

An introduction to e-book business models and suppliers

Anna Grigson, Royal Holloway, University of London

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Introduction

When an e-book is acquired, it must meet customers' needs, providing not only the content that is wanted, but also making sure that it can be made available where and when it is required, and at a price which provides best value for money. There are many different suppliers in the e-book marketplace, and it can be difficult to determine which can offer both the best value and the best content and service to their users, as well as meeting the terms and conditions for approved suppliers set by the library's parent organisation.

This chapter aims to help the library make an informed choice by reviewing some of the issues to be considered when choosing an e-book supplier, including:

- the different types of suppliers and formats
- the content that they can provide
- the range of current business models
- the issues to consider when reviewing and negotiating licences.

Suppliers

There are many different suppliers of e-books to libraries. Some are established players in the library supply chain for printed books, including both major publishers and vendors such as Coutts (MyiLibrary), Dawsons (Dawsonera), and Swets. Others

are established as providers of other types of online content, including aggregators such as EBSCO, who recently acquired the NetLibrary e-book platform. There are also specialist e-book aggregators, such as Bloomsbury, EBL, ebrary, and OverDrive. In addition, there are suppliers which focus on providing e-books to the consumer market, including e-book specialists, online retailers such as Amazon, and high-street booksellers such as W H Smith and Waterstones.

As well as having different suppliers, the library and consumer markets also have different supply models. The consumer market is dominated by sales of e-book downloads. Primarily designed for offline mobile use, these are published in various formats suitable either for proprietary e-book readers, such as the Amazon Kindle, or for generic devices such as laptops. Downloads are sold outright for the user to keep, although further use may be controlled by Digital Rights Management (DRM) software. Consumer e-books therefore follow a retail model similar to online music sales and the role of the supplier is essentially limited to the sales transaction.

In contrast, the library market focuses more heavily on an online e-book supply model. Instead of buying e-book downloads and then making the files available for users to access offline at any time, the library pays for access to e-books which are hosted on a third-party website. In some cases, the e-books must be accessed fully online at this website, either because the supplier's business model does not allow downloads or offline access, or because the added features of the e-book depend on it being delivered whilst connected to the internet, for example reference books which depend on an online search interface. In other cases the library user may be able to

download the e-book from the website to be read offline, although unlike retail e-books this is usually a temporary download in the form of a file which can only be accessed for a limited period.

From the user's perspective, the experience of borrowing an e-book does not differ greatly from buying the same title. Rather than going to an online bookstore and downloading the text to keep, they go to the website where the library's e-books are hosted and download a file which automatically expires in a few days. Library e-book loans therefore work in a very similar way to print book loans, with a visit to the physical library simply being replaced by a visit to the library website.

However, for libraries, the e-book model for acquiring content and supplying it to users is fundamentally different to the print model. The supplier is no longer simply selling books to the library – they are also selling the service which supplies them directly to the library's users.

This mode of delivery appeals to libraries. It fits with the model of third-party hosting of e-resources which has already become well established for e-journals and databases, and for most libraries it is much more cost-effective than maintaining the technical infrastructure needed to host e-books themselves. It also appeals to publishers, as it gives them the means to retain greater control over the distribution and use of their content than if downloaded files were simply sold to libraries, something which is of particular concern given the size and value of the consumer market for books. However, this mode of supply leads to more complicated business

models, which have more in common with those for the procurement of other types of online content than they do with print book supply. Because of this, there are also additional criteria to be considered which may be more akin to the process of choosing an e-journal supplier than they are to identifying a suitable print supplier.

Although most library e-book procurement follows the online model, there are some libraries which purchase offline e-books and load them onto library-owned e-readers which can then be loaned out to users, although the appeal of this model may be limited, both for the library which has to manage e-book reader devices, and for the user who has to visit the library in person in order to borrow the reader. There is also some cross-over in the consumer market. Although it is currently dominated by download sales, there are some online subscription-based e-book services aimed at individual users, for example Questia and Safari Books Online, and the forthcoming (at time of writing) launch of Google Editions with its online sales model, which is likely to result in the growth of online delivery in the consumer market.

However, these two supply models generally serve separate markets, to the extent that the terms and conditions of retail suppliers frequently limit their e-books to personal use only, prohibiting their supply to libraries. Therefore the first issue to address when choosing a supplier is whether they do actually supply to libraries, or whether their terms and conditions only permit personal use.

