Standing Committee on Digital Content and e-Lending

E-BOOK ISSUES PAPER

1. Introduction

The [LIANZA Standing Committee on Digital Content and e-Lending](#) was established in December 2012 to advise the LIANZA Council and membership on issues relating to overcoming legal, economic, and technical barriers to e-Lending and the provision of digital content, in order to promote the provision of equitable access to digital content to all New Zealanders.

This paper has been developed by the Standing Committee to provide an overview of the current e-book environment in New Zealand libraries, the wider New Zealand landscape and what is happening in the international arena.

2. Purpose and scope

The LIANZA Standing Committee on Digital Content and e-Lending will be facilitating a workshop at the LIANZA Conference 2013 entitled *e-Lending and Libraries: a Workshop*. The purpose of this e-book issues paper is to provide information to support discussion with the wider LIANZA community during the workshop about the issues in providing access to e-books in New Zealand libraries.

The scope of the paper is limited to the provision of commercially published e-books through libraries as New Zealand libraries have indicated that this is currently the most significant issue they are dealing with in this space.

The aim of the LIANZA Standing Committee on Digital Content and e-Lending in developing this paper is to facilitate discussion on what can be achieved in our local environment while aligning with, learning from and contributing to international initiatives and campaigns.

3. New Zealand Libraries and e-books, the current situation

The key issues that New Zealand libraries face in providing e-book access to their users are as follows:

- *Availability of content*

The key issues for public and school libraries is the availablity of current, popular fiction & children's material, while access to textbooks is a significant issue for the tertiary sector libraries. Some publishers impose embargoes or choose not to provide access through libraries at all. Access to New Zealand content is a significant issue for all sectors.

- *Flexibility of access models*

Academic e-book suppliers have developed a wider range of access models than public and school library suppliers, however, there are still constraints faced by all sectors. A strong preference for all libraries are models that provide the ability for simultaneous access to content by patrons. Although in-roads have been made on this front, due to restrictions imposed from publishers, very few fiction suppliers to the library e-book market provide mulit-user access models. A key issue for all library sectors is the exclusion of interlibrary loan from any current e-book access model.

- *Pricing barriers*

All sectors are facing strong budget pressures. Investment in setting up access to different platforms and purchasing content creates added pressures on tight budgets.

> ▪ *Discoverability*

Library patrons may have difficulty navigating multiple platforms, access points and download instructions. This will often include having to search on several different platforms to find the content they are interested in as well as downloading third party software and agreeing to their terms and conditions of use prior to being able to access content.

> ▪ *Technical barriers*

This includes both infrastructure (see points under *Discoverability* above) and expertise. Library staff are increasingly required to have technical troubleshooting skills in order to help patrons access e-content. Workflows also need to be adapted in all areas of the library, e.g.

> o In cataloguing, to create records or modify vendor supplied records to get e-book material into local OPACs
> o In acquisitions, to manage varying access models to titles
> o In circulation; to manage content that may be outside of the LMS.

> ▪ *Format compatibility*

E-books that are made available through libraries are not currently compatible with all e-book reading devices. There will also often be stark differences in the way that content is presented on different devices once content has been downloaded.

[Appendix A: New Zealand Libraries – Key issues in providing access to e-book](#) content provides a breakdown of the level of importance of these issues to each of the library sectors in New Zealand.

The sections below provide brief overviews of how access to e-book content is currently provided through each sector.

3.1   Public Libraries

61 of the 66 (over 92%)local authority libraries currently provide access to e-books through commercial e-book platforms. There has been a strong uptake in this sector in the last 2 years. In 2011 only 3 local authority libraries provided e-book access.

The most popular provider is Overdrive. 65% of New Zealand Public Libraries provide e-book access through this platform. The other prominent supplier is Wheelers with 30% of the market. Most New Zealand public libraries (79%) have also opted to provide access to e-book content through shared collections as part of consortia. As an example, apart from the three largest local authority libraries (Auckland Libraries, Wellington City Libraries and Christchurch City Libraries) all New Zealand public libraries that provide e-book access through the Overdrive platform do so through one of three consortia (see: *[Public Libraries](#)* in *Appendix B: Additional Information on Library Sectors and e-books* for an overview of public library e-book uptake of the Overdrive and Wheelers platforms including consortia uptake).

There are other providers that are moving into this market, for example, a few public libraries are now using the Bolinda Publishing e-audio/e-book platform and Auckland Libraries provide access to e-book content through the EBSCOHost platform (see: *[7.2 Publishers' E-Book models & content available to NZ libraries](#)* for a full list of public library suppliers in the New Zealand market).

3.2   School Libraries

Of the approximately 2,500 schools in New Zealand, there are currently just under 200 schools providing access to e-books through the Wheelers e-book platform. Overdrive have also entered the New Zealand schools market using Softlink as a distributor, however, only one school has launched the Overdrive platform thus far. This equates to a less than 10% uptake across the entire sector. The key reason for the low uptake from schools is budget constraints.

There has however, been some growth in this market, as the School Library Profile survey carried out by the National Library of New Zealand (NLNZ) Services to Schools in 2012 reported that only 0.2% of New Zealand's 2,500 schools provided access to e-books. The access reported in the survey varied widely from providing access to one or two e-books on a dedicated e-reading device to full remote access through the Wheelers e-book platform.

