ISBN registration by state government Catalonia and Madrid representing 61.6% of the total, with a share of 34.9% to Madrid and 26.8% for Catalonia. The regions with least rates are Andalusia (13.4%) and Valencia (5.3%).

The publishing sector in Spain has great importance in the field of the development of social culture. The crisis has also affected the book industry and, presentation although it is an entrepreneurial sector, economically mature and consolidated, is not immune to the crisis, but is maintained by their ability and strength, and the adoption of certain strategic, finally presenting better results other sectors of the Spanish economy, maintaining its position as one of the publishers in the world big powers.

• **STABLISHMENT OF PUBLISHING COMPANIES DISTRIBUTED BY DIMENSION**

	2006	2007	2008	2009	2010
BIG publishing houses	0	0	0	0	0
MEDIUM publishing houses	3	4	4	5	1
SMALL Publishing houses	270	295	295	276	297
TOTAL	273	299	299	281	298

Since the year 2000 there has been no incorporation of BIG publishing houses.
Stablishment of publishing agents 2001 – 2010



• **Number of books published and reprinted in Spain in 2010:**

SUBCATEGORIES	ISBN	Titles	% First publishing	% Reprinted	Average price in €	Tirada media	% Public edition	% Private edition
Books for children	12.622	12.042	64,8	34,4	9,25	4.143	0,4	99,6
Text books	18.681	16.655	64,2	23,1	22,29	3.152	0,7	99,3
Literary creation	21.955	21.496	88,3	10,5	13,13	2.178	3,7	96,3
Social Sciences and Humanities	36.381	34.584	84,1	10,2	24,89	1.243	15,2	84,8
Scientific and technical books	12.588	11.673	81,7	13,7	30,34	1.386	15,4	84,6
Leisure	7.855	7.197	88,6	9,4	19,37	1.934	7,9	92,1
Other	4.377	4.173	55,6	39,9	15,79	1.699	2,5	97,5
Total domestic supply	114.459	107.830	78,5	16,5	20,27	1.734	8,0	92,0



Comparing different data between different subcategories we can obtain some conclusion:

- The subsectors with the most consolidated titles are others with 39.9% then books for children with 34.4%; text books with 23.1% and reprinted books with 23.1%.
- The subcategory with highest prices are scientific and technical books with an average price of 30.34 €/ each; continued by books of social science and humanities with 24.89€/each and following by text books with 22.29 € / each. The lower prices are for children´s books with 9.95 € and literary creation with 13.13 €
- The private edition is by far the largest in all subsectors, particularly the books for children, text books, others and literary creation all of them with a proportion higher than 95%. In the case of children books and text books they reach 99,6% and 99.3% respectively.
- The highest incidence of the institutional edition has been produced in the scientific and technical books (15.4%) and social science and humanities (15.2%)

We can divide the sales of the publishing sector in two different subcategories:

1. Domestic trade of the book
2. Foreign trade of book

Regarding to **Domestic trade of the book** during the year 2010, 79,839 titles were published (4.8% more than in 2009) and 302.6 million individuals (8.2% less than in 2009). The average circulation was of 3,790 copies per title (538 fewer than in 2009). The subjects with the highest number of titles and copies published were not academic, Literature and Children's Books, which account for 53.7% titles and 61% of the copies published.

In 2010, 6,001 titles were issued and 32.6 million copies of books pocket (7.5% of total shares and 10.8% of the copies published), with an average circulation of 5,438 copies and 176.66 million Euros in turnover. The number of copies sold was 24.6 million and its average price 7.17 Euros.

In 2010 the turnover figure obtained by sales of books in the internal market, calculated to cover price, including VAT, was 2,890.80 million Euros (7% Less in current Euros than in 2009)

Deducting from the gross sales discounts and VAT is obtained net revenues in domestic trade of 1,822.22 million Euros (6.7% less than in the previous year)

And if to this number are added 394.10 million Euros from the sale of rights results in a net turnover of 2216.32 billion (2092.97 million in 2009). Therefore, in 2010 there was a net revenue growth of 5.9% compared to 2009.