Another major consideration for libraries may be whether the supplier has a contract with one of the consortia of which the institution is a member (for example the recently negotiated Joint Consortium Book Agreement covers several providers of e-books for university libraries) or provides an agreement through one of the national negotiating bodies such as JISC or Eduserv in the UK. Consortium purchasing can provide significant discounts, but there may also be limiting factors, such as a minimum threshold for spending before discounts are applied, or the necessity to sign a contract for two or three years.

Content

Once the range of potential suppliers has been established by the library, the next step is to evaluate the content that each of them can provide. Unlike print books, no single supplier will be able to supply the full range of e-books required. Firstly, not all books are available in e-formats. In particular, many textbooks are not made available in this format as publishers are concerned that e-book sales to libraries could result in a loss of revenue from print book sales to students (JISC, 2009).

Secondly, some books which have been published as e-books may be limited to retail sales. For example, although many new fiction titles are published in e-formats, some publishers may be reluctant to make them available to libraries for fear of a negative impact on sales (Hyams, 2009) – although other publishers see e-book availability as a driver for print book sales (OverDrive, 2010). Thirdly, even when an e-book is available to libraries, it may not be available from all suppliers. The range of content available from a supplier is largely dependent on their role in the supply chain.

Publishers

Publishers may supply e-books directly to libraries, although they will usually only offer their own titles.

Vendors

Vendors sell e-books on behalf of publishers. The vendor's role is to provide sales support, and once the purchase is completed (or the subscription arranged), access to the e-book itself is provided via the publisher's website. As with major print book vendors, e-book vendors typically offer content from a range of different publishers. But whereas most major print book vendors will sell titles from most mainstream publishers, the range of publishers covered by an e-book vendor may more restricted, because some publishers will only sell direct, especially when their e-books are available only as packages rather than as individual titles.

Aggregators

Aggregators such as NetLibrary or OverDrive also supply content from a range of different publishers. But unlike vendors who sell content on behalf of publishers, aggregators licence content from them and then sell directly to libraries, hosting the e-books on their own platform rather than the publisher's website. As with vendors, they typically cover a wide range of publishers, including smaller companies who do not have their own e-book platforms. However the content which aggregators can supply is limited by the licenses that they can obtain; some publishers may choose not to licence any of their content to aggregators, some may offer some or all of their

content through all the major aggregators, and some may have an exclusive deal to supply through a single aggregator.

Some e-books are only available from aggregators, whereas others may be available from both the publisher and an aggregator. Indeed, it is common to find that an e-book is available both as an individual title from an aggregator, and as part of a collection available direct from the publisher. The situation is further complicated by the fact that some companies act as both vendors of print books and as aggregators supplying e-books, for example Coutts supply through the MyiLibrary e-book aggregator, Dawsons supply e-books through Dawsonera, and Blackwells work in partnership with the e-book aggregator EBL. But because of the limitations on which e-books aggregators can supply, there may be occasions where a company can sell a print book, but does not have the rights to supply the corresponding e-book.

So the range of e-book content available from any one company, whether publisher, vendor or aggregator, is likely to be restricted. Consequently, when looking at whether or not to use a new supplier, the following factors should be considered:

- how many e-books does the supplier offer?
- if they are an aggregator, how many publishers do they licence content from?
- do they cover a range of subjects, or do they specialise?
- how current are the books - are the majority new or backlist titles, and are the most recent editions available?
- do they supply content from a range of countries and in a range of languages?

- do the e-books include all of the material in the print versions, including graphical content?
- is any material excluded because it is not licensed for digital format?
- is any additional content included, for example accompanying multimedia content?

Using the same supplier for both print and e-book procurement may have advantages in terms of streamlining the administration of ordering and invoicing, but due to the limitations on the range of content available, it may actually be necessary to work with several e-book suppliers. If a particular e-book or a particular publisher's content is only available from one source, this may even be a deciding factor in the choice of supplier.