For schools that do provide access to e-books through a commercial platform, those that have implemented BYOD (bring your own device) policies have reported better e-book usage than those that haven't, however, there are similar barriers to those experienced in other sectors; in providing patrons with access to desirable content and the level of support and instructions on using e-book platforms on different devices.

3.3   University Libraries

The academic e-book market is considerably more established and competitive than the public library market. There are also a variety of models on offer. All eight New Zealand University libraries provide access to e-book content to their users through a variety of academic e-book and e-content platforms. Collection sizes range from 85,000 titles to over 600,000 titles. (See: *University Libraries* in *Appendix B: Additional Information on Library Sectors and e-books* for further statistics on New Zealand University Libraries' e-book acquisitions). There is no uniformity across the sector about which platforms are used. The biggest supplier to the University library sector, however, is ebrary – seven of the libraries provide access to content and collections from this provider.

The biggest difficulty that University Libraries have in providing access to e-books is helping their end users to navigate the differing requirements, restrictions, platforms and download instructions from the array of competing providers. Universities would prefer that content is viewable through a browser as well as being able to download content to devices. A primary reasons for this is that while there are differing download requirements from suppliers there is much less complexity for the end-user to access the content directly through a browser.

3.4   Other Tertiary Libraries

16 of the 18 ITP (Institute of Technology/Polytechnic) Libraries in New Zealand provide access to e-book content through commercial platforms. Again, there is no uniformity across the sector about which platforms are used. This market is not as large as the university market, however, there are a variety of models available to these libraries. A popular model with ITP libraries has been the demand driven acquisition model. There are four key players in this market in New Zealand, they are Safari Books, Ebook Library (EBL), ebrary and EBSCO. Most now offer demand driven purchasing models.

There is a mixed uptake from tertiary libraries aside from ITP and University libraries. Only one Wananga provides e-book access (Te Wānanga o Aotearoa through Safari Books). While some of the smaller, specialised tertiary libraries have small EBL, EBSCO or ebrary collections.

See: *Other Tertiary Libraries* in *Appendix B: Additional Information on Library Sectors and e-books* for an overview of ITP and Wananga e-book uptake of the four key e-book providers for this sector).

3.5   Special Libraries

The Special Library sector includes corporate, Crown Research Institute (CRI), government agency and other not for profit libraries. There are varied levels of uptake of e-books in this sector, ranging from no uptake at all through to the use of multiple platforms and purchase models. The core providers for Special Libraries are the same as in the tertiary sectors, however, there are also bespoke suppliers that cater to special needs in this sector.

The specialist needs of these sectors mean that it is difficult for these libraries to leverage off any economies of scale when it comes to the provision of e-books to their users. Often special libraries are more interested in one-off purchases or short term loans that cater to the distinct needs of their users than investing in large subscription collections.

Special Libraries in *Appendix B: Additional Information on Library Sectors and e-books* provides the results of a survey of e-book uptake in usage in CRI libraries. This case study is a good reflection of the issues Special Libraries face in delivering e-book access to their users.

4. New Zealand environment relevant to strategies for e-book supply

4.1 LIANZA Standing Committee on Digital Content and e-Lending

See: *Section 1. Introduction* for an overview of the role of the LIANZA Standing Committee on Digital Content and e-Lending. On the recommendation of the Standing Committee LIANZA has adopted the IFLA Principles for Library eLending.

4.2 APLM strategic Framework and e-books

In August 2012, Local Government New Zealand (LGNZ) and the Association of Public Library Managers (APLM) released Public Libraries of New Zealand: A Strategic Framework 2012-2017. One of the eight strategic national priorities identified in this is to "work with New Zealand authors, publishers and booksellers to develop a whole-of-country approach to deliver an eBook solution that meets the needs of all parties" (pg.38).

4.3 NLNZ, APLM and LIANZA work engaging with the book industry

NLNZ, APLM and LIANZA are working together on the *New Zealand E-Book Initiative* to engage with authors, publishers, booksellers and library suppliers to explore solutions and opportunites for providing better access to e-books in New Zealand public libraries and schools.

A great deal of research has been conducted as part of this initiative, much of which has contributed to the development of this paper.

In addition, two multi-sector workshops (in November 2012 & February 2013) have also taken place to identify the key issues in providing access to e-books in libraries for all parties. The output of these workshops is documented in a paper produced by NLNZ which was distributed to all workshop participants entitled *"New Zealand E-Book Initiative: Update April 2013."*

4.4 EPIC consortium market approach

The EPIC consortium is undertaking a full market approach in 2013 in order to re-align the e-resource offerings to better meet the needs of member libraries for 2014. E-Book content offerings are being sought as part of this process.

4.5 Government focus on shared and collaboratives services

As part of the Better Public Services initiative, the New Zealand government has developed ten results for the New Zealand public sector to achieve over the next five years. The government has put a strong emphasis on connecting and collaborating across government in order to achieve these results. The potential to find a shared solution to providing e-book access to New Zealanders through libraries ties in with these priorities.