It also copies sold 228.23 million (3.4% less than in the previous year) and the average price was 12.67 copy sold Euros.



A total of 11,748 titles were published in digital format (PDF 64.7%), 25,927 titles were digitized backlist titles and 25,570 were sold (68.1% in computers). 8.5% of the sale of books published in digital format was direct from the website of the publisher, 80.2% through e-retailers, 0.5% through library and 10.8% through other channels.) Comics are the only subject which increase its turnovers, Dictionaries, encyclopaedias, practical and books of disclosure which suffered declines.

Libraries and bookstores chains were the main sales channels for books: 51.8% of sales are made through them. Libraries billed 1026.41 million (0.4% less than in 2009) and chains of bookstores 471.98 million (1.7% less than last year). For the purchase of copyrights, publishers paid 192.47 million Euros (182.33 for the purchase of copyrights, 5.13 for the purchase of other rights and duties of 5.01 per translator).

Regarding to the **foreign trade of book**, the figures for 2010 show good data for the Spanish book industry since its export total was 457.792 million Euros, an increase of 3.49% compared to 2009 when there was a decrease of 18 , 98%.

Imports totaled 224.6 million euros, 4.63% less than in 2009. Of these, 45.24% are newspapers and magazines and 28.54% to orders for printing and co-publications.

The sector's trade balance is very positive as in 2010 reached over 233 million Euros (12.7% increase)

Exports amounted to 264.657 million publishing (57.81%) and the printing industry 193.135 million (42.19%)

Within the publishing industry, the 42.53% of exports were for books, pamphlets and 13.30% to kiosk material and 2.99% to other products, in the graphic product, books are the most important because it represented nearly 26% of total exports (118.964 million Euros)

libranda

On July 2010 the main publishing sector's brands – Grupo Planeta, Random House, Mondadori, Santillana, Roca Editorial, Grup 62, Grupo SM y Grupo Wolters Kluwer- The main brands in the publishing industry, implement Libranda, b2b platform focused on the distribution and dissemination of electronic books in Spanish. Their goal: to energize the electronic book market in Spain and support the development of existing sales channels before the entry of large operators.

In order to respect the traditional value chain of the book, Libranda not sell directly to end customers, the reader, this is done through bookstores, who are their customers, while publishers act as content providers. In Libranda is not a store but as they are defined, "a company whose mission is to provide a set of logistics services, technical, commercial and administrative services to publishers, stores, libraries, or other customers, enabling them to manage efficiently the digital environment in which they are immersed. In this sense offers publishers and stores a wide range of services that respond to their needs:



- For publishers, Libranda offers the possibility to choose which channels, more than 80 existing outlets, they want their titles and are available for each one of them, decide what type of services required. Libranda basically offers two alternatives: first, a "distribution package" comprehensive, including both the negotiation and the logistics of the books are in the store. And secondly, a "package of logistics services" which is not commercially the publisher represented by Libranda. With this system, the publisher can focus their efforts on content.
- With regard to shops Libranda offers two solutions: the "channel 1" for those outlets that do not invest directly in the technological development necessary for online sales, and the "channel 2" for those who have already invested in technological development, which would fall stores like Amazon, Casa del Libro or Fnac, among other

After a long period of transition that have been making some inroads since the end of 2011 we are seeing various and significant movements that make us think that during this year 2012 will be a significant acceleration in the Spanish market for electronic books. Despite the modest revenue share ebook in our country, the main official data on digital reading and publishing in Spain show the increasingly firm commitment on the part of readers and publishers for this format. The ebook has not yet hoarding large numbers, evolving slowly but continued, with 6.8% of readers-by 5.3% in 2010 - a percentage that rises to 13.7% in the case of young people between 14 and 24 years. They are, on the other hand, many Spanish publishers who jump on the digital editing: last year more than 500 Spanish publishing and digital books published, most of them without leaving the book on paper, but increasingly publishers are born digital. In parallel, the number of digital books produced in Spain is growing: the increase in the records under this category between 2010 and 2011 has exceeded 55%.

