UNC University Library E-Books Platforms Recommendations & E-books Collections Strategy

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Contents

General Considerations & Determinants of Value

Because e-books are often available from more than one source, librarians need to be aware of which options generally would result in greater value and utility to the library and its patrons

- Although the standard e-book list price when purchased on a title-by-title basis is typically congruent with that of the hardback print version—but without any vendor discount for libraries—regardless of publisher or aggregator, the conditions of access, level of digital rights management (DRM) restrictions, and the number of simultaneous users (SUs) can vary greatly

    - *N.B. UNC Libraries strongly recommend selecting e-books with no or minimal DRM restrictions so as to maximize user access*

    - *N.B. As a rule, UNC Libraries will not allow single simultaneous user e-books to be downloaded even when technically possible and the license allows, because a download typically results in an extended checkout period of 1-2 weeks regardless of the actual duration of use, thereby effectively reducing e-book availability to a print book model by locking out all other users*

- When a single simultaneous user e-book is accessed from desktop, laptop, or tablet via browser as opposed to being downloaded, it becomes available again to other patrons after a short period of inactivity—although in the case of some platforms such as ebrary there is an exended wait of 30-45 minutes before the book will be available again to another user
  - *N.B. While UNC Libraries will put a single copy of a print book on reserves, an e-book restricted to a single simultaneous user is not acceptable for reserves because the catalog cannot indicate usage restrictions*
    - With e-resources, students assume they are always accessible and do not plan extra time for reading them in case there is a wait
    - Experience has demonstrated that students are unable to understand why an e-resource is unavailable and when they might be able to access it
    - Students typically believe lack of e-access is a technical problem and become extremely frustrated

- Because aggregators often charge more than one price depending on the number of simultaneous users, staff selecting e-books need to pay particular attention to the variable costs for multiple simultaneous users
  - *N.B. The less expensive single simultaneous user options do not necessarily represent the best value; consider selecting the more expensive multiple/unlimited simultaneous users option if the e-book is a potentially high-use title or one that users would like to download to/access from a mobile device"*

- Given the proliferation of tablets, e-readers, smartphones, and other mobile devises, UNC Libraries recommend choosing those e-book platforms that allow for easy and readable downloading
  - *N. B. UNC Libraries strongly recommend selecting e-books in ePub, XHTML, and other XML-based formats rather than PDF because the former are reflowable files developed for digital publishing that can adapt their presentation to the output device and therefore typically easily download to and accurately display on a wide range of mobile devices*
  - Conversely, PDF files are not easily reflowable, do not adapt well to various sized displays and mobile devices, and therefore are difficult if not impossible to view on small screens that come with some e-readers and smartphones
    - If only PDF formats are available, UNC Libraries very strongly recommend text-based Adobe PDF formats, which allow easy highlighting (copy and paste), keyword searching, improved

downloading, and better support for disability access; conversely, image-based Adobe PDF formats do not allow highlighting (copy and paste), do not allow keyword searching, often result in problematic/complicated downloading with difficult-to-read displays, and probably do not meet disability access standards

Select publisher aggregators as the optimal e-book platform option and do so in order below because of the following advantages:

- Oxford Scholarship Online (OSO)/University Press Scholarship Online (UPSO) - Oxford University Press
    - Works with YBP Library Services
    - Works with consortia
        - Offers very attractive consortial model, resulting in UNC Libraries acquiring all UPSO e-books in all subjects and sharing ownership within TRLN of all the USPO publishers' print titles in humanities and social sciences that YBP profiles
        - Offered TRLN extremely attractive discount on all 11K retrospective e-books currently available, resulting in UNC Libraries acquiring all UPSO e-books currently available and planning to purchase all future retrospective offerings so long as these terms apply
    - Almost all current print books available as e-books
        - Exclusions: textbooks, "trade" books, and course-adoption titles, Oxford Handbooks Online (which are vended only as separate package outside of OSO/UPSO), and certain categories of reference titles
    - E-books currently sold directly only as packages
    - E-books sold on a title-by-title basis only via general aggregators
        - *N. B. After OUP moves to new platform that allows selling e-books on a title-by-title basis, it will be able to control number of simultaneous users on a title-by-title basis; hence, plans to sell textbooks, "trade" books, and course-adoption titles with a single simultaneous user*
    - E-books released 3 times annually
        - *N.B. After OUP moves to new platform, e-book releases will occur more frequently and approximate release date of print or be slightly in advance*
    - Unlimited simultaneous users at no additional charge as the default
    - Includes alumni access at no additional cost
    - Superior discoverability because only platform to use XHTML, which offers the most most powerful linking keywords in text, references, and footnotes

