



Australian Government

Department of Innovation  
Industry, Science and Research

# Book Industry Strategy Group (BISG)

## Public Submission Process

Welcome to the Book Industry Strategy Group (BISG) public submission form. The information you provide through your submission will form part of the BISG's research into the future of book production within Australia.

Submissions will be placed on the Department of Innovation, Industry, Science and Research's website for public viewing. This will include the name of your organisation (or your own name if you are submitting as an individual) and your responses to the four submission questions. Your contact and personal details will not be included.

If you do not wish for the content of your submission to be included on the website, please check the box below. Please note that your name/organisation will still show in the list of submissions received.

I do not want the content of my submission to be publicly available.

Submissions received will not be available publicly until they have been checked by the Department for suitability.

### Personal Details:

Name of organisation or name of individual making the submission	National & State Libraries Australasia
Name of person submitting on behalf of an organisation	Alan Smith (Chairman)
Email Address	nsia@slv.vic.gov.au
Phone number	03 8664 7512

### Respondent categorisation:

Respondents will be asked to nominate which of the sub-categories they belong to (*note that multiple selections can be made*):

SUB-SECTOR				
<input type="checkbox"/> Individual <i>If yes, nominate:</i> <input type="checkbox"/> Author <input type="checkbox"/> Reader <input type="checkbox"/> Researcher <input type="checkbox"/> Educator <input type="checkbox"/> Other (specify)	<input checked="" type="checkbox"/> Library <i>If yes, nominate:</i> <input checked="" type="checkbox"/> Public <input type="checkbox"/> Primary or Secondary School <input type="checkbox"/> University <input checked="" type="checkbox"/> Research <input type="checkbox"/> Government <input checked="" type="checkbox"/> Other (specify) National & State Libraries	<input type="checkbox"/> Government <i>If yes, nominate:</i> <input type="checkbox"/> Commonwealth <input type="checkbox"/> State/Territory <input type="checkbox"/> Local Govt <input checked="" type="checkbox"/> Cultural Institution <input type="checkbox"/> Other (specify)	<input type="checkbox"/> Research institution <i>If yes, nominate:</i> <input type="checkbox"/> Government <input type="checkbox"/> University <input type="checkbox"/> Other (specify)	<input type="checkbox"/> Educational institution <i>If yes, nominate:</i> <input type="checkbox"/> Primary or Secondary School <input type="checkbox"/> University <input type="checkbox"/> TAFE <input type="checkbox"/> Other (specify)

SUB-SECTOR				
<input type="checkbox"/> <b>Publisher</b> <i>If yes, nominate:</i> <input type="checkbox"/> <i>Independent Australian owned</i> <input type="checkbox"/> <i>Independent Foreign owned</i> <input type="checkbox"/> <i>Associated with a multinational publisher</i>	<input type="checkbox"/> <b>Retailer</b> <i>If yes, nominate:</i> <input type="checkbox"/> <i>Independent specialist bookseller</i> <input type="checkbox"/> <i>Chain specialist bookseller</i> <input type="checkbox"/> <i>Academic specialist bookseller</i> <input type="checkbox"/> <i>Discount store</i> <input type="checkbox"/> <i>Other (specify)</i>	<input type="checkbox"/> <b>Printer</b> <input type="checkbox"/> <i>Australian owned</i> <input type="checkbox"/> <i>Foreign owned</i> <input type="checkbox"/> <i>Associated with a multinational company</i> <input type="checkbox"/> <b>Other (specify)</b>	<input type="checkbox"/> <b>Distributor</b> <input type="checkbox"/> <i>Australian owned</i> <input type="checkbox"/> <i>Foreign owned</i> <input type="checkbox"/> <i>Associated with a multinational company</i> <input checked="" type="checkbox"/> <b>Agent</b> <input checked="" type="checkbox"/> <b>Union</b>	<input type="checkbox"/> <b>Industry Association</b> <i>If yes, nominate:</i> <input type="checkbox"/> <i>Book industry</i> <input checked="" type="checkbox"/> <i>Other (specify)</i> <i>National &amp; State Libraries Australasia</i>
				<b>Community organisation</b> <i>If yes, nominate:</i> <input type="checkbox"/> <i>Disability services</i> <input type="checkbox"/> <i>Community services</i> <input type="checkbox"/> <i>Other (specify)</i>