Discovery

To purchase a book in e-format, it is necessary to not only identify whether it is available as an e-book, but also which company is able to supply it. Unfortunately, finding this information is far from straightforward. In the print world, finding tools such as Global Books in Print and Nielsen BookData can be employed, and most major suppliers will be able to supply most titles. In the online world, Eduserv's e-Book Finder or SwetsWise e-books may be of use to identify books that are available in e-formats, but they may not list specific suppliers. The title may also be available from multiple suppliers under different business models, some of which may offer better value for money than others, but which may be difficult to compare directly.

Finding the relevant information can therefore be very time-consuming, and the difficulty in discovering available titles and comparing prices between different suppliers is a significant barrier to library acquisition of e-books.

When evaluating a potential supplier, it is important to consider not only the general range of content provided, but also to assess the ease with which it is possible to discover whether or not they offer a particular e-book title:

- how easy is it to find e-books when searching the database of available titles?
- is there an option to narrow the search to look for e-books only?
- does the database show whether the e-format is available when a print title is searched for?
- does the supplier offer a title-matching service, allowing the library to send a list of ISBNs for print holdings and receive back a report of the titles that are available as e-books?
- can alerts be set up to receive notification of new e-books on specific subjects?
- are alerts sent for new editions of e-books that have previously been purchased?
- are alerts sent when titles previously purchased in print become available as e-books?

Business models

Having established which suppliers can offer the content required the next step is to consider the business models on offer. There are a bewildering number of business models for e-books, each of which has advantages and disadvantages for different

types of libraries. Comparing the models to work out which offers the best value for money can be difficult, however most can be broken down into three key elements:

- a choice between acquiring individual titles or packages
- a choice between purchasing e-books outright or taking a subscription
- a choice between an unlimited number of uses per annum or an unlimited number of simultaneous users.

Individual titles vs packages

As with print books, it is possible to acquire e-books as individual titles, usually from aggregators, either directly or through a library supplier such as Coutts or Dawson.

Many e-books are also available in packages, of which there are several different types. Publishers may offer packages of e-books grouped by subject (for example, Palgrave Connect), or by publication date (for example, Springer eBooks).

Aggregators such as ebrary may package together a selection of e-books from a range of publishers, or may offer mixed packages of e-books and e-journals. In some cases, the selection of titles in the package is made by the supplier, and in other cases, the supplier may offer the library a degree of choice over the content included (for example Credo Reference).

Acquiring e-books in packages offers some advantages: the cost per title is usually lower than that for individual acquisitions and if the choice of titles is made by the publisher it can save staff time on selection, so this can be a quick and cost-effective

way to build up the library's collections. However a disadvantage of acquiring a collection is that the library is potentially paying for content which may not be used and which therefore represents poor value for money.

A package which allows the library to have some choice over the titles included may address this issue, as it provides the opportunity to select content for which there is known demand, or to match existing print holdings. Some subscription-based packages allow the library to change the initial number and/or selection of titles.

These may offer better value, since the library can adjust its selections in the light of actual usage and drop little-used texts in favour of new ones. Some packages may only allow changes once a year when the subscription is renewed, while others may permit adjustments during the subscription, allowing the library to swap the titles on their virtual bookshelf at more frequent intervals (for example, Safari Books Online).

This gives the potential to maximise value for money by matching supply to demand, for example by adding content to reflect topics or authors in the news, or by adding or withdrawing particular textbooks at different points in the academic year.

Purchase vs subscription

Different business models offer different payment and ownership models, including outright purchase, temporary subscription, or even a mixture of the two.

Outright purchase

This is of course the more familiar way for libraries to acquire books and is offered by many suppliers. As with print books, payment is made once and the library can theoretically retain indefinite access to the e-book. However, there may also be an annual platform fee to cover the ongoing costs of hosting the purchased e-books on the supplier's website. This may be in the form of an additional charge added to the purchase price of each book, or it may be a flat-rate annual fee which covers all of the books hosted on the site. In some cases the platform fee may be waived or reduced if a minimum amount of money is spent on new purchases each year.

Purchasing e-books is usually more expensive than paying for a subscription. In addition to a platform fee, the list price for an e-book may well be higher than that of an equivalent print copy, and in the UK it is currently subject to VAT. However although it is more expensive initially, a purchase option may represent good value for money in the longer term if the book is likely to remain in demand for several years.

