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eBook Lending Platforms

by **John Novak** (Collection Librarian, University of Nevada, Las Vegas) <John.Novak@unlv.edu>

For the purposes of this article, the definition of an eBook lending platform is one that contains eBooks from multiple publishers that patrons may browse and checkout. Though these platforms have eBooks that allow for multiple and simultaneous users, in general they have a one-book, one-user model. Details about the major eBook lending platforms for academic libraries, eBook lending platform characteristics, why and how an academic library would license one, and finally what the future of this rapidly changing environment may hold are explained in this article.

Examples of eBook lending platforms discussed in this section are **Axis 360**, **3M Cloud Library**, **Freading**, **LexisNexis Digital Library**, and **Overdrive**. The following characteristics are what most of these platforms share. First, patrons have the option of reading eBooks in a variety of platforms, whether in the cloud via their preferred browser, on a dedicated e-reader (or e-ink reader like the Kindle, Nook, Sony Reader, etc.), or on an app on a tablet device. They each have an off-line version of the eBook that users can download and access. To protect eBook piracy and to enforce circulation periods, these eBooks are encoded with Digital Rights Management (DRM) software. DRM for these eBooks is usually managed with Adobe Digital Editions and a user-created Adobe ID. In this one-book, one-user model, libraries can set loan periods for eBooks that generally last one to three weeks. Libraries can also limit the number of checkouts per patron and develop a hold queue for patrons to receive eBooks once they are returned. To satisfy demand, it is common for libraries to purchase multiple copies of an eBook on these platforms. The above eBook lending platforms will also develop a customizable Website that allows patrons to browse eBook content available from their academic library. MARC records are provided to the academic libraries, sometimes at a cost, and all have detailed help pages designed to help patrons get started with eBook borrowing.

eBook lending platforms are popular and user-friendly. First, there are no overdue charges, and apps are available that allow users to read their book on a variety of e-reader or mobile devices. Patrons can also download eBooks from their library at any time and anywhere there is Internet access, provided that the eBook is not checked out. The eBook lending platforms also support some assistive screen-reader technologies that allow patrons with reading and visual disabilities to read eBooks. For example, last year, **Axis 360** was honored by the **National Federation of the Blind** for their work in making eBooks accessible with the additional ability to be read aloud through their Blio app.¹

Comparing eBook lending platforms with aggregator platforms such as **EBL**, **ebrary** and **EBSCOhost**, one finds some similarities. They all deal with multiple publishers and some aggregators, like **ebrary**, provide a reader for

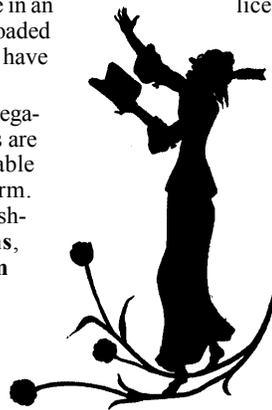
mobile devices that users may access to view eBook content. Additionally, the differences between eBook lending platforms and aggregators are shrinking. For example, **ebrary** is beginning to explore “checkout-based distribution systems ... where library users can ‘check out’ an eBook.”² Until the patron checks in the eBook, it would be unavailable in the same way it is not available in an eBook lending platform. Downloaded eBooks on both platforms also have DRM associated with them.

A big difference between aggregator and eBook lending platforms are the mass-market content available primarily in the latter platform. Content from the Big Six publishers (**Hachette**, **HarperCollins**, **Macmillan**, **Penguin**, **Random House**, and **Simon & Schuster**) is found primarily in these eBook lending platforms, and some publishers have their own, and sometimes exclusive, relationship with these platforms. For example, **HarperCollins** books have a 26-uses-per-year checkout limit on each of its eBooks, which means that after the year is up, libraries need to “purchase” another eBook. Purchase is an inaccurate term, for libraries do not buy eBooks in this model. Instead, they lease it. Publishers not only define the leasing terms, but prices as well. For example, at the time of this writing, **Random House** charges libraries wanting to license an eBook three times the commercial price of its print counterpart. The **State Library of Kansas** has created a Facebook page entitled *The Big 6 – eBooks in Libraries* (<https://www.facebook.com/thebig6ebooks>) that details the current state of licensing mass-market material from these publishers based on information from the **3M** platform.

