

Identifying e-books: issues and options

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Overview

Where are we...?

International ISBN Agency survey
Book Industry Study Group (BISG) survey

Why are we here...?

ISBN standard revision 2000-2005
How digital books have developed

Recommended resources to help you now...

International ISBN Agency guidelines and FAQs

Ongoing work...

Revisions to Users' Manual
BISG Working Group



Where are we...?

IJA - commissioned study from DPP

Aim

- Provide an evidence base for IJA to develop policy and actions concerning assignment of ISBNs to e-books

Core tasks

- Identify the key issues
- Collate the business requirements of all stakeholders in supply chain
- Identify the impact on stakeholders of different approaches
- Suggest possible solutions

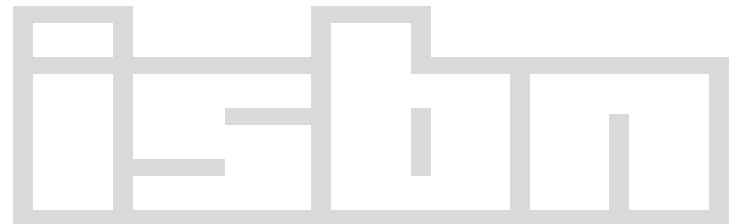


Where are we...?

IIA – commissioned study from DPP

Key findings

- Non-compliance with standard
 - some publishers use print ISBN, others use same ISBN for all versions, others allow intermediary to assign identifiers
- Complexity of defining a product - not just file format
- Issues are:
 - **discovery** (what e-books are available, is there a version for my reader/software or do I need to get something new?)
 - **what can I do with it** (lend, share, print?)
- Need for standard and consistent identification and metadata framework
- **Who** is the publisher?
 - intermediaries create different versions but what (or whose?) identifier is used?
- **Situation in US need not be replicated elsewhere** – in other countries where digital market is still developing, compliance with Standard is higher



Where are we...?

International ISBN Agency survey

- Complex e-book supply chain
 - *solely* publisher-assigned ISBN model inadequate
- Intermediary-assigned model
 - problems of metadata management, increased cost and effort?
- Confusion can be avoided in other countries
- Proposal: application to allow:
 - viewing of e-book metadata
 - request by intermediaries for publisher ISBN or assignment of their own (according to rules set by publishers)



Where are we...?

Book Industry Study Group (US) survey

- Focus solely on US market
- Findings **same as IIA**: variety of practices, confusion, lack of leadership

AND also:

- “Bad practices” are now habits that are embedded
 - No business case to use ISBNs correctly in digital arena
- Little understanding of ISBN as **international standard** (not “nice to have”)
- Poor quality of e-book metadata (print often better!)
- Librarians want to source the right books but wary of trusting ISBN because of inconsistent application



Where are we...?

Whose responsibility?

Publisher-assigned ISBN brought benefits to supply chain

- reliable, consistent identifier all stakeholders could use
- enabled same publication to be identified in multiple countries and outlets
- unique publications have a unique identifier
- facilitated wider participation and greater efficiencies for all of supply chain

Role of national agency

- source of advice
- ensure that Standard and its rules are widely known and understood
- guidance notes for publishers
- awareness that this may be a long transition and markets in different countries will develop at different paces



Where are we...?

In choosing not to (or failing to) assign separate identifiers, publishers:

- *push the problem (and the costs of managing the problem) downstream*
- *relinquish control of their metadata*
- *may lose the chance to fully track and analyse their sales*
- *generate more confusion in the supply chain*
 - *unique products are not uniquely identified*
 - *discovery is inhibited*
 - *acquisitions, particularly by libraries, are inhibited (cannot easily identify if a publication is different)*
 - *shift to **reliance on multiple pieces of metadata** rather than simple identifier*
 - *may be losing sales!*



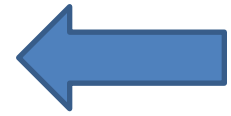
The Girl Who Kicked the Hornets' Nest

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Why are we here...?


ISBN standard revision (ISO working group 2000-2005)

- Emphasis on *extending capacity of ISBN system* – **move to 13 digits**
- Some early examples of e-books (e.g. pdf, Rocketbook, Mobipocket) but tiny proportion of sales
- Early development of epub format by OEBF (later IDPF)
- Impact of DRM not considered
- *Extension of accepted print rules to e-books*
- **“Each different format of an electronic publication (e.g. “.lit”, “.pdf”, “.html”, “.pdb”) that is published and made separately available shall be given a separate ISBN”**



Why are we here...?

New ISBN standard published 2005 and....?

- Predicted digital boom did not happen...initially
- Players such as Sony and Palm emerged  ...but take up slow
- 2002 - 2005 US quarterly trade e-book sales grew from **\$1.6m to \$2.2m***
 - **in some quarters sales actually....**
...fell
- Publishers experimenting; more opportunities for self-publishers
- Inconsistency in how ISBN standard used, but small size of market meant there was little impact
- Use of proprietary identifiers

* Source: IDPF



Why are we here...?

Then....

- Increased adoption of epub as content file

- 2007 – Launch of first Kindle



- 2008 on – many devices on market (Iliad, Elonex, BeBook, Cool-er, Cybook)



- 2008 – IIA permit intermediaries to assign ISBN if publisher does not do so

- 2010 – release of iPad



Why are we here...?

Then....

- 2006 - 2010 US quarterly trade e-book sales up from **\$4.1m to \$119.7m***
- Late 2010 – Amazon reports selling more e-books than hard covers...
- Publishers developing e-book apps for smartphones, “fragments”
- Behaviour still inconsistent, but now it starts to matter
 - E-book sales c.10% of print sales
- Demand for clear guidance from agencies to publishers and intermediaries
- Is the time right for agreement and solution?

* Source: IDPF



Recommended resources...

IIA guidelines and FAQs issued November 2010

<http://www.isbn-international.org/news/view/31>

“Publications need separate ISBNs if **anyone in the supply chain needs to identify them separately.**”

A separate product is defined by a **combination of file format** (*will this work on my device/software?*) and **Digital Rights Management software** (*what can I do with this – e.g. copy, lend?*)”



Recommended resources...

IIA guidelines and FAQs

More comments, new examples and FAQs are very welcome!



Ongoing work...

BISG Working Group

- Last (?) chance to reform inconsistency
- Meetings every 2 weeks (mainly by phone)
- Mostly positive response to IIA guidelines



Thank you!

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