If e-books are purchased with a view to long term use, it will be necessary to consider how indefinite access is supported. For example what happens if, or more likely when, the original format becomes obsolete, or if the publisher goes out of business or decides to close their e-book service? The issue of the long-term preservation of e-resources goes beyond the scope of this chapter, but it is an important consideration if the library is building a significant collection of e-books, and one which the supplier should address in their licence terms.

Consideration also needs to be given to the fate of e-books in the event that the original supplier loses the rights to supply the content:

- if the e-book has been purchased, does the library retain access?
- if so, is access via the original supplier's platform, or through the new rights-owner's site?
- if access is lost, will there be a full or partial refund?
- how much notice is given that a title is being withdrawn?

Annual subscription

This is the other most common payment model for e-books. A subscription usually provides access only for a specific period, so that if the annual fee is no longer paid, the e-book or package is no longer accessible. For this reason, subscription prices are usually lower than purchase prices, and the pricing model may be simpler as platform fees are usually included. Although it provides only temporary access, a subscription may still represent good value for money. If the content has a short life-span (for example law textbooks, computing books, or tourist guidebooks), or if demand will be short-lived (for example a book acquired to support a short course), then indefinite access to the content may be unnecessary, and paying a lower price for temporary access may therefore be more economical.

Alongside simple purchase and subscription models there are other options which employ a combination of both. Some reference books may be available to purchase, but there may be ongoing annual fees for content updates (for example, Wiley-Blackwell Online Reference Works). Content fees may be included in the platform

fees, or may be charged separately. In some cases the annual content fees may be optional, giving the library the option not to receive updates but to retain permanent access to content already paid for.

Rental

Some suppliers offer options for short-term rental of individual e-books (for example, Dawsonera and EBL). In the rental model the library user is able to browse all of the e-books available from the supplier's website, including titles that are not in the library's collection. If the user sees a title that they wish to read that is not owned by the library, they can request a rental. The library then pays a fee and the user is granted temporary access to the book for a set number of days or weeks.

This model is broadly equivalent to an inter-library loan for a print book, providing a pay-per-view option for whole e-books. The fee is typically 10-20% of the list price of the book per rental, making this model appear comparatively expensive. But since content is only paid for when requested by a user, no funds are wasted on paying for titles which are never used; so rentals may in fact offer better value for money than it would first appear. However, the content is only available to a single user for a limited period, so libraries may find themselves spending significant amounts of money without adding any content to their collections.

Demand-led acquisition

An extension of the rental model which is designed to address this is the demand-driven or patron-driven acquisition model (offered by Dawsonera, EBL, MyiLibrary

and NetLibrary for example). If the same book is accessed a certain number of times by library users, it will trigger a purchase request. The library is charged the full price for the book, which is then added to the library's collection.

This model offers several advantages. Once again, it maximises value for money as the library only pays for content which is used, and no staff time is spent selecting titles for purchase. It also gives the library the means to respond very quickly to user needs, for example sudden demand for a title on a reading list, or for a book featured in the media.

However it does raise some issues for collection management policy. Allowing users to select titles could result in an unbalanced collection which reflects the interests of a few users; although this risk can be reduced by limiting the range of titles made available to users for selection, or by increasing the number of requests required before a purchase is triggered so that only titles with broad appeal are purchased.

Allowing automatic approval of purchases also means that the library may have less budgetary control. Again there are options available to alleviate this concern, for example requiring more expensive books to be approved by a librarian rather than being purchased automatically. But very close monitoring of spending is required to manage the budget effectively and the demand-led acquisition model may therefore be less suitable for libraries with limited financial resources.

Selected chapters and pay-per-view

A further extension of the concept of buying only required content is the option to acquire only selected chapters of a book. Similar to the custom-publishing model for textbooks, this new option may be particularly suited to the academic sector, as it fits well with demand for short extracts of online content for inclusion in virtual learning environments (VLEs), as well as aligning with trends towards article-level purchase models in the scholarly journals market. However at the time of writing very few publishers are offering libraries the option to purchase content in this way, possibly due to fears of a potential loss of revenue if they are only selling sections of books, and where chapter-level (or even page-level) purchasing is available it may be restricted to sales to end-users on the pay-per-view model.

