Yale University Library

The eBook Strategic Plan Task Force

Report of Findings and Recommendations

Submitted to Daniel Dollar, Director of Collection Development, YUL

By:

Greg Eow, Associate Director of Collection Development & Librarian for American, British, and Commonwealth History (Chair)
Todd Gilman, Librarian for Literature in English, HCRE
Jill Jascha, Continuations Management Librarian, SML Acquisitions
Caitlyn Lam, Team Leader, Electronic Resources Group
Melanie Maksin, Librarian for Political Science, International Affairs, Public Policy, and Government Information, CSSSI
Scott Matheson, Librarian for Digital Resources, Yale Law School Library
Colin McCaffrey, Classics Librarian, Arts Area Libraries
Nathan Rupp, Head, Collection Development & Management, Yale Medical Library

3/1/2013
PART ONE: EXECUTIVE SUMMARY AND RECOMMENDATIONS

Background.................................................................3
Charge and Membership..................................................3
Executive Summary & Recommendations.............................3

PART TWO: ENVIRONMENTAL SCAN

Overview...........................................................................11

The View from YUL.........................................................12
  Access Services..........................................................12
  Acquisitions/e-Collections/Technical Services......................13
  Selection........................................................................14
  Special Collections......................................................14
  Preservation.................................................................14

Peer Institutions..............................................................14

Publishers & Aggregators..................................................17

PART THREE: VALUE STATEMENT

YUL Values in an eBook Environment.....................................20

PART FOUR: SELECTOR GUIDELINES & VENDOR MATRIX

General Considerations Based on Value Statement...................23
Should We Also Buy Print?..................................................24
Some Examples..................................................................24
Vendor Matrix....................................................................26

PART FIVE: BIBLIOGRAPHY

Task Force Reports, Value Statements, and White Papers...............27
Articles, Books, and Videos................................................27
PART ONE: EXECUTIVE SUMMARY & RECOMMENDATIONS

Background and Charge

Over the last three decades, publishers, vendors, and librarians have speculated on the impact that eBooks would have on their respective industries and institutions. Although the transition to the digital monograph has proceeded more slowly than the move from print to electronic journals, the market for eBooks has grown steadily in the past decade, with notable acceleration in recent years. In September 2012, Daniel Dollar, Director of Collection Development, charged an eBook Strategic Plan Task Force to assess the rapidly developing eBook market and make recommendations for how the collection development enterprise of the Yale University Library (YUL) could best address the challenges it posed to the Library’s traditional values, current activities, and anticipated future needs. The eBook Strategic Plan Task Force was asked to produce two documents. First, the Task Force would create a value statement to provide an overarching set of principles to guide the Library’s eBook collection development. Second, the Task Force would recommend eBook purchasing guidelines for YUL selectors. In order to inform the creation of the two documents, the eBook Strategic Plan Task Force also conducted a robust environmental scan of the eBook market as it stood in the fall of 2012. The results of that scan make up part two of this report.

Task Force Members

- Gregory Eow, Associate Director of Collection Development; Kaplanoff Librarian for American, British, and Commonwealth History (Chair)
- Todd Gilman, Librarian for Literature in English, HCRE
- Jill Jascha, Continuations Management Librarian, SML Acquisitions
- Caitlyn Lam, Team Leader, Electronic Resources Group
- Melanie Maksin, Librarian for Political Science, International Affairs, Public Policy, and Government Information, CSSSI
- Scott Matheson, Librarian for Digital Resources, Yale Law School Library
- Colin McCaffrey, Classics Librarian, Arts Area Libraries
- Nathan Rupp, Head, Collection Development & Management, Yale Medical Library

Executive Summary & Recommendations

The eBook market is plagued with uncertainty. No market players, whether they work in libraries, publishing, or in the third party aggregator business, can tell how the eBook market will develop. Speculation abounds, much of which represents the perspectives, desires, and interests of the party doing the prognosticating. The purpose of a strategic plan in the current environment boils down to determining what should be done when presented with such unsettling ambiguity.
The degree of uncertainty in the eBook marketplace can scarcely be overestimated. In fact, this uncertainty deserves some preliminary remarks, since it presents us with series of questions that inform the remainder of the report. For instance, what constitutes “ownership” in the eBook marketplace? Unlike printed books, which the library owns by merit of the first sale doctrine, ownership in an eBook environment remains elusive. “Ownership” of eBooks is a vexed issue. Licensing arrangements can trump not only first sale, but also fair use, and present law suggests that ownership, as it is traditionally understood in academic libraries, is at best only approximated for eBooks. This raises questions of preservation and long-term access. Without control of electronic materials that at least closely approximates ownership, the Library’s ability to preserve those materials and ensure long-term access is severely impeded. Moreover, it is unclear that the providers who retain ownership of the materials share the Library’s commitment to preservation. The Task Force’s investigations revealed that long-term access and preservation, issues at the heart of the Library’s collecting mission, are of uneven and intermittent concern in the eBook market, with some vendors taking little to no interest in ensuring long-term access to their media. eBook aggregators, who also do not own the eBooks they supply, may have neither the incentive nor the capacity to commit to long-term preservation.