- Superior discoverability because only platform to provide both book summaries and chapter abstracts supplied by author
- Superior discoverability because works with Google so that its search engine pulls from the OUP supplied book summaries, chapter abstracts, and keywords on the site metadata rather than from publisher website
- Superior discoverability because metadata is live within Summon, which is the discovery tool that UNC Libraries use
- Superior discoverability because of inclusion in/integration with larger database of publisher content
- Superior discoverability because will include links to UNC Libraries owned non-OUP/USPO content such as JSTOR and Project Muse via the Oxford Index
- Minimal digital rights management (DRM) restrictions
- Uses chapters rather than arbitrary page limits as the unit of downloading, printing, saving, and emailing
- Can print or save individual chapters to PDF by simply clicking on the Download Chapter PDF option at the top of the full text chapter page
- Only platform to use XHTML for its e-books, which is an extremely portable language, fully compatible with applications like JAVA, and maximally accessible across many networks and systems (including rendering the most efficient and accurate display of text, graphics, and other elements)
- Only platform to use XHTML for its e-books, which maximizes easy/fast download to potentially all mobile devices (including those with small display screens)
- Also provides text-based Adobe PDFs, which allow easy highlighting (copy and paste), keyword searching, improved downloading, and better support for disability access
- Has Digital Object Identifier (DOIs) as well as static URLs at the level of both the books themselves and the chapters, which facilitates linking for e-reserves
- MARC21 records available free of charge
- E-archiving/e-access via Portico (including both OUP and partner press press titles in UPSO)
- Use of XML-based formats facilitates movement to newer platforms and therefore maximizes chances of e-text survivability over time
- If UNC Libraries own e-book, offers UNC Libraries 40% discount on additional print copies purchased
- If UNC Libraries own e-book, plans to offer library-affiliated users option of purchasing print copy at concessionary pricing akin to the Springer "MyCopy" program, probably by 2014 when the e-commerce capability becomes available

- Springer/SpringerLink
  - Works with YBP Library Services
  - Works with consortia
  - All current print books available as e-books
  - E-books sold directly only as packages
  - E-books also sold on a title-by-title basis only via general aggregators
  - E-books released simultaneously with print
    - Offers TRLN very attractive consortial model, resulting in UNC Libraries acquiring all e-books in all subject packages
    - Offered extremely attractive retrospective recent e-books vending model, resulting in UNC Libraries acquiring all e-books in all subject packages back to 2005
    - Plans to digitize all earlier books 1842-2004
      - Offered TRLN discounted price if bought entire 1843-2004 package
  - Unlimited simultaneous users at no additional charge as the default
  - Superior discoverability because provide individual chapter access by author(s) and title
  - Superior discoverability because of inclusion in/integration with larger database of publisher content (SpringerLink)
  - E-books are text-based Adobe PDFs, which allow easy highlighting (copy and paste), keyword searching, improved downloading, and better support for disability access
  - No digital rights management (DRM) restrictions
  - Uses chapters rather than arbitrary page limits as the unit of downloading, printing, saving, and emailing
  - MARC21 records available free of charge
  - E-archiving/e-access via Portico
  - If UNC Libraries own e-book, through its "MyCopy" program Springer offers library and UNC-affiliated users option of purchasing print copy at $24.95 (including shipping and postage)

- Cambridge Books Online (CBO)/University Publishing Online (UPO) - Cambridge University Press
  - Works with YBP Library Services
  - Has expressed interest in working with consortia
  - All current print books available as e-books