4.6   Self-publishing

There has been a strong growth in self publishing both internationally and in New Zealand, both in tradtional print and increasingly in e-format. Established authors are increasingly exploring the potential of self publishing in e-format as there are significant cost savings that can be made for known authors.

Online retailers such as Kobo and Amazon have developed self publishing services. These enable authors to reach a world wide audience, however, in the case of Amazon, it can tie them into an exclusive arrangement that excludes providing access through libraries.

Smashwords is a stand-out example of a self publishing e-book initiative that does provide content to libraries both through commercial distributors such as Baker & Taylor – Axis 360 as well as directly to libraries (Smashwords has direct supply arrangements with both Douglas County and the Califa Group – see: *5.2.1 Douglas County, Colorado – ownership model* for more information on both these initiatives).

There are also examples of independent initiatives from self-published authors to connect and make their content more accesible. A local example of this is Oceanbooks which is an initiative by Tauranga based authors to sell both e-books and hardcopy books directly to consumers.

4.7   Findings of Amy Joseph's research paper on public library requirements on e-book licensing

As part of the requirements to complete her Master of Information Studies degree through the School of Information Management, Victoria University of Wellington, Amy Joseph submitted a research paper in June 2013, entitled *'Non-friction reading: Licensing requirements for e-book lending in New Zealand public libraries.'*

Amy surveyed public library managers to determine which elements of e-book licensing agreements and platforms would best meet the needs of their users. Respondents showed a strong preference for perpetual access licenses: 67.7% of respondents considered this the optimal model, and no other proposed model was considered optimal by any library. Respondents generally tended to favour licenses that allow for predictable budgets and control over title selection. However, many recognised that one size doesn't necessarily fit all, and can see the value in different license models for different types of content. They were concerned with system integration and would ideally like to see e-books from all their chosen vendors available through one interface that integrates with their catalogues. They would like to see more New Zealand content available, and access to library e-book lending on any device their users may wish to use.

The survey also explored how e-book costs were split between capital and operational budgets. Although there is variation over how e-book spending is allocated, e-books are much more likely to be considered operational spending than traditional print collections. Several libraries expressed concern that operational budgets are more vulnerable to pressure from funding bodies than capital budgets.

5. International Context

5.1   Campaigns and working groups

Providing access to e-book content through libraries is an international issue. The following is an overview of some of the existing international campaigns and working groups that have been established to address the key issues libraries are facing.

5.1.1 IFLA (The International Federation of Library Associations and Institutions)

In 2011 IFLA established a working group to propose actions which IFLA and its members should consider in addressing the issues involved with e-lending. This has resulted in the following outputs:

A background paper on eLending (11 May 2012)
An expert meeting on eLending in libraries (November 2012)
Principles for Library eLending (Rev ed, 16 August 2013)

IFLA also created a webpage: E-Lending for Libraries: IFLA, E-books and Access to Digital Content, the purpose of which is to document IFLA strategies and initiatives in this space.

5.1.2 Australian Book Industry Collaborative Council

The Australian Government established the Book Industry Collaborative Council in 2012. It comprises representatives from book industry associations and professional bodies; libraries; and experts from related areas such as copyright, research and telecommunications. The role of the group is to help the book industry deal with the changes due to digitisation by implementing recommendations from the Book Industry Strategy Group Report.

5.1.3 ALIA (Australian Library and Information Association)

ALIA have launched an E-books and elending campaign which can be accessed via the ALIA website. As part of the campaign, ALIA issued the Ebooks and elending issues paper (January 2013), organised "Think Tanks" in five locations across Australia and based on the feedback received through these they have developed a draft position statement on ebooks and elending.

5.1.4 ALA (American Library Association)

The ALA have established the Digital Content and Libraries Working Group. The following link provides the aims of the Working Group http://connect.ala.org/node/159669

5.1.5 SCL (The Society of Chief Librarians)

The SCL in the United Kingdom is actively working with publishers and aggregators. The aim is to seek common agreement on what library e-book lending models will be and how libraries will operate, thereby encouraging more publishers to make UK content available for libraries to purchase or licence. http://www.goscl.com/scl-position-on-e-lending-in-libraries.

The UK government has also become involved in looking at ways to increase e-book usage through libraries. The Culture Minister, Ed Vaizey asked publisher William Sieghart to lead a review of e-lending with a panel of experts, including input from the SCL. A report was published in March 2013. A key recommendation of the report was to conduct a number of research pilots to explore approaches to e-lending. These have been commissioned by the SCL in conjunction with The PA (The Publishers Association) http://www.goscl.com/wp-content/uploads/2013/06/ELending-Research-Company-RFP-26.06.13-FINAL.pdf

5.1.6 ReadersFirst

ReadersFirst is an international movement (founded in the US) to improve e-book access and services for public library users. ReadersFirst participants believe that libraries have a responsibility to fight for the public and ensure that users have the same open, easy and free access to e-books that they have come to rely on with physical books. There are nearly 300 public library systems that have signed up as ReadersFirst Coalition partners. The first initiative of ReadersFirst has been to draft up Content Access Requirements for e-content distribution services.