Related to all these questions is the extent to which eBook adoption resembles (or ought to resemble) previous moves from print to electronic journals. To some, the transition from print to e-journals provides a salubrious model for a transition from print to electronic books. Eliding the question whether or not journals and books are fundamentally alike or dissimilar, we should exercise caution in comparing these two scholarly publication formats. What would it mean to have the eBook market resemble that of electronic journals? A recent study from 2CUL (Cornell & Columbia University Libraries) reports that even when the two major e-journal preservation initiatives, LOCKSS and Portico, are taken together, only 15-20% of their collective e-journals are being preserved. The other 80-85% of e-journals are at risk, with only a few having a digital preservation commitment and sustainable strategy developed by their publishers. As Yale University Librarian Susan Gibbons has observed, this situation is “intolerable,” and we must be careful to avoid recreating this problem in an eBook environment.

In addition, while most users are comfortable with online access to journals, many express frustration with the usability of current eBook platforms for scholarly and pedagogical purposes. Whether this is the result of poor interface design (or DRM and other usage restrictions, or both) or of the reading practices of scholars and students, or, most likely, a combination of these factors, this problem will affect the rate and depth of eBook adoption among Library users. Moreover, demand for, and even acceptance of eBooks varies drastically from discipline to discipline. In fact, disciplinary discrepancies are in many cases more striking than generational discrepancies when it comes to the adoption of the eBook format.
If these questions were not enough, new data indicate that the growth of eBook sales has begun to slow, raising questions concerning how comprehensive the move to electronic formats for books ultimately will be. This is the degree and nature of uncertainty in the eBook market and it provides the context for the remainder of this report. Although ambiguity in the eBook marketplace will continue to play mischief with Library planning and workflow, we take comfort in the fact that we are not alone in facing this problem. As a senior sales representative from Oxford University Press remarked to the Task Force, “At Oxford, we tried to come up with a strategic plan for eBooks that forecasted out more than a year or two. Those efforts were untenable.”

The Problem of the Two-Fold Mission

According to its mission statement, YUL has two main goals:

1. To collect, organize, preserve, and provide access to and services for a rich and unique record of human thought and creativity.

2. To foster intellectual growth and support the teaching and research missions of Yale University and scholarly communities worldwide.

Developing a collection that serves both of these goals simultaneously can be difficult in that the first goal involves collecting, organizing, and providing access to human knowledge for the long term, while the second goal involves supporting the teaching and research missions of the University in the short term. It would be inaccurate, though tempting for the sake of simplicity, to say that the first goal is collection-centric while the second is public-services oriented. It would be more accurate to say that the first goal is concerned with meeting the needs not only of contemporary users but also with hypothetical future researchers, whereas the second goal, while not forsaking future patrons, prioritizes the needs of current researchers. In some ways, this is simply a restatement of the “just in case” versus the “just in time” philosophy of building collections. But eBooks and digital resources amplify the distance between these two positions by an order of magnitude.

Traditionally, the Library would procure a print book in support of activities of members of the university and then preserve that book for future users. We could do this because we owned the book, owned the device used to store the book (the bookshelf), and employed staff to ensure the maintenance of the book for future use.

---

Now, when the Library procure an electronic book in support of such activity there is no mechanism for the Library to preserve that eBook for future users. There are several reasons why this is so, but these can be divided into two types.

First, publisher requirements often prohibit the Library from preserving an eBook. Generally speaking, with the eBook contracts currently in place, when the Library procures an eBook, it is not purchasing the item but rather licensing it. The license may require that the Library “return” the eBook at any time, or the publisher can cease to do business, “orphaning” the eBook. Although third party solutions such as LOCKSS, CLOCKSS, and Portico have been developed to preserve electronic journals (and theoretically could also be used to preserve eBooks), this is not the same as the Library being able to use its own efforts to preserve eBooks. Other publisher requirements such as Digital Rights Management (DRM) restrictions or printing limitations also prevent the Library from ever preserving an eBook. The only way in which the Library could consider preserving eBooks is if publishers were prepared to sell the Library digital eBook files with which the Library could do whatever it wanted. In the current market, publishers are not prepared to sell digital eBook files with “no strings attached.”