The GfK consultancy estimates indicated that at the end of 2011 the park of devices in our country would exceed one million units, of these, 285,000 have been sold in 2011, 500% more than in 2010. An increase also reflected in the latest report on reading in Spain. However, the explosion in the marketing of these appliances actually translates into increased demand for content. In this sense, for the time being until the end of last year it seems that Spain has been selling more devices than contained

2011: FALLS PAPER FORMAT AND INCREASES THE DIGITAL FORMAT

The e-books represent the 18% of the books registered in Spain.

According to data provided by the Spanish ISBN Agency, last year there were a total of 20,119 e-books, a figure that represents an increase of 55.4% compared to those collected in View of the Spanish edition of Books in 2010 (ISBN 12 948).

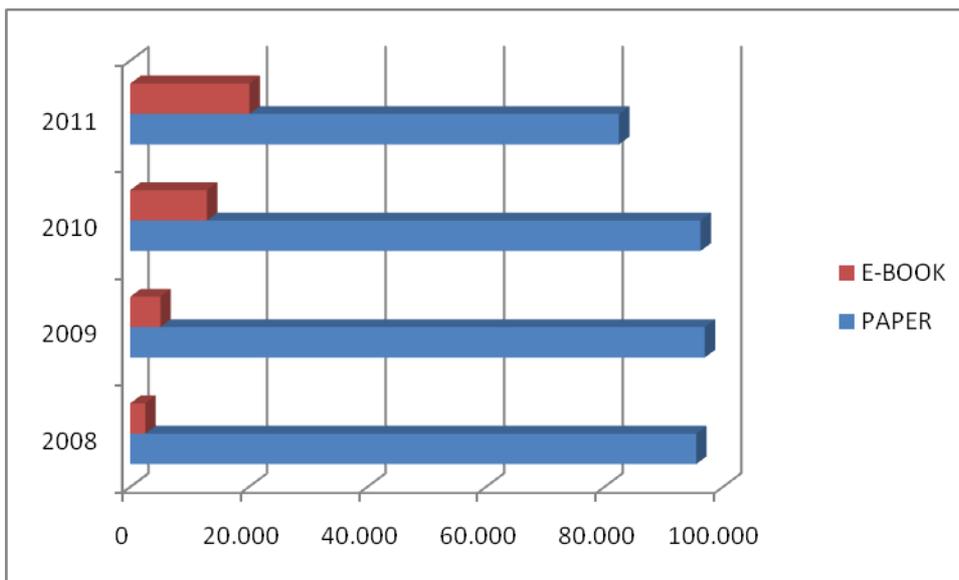
With that figure shows a significant evolution ebook also as to their representation in the total issue is concerned, from 11.3% in 2010 to nearly 18% in 2011.

REGISTERED ISBNs ACCORDING TO THE FORMAT 2008-2011

	2008	%	2009	%	2010	%	2011	%	DIFFERENCE 2010/2011
PAPER	95.508	91,6	96.955	88	96.238	84,1	82.495	73,4	-14,3
E-BOOK	2.519	2,4	5.077	4,6	12.948	11,3	20.119	17,9	55,4
OTHER	6.196	6	8.173	7,4	5.273	4,6	9.763	8,7	54,3
TOTAL	104.223	100	110.205	100	114.459	100	112.377	100	-1,8

Although these data reflect the growing interest in the publishing industry by providing readers with titles in digital format, also seem to confirm the tendency to publish fewer titles in paper. Between 2009 and 2011 the paper edition shows a decline of almost 15%, a drop that occurs in parallel to increase production in ebook format.