5.2   Initiatives

There have also been a number of initiatives that have been set up internationally aiming to provide better access to e-book content through libraries. These have had varying levels of success. The following are some high profile initiatives:

5.2.1   Douglas County, Colorado – ownership model

As well as licensing content through third party platforms, Douglas County purchases e-book files directly from publishers and offers the content to their library patrons through their own system. In return for a share of the revenue, Douglas County Libraries also has an agreement with the Colorado Independent Publishers Association to both loan its e-books and offer them for sale. They have the Horizon ILS, use VUfind (open source discovery portal) for presentation and circulation and collect content in EPub and PDF formats. http://douglascountylibraries.org

http://www.alatechsource.org/blog/2012/03/douglas-county-libraries-diy-e-book-hosting.html - this article provides a thorough explanation of the Douglas County model.
http://evoke.cvlsites.org   - this is a link to a site that Douglas County and their partners in Colorado have set up to track what they are doing and to provide guidance for other similar initiatives.

This model has been adopted by other groups, including the Califa Group (the largest library network in California) http://califa.org.

5.2.2   New York Public Library – trialling publishers' models

New York Public Library made a decision to trial the different business models that the major publishers provide through distributors in order to collect usage data to share with the publishers. A key success of this approach has been with Penguin who had previously pulled all access to their e-books through public libraries. New York Public Library set up a trial with Penguin to provide embargoed access (a six month delay on new titles) to their patrons through the 3M E-Book platform. Based on the success of this trial, Penguin have now agreed to release e-books to libraries at the same time as its hardcover books come out.

New York Public Library have also negotiated an option for their patrons to buy the e-copies of books through an option of three e-book retailers in return for a share of the profits, although, according to this article from Fortune on 22 July 2013, it has had only moderate success thus far http://tech.fortune.cnn.com/2013/07/22/amazon-9.

5.2.3   Canada – Collaboration of public libraries & English language publishers

Canada's English-language publishing community (represented by eBOUND Canada) http://www.eboundcanada.org and Canada's public libraries (represented by the Canadian Urban Libraries Council – CULC) are working together for the creation of a made-in-Canada solution that, potentially, will provide e-book lending capabilities to all Canadian public libraries from Canadian publishers. http://www.culc.ca/knowledge/ebook-rfp

5.2.4   Denmark – a National portal for public libraries

eReolen – the Danish Public libraries' digital book loan service was launched in November 2011. Danish public libraries negotiated agreements with over 50 Danish publishing houses to provide lending access to Danish language e-books. Each time a book is loaned out, the library pays the publisher a user fee. The more the title is borrowed, the lower the fee to the library. (There is no charge to the patron). The individual library also decides how many digital books patrons may borrow and for how long. In December 2011, the option for patrons to purchase the e-book outright was also added to eReolen, the profits for the purchase to be shared between the publisher and the libraries.

This initiative has since suffered with publishers pulling out due to increasing fears of libraries having a monopoly on e-book sales. This article from the Economist in March provides more detail about this and other initiatives http://www.economist.com/news/international/21573966-e-books-mean-plot-twist-public-libraries-and-publishers-folding-shelves

5.2.5 German Public Libraries commercial platform

The following slideshow: *E-Books in German Public Libraries: business model with aggregators and others* http://napleblog.files.wordpress.com/2013/05/e-books-in-german-public-libraries.pps was presented by Barbara Schleihagen & Miriam Schriefers from the German Library Association to the NAPLE seminar on e-book business models for public libraries, 13 May 2013 and provides a thorough overview of the business models prevalent in the German environment.

The main commercial e-book platform for German public libraries is **DiViBib GmbH – the German E-Library** http://www.divibib.com. It is a similar to the Overdrive model, however, they do not experience the same resistance from publishers that English language library providers are experiencing. Almost all the books are available to public libraries at the same price as individual customers and only one big German publishing house doesn't provide access to their content through the E-Library. The most common access model offered is single user access, however, they are in the process of negotiating new licence terms with publishers.

6. Library users and e-books

6.1 Anecdotal observations from New Zealand libraries

The most consistent observation from New Zealand libraries across all sectors when it comes to library users and e-books is the frustration felt by the users at the complexity of getting access to the content. The process of downloading an e-book in the commercial environment (i.e. via Amazon) is a relatively simple process. Users expect it to be a similar experience to download an e-book from a library, but this is not the case. Usage barriers faced by library users include:

- Having to download different software to access content provided through different suppliers
- Where libraries haven't integrated e-books into their catalogues, users have to search for the content separately from other searches
- Different loan periods and usage terms
- Incompatibility with their e-reading device
- Long waiting lists
- Lack of quality or desirable content

Library users also expect to receive a high level of assistance from frontline library staff in accessing e-books both through the library and commercially, just as they would expect assistance in accessing physical books.

The level of service from libraries in this area can be vary quite considerably both within and across different organisations. To provide the necessary level of service to library users there is a need for library staff to have the applicable technology and learning skills. Currently, these skills are not widely considered core requirements for library professional development.

6.2   International observations and research

6.2.1 Pew Research Center

As part of the [Pew Internet & American Life Project](#) the [Pew Research Center](#) commissioned a report which was released on June 22, 2012 entitled [Libraries, patrons, and e-books](#) looking at e-book borrowing in US public libraries.