Second, even if publishers were prepared to sell digital eBook files in this way, the Library would not be able to provide an adequate home for them. The Library currently does not have a robust information technology infrastructure (e.g., an institutional repository) in which to store eBook files, nor does it have a plan in place to migrate eBook files (or any other kind of digital files) from the current generation technology platform to the next. (The current platform used to store print books – a bookshelf – has not changed in hundreds of years.)

Despite the Library’s inability to preserve eBooks for future users, its current constituents (faculty, staff, researchers, and students) have embraced technology and are using it in new and exciting ways: they use technology to work remotely, for collaboration, and to gain access to library resources. The Library’s current constituents, although they remain heavy users of print materials, increasingly expect that its resources will be available to them at any time, from anywhere. Print books do not meet this need, but eBooks do.

In other words, on one hand print books help the Library best fulfill its mission to collect, organize, and preserve knowledge, but on the other, eBooks help the Library fulfill its mission to support the (current) teaching and research missions of Yale University. The question should be raised whether or not the Library can afford to continue to purchase both print and electronic copies of books, at the same time recognizing that the Library’s budget is affected by both external economic realities (reduced budgets and the rising costs of resources) and internal constituent demands (stakeholders demand access not only to books, but also to journals, databases, and other materials). There may be situations in which it makes sense for the Library to purchase a particular title in electronic format without concern for whether or not future users
will have access to it, and there may also be situations in which it makes sense for the Library to purchase a particular title regardless of current user demands. The fact of the matter is that there is no eBook solution that simultaneously meets both the “current user” and “future user” requirement.

What is to be done?

Faced with uncertainties in the eBook marketplace, not to mention the mutually exclusive collection development goals inherent in the problem of the two-fold mission, the challenge the Library faces when it comes to eBooks becomes clear. What is to be done in the face of uncertainty and the nature of the mission? The eBook Strategic Plan Task Force makes five recommendations that, taken together, define a course of action that would allow the Library to engage in calculated risk-taking and creativity in the collecting of eBooks while remaining faithful to the values of curation and preservation of the scholarly record. Additionally, these five recommendations will economize collection budgets in a time of continued fiscal restraint, leverage the collective buying power of YUL, streamline the internal eBook workflow, and position YUL to play a role in developing the eBook market.

Recommendation One: Establish an eBook Working Group

YUL cannot reduce the confusion and ambiguity that presently defines the eBook market. It can, however, create an internal and purposeful information gathering and sharing structure that enables it to stay abreast of developments with the goal of interacting with the eBook market strategically as a single entity. The Director of Collection Development will appoint an eBook Working Group to meet at the behest of, and in order to provide guidance to, the Assistant Director of Collection Development. The eBook Working Group should consist of staff drawn from different functional and operational units in the YUL system, including selectors, electronic collections, acquisitions, systems, and special collections. The eBook Working Group should be large enough to represent relevant voices but small enough to be a cohesive group that meets with a strong sense of purpose and a team ethos. The eBook Working Group ought to continue the work of this group in attending conferences, reading literature in concert, and inviting publishers and representatives from the major aggregators to campus for discussions, updates, and public presentations. The eBook Working Group should also work with the Assistant Director of Collection Development to articulate to YUL staff, patrons, and vendors the Library’s values, goals, and collection-building policies as they concern eBook content.

Recommendation Two: Central management of eBook packages

In several instances, for reasons such as scale, scope, and interdisciplinary interest, certain eBook packages or publisher offerings should be handled with a degree of central oversight and coordination. We recommend that the Director of Collection Development, in collaboration with
the Assistant Director of Collection Development, the Collections Steering Committee (CSC), and the eBook Working Group organize the purchase of eBook content in three Tiers, as follows:

1. Tier One: eBook packages that are negotiated and purchased with central funds
2. Tier Two: eBook packages that are negotiated and coordinated centrally, but are funded through cross-unit cost-sharing
3. Tier Three: eBook content that is purchased by individual selectors

The present arrangement, in which the selection and negotiation of eBook packages falls to individual selectors, increases confusion in an already chaotic digital resource environment. By failing to divide eBook packages into the Tiers suggested above we create a highly inefficient system in which it is not uncommon for the Director of Collection Development to be involved with decisions on individual titles, while individual YUL subject specialists negotiate directly with publishers for bits and pieces of a package deal that could be purchased collectively with less effort and deeper discounting than an individual selector can achieve.