ISBN REGISTERED PAPER VS. E-BOOK



Almost 5 of 10 titles recorded in digital format come from medium-sized private publishers

Last year, 516 digital publishing houses published some book presenting the following characteristics:

- Over than 90% are private publishers, followed by the public (7.5%) and self-publishers
- The presence of small private publishers is greater in number than any other category, representing over 62% of the companies that publish ebooks
- Medium-sized publishers condense most of the digital edition, just over 46% of digital titles come from these companies, followed by small (25.4%) and large (22.2%).
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- Considering the number of ebooks registered under these categories, the average digital books is much higher in the largest publishers, which exceeded the 109 titles annually. They are followed by medium with almost 83 titles and, far behind, the small, half-skim the 15 titles by publisher



2. National analysis of best practices related to e-publishing



Devices+contents+ associated services

Under this formula the company's claim is, convert the online store in the largest library of Spanish background. Conversion which will undoubtedly help, the fact that Planeta is the largest Spanish publishing group in the world, and its library which includes the largest catalog of books in Spanish: More than 1 million titles in various formats and about 60,000 digital titles offered in ePub and PDF. This virtual library, with 900,000 registered users and over 7 million monthly visitors, is also a leader in the sales network of titles in this language, with over 40,000 estimated per year. It has, moreover, with 37 physical facilities located throughout the Spanish geography.

A model that is characterized by:

- Offering a shopping experience quick, easy and secure: Incorporates the functionality "Buy a 1-step", allowing a shopping experience similar to the Amazon with its Kindle and using its own DRM.
- Two access models: with its objective to meet the demands of readers, the Tagus universe provides access under both download-on Tagus device and many other applications through the Android Free and Apple, as in "read-the cloud. The limitations of Internet connection are also a problem of reading online, but the limited capacity of some devices for storing books and the difficulties of DRM are reading low download.
- A firm commitment by tools that facilitate the creation and maintenance of communities of readers, searching recommendations, reviews and readings. Its platform provides the reader with direct access to the largest community of Spanish-speaking readers, enabling the sharing readings, discuss what is being read or even see notes or underlining of other reader.

E-books for everyone

In order to reinforce the approach of many readers interested in the ebook but not accustomed to using the Internet, from January "Casa del Libro" also provides access to them from their physical libraries. The way: a card preloaded with the 10 best-selling ebooks which new titles will be added gradually and that, once activated, allows the reader to read books in Tagus and other devices. This is to provide an additional channel of access to the books most in demand by readers, especially those who like to read by e-reader but without giving up the shopping experience in the physical library.



Cost adjustment

From the publisher Metro recognizes that the cost of producing a digital book is much smaller than a printed book, so opt for a clear reduction in prices and the establishment of commercial formulas alternatives such as pay only for parts of a book. However be supported by a process of adjustment costs, which in the opinion of the company will be faster with the addition of new players in the market.

A part of that necessary adjustment and, apart from VAT issue, the involvement of certain factors, such as distribution managers, increases the price of the e-book, besides not having much sense in a medium like the Internet.



After fifty years of experience, "Circulo de Lectores" the most important Spanish book club, embarks on the adventure by creating digital Booqu. One initiative that "Circulo de Lectores", responding to a request by many of its partners, aims to reinvent their traditional business model adapted to the digital world, but not forgetting one of its best assets: the readers. For this reason, Booqu offers Internet access to digital content under both downloading and streaming, same time encouraging their active participation.

Reading the book on the net

One of the possibilities of Booqu is the access e-books through a closed system, under subscription, which is intended to simplify the problem caused by the formats. At first glance this model recalls launched last year by 24symbols, but there are several aspects that differentiate the two platforms, one being that does not allow any options Booqu free access and advertising content.