- All e-books sold on a title-by-title basis as well as packages except for Cambridge Histories Online (which are vended only as separate package outside of CBO/UPO)
- E-books will be made available on the platform within 4-6 weeks of the first print publication date
  - Offered UNC Libraries attractive discount on all retrospective CBO e-books, resulting in UNC Libraries acquiring all CBO e-books in all subjects except medicine released through 4/2012
- Unlimited simultaneous users at surcharge (which for UNC Libraries would be 15%) for all titles with the exception of textbooks, "trade" and course adoption titles
- Textbooks, "trade books", and course-adoption titles sold only as single simultaneous user (SU)
- Includes alumni access at no additional cost
- Enhanced discoverability because of book summaries
- Superior discoverability because of inclusion in/integration with larger database of publisher content
- E-books are text-based Adobe PDFs, which allow easy highlighting (copy and paste), keyword searching, improved downloading, and better support for disability access
- Minimal digital rights management (DRM) restrictions, with exception of textbooks, "trade books" and course adoption titles
- Uses chapters rather than arbitrary page limits as the unit of downloading, printing, saving, and emailing
- Has Digital Object Identifier (DOIs) as well as static URLs at the level of both the books themselves and the chapters, which facilitates linking for e-reserves
- MARC21 records available free of charge
- E-archiving/e-access via Portico (for only CBO titles, although CUP is considering having them included in Portico as well; partner presses presently need to make their own arrangements, which they have not done as 6/2012)

- De Gruyter Online
  - Works with YBP Library Services
    - *N.B. De Gruyter is negotiating with YBP; however, adding them as a supplier is a low priority at YBP; as a temporary workaround can buy e-books on the De Gruyter platform and do invoicing via YBP*

- Interested in working with consortia but lacks a model
- All current print books available as e-books
  - Many of its print reference works also are available electronically as eBookPLUS, which has enhanced, database-like functionalities
- E-books sold title-by-title as well as packages (including "pick and choose packages), with package discounts
- Print and e-book price is same, except for textbooks (whose prices are calculated at a fixed price of 10x the list price)
- E-books released simultaneously with print
  - Plans to digitize all earlier books back to 1749, and in meantime will digitize specifically requested titles upon request
- Superior discoverability because of inclusion in/integration with larger database of publisher content (SpringerLink)
- No digital rights management (DRM) restrictions
- Uses chapters rather than arbitrary page limits as the unit of downloading, printing, saving, and emailing
- E-books are text-based Adobe PDFs, which allow easy highlighting (copy and paste), keyword searching, improved downloading, and better support for disability access
- Will move to ePub format in 2013, which as an XML-based format consists of reflowable files developed for digital publishing that can adapt their presentation to the output device and therefore typically easily download to and accurately display on a wide range of mobile devices
  - Is considering converting its PDF e-books to ePub format
- Has Digital Object Identifier (DOIs) at the chapter level as well as static URLs at the book level, which facilitates linking for e-reserves
- MARC21 records available free of charge
- E-archiving/e-access via Portico (including both De Gruyter and partner press titles)

- Palgrave Macmillan Connect
  - Sells both collections (with separate corresponding subject backlists that total 9,500 titles as of 7/2012) and title-by-title (via Build Your Own platform)
  - Works with YBP Library Services
    - Presently only for collections but is negotiating with YBP to sell title-by-title (currently, individual titles must be ordered directly via Build Your Own publisher platform)

- ▪ Works with consortia

- ▪ All current print books available as e-books except for textbooks

- ▪ E-books released simultaneously with print

- ▪ Unlimited simultaneous users at no additional charge as the default

- ▪ E-books bought on title-by-title basis are more expensive than print, averaging 5-10% more

- ▪ E-books bought on collection basis are less expensive, averaging ½ price

- ▪ Includes alumni access at no additional cost

- ▪ No digital rights management (DRM) restrictions in terms of what can be copied, pasted, saved, and printed

- ▪ Uses articles/chapters and other individual items rather than arbitrary page limits as the unit of downloading, printing, saving, and emailing, in addition to allowing downloading the entire e-book

- ▪ Uses ePub format in beginning with 2011 imprints, which as an XML-based format consists of reflowable files developed for digital publishing that can adapt their presentation to the output device and therefore typically easily download to and accurately display on a wide range of mobile devices