Suggesting the specific Tier to which a package or platform belongs will be a conversation for the Director of Collection Development/CSC and the Assistant Director of Collection Development/eBooks Working Group. To help launch that conversation, the eBook Strategic Plan Task Force identifies the following eBook packages as possible Tier One or Tier Two packages:

- Brill
- De Gruyter
- Cambridge University Press
- JSTOR Books
- Oxford University Press (including UPSO, Oxford Handbooks & Scholarly Editions)
- Project Muse/UPCC
- Sage
- Springer
- Wiley

During this Task Force’s scan of the current eBook landscape, these packages and platforms struck us as potential Tier One or Tier Two options for several reasons. In some cases, we learned that individual selectors or units are already purchasing from these packages in a piecemeal fashion; because many of these vendors are known for publishing high-quality academic content, it is understandable that access to these eBooks would be a priority for YUL selectors and patrons. Additionally, the platforms listed above constitute those that align most closely with our values and requirements for eBook platforms, as expressed in this report’s Value Statement and detailed in the Selector Guidelines and Vendor Matrix.
Within the context of this report the important point is not to determine which packages will be handled centrally and which locally, or even which packages will or will not be given priority at YUL. Our recommendation is both more modest and more fundamental. YUL needs a command and control structure for eBooks that ensures that eBook content is handled at the appropriate level of central management: complete, centrally negotiated but locally funded, or locally negotiated and funded. The proposed tiered system would allow for a number of benefits, not the least of which are the leveraging of the collective YUL buying power to secure advantageous pricing, a more strategic and predictable internal workflow, and the reduction of duplication across electronic platforms. Acting collectively also empowers YUL to register its approval or disapproval of eBook products in the marketplace. By strategically purchasing and not purchasing eBook content, YUL can help shape the eBook market in ways consistent with its needs and values.

**Recommendation Three: Provide guidance for selectors**

Our investigations made clear that selectors across YUL—regardless of discipline or imprint area—want more direction in making eBook purchase decisions. Selector confusion extends from such basics as not knowing whether or not the Library has preferred platforms (if a title is on offer from both Oxford Scholarship Online and eBrary, which should we choose?) or policies that indicate a preferred number of users (multiple or single), to what constitutes fair pricing, to which library staff/units are responsible for different parts of the eBook workflow, to what eBook content the Library has already purchased. Part of this confusion reflects the Library’s general need for a more streamlined and coherent digital resources workflow. EBooks do have unique characteristics, however, and selectors need guidance on how to handle eBook titles not included in centrally managed packages. The Associate Director of Collection Development, in consultation with the eBook Working Group, should provide this guidance. Part four of this report, Selector Guidelines and Matrix, offers a template intended to assist in this task.

**Recommendation Four: Systematically compare print v. electronic book/eBook usage**

As YUL works to become an evidence-based/data-driven organization, it will be necessary to incorporate data and usage statistics, both of eBook titles and their print counterparts, into collection development decision-making. The Assistant Director of Collection Development and the eBook Working Group must collaborate with the new Assessment Librarian to create a mechanism through which the Library can compare print and eBook usage.

At present, the Library measures print circulation while simultaneously gathering usage statistics for electronic collections. What is needed, however, are data that compare print v. electronic usage so that the Library may measure, using evidence rather than anecdote, the practices of our
users and their rate of eBook adoption (or lack thereof). The Library’s purchase of Project Muse/UPCC eBooks as well as Oxford University Press’s Oxford Scholarship Online provides a rich data set for precisely this type of analysis.

A word of caution: data collection is only the beginning, not the end, of the difficult work of analysis and interpretation. For instance, high usage statistics of eBooks versus their print equivalent might reflect user preference for digital over print. Alternatively, such statistics could reflect policies such as non-circulating collections or the fact that online indexes and databases drive traffic to online, not print, sources. We mention this because it should be kept in mind that data gathering is not a replacement of data analysis and interpretation. Neither is data collection (and analysis) a replacement for decision-making.

**Recommendation Five: Create an R&D collection development fund to responsibly foster experimentation and creativity**

The problem of the two-fold mission makes clear the tradeoffs between two competing objectives, the acquisition of research material for present consumption versus acquiring materials for posterity (presumably the research and teaching activity of the future). Print books, for the most part, do an admirable job of meeting both objectives; eBooks tend to give primacy to the former rather than the later. Should the library continue to purchase material that might not be in accordance with values of long-term access and preservation but that meets the needs of current users?