To read in the cloud Booqu the reader must pay a monthly fee varies depending on whether or not a member of the Circle of Readers -7.90 euros per month for members and 9.90 for no members. The payment of this fee allows the reader to enter in the "Premium" and unlimited access to the catalog of the Digital Library. In total, about 300 titles of books and magazines at the present time, no news, though is expected to reach 1,000 titles. The reader may also choose to access additional thematic channels, for each, 5 Euros monthly, allowing switching from one to another in each subscription.

The reading in the net through Booqu can be done from any personal computer, mobile phone and a tablet with Android or Apple Internet connection.

Buying books downloading them.

In parallel, Booqu also supports open reading under download and without commitment to stay with a catalog of over 10,000 titles accessed through Libranda. The books can be downloaded on up to five different devices with Apple or Android system.



More than a website, a social network of readers

One of the strengths of this initiative over other platforms is its commitment to creating a social network of readers to generate added value. Taking to account that Booquo is a part of a book club with more than one million members, this seems an easy target to reach, and a medium with a huge potential in influencing the purchasing decisions of other readers.

3. International analysis of best practices related to e-publishing



Amazon is currently present in five European countries: UK, Germany, France, Italy and Spain, and many others around the world-United States, Canada, China, Japan and India, a market that has been recently incorporated under the Jungle name-with this new movement Amazon entered the market of digital books in Spanish with an initial catalog of 23,000 titles in Spanish languages accompanied also its famous Kindle.

There are not available in the Spanish market with advertising or the Kindle, sold in other countries at prices below the model without advertising and the Fire Kindle, the tablet "rival" of the iPhone, which is reaching sales figures not negligible in the USA market, the only one that sold for now.

Nearly a third of its offer, new

But the competitiveness of this site will not stay in his huge catalog. The key to success for the platform is to offer the reader a quick and easy access to books, as well as good prices. With this objective Amazon.es included in its launch in Spain more than 7,800 new-about 31% of its catalog in Spanish at the moment, many of which are literary titles. Its price, though variable, is between 10 and 15 euros. The titles of literature comprise approximately 45% of the catalog in Spanish.

Adding to its exclusively offer- like text books selected by the newspaper "El Pais", which are offered under the title "El País Selección", or "La Vanguardia", of which Amazon claims to have the largest catalog in Spanish, and bestsellers. A major commitment when you consider that, today, about 20% of sales of bestsellers in the United States already carry in digital format.



The iPad, a great ally publishing certain genres.

There is no doubt that Apple has revolutionized the tablet market. Since launching the first iPhone in 2010, the Apple company has been monopolized most of the market share. According to comScore, in June last year it contributed to over 89% of traffic generated by all the tablets worldwide. In the Spanish case the IPAD-present since May 2010 - not far behind, condensing more than 65% of traffic is derived from the PCs in our country and more than 97% of the tablets. Apple also dominates the business of apps, this field represents three quarters of the total market.



Due to its specific characteristics, particularly in contrast to the ereader, this device is best suited to address fragmentary readings mixed with navigation and information search on the net. These details are what determine which is more widely used in professional, academic or for reading nonfiction books, newspapers and magazines. But on the other hand, technical specifications make this device an ideal medium for creating books that are not only plain text, such as interactive books with pictures, videos, sounds ... These are precisely the conditions that have allowed the jump to digital of different genres. The most representative examples are comics, children's books or technical books, as well as practical books such as cooking and travel, in which the tablet is becoming a great ally.

The success of the apps and possibilities of the iPhone in education

Apple dominates the field of apps and offers numerous free applications such as iBooks, which allows iPhone users, iPhone and iPod Touch iBookstore access the store where books are digital, both pay and free, which can be download. With the interface can be searched fields by different fields, allowing you to synchronize the read in various devices.