Key findings included:
- Most people (62%) were unaware that they able to borrow e-books from their library.
- Of those that had borrowed e-books from libraries
  - 56% had tried to borrow a book and found the library didn't carry it
  - 52% said that at one point or another they discovered there was a waiting list to borrow the book
  - 18% said that at one point or another they found that the e-book they were interested in was not compatible with the e-reading device they were using.

Library staff members were also surveyed. The majority of which reported that much more of their time is now devoted to providing "tech support" for patrons—both in their hardware needs and mastering software and the web—and away from traditional reference services. A notable portion reported that they are self-taught techies and that there is a wide variance in training in this area.

These research findings mirror the anecdotal observations made about the issues in New Zealand libraries in the above section.

6.2.2 Pat Losiniski

Pat Losinski, Chief Executive Officer at Columbus Metropolitan Library presented at the Next Library conference, held in Aarhus, Denmark, 16 - 19 June 2013. His presentation was titled *[Reimagining the Roles of Public Libraries](#)*. As part of his presentation he made some interesting comments about trends in library usage and e-book access. The following are some key points from his presentation:
- Browsing behaviour is changing. People are less inclined to browse shelves and are more likely to browse online and then come into the library to pick up the item
- Next year there will be 23 billion mobile devices – significantly more than the world's population
- We are moving from a digital or technology divide to a content divide, i.e. access to the technology is becoming increasingly affordable, while access to content is becoming increasingly restricted. "By their actions, publishers are creating public policy."
- Digital will accelerate over the next 5 years. "Are we able to predict what the future will be with this growth?"
- Strong competition for public libraries is developing, for example, Redigi - their business model is to sell used digital music and used digital books. The Apple and Amazon license agreement specifically forbids licensees to resell but there is a view that this is something they may want to be moving to.

7. Publishers influence on e-book supply to libraries

As is highlighted by several of the examples in previous sections, a key issue in providing access to e-book content through libraries has been the difficulty in reaching access terms that are satisfactory to both publishers and libraries. This has particularly been the case with popular, new

release content from the large English language publishers and therefore has had a major effect on the quantity, quality and currency of the e-book content that (particularly public) libraries are able to provide to their patrons. The most high profile example of this has been US public libraries' negotiations with the Big Six Publishers.

7.1   The Big Six Publishers – E-Book models & content available to US public libraries

Thanks to organisations like the New York Public Library and strong lobbying from the American Library Association, the six biggest publishers in the US (which publish roughly two-thirds of the books in the US) have now all agreed to provide new release e-book content to US libraries. However, all of the publishers have provided models to libraries with levels of difficulty that do not exist in the provision of e-books to general consumers.

The following table provides a breakdown of the models that the publishers have in place to make e-books available to US public libraries through library supply companies and aggregators.

PUBLISHER	CONTENT	MODEL
HarperCollins	All	26 loan cap per licence
Simon & Schuster	All	1 year licence per title
Macmillan	Limited range	2 year licence or 52 loan cap per licence
Hachette	All	Charges approx 3x higher per title than print for new titles. After 1 year, the price drops to 1.5x higher than the print title
Random House	All	Charges approx 300% higher per title than the retail price
Penguin	All	1 year licence per title

Although these publishers have released content to the US library market, the New Zealand library market only benefits from these advancements if and when regional rights to the content are negotiated.

7.2   Publishers' E-Book models & content available to NZ libraries

It is anticipated the advancements that have been made with the big publishers in the US will eventually have positive flow on effects for New Zealand libraries, however, there are additional restrictions that New Zealand libraries face in obtaining access to e-book content for their patrons. These include:

- As mentioned in section 7.1 regional rights restrictions which often preclude library e-book content providers from offering access to content in New Zealand that they are able to in the US and other regions.
- There is no library e-book provider in New Zealand that provides Kindle compatible content. Overdrive have negotiated a deal with Amazon in the US which enables library patrons to re-direct through to the Kindle store to access content. This is not available outside of the US.
- Some publishers only allow specific library suppliers or aggregators to supply libraries with their e-book content. Not all of these suppliers have a presence in the New Zealand market.
- Very little New Zealand content is available in e-book formats or available through the existing library suppliers. (meBooks is a commercial provider, specifically focused on New Zealand content, however, they do not currently supply the New Zealand library market.)
- E-Book publishers do not allow aggregators and hence libraries to supply books in e-format for interlibrary loan.

The following table is a breakdown of the e-book suppliers currently offering services to the New Zealand public library market and a description of the service they currently provide:

SUPPLIER	DESCRIPTION
3M Cloud Library	Aggregated over 200,000 titles from over 300 publishers. Trialled Penguin and Simon and Schuster with NYPL
Askews and Holt	Over 106,000 titles from UK sources – both front and back list. Has just enabled backend for license and time restrictions to enable big six issuing restrictions.
Baker & Taylor – Axis 360	Provides access to over 440,000 titles. Has recently acquired access to Penguin and Simon & Schuster titles. Also includes Smashwords titles.
Bolinda	Have recently expanded into the e-book market after providing access to e-audio content through the Bolinda Digital Platform for over 4 years. Have strong Australian content and have recently secured access to Macmillan content.
EBSCO	Provides aggregation of many "reference" titles and a growing selection of popular material.
Overdrive	With more than 1,000,000 titles from 1,000+ publishers, OverDrive hosts the largest digital library catalogue of e-books for public libraries.
ProQuest – EBL & ebrary	Provides aggregation of many "reference" titles and a growing selection of popular material. Brands include ebrary and EBL
Wheelers	New Zealand company which has 1000s of Australian and New Zealand e-books available and hundreds of international publishers.