YUL can undertake a moderate degree of risk-taking while remaining confident it is responsibly stewarding its collection budget by committing up to 3% of the annual collection budget to materials classified as Research and Development projects. The Research and Development funds for collection development would allow the Library to purchase materials that might not conform entirely to past practices and standards, such as electronic textbooks which might not enter the permanent collection, entering into a PDA (Patron Driven Acquisitions) pilot program, or continuing to fund projects such as Overdrive, Project Muse UPCC eBooks, and Lynda.com. Some experimentation and risk taking is entirely appropriate and to be welcomed. (Indeed, the Library is already taking part in such experimentation it is just not coordinated.) But to be effective, experimentation must be purposeful, strategic, and conducted in such a way that the Library system learns from both its successes and its failures.

One way to manage R&D collection development funds would be to have an “open call” to which YUL staff could submit proposals. Successful proposals would state the goals of the project, specify what the Library intends to learn from it, and be the subject of Collection Development Forums so that the YUL system can benefit collectively from these experiments.
Recommendation Six: Be patient/Do nothing (Festina lente)

The eBook marketplace is a hive of activity, with products, platforms, pricing models, and corporate relationships changing constantly. In the face of such activity, it is tempting to feel the need to *do something*. However, we should not act at the cost of losing sight of our values, the needs of library users, both at present and in the future, and the role a major research library such as YUL plays in a broader inter-institutional context. The previous recommendations offer guidance for how the Library can take action, including exploratory and experimental action, while doing so in a deliberate, informed, and strategic manner consistent with our values. As a result, we are recommending an incremental and evolutionary approach to expanding and improving YUL’s acquisition of eBooks that is, as much as possible, on our own terms.

No one on this Task Force counsels the Library “do nothing” when it comes to making eBook workflows and management more purposeful and strategic, and to making the most effective use of resources and bargaining power. But our list of recommendations would not be complete if we did not remind readers to “make haste, slowly.” Until the Library has its workflow and internal structures in place, it should be cautious when it comes to experiments such as patron-driven-acquisitions (PDA) or consortial purchasing of eBook content. Moreover, taking more deliberate and selective action may allow us to influence the developing eBook marketplace, since this strategy gives us more scope to walk away from opportunities that may not ultimately support our mission. Yale’s Committee on Online Education’s recent report on MOOCs (Massive Open Online Courses) offers an example of circumspection in the face of great activity on the part of peer institutions; we believe we should feel free to adopt this stance, as appropriate, when it comes to eBooks.

PART TWO: ENVIRONMENTAL SCAN

Overview

Over the fall of 2012, the eBook Strategic Plan Task Force performed an extensive environmental scan, consisting of the first two months of the groups’ work, studying not only the eBook market today but also how it developed over the last several decades. The environmental scan was deliberately paced in a way to encourage reflection. In advance of the first group meeting, Task Force members read perhaps the most authoritative history of modern academic publishing, John B. Thompson’s *Books in the Digital Age* (Polity, 2005) as well as portions of Thompson’s follow-up study of trade publishing, *Merchants of Culture* (Polity, 2010). These initial readings were supplemented by numerous white papers, task force reports, journal articles, and blog posts identified and recommended by members of the Task Force. (See the bibliography that constitutes part five of this report.)
The Task Force also invited a number of publishers and eBook aggregators to campus for conversations. These talks included eBrary/ProQuest (including eBrary founder and President Kevin Sayar), EBSCO, Project Muse UPCC & LYRASIS, and Oxford University Press. These campus visits were supplemented by calls and emails to additional publishers, peer institutions, and conversations with Yale University Library staff from a number of departments and operational units. The Task Force also sent representatives to two of the more interesting eBook events held in the fall of 2012, the NISO Forum “The E-Book Renaissance, Part II,” in Boston, and the New York Law School’s Conference on the Law and the Future of Books.

Included below are observations from this data gathering. Note: this section of the Task Force report is deliberately descriptive rather than prescriptive.

The View from YUL

Many different perspectives and workflows affect eBook content in the Yale University Library system. One way to make sense of the current state of affairs is to employ two categories of description: “digital resources” versus “licensed electronic resources.” As a concept, “digital resources” is the more expansive. Digital resources include chapters of books created through Access Service’s Scan On Demand and electronic reserves program as well as digital copies of books created by the Preservation Department or other digitization programs in the Library. On the other hand, “licensed electronic resources,” while also “digital” resources, are a smaller subset of this larger category and are limited to eBook content that the Library purchases through the spending of collection development budget allocations and entering into license agreements. (The recommendations in the first section of this report pertain to eBook content falling under the rubric of licensed electronic resources, not digital eBook content more broadly.) A quick tour of some YUL units reveals the complexity of eBook activity at YUL, both in terms of digital content and licensed e-resources.