There is one niche eBook lending platform worth highlighting, the **LexisNexis Digital Library**. **LexisNexis** has been working with the legal community for decades, and their eBook lending platform provides access to “primary law, deskbooks, code books, [and] treatises.”³ To distribute these eBooks, **LexisNexis** has partnered with **Overdrive** to provide customized legal content to law firms and academic libraries. Due to their relationship with legal publishers, **LexisNexis** can provide more types of lending options (such as simultaneous users and longer checkout periods) to their subscribers than one might get from a regular eBook lending platform license.

There are challenges and issues for libraries within this eBook lending platform landscape. For example, the preservation of cultural heritage mission of the library is threatened. It is hard to preserve the heritage of materials when you license, not own, the content. Without ownership, interlibrary loans are difficult in an eBook environment. DRM associated with these eBooks provides access

challenges, for DRM’s “purpose is to limit access to eBooks to select devices and users — essentially making ‘digital objects not behave digitally’ (Neiburger).”⁴ The popularity of the content of these eBooks, and patron desire to read this on their preferred mobile device, puts the library in a difficult position of satisfying public demand and negotiating favorable licensing terms with eBook lenders (and publishers) without much leverage.



eBook prices for libraries are also a big challenge. Since many eBooks cost more than their print equivalent, duplicating formats of the same content puts an additional strain on budgets that have been slashed during the recent recession. As eBooks command more and more dollars of an ever-shrinking budget, directors of public libraries have led the charge to find solutions and promote public awareness of the economics of the eBook lending landscape.

For example, **Jamie (James) LaRue**, director of the **Douglas County Library** in Colorado, has opted for a campaign of transparency, publishing monthly reports that compare eBook prices of bestsellers from **Overdrive** and **3M** with the print and consumer eBook price.⁵ The July 2013 report indicates that 12 out of 20 top **amazon.com** titles are available to be borrowed from either **3M** or **Overdrive**. Costs for the eBook lender versions of the 12 available titles range from \$7.99 to \$90.00; the print equivalent from vendor **Baker & Taylor** has costs that range from \$7.79 to \$21.58. The average price difference between purchasing a print book on **amazon.com** and licensing the eBook is \$32.35 per book. With an annual budget of \$3.4 million, the \$32.00/book difference can significantly eat into **Douglas County Library’s** ability to provide a variety of material to its patron base.

Most academic libraries license content from eBook lending platforms to support their leisure, or popular, reading collection. This eBook service is somewhat analogous to **McNaughton** plans, which allows libraries to lease popular current fiction and nonfiction print books so that patrons can have quicker access to new releases. eBook lending platforms could also complement or replace the e-reader lending program that some academic libraries have started. For an institution, it may be more cost-effective and easier to license an eBook that users may then place on their own e-reader device than to purchase multiple Kindles or Nooks, load digital content on them, and then circulate to patrons.

There are more reasons for academic libraries to consider an eBook lending platform. For example, eBook lending platforms can provide access to juvenile literature. At the **University**

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of Nevada Las Vegas, my home institution, we have started offering patrons access to juvenile literature in **Overdrive** to supplement our children's literature collection that supports our College of Education's K-12 program. Some of these eBook lending platforms also provide audiobooks, an option that can expand the popular literature possibilities for your patrons. Another development to track is **Overdrive's** announcement in the summer of 2013 that they will provide streaming video on its platform. When ready, this service could be an affordable alternative for providing films to patrons on a user-friendly platform.

There are some limitations to these eBook lending platforms that you will also need to consider. First, printing is limited, if it is available at all. These eBooks are meant to be read online or on a tablet/reader. Second, adopting a new technology means staff training will be needed to allow public service providers to support the variety of e-readers these lending platforms utilize. Third, though the content is popular, it is a limited selection and not all of your popular and juvenile literature needs will be satisfied by any one eBook lender. Fourth, if you want to avoid de-duplication, it will take work to synchronize your eBook lending program with your print profile. Fifth, eBooks on these lending platforms are not cross-searchable, so a user cannot trace the use of a word or phrase within these eBooks as you can on a publisher- or aggregator-based eBook platform. And finally, you may have to decide whether or not to include the public and alumni access to these eBooks. Base prices for maintenance fees are often based on the number of patrons you are serving. By limiting access to eBooks, you can cut costs. However, by excluding access to alumni and the public you are excluding this segment of your population to a potentially popular program.

