

Public Library E-Lending Models

Research Project

1 Objective

The market for e-books and digital content is continually evolving and adapting, while simultaneously becoming increasingly global in terms of its interdependence and reach. Whilst many determinants of this evolving and decentralised information environment are beyond the control of any one actor, institution or organisation - there is significant scope for libraries to act as the architects of their own future by learning from the diverse spectrum of international e-lending experiences and practices to evaluate which models (and their components) deliver the best outcomes for library users. These e-lending business models include:

- Library-managed platforms for hosting owned digital content
- Library-managed platforms for aggregating multiple sources of licensed digital content
- Third party platforms which offer either of the two services above
- Library-led licensing arrangements with publishers, authors or aggregators (either through consortia or on an individual library system basis)

This research project will seek to produce a comparative analysis of different national/regional e-lending business models to identify the key environmental, political, cultural, financial and logistical factors which are capable of fostering sustainable approaches to supporting e-lending and public access to digital content. It will endeavour to map the leading actors and initiatives across the international e-lending landscape as well as the common barriers which may restrict the future development of effective e-lending business models.

Whilst the resulting report will necessarily approach the e-lending landscape from a library standpoint, it will also attempt to evaluate the benefits and drawbacks of each approach from the perspective of library users, publishers and authors – given that any viable long-term solutions in this space must effectively address the holistic concerns of all stakeholders.

2 Methodology

2.1 Sources of information

This report will draw upon a broad range of inputs including:

- Existing commercial surveys of national and international e-book markets
- Existing library community publications on e-lending (IFLA, ALIA, ALA....etc)
- Data solicited/submitted by national library associations or agencies in the selected countries
- Interviews conducted with key stakeholders relating to each e-lending business model analysed in the report

2.2 Geographical scope

As one of the key outputs of this research project will be a comparative study of national e-lending business models, the core group of countries selected for the study will all need to have passed a minimum threshold of e-book market maturity to enable a meaningful comparison to be made. In the European market is envisaged that the research will cover 10 territories, including the Netherlands, Flanders, the United Kingdom, Germany, France, Spain, Sweden, Finland, Norway and Slovenia.

Additional context may be added by surveying key initiatives in the US market including the models developed by Douglas County Libraries (Colorado), CALIFA (California) and MELSA (Minnesota), and the PRETNUMERIQUE e-lending platform initiated by a consortium of public libraries in Quebec (Canada). If possible, a supplementary case study will be added South America, Asia or Africa to provide additional international context.

2.3 E-lending Business model assessment criteria

In addition to providing a general overview of each selected e-lending model (covering its history, origins and key actors/organisations involved), this report will assess each e-lending initiative according to a specific set of criteria/benchmarks which are outlined below. The exact sequence of how these criteria are approached in the final report may be adjusted to ensure a digestible narrative.

2.3.1 Commercial context

This section will offer a comparative analysis of the size, reach and maturity of each territory's e-book market – including where possible an assessment of the scale of library expenditure against the overall value of the domestic e-book market.

2.3.2 Policy context

This section will assess the role of government policy, existing legislation and financial support in the development of each e-lending business model. In supporting an effective across the board comparison it is worth noting that identifying the absence of supportive regulation and policy in this area is equally as important as noting their presence.

2.3.3 Type of e-lending business model

This section will distinguish between different types of initiatives – such as library consortium led projects with mainstream distributors versus library developed e-lending platforms.

2.3.4 Scope and audience of e-lending business model

This section will identify the target audience for each e-lending business model (e.g. the percentage of the library members/population served) as well as differentiating between national, regional and single library system initiatives.

2.3.5 Collection characteristics

This section will provide a description of the size, scope and composition of the collection offered by each e-lending model – including whether this includes fiction, non-fiction, front list titles, back list titles and out of copyright works.

2.3.6 Financial characteristics

This section will analyse the comparative budgets and related costs and revenue streams associated with each e-lending business model.

2.3.7 Technical specifications and user experience

This section will review the technical infrastructure and delivery/discovery mechanisms associated with each e-lending business model. This will include the hardware and software used for library-hosted e-book platforms or for the development of library-based discovery layers which aggregate multiple sources of external digital content. It will also review how these technical characteristics define the e-lending experience from the user perspective, such as whether titles are available for streaming or downloading, the digital format(s) of available titles, whether DRM is applied, and the system used for user access/authentication.

3 Anticipated outputs from this report

3.1 Sustainability of different e-lending models

- An assessment of the long-term viability of different e-lending business models - and their capacity for transposition to other national contexts.

3.2 Positives and negatives of different e-lending models

- The benefits and draw backs of different e-lending models for different stakeholder groups including libraries, library users, publishers and authors.

3.3 Government policies which support e-lending

- An evaluation of specific government regulations and policies which support the development of viable e-lending business models

3.4 Review of cultural, commercial and political barriers

- An analysis of the key barriers which impede the development of viable e-lending business models – or the effective transposition of key elements of these models to different national contexts.