Recommended reading

American Library Association (ALA):
"EBook business models for Public Libraries: A report for the American Library Association." (8 August 2012)
http://connect.ala.org/files/80755/EbookBusinessModelsPublicLibs.pdf
Besen, Stanley M. and Sheila Nataraj Kirby (September 2012)
"E-books and libraries: An economic perspective."
http://www.ala.org/transforminglibraries/sites/ala.org.transforminglibraries/files/content/final%20economic%20report%20sept2012.pdf

Association of Public Library Managers (APLM):
"Public Libraries of New Zealand: A Strategic Framework 2012 -2017."
http://www.publiclibrariesofnewzealand.org.nz/misc/pdfs/NZ_Public_Libraries_Strategic_Framework.pdf

Australian Library and Information Association (ALIA):
"Ebooks and Elending Issues Paper"
http://www.alia.org.au/sites/default/files/documents/advocacy/Ebooks%20and%20Elending%20Issues%20Paper%20FINAL.pdf
"ALIA position statement on ebooks and elending, May 2013"
http://www.alia.org.au/sites/default/files/documents/advocacy/ALIAebooksandelendingposition130522.pdf

International Federation of Library Associations (IFLA):
"IFLA E-Lending Background Paper" (11 May, 2012)
http://www.ifla.org/files/assets/clm/publications/ifla-background-paper-e-lending-en.pdf
"IFLA Principles for Library eLending" (rev ed. 16 August, 2013)
http://www.ifla.org/files/assets/hq/topics/e-lending/principles-for-library-elending-rev-aug-2013.pdf

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"Non-friction reading: Licensing requirements for e-book lending in New Zealand public libraries." (Masters Research Paper, School of Information Management, Victoria University of Wellington, Wellington, New Zealand) http://hdl.handle.net/10063/2970

O'Brien, David R, Urs Gasser and John Palfrey. (2012)
"E-Books in Libraries: A Briefing Document developed in preparation for a Workshop on E-Lending in Libraries." (Berkman Center Research Publication No. 2012-15)
http://apo.org.au/sites/default/files/SSRN-id2111396.pdf

Pew Internet & American Life Project:
Rainie, Lee, Kathryn Zickuhr, Kristen Purcell, Mary Madden and Joanna Brenner (2012)
"The Rise of e-reading" (Pew Research Center, 5 April, 2012)
http://libraries.pewinternet.org/2012/04/04/the-rise-of-e-reading
Rainie, Lee, Kathryn Zickuhr, Kristen Purcell, Mary Madden and Joanna Brenner (2012)
"Libraries, patrons, and e-books" (Pew Research Center, 22 June, 2012)
http://libraries.pewinternet.org/2012/06/22/libraries-patrons-and-e-books

ReadersFirst
"ReadersFirst Content Access Requirements [DRAFT"]
http://readersfirst.org/ReadersFirst-Content-Access-Requirements.pdf

Sieghart, William. (March 2013)
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Appendix A: New Zealand Libraries – Key issues in providing access to e-book content

The following table is a breakdown of the key issues faced by libraries in providing access to e-book content and the level of importance each of these issues are to each library sector.

ISSUES	LIBRARY SECTORS				
	Public Libraries	*School Libraries*	*University Libraries*	*Other Tertiary Libraries*	*Special Libraries*
Availabilty of content	HIGH	HIGH	LOW	LOW	MEDIUM
Flexibilty of access models	HIGH	HIGH	MEDIUM	MEDIUM	MEDIUM
Pricing barriers	HIGH	HIGH	HIGH	HIGH	HIGH
Discoverability	HIGH	HIGH	MEDIUM	MEDIUM	MEDIUM
Technical barriers	HIGH	HIGH	LOW	MEDIUM	MEDIUM
Format compatibility	HIGH	HIGH	HIGH	HIGH	HIGH

Appendix B: Additional information on library sectors & e-books

Public Libraries

The following table provides an overview of New Zealand public libraries' uptake of the **Overdrive** and **Wheelers** e-book platforms as at August 2013. It also indicates whether they are providing access as part of a consortium. There are a number of other providers emerging in the public library market (see: *7.2 Publishers' E-Book models & content available to NZ libraries* for a full list of public library suppliers), however, the uptake of these two suppliers' platforms provides a good overview of the growing demand for e-books in this sector.