- **Access Services** – The Access Services departments at YUL are actively involved with eBook initiatives in ways that bring together issues and workflows from across the system. For instance, Access Services’s Scan and Deliver program creates digital surrogates of print holdings, including books, already in the YUL system. Access Services’s ILL program also creates and shares digital assets from analog YUL holdings, such as microfilm. Electronic reserves provides yet another way that Access Services is involved with creating digital content, much of which comes from books.

All of the above examples involve digital resources, not licensed electronic eBook content of the kind that concern this Task Force. This is not to suggest the licensed eBook content does not affect the Access Services workflow. If the Library secures multi-user access to an eBook, this can render Scan and Deliver or resource sharing of this resource unnecessary.
• **Acquisitions/e-Resources/Technical Services** – When it comes to Acquisitions, eCollections, and Technical Services, the management of electronic resources, including eBook content, is dispersed across the YUL system. The workflow is marked by inconsistent and undocumented practices, and uneven levels of familiarity with generally accepted best practices in electronic collections, such as the Digital Library Federation Electronic Resources Management Initiative (DLF-ERMI). The lack of a cohesive departmental structure designed to enable effective response to constant changes in the electronic environment exacerbates these problems.

YUL has accumulated approximately 1.5 million eBooks in the Library catalog. At present, staff find it difficult to identify the number of eBook platforms maintained, the variety of purchase arrangements that allowed for the acquisition of the content, and the scope of licensing and DRM restrictions.

EBook acquisitions at YUL may be roughly divided into three categories: subscription databases (e.g., eBrany Academic Complete, Safari Books Online), package purchases (e.g., Springer), and title-by-title purchases (e.g., via YBP’s Gobi workflow and presented on a platform such as Ebsco or eBrany).

A. **Subscription Databases**: While subscription databases seem relatively effortless to acquire and maintain (post database URL and load MARC records into Voyager in bulk), these collections are acquired with no Library control over itemized content, and titles are added and removed from the collection at the vendor’s discretion through auto-updates to the OPAC, with no notice to library staff or readers.

B. **Package Purchases**: Package purchases (buying in bulk) seem convenient and economical, but library staff find it difficult to trace a given title back to its purchase order, since few title lists are maintained and connected to the original order or invoice. Even with the recent practice of loading title lists into suppressed bibliographic records connected to purchase orders in Voyager, retrospective reconciliation for the millions of eBooks already in the system remains an issue. Furthermore, purchase order records associated with any given eBook often lack crucial bibliographic and other information.

C. **Title-by-Title Purchases**: Title-by-title purchases are primarily processed through Gobi; however, not all campus libraries had set up an eBook account through Gobi, with some choosing to go directly to the vendor. Until recently, the Library maintained six Yale Gobi accounts, all with different approved eBook vendors. Furthermore, only the main Library eBook account was scripted for EDI and automated MARC record loads. As a result, MARC records for Gobi eBook accounts not scripted for automated loads were often lost. Although centralization and uniformity across Gobi eBook accounts helped resolve many of these issues, complications remain.
• **Selectors** – Selectors from across YUL lamented the general lack of known standards, workflow, and procedures regarding the vetting and purchase of eBook content. Although some areas, especially in STEM subject areas or in North American imprint markets, have experienced wider adoption of eBooks among their users and most heavily used vendors and publishers, no area of selecting activity, including the Area Studies, remains untouched by eBook developments. The lack of direction in both collection development training and standards and similar issues in Acquisitions, Electronic Collections, and Technical Services Workflow, is a noted source of confusion and even frustration among selectors. Part four of this report suggests guidelines and standards to help selectors navigate the eBook marketplace.

• **Special Collections** – The effect of licensed eBook content on Special Collections workflow and planning has so far been negligible. This is not to say that Special Collections has no interest in digital books, however. In Rare Books and Special Collections, eBook content generally falls under the category of digitized material (digitized versions of out-of-copyright printed material that the library owns in print).