  - ▪ 2000-2010 e-books in image-based PDFs but with fully searchable PDFs and web PDF functionality through "Browse Inside"

  - ▪ Plans to convert 2000-2010 e-books to ePUB if/when possible on a case-by-case basis

- ▪ Has Digital Object Identifier (DOIs) as well as static URLs at the level of both the books themselves and the chapters, which facilitates linking for e-reserves

- ▪ Provides COUNTER-compliant usage statistics

- ▪ MARC21 records available free of charge

- ▪ E-archiving/e-access via Portico

- ▪ Users at subscribing institutions are allowed to output copies of e-book chapters for postal or faxed fulfillment of inter-library lending requests for academic, research, or other non-commercial libraries although digital transmission of articles is not permitted

Select publisher as the next best e-book platform option because of the following advantages:

- ▪ As a rule, work with YBP Library Library Services—although there are some major exceptions. e.g., McGraw-Hill (which also does not sell title-by-title)

- ▪ Publisher version of an e-book may contain content not available in an aggregator version, especially multimedia

- Unlimited simultaneous users as the default and at no additional charge
- Major publishers often offer superior discoverability because of chapter-level title and author access via inclusion in/integration with larger database of publisher's content, e.g., ScienceDirect
- Lower level of digital rights management (DRM) restrictions compared to general aggregator platforms as a rule and no DRM restrictions in some cases, e.g., Elsevier
- Clearer and direct e-ownership rights
- Often provides backup e-archiving/e-access via Portico or LOCKSS in the case of largest publishers, e.g., Elsevier

Select general aggregators as the least desirable e-book platform option and, when necessary, do so in the following default order:

N.B. The less expensive general aggregator single simultaneous user options do not necessarily represent the best value, especially if the e-book is a potentially high-use title or one that users would like to download to/access from a mobile device; in the latter instances, the more expensive multiple/unlimited simultaneous users option should be selected

- EBSCOhost (single simultaneous user: 1B1U) **Not acceptable for reserves:** Why Only Multiple/Unlimited Simultaneous Users Acceptable
  - Works with YBP Library Services
  - Offers three options: 1B1U (1 book one user), 1B3U (1 book three simultaneous users), and UU (unlimited simultaneous users)
  - Platform seems to be more user-friendly than ebrary and text loads more quickly
  - E-books are text-based Adobe PDFs, which allow easy highlighting (copy and paste), keyword searching, improved downloading, and better support for disability access
  - Uses arbitrary 60 page limit as the unit of downloading, printing, saving, and emailing *[N. B. Aggregators are dependent on what the publishers will agree to; in most cases this means a 60 page limit but in some cases less]*
  - E-archiving/e-access via OCLC Digital Archive

- ebrary (single simultaneous user: SUPO) **Not acceptable for reserves:** Why Only Multiple/Unlimited Simultaneous Users Acceptable
  - Works with YBP Library Services

- Has expressed interest in working with consortia
- In addition to leased collections and title-by-title purchase, offers short-term title-by-title loan accessible by one patron at a time
- Both patrons and librarians find the ebrary reader to be less user friendly and intuitive than many other publisher and vendor interfaces
- Navigating the text is clunky, beginning with being only able to move one page at a time, while not offering a side scroll bar option
- Moving back and forth from citations to text also is clunky: UNC strongly recommends that in text citations need to be clickable with an easy way back to the text
- Table of contents and bibliographical information take more half display area, even when one sets the text display at 200%—a situation that will only be aggravated when accessing e-books via smaller mobile devices rather than from a desktop or laptop computer
- E-books are image-based Adobe PDFs
  - Can copy/past while viewing in the browser with live internet connection via the ebrary reader
  - When e-book PDF is downloaded (for offline viewing) does not allow highlighting (copy and paste), does not allow keyword searching, often results in problematic downloading and difficult-to-read displays, and probably does not meet disability access standards
- Uses 60 pages rather than chapters as the units of downloading, printing, saving, and emailing
- Mobile dedicated app from ebrary for the iPad®, iPhone® and iPod touch® too complex
- Mobile download options presently offered for PCs and e-readers are too complicated and users may not tolerate them, especially when choosing the "special format"
- Mobile download PDF using the simple option is extremely low resolution, which many will find difficult to read comfortably
- Additionally mobile download using the simple option for the Kindle results in an oddly formatted text that is even more difficult to read
- No trusted third-party e-archiving/e-access