Since mid-January in Spain and other countries around the world, Apple has released two iBooks application for iPhone, an update oriented education sector which, according to the company, aims to place the tablet from Apple in the textbook for excellence in schools. This application already existed, the novelty is that now introduces the ability to read textbooks loaded with many more multimedia content that teachers and authors of books can be expanded or modified. Among other operations, allowing stress, find synonyms, create notes and access self-assessment sections.

iBookstore store also offers customers –at the moment only in U.S.A access to the Textbooks section, consisting of interactive textbooks available under the agreement signed with various publishers such as McGraw-Hill or Pearson. Their prices are below the \$ 15, a factor which, combined with high rates of penetration of the Apple tablet in the U.S. market, according to the company in the U.S. and there are 15 million iPads, and the decision to implement this tool in some American schools, may help the company in achieving its objective. Even more significant may be its impact on South Korea in 2015 which aims to become the first country with all its curricula for compulsory education digitized and accessible on all devices. A transformation certainly more feasible in this country than many others in light of the results of the latest digital competition PISA tests conducted by the OECD, which put all South Korean students in the first place in the management of new technologies.



4. Reflections and Conclusions

Keeping the dual market, a great challenge.

But the challenge, nowadays, is not only the sector integration in the online edition, but it is especially directed to the search for balance between the digital market and the paper, the latter clearly our publishing engine and even continent par excellence when dealing with reading.

Trend toward collaboration in the cultural sector with ICT companies

Maintaining this dual market is demanding a reconfiguration of the corporate structure of the publishing industry to accommodate the digital business. To address this situation new profiles are integrated in the publishing, in some cases people in the world incorporating technological and other staff converting to digital sector.

This scenario is of particular value in the cultural sector in collaboration with companies specializing in information technology and communication that offer a wide range of services, from the digitization of books to correction and design work. The decision regarding the inclusion within the editorial team of the department of correction or digitization and outsourcing this service will depend, according to the Foreign Service Institute (ICEX) the type of catalog and content of the publisher: for publishers of between 200 and 500 titles is recommended to outsource the service, but for those with big catalogs, from the 8,000, is recommended more training of staff or hiring a specialist.

The final launch of e-book in Spain would be supported by easier access to the contents and configuration of an offer with more competitive prices.

The reader demands a simplification: the reader what he wants is to read, and do it as easily as it had been doing with the paper. The reader today is forced to confront a whole technological network when you take the plunge into this format.

From the moment that the reader is decided by one device or another, whether it is defining what is to be able to read and what not and this often-most-the reader does not know. The goal of digital books, and any other technological change, is to enhance an existing product, in this case the paper book, which since its inception has demonstrated its effectiveness as a means of reading: not overextend their benefits in exchange for other, but try to add new ones you already have.

The sector is aware of its limitations and the need also to ensure their rights to the reader similar to the paper. But the challenge is not easy. For now, the Spanish industry is beginning to promote models that overcome the complexity of the digital book access, while ensuring the protection of copyright. But it is necessary to strengthen access models and / or technological alternatives more reader friendly, parallel to the establishment of a stable and secure respect for intellectual property.

The demand grows, but for the moment at a slow pace, still unable to generate sufficient profits to maintain the digital book business. Effectively with the e-book costs are reduced, but the ebook



has other associated costs, different from the paper, and requires a large initial investment at a time when even low profitability and limited demand. On the other hand, the process of creating a

book by the author is basically the same, so the value of the book, its content remains unchanged. Meanwhile, the editor's job does not disappear, it modifies and expands and becomes even more valuable in an environment increasingly saturated in which you have to select and respond to the wishes of the reader and which also grow the mechanisms promotion to those who should attend. Therefore the digital book should better reflect the cost reduction in price, yes, but without becoming synonymous with free. That is, digital book, should be synonymous with accessible.

Tendency to transform the habit of buying books through online stores

Amazon is helping to spread the culture of online shopping for both digital and physical books. A situation that is having huge impact on physical bookstores of other countries, especially the United States and United Kingdom. In Spain today, the culture of online shopping is far less advanced.



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