Usage limits

As mentioned above, a major concern of publishers supplying e-books to libraries is that one copy of an e-book in a library provides potentially unlimited usage, possibly reducing overall sales of multiple copies to libraries or end-users. Therefore it is common to find that e-books for libraries have some form of limit on the level of usage, and the nature of this limit is another factor in the choice of a suitable business model.

Unlimited usage model

Some e-books offer unlimited usage, typically major reference works (for example Oxford Reference Online), specialist research monographs (for example Springer eBooks) and database-style packages of books which have traditionally been sold

principally to libraries, so the publisher may be less concerned with the possible loss of print book sales.

However most business models impose a cap on usage, limiting either the number of users who can access the e-book at the same time, or the number of times the book can be accessed within a set time period.

Limited user model

Where there is a limit on the number of simultaneous users it may restrict the total number of readers able to access the supplier's platform as a whole, but it is more common to limit the number of users who can access a particular book at the same time. Access may be limited to just a single user, or to a small number of users, but once the limit is reached any other readers trying to access the book are turned away and will have to try again later (for example MyiLibrary and NetLibrary).

This method of limiting usage may be suitable for titles in low demand, as it is unlikely that more than one user will need access at any one time. It may also be suitable for titles with higher demand which is spread throughout the year, because although only one user can access the book at a time, there is no limit on the total number of times the book can be used. It is less suitable for titles where usage is concentrated into periods of peak demand, for example new fiction or books on reading lists. Users may find the e-book they want is already in use, a situation which may be particularly frustrating for users who equate online access with immediate

availability. As with print books, if the library wishes to increase access to meet demand they must purchase additional copies of the e-book.

Limited usage model

An alternative model which addresses this problem is to allow many users to access a book simultaneously, but to limit the number of times the book can be viewed within a given time period, usually a year from the date of purchase (for example Dawsonera and EBL). If an e-book reaches its limit it cannot be used again until the end of the year, when the usage count is reset to zero. If further access is needed in the meantime, the library must purchase additional copies to provide more usage credits for that title. This model provides more flexibility to meet peak demand, but it may be less suitable for books with high demand throughout the year, as there is a risk that the book will hit its annual usage limit very quickly. Some suppliers give an additional option to 'opt out' a single chapter from the usage count, thereby providing unlimited use of a part of a book for a limited period, and this may be a useful option for chapters with very high demand, for example those from a key textbook cited on a reading list.

There are advantages and disadvantages to both methods of limiting access, and the patterns of use for the e-books in the library's collection, both the overall level of demand for a title, and the distribution of that demand throughout the year, will determine which represents best value for money. Usage statistics will demonstrate these patterns, showing how many times a title was accessed, whether the usage was concentrated into a short period or spread throughout the year, and whether any

readers were turned away, and this information can help to decide whether a limited user or limited usage option is best for the library. Some suppliers offer both options whilst others may offer only one or the other, so this will be another key factor in the library's choice of supplier.

Licence terms

Most suppliers will apply a licence to the use of their service. Some may simply display a webpage stating the terms and conditions, but most will supply a formal licence which defines who can use the e-books, where they can use them, and what they can do with them.

Licences can be very complex, so before taking on a new e-book supplier it is essential to ensure that the terms are acceptable, and that the library and its users are able to comply with the requirements. Some key elements are common to all licences, although some details may vary considerably depending on the nature of the library service, and whether it is intended for public, academic or other libraries.

Authorized users

The licence may define those who can be given access to the service. As already noted, the key consideration is to ensure that the service allows library use, and is not limited to private use only. The library will also need to ensure that any definitions of authorized users cover all of the groups who need to access the service, such as alumni, external members, business users, and visitors or non-members, often

termed walk-in users. The exact nature of the user groups that need to be covered will depend on the policy of the individual library.

Authentication and access

The licence will usually place some limits on where and how the service can be accessed. Most licences will stipulate secure network access requiring the use of a login or password. Many will also contain geographical restrictions, for example overseas usage may not be allowed, or in some cases access by users based in specific countries may be prohibited by a supplier, according to the trade law of the company's country of origin. Walk-in access may only be permitted within the library building, and if the library operates over multiple branches or campuses, the licence may not cover all sites without payment of a higher fee.

Authorized usage

The licence will also define the acceptable uses of both the e-book titles and the supplier's interface. For example it may specify that use is for non-commercial purposes only, and it may limit printing, copying and downloading of extracts or their use for the purposes of interlibrary loan. For academic libraries, the licence may state whether sections of the book can be uploaded for use in a VLE.