• **Preservation** – Similar to Access Services, the Preservation Department works with eBook content from a number of perspectives. For Preservation, an eBook may be:
  A. A digital title that the Library licenses and provides access to. Since no files reside on Library servers, there is no need for a digital preservation plan. This could include a public domain title in HathiTrust or Internet Archive to which access is free and to which the Library simply provides an access point and a link.
  B. A digital title acquired by the library stored on a Library server and thus a digital preservation plan is needed. This may be a newly acquired title, a title that replaces a damaged paper original, or one that replaces or augments a microfilm copy.
  C. A digital version of a title the original of which we have either digitized in-house or had digitized by a vendor for which files will be maintained by the Library, a digital preservation plan is required, AND the assurance that the title has been digitized properly (including image quality, completeness, and metadata) rests with the Library.

*The View from Peer Institutions*

The eBooks Strategic Plan Task Force surveyed the following peer institutions: Cornell University, Duke University, Princeton University, Stanford University, and the University of Michigan. Asked whether they have a strategic plan for eBooks, the university libraries we
corresponded with state that they do not have a written, comprehensive plan but in some cases are working on one. Generally speaking, these libraries are opportunistic when it comes to purchasing eBooks, purchasing them when the opportunities arise, although certain subject units within the libraries prefer e-content.

In response to a question about eBook workflows, from selection to acquisition to discovery, we learned that workflows vary depending on whether the eBooks are purchased as a part of a package or on a title-by-title basis. eBook packages have been treated like databases and individual title selections have been treated like monographs (especially when ordered through the same platform – YBP’s Gobi web site – as print monographs), but it can be difficult to manage the different processes. The workflow from selection to acquisitions is relatively smooth; the workflow from acquisition to discovery, less so. One institution uses an in-house tool (Cornell’s pre-order online form, or POOF) for ordering eBooks and uses an external tool (OCLC’s WorldCat Selection tool) for ordering print books.

When we asked about provisions for long-term access to eBooks, we learned that these peer institutions are concerned about this but usually attempt to address this in their license negotiations with vendors. They rely on both third party (Portico and LOCKSS) and local repositories (Stanford Digital Repository), but at this point they have more confidence in their local solutions. Some libraries are comfortable with the lack of long-term access to eBooks in the social sciences and humanities as long as the eBooks are primarily supplements to print editions in the collection and not substitutes for them. On the other hand, eBooks in subscription packages in the STEM fields often do substitute for ownership of books in any format. STEM publishing has also been more open to dynamic eBook content, which complicates issues of long-term access to a stable record of scholarship.

When we asked what percentage of these libraries’ monograph purchases are electronic, we learned that these figures vary widely, from four to five percent at one institution to 20% to 25% at another. A third institution still purchases more print monographs than electronic; the opposite is true for serials. Finally, a fourth institution indicated that they would have a difficult time answering this question because of the uncertainty surrounding the nature of an electronic monograph – is the rental of an eBook collection the same as a database subscription?

When we asked whether the adoption of eBooks across the library system was uneven, generally speaking the answer was “yes.” One library reported that the science and engineering disciplines acquired the greatest share of eBooks and that the arts and international studies acquired the smallest share. Another library reported that the science disciplines purchased books in either print or electronic but not both, but the social sciences and humanities tended to acquire electronic books as a backup for print or to fill the need for multiple copies. Another concern that
influenced the uneven adoption of eBooks across a library system was that print versions of books are generally issued first and by the time the electronic version is issued, the library already has the print book and so is reluctant to duplicate the purchase.

We next inquired about discoverability of eBooks, including the availability (or unavailability) of high quality MARC records; the capability of the library system's discovery layer to work with eBooks; or any other difficulties, challenges, or successes they have had in enabling their users to find eBooks in their library systems. We learned that some libraries retrieve data for eBooks from data providers such as Summon and SFX, but in general obtaining “perfect” MARC records can be difficult. Some libraries feel strongly that eBooks in their catalog should have full MARC records that equal records for print in level of detail, but other libraries take the view that an imperfect record can be better than no record at all. There are issues with obtaining records for all the titles in an eBook package and record updates for new titles when they become available. Discoverability of eBooks is important, whether on publishers’ native platforms or via the library catalog through MARC records or tables of contents.

Next we asked the libraries to discuss the availability of usage statistics for eBooks. We wondered how adaptable COUNTER-compliant statistics are for eBooks, and what other ways libraries have found to assess the effectiveness of eBooks in their system. We learned that COUNTER-compliant statistics for eBooks are available (successful use reports, BR1 or BR2, and turnaway reports, BR3 or BR4) and some libraries have begun to look at custom (non-COUNTER) reports being provided by some vendors which cover issues not addressed by COUNTER (IP-based reports and reports on device type used for access). However, in general eBook statistics are less than perfect, often too brief to be useful. In particular, comparisons of COUNTER eBook user reports are only valid from title to title within platforms and not between platforms.