No eBook lending platform is the same, and the following are things to consider when selecting a vendor. First, content and availability differ among the eBook platforms. For example, **Overdrive** provides the most eBook titles of any eBook lending platform. **Overdrive** also has the most academic clients of the eBook lending platform providers. And though eBook leasing prices vary a little from platform to platform, annual administrative and hosting fees can. **Freeding** is the exception, as they provide libraries with tokens which patrons may use to checkout material. It operates similar to a patron-driven acquisition model for libraries. eBook lending platforms are also developing API (Application programming interface) integration, which would allow patrons to check out and place holds from the library catalog. If this feature is important for your library, then be sure to ask each eBook vendor what the timetable is for API integration and if your ILS or library catalog will be compatible for this integration. Comparing e-reader apps will also be important, for outside of **Overdrive**, none work with the Kindle e-ink reader and each reading app used by the vendors has different functions.⁶

The future of eBook lending platforms is in flux, but there are models and developments that point the way to future relationships between publishers, distributors, and libraries. One model that could be attractive to academic libraries is where the library becomes the distributor and works directly with publishers to obtain and distribute eBooks. On blogs and in library articles, this is being called the **Douglas County Libraries** (or **DCL**) model, based on this library system's success in providing eBooks to its patrons. **DCL** negotiates deals directly with publishers, obtains eBook rights to distribute, and delivers these eBooks to its patrons via a **DCL**-maintained platform. By owning and maintaining the eBooks, the **DCL** model allows the library to re-capture its mission to preserve the cultural and print heritage of its community.

Rochelle Logan, in her article "Working Directly with Publishers: Lessons Learned," talks about the benefits and difficulties **Douglas County Libraries** have had working directly with publishers.⁷ First, not all publishers are the same, and though the Big Six did not work with **DCL**, they found many small- to medium-sized presses to work with **DCL**. Second, there are potential savings working with publishers, who are often willing to give up to 45% off retail price to **DCL**. Additionally, directly dealing with publisher bypasses a distributor's markup, offering opportunities for additional savings. The downside, though, is that bypassing distributors means that **DCL** must work with publishers unfamiliar with MARC records and the many ways libraries make eBooks accessible to readers.

When a library can provide eBooks to patrons, this creates new possibilities in its relationship with third-party vendors and with its patrons. For example, **DCL** recently announced that it is working with **OdiloTID** to handle its locally managed eBook collection. Unlike other eBook lending platforms, **OdiloTID** is not a content provider. Instead, this company provides the technology that allows libraries to manage eBooks and provide access to them. **Jamie (James) Larue**, director of **Douglas County Libraries**, argues in his article "Wanna Write a Good One?" that the "infrastructure to manage eBooks directly from publishers . . . [is] the same infrastructure [that] allows it to be a publisher."⁸ **LaRue** then ponders a world in which the library recruits content from authors that can then be distributed on a library platform. This publication model could provide an alternative to the Big Six publishers for authors to reach their audience.

Even without competition from libraries as publishers, the world of the Big Six publishers, and their stance on eBooks in public libraries, is in flux. For example, **Penguin** and **Random House** finalized their merger. Interestingly, both publishers had different stances with respect to eBooks. **Penguin** charges a fair price for eBooks, but these eBooks expire one year after purchase; **Random House** charges up to three times the list price per eBook with no expiration date. **Simon & Schuster** is now experimenting with eBook lending in a limited target area, New York City. Now that the Big

Six are all involved in some way with eBook lending platforms and libraries, along with more eBook lenders outside of **Overdrive** to work with Big Six publishers, libraries will have to track and see if pricing and lending practices for all the Big Six publishers become more uniform.