- ebrary (unlimited simultaneous users: MUPO) **[use as default for reserves]**
- MUPO costs 50% more than SUPO
- Uses ePub format for MUPO titles, which as an XML-based format consists of reflowable files developed for digital publishing that can adapt their presentation to the output device and therefore

typically easily download to and accurately display on a wide range of mobile devices; however, one still has to use Adobe software to download the ePUB

- EBSCOhost (three simultaneous users: 1B3U)
  - 1B3U costs 50% more than 1B1U
- EBSCOhost (unlimited simultaneous users: UU) **[use as default for reserves]**
  - UU typically costs twice as much as 1B1U but could be higher, dependent on what the publisher is willing to do regarding the multiplier so it varies from one publisher to another

Unacceptable e-book platforms for which the UNC University Library does not have license and has no plans to get one:

- Books at JSTOR *[to be available 11/2012; as of date have only incomplete information]*
  - UNC University Library will not consider license:
    - Unless/until works with YBP, so library can coordinate titles available on its platform with those not included, easily identity titles excluded as e-books and therefore must be bought as print titles, and protect the overall high discount with its global English-language book vendor
    - Unless/until abandons its tiered pricing structure that results in large research libraries paying more
    - Unless/until it develops a consortial model
    - Proposed access/pricing models not attractive
      - Single use with restricted number of downloads (probably 30) per year, whereas other aggregators acceptable to UNC University Library do not impose such limits
      - Unlimited use and multiple simultaneous users priced at 145% of list rather than norm of equal to print hardback list price used by other university press aggregators
    - Has not indicated offering alumni access at no additional cost whereas other acceptable university press aggregators do include alumni access at no additional cost, as does Project MUSE/University Press Content Consortium

- Duke University Press
  - University Library will not consider license:

- Until/unless Duke University Press brings it e-book prices into alignment with other U.S. university presses

    - *N.B. DUP hardback book prices—which form the basis of e-book prices—are too high, being twice that of Harvard and Yale university presses; hence, the UNC University Library will continue with its policy of buying DUP books on a title-by-title basis and as paperbacks whenever available*

    - When in 2007 UNC priced out the cost moving from its paperback preferred model for DUP monographs to the DUP e-books model, the cost increase would have been 244% after the loss of print discounts were factored in; if UNC decided that it also needed to get the print versions to satisfy faculty, the cost of the move would be close 3 times current expenditures

    - Unless/until abandons its tiered pricing structure that results in large research libraries paying more

    - Additionally, does not offer alumni access at no additional cost whereas other acceptable university press aggregators do include alumni access at no additional cost, as does Project MUSE/University Press Content Consortium

- EBL (EBook Library)
    - UNC University Library will not consider license:
    - Unless/until removes barriers to acceptable access by non-affiliates

- Project MUSE/University Press Content Consortium
    - UNC University Library will not consider license:
    - Unless/until works with YBP, so library can coordinate titles available on its platform with those not included, easily identity titles excluded as e-books and therefore must be bought as print titles, and protect the overall high discount with its global English-language book vendor
    - Unless/until vends on a title-by-title basis, because do not want/need to acquire all titles included and is getting some of these e-books from other options and therefore will not automatically duplicate
    - Unless/until abandons its tiered pricing structure that results in large research libraries paying more

- Unless/until Project Muse archives its e-books in Portico as other acceptable university press aggregators do, because the current license language indicating it would allow libraries to "engage the services of third-party trusted archive, including LOCKSS" is not adequate
  - *N. B. Specifically at UNC, the servers in place could not handle the expected load after a triggering event for any high-demand content and therefore would have to be upgraded at significant additional expense involving both equipment and staff costs, while libraries would lose a great deal of valuable functionality if they had to offer these e-books in such a manner*