Supplier responsibilities

As well as imposing terms on the library, the licence also determines the responsibilities of the supplier, for example to maintain website availability, to provide

technical advice to the library or its users, to support authentication systems, and to supply usage statistics. As noted above, the licence may also commit the supplier to guarantee continuing access to the e-book, perhaps by preserving content in a secure archiving service such as CLOCKSS or Portico.

Before using a new supplier, it is essential to ensure that the terms of the licence are acceptable. If any of the terms are unclear, ambiguous or contradictory, clarification should be sought from the supplier and if possible from a legal professional. If some of the terms are unacceptable, it may be possible to negotiate more appropriate terms. Whilst the supplier may not agree to major changes, they may well be prepared to accept minor amendments such as a change of wording. However if the supplier is unable or unwilling to compromise and the terms remain unacceptable, it will be necessary to seek an alternative source for the required material.

Quality of service and technical considerations

As well as the core issues of content availability, business models and licence terms, the quality of service which the supplier offers to the library and its users will also influence the choice of supplier.

For e-books which are intended to be read online, the quality of service to library users will depend largely on the quality of the supplier's interface. The library will need to evaluate the features available to readers as follows:

- is there a good range of search options?

- are the search results clearly presented?
- are the books easy to read, and in a suitable file format?
- can users print or copy selections from the e-book easily?
- does the supplier use digital rights management (DRM) software to enforce limits on printing and copying?
- does the interface offer any personalisation features such as the ability to add notes, bookmarks, tags or reviews?
- does the interface offer any additional tools, such as embedded dictionaries or study support materials?

The library will also need to assess whether the interface is technically compatible with its systems:

- does it meet accessibility requirements?
- does it support the authentication systems in use?
- does it support any federated searching or web-scale discovery systems that are in use?
- is it compatible with any link resolver system in use?

Although limited in scope to suppliers to the academic market, the JISC Academic Database Assessment Tool (ADAT) provides a useful overview of the features of a range of different e-book platforms.

The quality of service that the supplier can offer to the librarian is also an important factor:

- is ordering via EDI (electronic data interchange) or via the supplier's website possible?
- are COUNTER compliant usage statistics provided?
- are good quality catalogue records provided, and if so is there a charge?
- is good support provided, ideally from a local office or re-seller to account for any time zone differences?
- are marketing materials for the promotion of e-books provided?
- are training materials which can be repurposed by the library provided?
- is personal training provided, either onsite or online, and is this offered to library staff and/or library users?

Conclusion

Choosing an e-book provider involves balancing many different criteria to find the best value option for the content required. Acquiring e-books can be more complicated than acquiring print books, and restrictions on content availability in particular have hampered the take-up of e-books in libraries. However, more content in e-formats is now appearing, and new practices are being introduced to address problems in the supply chain, for example developing standards for the consistent use of e-book ISBNs, and building new services to provide e-book metadata and better information about the availability of specific titles.

This complexity is not wholly negative. It also gives the potential for greater flexibility, with new suppliers and evolving business models giving libraries the opportunity to find innovative new ways to supply content to users. A shift from local provision to an outsourced model offers a new approach for library services, with the potential for

significant cost-savings, and models such as demand-driven acquisition offer the opportunity to move from a 'just in case' mode of collection building towards a more cost-effective 'just in time' mode of content supply.

This is a time of rapid change in the wider e-book market. The growing popularity of e-book reader devices is driving a rapid increase in the number of titles available in e-formats, and new suppliers and business models are challenging the established economics of the publishing market. In the longer term, the eventual settlement of the Google Book agreement could lead to further fundamental changes (see chapter on E-books for free, below). These will no doubt drive further evolution in library e-book business models, which will offer both new opportunities and new challenges to librarians.

Useful links

EduServ e-Book Finder

<http://ebookfinder.labs.eduserv.org.uk>

JISC Academic Database Assessment Tool (ADAT)

www.jisc-adat.com/adat/adat_ebooks.pl

The UKSG E-Resources Management Handbook

www.uksg.org/serials#handbook

TeleRead (blog): news and views on e-books, libraries, publishing and related topics

www.teleread.com

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