PUBLIC LIBRARIES	OVERDRIVE	WHEELERS
Ashburton District Libraries	√	
Auckland Libraries	√	
Buller District Libraries	√	
Carterton Library	√	
Central Hawkes Bay District Libraries		√
Central Otago District Libraries	√	
Christchurch City Libraries	√	
Clutha District Libraries	√	
Dunedin Public Libraries		√
Far North District Libraries	√	
Feilding Public Library	√	
Gore District Libraries	√	
Grey District Libraries	√	
H B Williams (Gisborne) Memorial Library	√	
Hamilton City Libraries		√
Hastings District Libraries	√	
Hauraki District Libraries	√	
Horowhenua Library Trust		√
Hurunui District Libraries	√	
Hutt City Libraries	√	
Invercargill City Libraries	√	
Kaikoura District Library		
Kaipara District Library	√	
Kapiti District Libraries	√	
Kawerau District Libraries	√	
Mackenzie District Library		
Marlborough District Libraries	√	
Masterton Library	√	
Matamata-Piako District Libraries	√	
Napier Libraries	√	
Nelson City Libraries	√	
Opotiki District Library		
Otorohanga District Libraries	√	
Palmerston North City Libraries	√	
Porirua Library	√	
Puke Ariki	√	
Queenstown-Lakes District Libraries	√	
Rangitikei District Library	√	
Rotorua District Library		√
Ruapehu District Library		
Selwyn District Libraries		√

Library	Col2	Col3	Col4	Col5
South Taranaki District Libraries		√		√
South Waikato District Libraries		√		
South Wairarapa District Libraries		√		
Southland District Libraries		√		
Stratford Library		√		
Tararua District Library				√
Tasman District Libraries		√		
Taupo District Library				√
Tauranga City Libraries				√
Thames-Coromandel District Libraries				√
Timaru District Libraries				√
Upper Hutt City Libraries		√		√
Waikato District Libraries				
Waimakariri District Libraries				√
Waimate District Library				√
Waipa District Libraries				√
Wairoa Centennial Library				√
Waitaki District Libraries				√
Waitomo District Library		√		
Wanganui District Library		√		
Wellington City Libraries		√		
Western Bay of Plenty District Libraries				√
Westland District Libraries		√		
Whakatane District Library				√
Whangarei District Libraries		√		
Total: 66		**43**		**20**
Overall %		**65.15%**		**30.30%**

KEY		
No access to e-books		
Wheelers consortia		
Infoshare		
NZ Lib		
Overdrive consortia		
Northern Virtual e-library		
ePukapuka Lower North Island Digital Library Group		
South Island Downloadable Zone		

University Libraries

The following table provides a breakdown of New Zealand University Libraries' e-book acquisitions through to 2012, as reported to the Council of Australian University Librarians (CAUL). These statistics can be retrieved from http://statistics.caul.edu.au/inst_data.php

NZ UNIVERSITIES	Auckland University of Technology	Lincoln University	Massey University	University of Auckland	University of Canterbury	University of Otago	University of Waikato	Victoria University of Wellington
E-books: Individually acquired in 2012	6,613	32	7,500	69,730	2,041	96,353	1,790	7,790
E-books: Current total titles	85,745	193,834	223,362	557,270	227,023	489,607	131,301	252,786
E-books: Demand-driven packages (i.e. records in the catalogue but not purchased)	43,562	0	0	0	8,125	35,360	21,307	2,053
E-books: Titles acquired through subscriptions in 2012	Not provided	77,109	0	525,724	1,588	20,668	86,459	17,652
Expenditure: On all e-resources	$4,450,696	$1,236,958	$5,749,897	$13,726,967	$5,623,139	$8,821,130	$3,722,673	$6,705,136

Other Tertiary Libraries

The following table provides an overview of New Zealand ITP and Wananga uptake of the four key e-book platforms in the sector.

LIBRARY TYPE	E-BOOK PLATFORMS			
Institute of Technology/Polytechnic (ITP) Libraries	**Safari**	**ebrary**	**EBL**	**EBSCO**
Aoraki Polytechnic Library				
Bay of Plenty Polytechnic Library	√	√		√
Christchurch Polytechnic Institute of Technology (CPIT), Library & Learning Services	√	√	√	√
Eastern Institute of Technology +	√	√		
Manukau Institute of Technology Library	√		√	√
Nelson Marlborough Institute of Technology, Library Learning Centre	√			
Northtec	√		√	
Open Polytechnic of New Zealand Library			√	√
Otago Polytechnic Library	√			
Southern Institute of Technology Library		√		
Tai Poutini Polytechnic				
Te Wairere Library Learning Centre		√		√
UNITEC Institute of Technology Library		√	√	
Universal College of Learning (UCOL) Library	√			√
Waikato Institute of Technology Library		√	√	√
Wellington Institute of Technology Learning Resource Centre	√		√	
Western Institute of Technology at Taranaki Library		√		√
Whitireia Community Polytechnic Library		√		√
Wānanga	**Safari**	**ebrary**	**EBL**	**EBSCO**
Te Wānanga o Aotearoa	√			
Te Whare Wānanga o Awanuiarangi Library				
TeWānanga o Raukawa & Te Whare Pukapuka				

Key
No access to e-books

Special Libraries

Case Study: Survey of CRI (Crown Research Institute) libraries e-book collections & usage.