DO YOU HAVE SPECIAL NEEDS THAT AFFECT YOUR ABILITY TO ACCESS READING MATERIAL? If yes, please provide details				
<input type="checkbox"/> Restricted eyesight	<input type="checkbox"/> Restricted mobility	<input type="checkbox"/> Restricted hearing	<input type="checkbox"/> Restricted mental capacity	<input type="checkbox"/> Other
Comments:				

LOCATION		
<input checked="" type="checkbox"/> <b>Metropolitan</b> <input type="checkbox"/> <b>Regional</b> <input type="checkbox"/> <b>Remote</b>	<input type="checkbox"/> <b>Australian Capital Territory</b> <input type="checkbox"/> <b>New South Wales</b> <input type="checkbox"/> <b>Victoria</b> <input type="checkbox"/> <b>Queensland</b>	<input type="checkbox"/> <b>Northern Territory</b> <input type="checkbox"/> <b>Western Australia</b> <input type="checkbox"/> <b>Tasmania</b> <input type="checkbox"/> <b>South Australia</b>

QUESTIONS (500 word limit for each question)
1. How will digital book production and distribution technologies affect you, your business or your clients over the next two years?
National & State Libraries Australasia (NSLA, <a href="http://www.nsla.org.au">www.nsla.org.au</a> ) represents the State and Territory Libraries across Australia and the National Libraries of Australia and New Zealand. These ten major publicly-funded research libraries hold unique documentary heritage materials as well as large collections of published and electronic items. In 2009-2010, 11.4 million people visited our libraries, 233 million pages were viewed on our websites, and \$36 million was

spent purchasing additional resources for our collections.

Our libraries hold extensive digital collections, totalling more than 1,000 terabytes currently stored. The bulk of the material that we have digitised and make available online is newspapers and images, with growing collections of digitised manuscripts, maps, oral histories and other collections. In addition to this digitised material, the libraries collect and preserve selected websites, subscribe to large international databases of journal articles across many disciplines and subject areas, and acquire published digital material in physical formats, such as DVD.

Ebooks still have low use in our libraries but this is expected to increase over the next two years as the community takes up ebook readers and tablets more extensively. This current low use in libraries is affected by:

1) the concentration of ebooks published overseas, particularly fiction, or scholarly and technical works while our collection policies concentrate on Australian research, literature, culture, education and government;

2) there is limited flexibility in selection of ebooks provided in aggregations by suppliers. They are offered as bulk content rather than able to be selected by subject, title or genre and often do not meet our collection development requirements; and

3) the high cost of subscribing to or purchasing ebooks for libraries compared to printed book purchasing (110% - 255% of printed book purchasing price). There can also be platform fees (between US\$700 - \$1500) that vary depending on purchasing commitment levels.

Ebooks are acquired by libraries through subscriptions or arrangements with aggregators, rather than with individual ebook publishers, so as to obtain standard access arrangements and centralised pricing, licensing and digital rights management. The management costs for libraries to deal with individual publishers are very high.

NSLA libraries have different relationships with the public library networks in each state. In Tasmania, ACT and NT there are closer links to public library collection development and management and their take-up of ebooks, particularly for fiction, is higher.

NSLA Libraries have begun to build ebook collections even though current use is low, purchasing largely overseas products such as Safari Books Online, Gale Virtual Reference, Blackwell Reference Online, Oxford Reference Online and retrospectively published collections such as Early English Books Online. NSLA libraries pursue consortial purchasing arrangements through the NSLA eResources Consortium and this group are looking at opportunities for ebook purchasing.

We are watching progress in this industry closely, noting that Google has recently launched its retailing venture, Google eBooks, in the US (Wall Street Journal, 1 December 2010) and the accelerating growth rate in ebook reading (PaidContent.org, 8 November 2010). Other projects such as the Hathi Trust and Project Gutenberg are also of keen interest to libraries.

## **2. How will digital book technologies influence your use/production/distribution of printed books?**

The proliferation of ebook readers, the lack of standard publishing formats, legal deposit provisions for online formats, and proprietary distribution channels for ebooks are issues for all libraries and their clients. NSLA Libraries generally do not invest in ereader devices, instead working towards providing content that can be used on multiple devices, as they become available. NSLA Libraries provide free wireless broadband access without registration requirements (i.e. free internet access) and content is not device- or platform-specific as far as possible.