To actively shape the future of eBook lending platforms, libraries and librarians are participating in eBook lending advocacy groups that are working to create solutions that are beneficial to publishers, vendors, and libraries. For example, the **American Library Association** sponsors the Digital Content Working Group. Part of the charge of this group is to "explore, analyze and share information on various options for expanding access to digital content for libraries and the public and for overcoming legal, technological, policy and economic barriers to equitable access."⁹ **ReadersFirst.org** is another advocacy group, describing itself as a "movement to improve eBook access and services for public library users."¹⁰ The movement focuses on providing ideal characteristics for e-content distribution services (like eBook lending platforms) that will create a user-friendly eBook borrowing experience. In their draft document, *ReadersFirst Content Access Requirements*, this group articulates the ideal for a number of categories like metadata, customization and administrative features, patron privacy, and ease-of-use that would make any eBook lending platform more user and library friendly.¹¹

For now, academic libraries are not major licensors for eBook lending platforms. But this could change as content grows and/or as libraries become distributors of content. In the research environment, the success of the **LexisNexis Digital Library** could pave the way for University Presses to place content on eBook lending platforms, allowing patrons to access materials in their preferred format at their point of need. Growing demand from academic libraries could also spur publishers to place more academic content on eBook lending platforms. Through purchasing power, advocacy groups, and their relationships with publishers, academic libraries can help shape the future of eBook lending platforms into a model that is beneficial for all.

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Really? We will miss **Bob** and hope that he will have second thoughts in the meantime! Many thanks to you, **Bob**, for your years of work for *ATG*!

Other updates on *ATG* **columnists**! Did I tell you that **Dennis Brunning** has been appointed the **Interim Head, Architecture and Design Library at Arizona State University**. **Dennis** who is the Subject Librarian for the Arts will begin this assignment on January 6, 2014. It is very hard to keep up with **Dennis**!

Leila Salisbury and **Alex Holzman** are both doing a great job of keeping us informed about **university press goings-on**. Unfortunately for us, **Alex** is retiring in March. :(

The glorious **Nancy Gibbs** is packing up the last few things in her office and retiring! Hasn’t it been great having her with us first at **North Carolina State** and then at **Duke**? She is truly a marvelous, intelligent, caring colleague. **Nancy’s** home email is <gibbsrn@mindspring.com> and cell number is 919-818-1958. **Nancy** will be living in Apex, NC (the peak of good living). Plus she says she might be a mentor at the next **Charleston Conference**! Just like **GINNY Gilbert** and **Julie Arnheim** and **Mary Marshall**.

And **Nancy** introduced me to her colleague, **Teddy Gray** in Collection Development at **Duke**.

Speaking more of columnists, we are happy to have the awesome **Glenda Alvin** joining the crew (this issue, p.66)! **Glenda** just celebrated her 60th birthday with **Bettie Page** and classmate/co-worker, **Bernice Collins** at the London Tea Room in downtown St. Louis. See pictures on **Glenda’s Facebook** timeline!

Another new columnist we have lined up is the incredible **Matthew Ismail** who is writing a new marketing academic libraries column which will premier in the next issue of *ATG*. Did you know that **Matthew** is quite the author/publisher on Amazon? Besides *Wallis Budge: Magic and Mummies in London and Cairo* by **Matthew Ismail** and **Julian Reade**, there are many other reads which you can get on your Kindle.

Yet another, the energetic **Joyce Dixon-Fyle** is celebrating 14 years at **DePauw University**! Wow! Congrats, **Joyce**.

Speaking of university presses, was interested to read **Steve Escar Smith’s** piece on the **American Historical Association** statement on embargoes and dissertations (see this issue, p.52). I hear the discussions about dissertations getting published in tenure meetings at the **College of Charleston** all the time. And **Sandy Thatcher** has mentioned this more than once in his columns.

Guess everyone at the **Charleston Conference** this year noticed that **Bill Hannay**, the singing lawyer, was absent. Well, he had a good excuse — open heart surgery on five valves I am told. But, fear not, **Bill** is alive and well and performing plays in Chicago for his law office. And in his spare time **Bill** pens a legally speaking column or two (see this issue, p.41).

I met so many new people in Charleston this year. One was **Charles Lyons**, scholarly communications and electronic resources librarian, **University of Buffalo**. By consequence, **Charles** is the brother-in-law of **Simon Andrews**, a chef at the **Francis**

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Sprite

*My glorious goddess of the night,
You eclipse me with a dark delight.
You haunt me like a wicked wight.*

*Standing statuesque in the lucid light,
You’re all that’s best of dark and bright,
Everything pure within my sight.*

*My heart is chaste, my thoughts are white
But, my love, you are a spirited sprite
And alas I’ve set you to fearful flight.*

— James Nicholas