The following table document the results of a survey of CRI libraries carried out in August 2013. The results (listed in each column below) highlight the varied level of uptake and use of e-books by these eight libraries and reflect the key issues faced by the Special Library sector in providing access to e-books to their users.

1. List the vendors/aggregators that you use							
CABI	EBL (now taken over by ProQuest) -	Ebscohost Collection Manager	we have e-books through ScienceDirect, Geological Society of London special publications and a few others	ebooks through CABI and Science Direct	Vendor /Publisher /Consotium Elseveier/Elsevier /CRI -/Wiley/CAUL -/ Springer / CRI Baker&Taylor - YBP/EBSCO /- World Scientific/ World/Scientific/	Springer (Biomedical and Life Sciences 2005 -2008), Ebrary (individual titles), Wiley-Blackwell Online Books (individual titles), CABI (2011-), OECDiLibrary (subscription), EBSCOHost (individual titles). Use Serial Solutions eBook module and Link Resolver also link to InTech Open Access Books	N/A

2. Acquisitions – do you (a) select individual titles							
We do not normally purchase ebooks (apart from a one-off package) but have in the past bought individual titles if no other purchase options are available or where e-content is free with print.	we offer the whole collection to our users, and purchase individual titles on request	Select individual titles	Selection is partly patron driven and partly package	Selection is individual titles, no patron driven acquisition (although patrons make recommendations they cannot go online and buy)	Select individual titles, as recommended by patrons	Purchase indivdual titles on request from science staff.	
or (b) allow patron-driven acquisition							
		do not allow patron driven acquisition				No patron driven aquisitions	
3. Size of e-book collection							
250-300 approx	Size on collection ... less than 20 books	At present the eBook collection is very small <100 titles	small - under 500	100?	Less than 100 titles	>1600 (bulk Springer 2005-2008 purchased as a trade off during Springer ejournal package negotiations)	

4. Annual circulation							
Unknown but likely to be low because our ebooks are not as visible as we would like them to be. We have so far been unable to collate usage across multiple platforms.		Don't know yet		3683	Circulation statistics not available, but low compared with tertiary institutions or public libraries	3,566/annum for print books. E book circ unknown, our eBook access is by IP recognition and we have not analysed the few usage stats that are available.	

5. Ratio of e-book circulation to print book circulation							
Well below 1%	ratio of eBook to Print - too tiny to calculate	Less than 1 %		unknown	Statistic not available. Only 3-5 e-book titles are on a platform that uses a loans functions	Our book content is typically very specalised, with print books issued on long term/permanent loan to individuals or teams, with minimal loans per title. We suspect the ebook use follows similar trends	We only have a few ebooks and they are not in the OPAC.

6. % of collection spend on eBooks (now and predicted in the next 2 years)							
0% of annual budget – ebook purchases so far have been mainly one-off purchase where content of sufficient interest and funds available. We will continue to investigate ebooks but unlikely to purchase unless vendor model & content are suitable and funds permit.	very little, and I cannot see it changing in the next few years	Spend is currently low and growing (less than 1% at present and possibly growing to 5% in the next year). eBooks is like to be our preferred option	10% of book budget (2k), one package comes out of serial budget .02% of that - very small		0.1	Approximately 20% now . Should increase to 25% over next two years.	Overall our monograph spend is only 5% of our total collection spend. For the 2012/13 financial year eBooks amounted to 61% of our book spend, for the 2013/14 financial year to date 62%. We would expect to remain at this level unless there are some major changes in publisher policies re the purchase of individual titles

7. Anything else							
Ebook models not generally of use in our context (e.g. minimum purchase models & large package models do not suit). Single pick & choose models with no or manageable DRM would be of most use to us. We also do not have authentication off-site, which restricts e-book usage.	With Adobe digital editions as the industry standard, we are loathe to purchase many e-books, with demand for iPad as the reading device. EBL gives us access to a wide range of books and the ability to borrow them – this is great.	Individual vendors do not want to, in general, deal with individual special libraries, esp. if you are not going to be buying large numbers of eBooks. It's all about economies of scale. We (small special libraries) do not have the need nor the buying power of academic or public libraries. Therefore it is best to go with an aggregator because it allows us to buy individual copies or licences which suit our needs much better. Instances of where an eBook is licenced on an annual rate like a subscription do not encourage us to purchase			our policy is to choose the e-format where it is available, however we do take into consideration the suitability of the format for the use. Some books are used as identification guides, for example, in labs, on boats and in collections, so e-books do not suit the task. We look for edited books, hosted on a platform that requires only a link and IP recognition to access the book. DRM is avoided as much as possible. E-book collections offered to date do not meet the needs of the organization.	It is library policy to purchase electronic format as 1st choice, but each title is assessed on availability, suitability and price. We are an institute of around 800 staff spread over 14 locations so electronic formats are the most effective for us. We are continually frustrated that there are often delays between when print and electronic formats are available, and often delays to when some publishers make e versions available to aggregators such as Ebrary, a large number of our book purchase	

						requests are generated from pre publication data. Bundled ebook collections from scientific publishers such as Elsevier & Springer are too broad in the coverage (both content and level) and are simply unaffordable, we need to be able to "cherry pick"individual titles.	
		such titles					