Proprietary ebook systems limit the transferability between platforms. They also limit the discovery of resources online by restricting search to the ebook platform. If ebooks are to be discoverable and accessible through library catalogues, the quality and availability of machine readable (MARC) records will need to be improved and made cost effective, as they have been for printed books.

Another issue is non-concurrent publishing, with delays of six months or more between the publication of a printed book and the digital equivalent. This may cause uncertainty for a library in ordering, pushing libraries to order a print title even when a digital title is preferred, as it is not always certain whether the digital equivalent will be published.

As well as device issues, the lack of standard formats lead to printing, authentication and digital rights management issues. In some cases, digital rights management software is more restrictive than copyright law and seen as a major inhibitor of ebook usage. Also ebook vendor licences often do not allow for use of material in interlibrary loan, even when this is within copyright law. This effectively reduces the level of service that can be offered by libraries to other institutions.

A related issue is that concurrent user numbers specified in licensing agreements for libraries may constrain use, and as demand increases will potentially increase prices even further.

For some NSLA Libraries where legal deposit legislation is outdated and does not apply to online publishing (this includes the National Library of Australia and several of the State Libraries), capturing digital publishing for future generations is particularly difficult. Demand for legislative change is growing. Even for those who do have the legislation, the infrastructure and technology for digital archiving and preservation are in an early stage of development.

With access provided through ebook aggregators, digital preservation and long-term access to ebooks is out of the control of libraries. Libraries only have access for as long as they pay subscription or hosting fees. The long-term maintenance, storage, reformatting, and perpetual access responsibilities are with the aggregator. Libraries are engaged in the challenges of digital preservation for our own extensive digitised collections and realise the enormity and the costs involved in addressing this in the long term.

**3. What are the specific costs and/or benefits to you, your business or your clients of digital delivery versus printing?**

For NSLA libraries, digitising our collections and providing easy access to material formerly only in hard copy, greatly increases use. People see the benefit of digital access and a majority now expect information to be available online and searchable through search engines. Digital publishing offers particular benefit to rural and regional communities and can be adapted to accessible formats for people with disabilities. The NBN, and other initiatives to support access to broadband and digital devices, will increase online access and stimulate the demand by the Australian community for a greater and richer range of content.

A great success story of the last two years has been the launch and growth of Australian Historic Newspapers, part of the National Library of Australia's Trove service ([www.trove.nla.gov.au](http://www.trove.nla.gov.au)) where more than 4.4 million fully-searchable newspaper pages (approximately 40 million articles) will be available by 2011. The use and engagement with this new service has been extraordinary with impacts being seen through many educational, academic and other research sectors. Further resources are being sought to make more content available through this platform.

Another service that is provided by some NSLA Libraries, and soon to be available from others, is a digitisation-on-demand service, providing digital copies for a fee rather than printed or loan copies of library items. These services are provided within copyright regulations..

**4. Comment on any topic related to digital book production and distribution, including what factors, if any have influenced your decisions to adopt, or not adopt, digital book technologies**

For NSLA Libraries, as major research and cultural institutions, digital delivery of information is part of our core business. Providing access to ebooks has begun and is expected to increase rapidly in the next two years, though the current stage in the development of the industry is challenging for libraries. Proprietary ebook systems, cost and aggregation issues, and the legal deposit framework are limiting the access for library users.

NSLA recognises the need to address the challenges emerging from the shift to digital book technologies and for all participants in the supply chain to contribute to the development of a new model and a workable infrastructure so that Australians have long-term, cost-effective and easy access to ebooks.

This is an opportunity to establish agreements to deposit Australian ebooks in libraries, to streamline and compensate for the lag in legislative response to digital publishing in some jurisdictions and to take a national

approach.

We recommend that a representative of NSLA libraries is included in the ongoing consultation and decision-making that is being initiated through this public submission and workshops process.

Contact: NSLA Executive Officer, [nsla@slv.vic.gov.au](mailto:nsla@slv.vic.gov.au)

Thank you for making a submission to the Book Industry Strategy Group.

---