Although there are more statistics available for electronic books than there ever were for print, librarians are somehow unsure how to interpret them. For example, CRC statistics do not include which collection the title is in; therefore, librarians cannot use these data to determine whether to purchase the next year’s collection. There are conflicting signals about what patrons desire in terms of electronic vs. print books, but this varies by discipline. This is in contrast to journals in which there is a much more consistent preference for the electronic format.

Wanting information on DRM (digital rights management), we asked these institutions to discuss how DRM conflicts with user expectations and how they think both libraries and vendors might address this challenge. Some libraries expect vendors to eventually eliminate DRM but other, perhaps more realistic, organizations recognize the need for publishers to protect their sales and DRM’s effect on lowering prices for eBooks. The way in which DRM is currently implemented by most eBook vendors conflicts with user expectations when it becomes a
hindrance for the user. In a rush to protect their rights, publishers have imposed DRM systems that in reality don’t deter piracy, if piracy were ever intended. Rather than trying to understand and assess whether or not there truly is a problem that should be mitigated by DRM, publishers have imposed on vendors arbitrary DRM restrictions (printing only x number of pages at a time, or downloading only x number of pages at a time) that interfere with the users’ work and research. More sensible, generous, consistent, and easy-to-understand measures such as limiting printing and downloads to a set number of chapters would make more sense, but it may be the case that vendors and libraries are not yet able to agree on such measures.

Since vendors only follow guidelines from publishers, it is publishers who need to understand and assess the problems and the reasons that would warrant DRM restrictions for an academic library. There are publishers who have successfully mitigated the risk of piracy while completely removing DRM restrictions by offering alternatives such as cheap print-on-demand options, which make more sense than applying arbitrary restrictions across the board. On the other hand, one vendor that has eliminated DRM, MUSE/UPCC, has not been able to convince its publisher partners that this move is to their advantage and so publishers have kept selected books (potential course- adoption titles) out of the packages.

Finally, we asked about e-textbook adoption. There does not seem to be widespread attention to this issue among our peer institutions. Only one library has undertaken a campus-wide initiative for e-textbooks, but that initiative is stalled because of concerns about the accessibility and ADA compliance of e-textbook platforms.

The View from Publishers and Aggregators

Publishers and aggregators have responded to the rapid expansion of the market for eBooks in a wide variety of ways. We are encouraged by some of the responses, while others are less favorable to the values and needs of research libraries such as Yale. As of January 2013, there are two major trends emerging: first, a growing divide between trade and scholarly publishing, as well as further internal differentiation within the scholarly publishing sector; second, growing competition between publisher-driven platforms such as the Oxford University Press’s University Press Scholarship Online (UPSO) or the Johns Hopkins University Press’s Project MUSE and those provided by third-party aggregators such as ProQuest (eBrary) and EBSCO (NetLibrary).

As a result, libraries now have a wide variety of options for obtaining many titles, while many titles are not available at all, or only available under licensing terms that are difficult to accept. This contrasts sharply with the print supply chain, where libraries purchased print books primarily from specialized jobbers. Libraries may obtain eBooks from a range of sources: direct from publishers or from a variety of third-party aggregators, with or without the involvement of
an intermediary vendor. Moreover, this content is now licensed, rather than purchased outright, and we are faced with a wide variety of the terms in their licenses. We suspect that the extent of this variety will decline somewhat as the eBook market and technology continues to mature. However, some of this diversity is likely to persist since it results from internal differentiation within the book market. The diversity factor was not readily apparent to libraries but plays an important role in publishers’ business models and strategies. One consequence of this diversity is that we cannot expect publishers to offer their entire list in electronic form to libraries in the same way and on the same terms. In some cases, the terms available may not be adequate for collection-building.

We can see the effects of this differentiation in the contrast between the approaches to the Library market taken by the “big six” trade publishers and major commercial scholarly publishers. Trade publishers generally have insisted on significant restrictions on the use of the eBooks licensed to libraries, and these restrictions are often implemented with extensive digital rights management. Some of these publishers seem very cautious about entering the library market for eBooks at all. On the other hand, international scholarly publishers such as Springer, De Gruyter, and Brill offer the vast majority of their monographic output to libraries in electronic form on very favorable terms: DRM is usually minimal, licensing terms acceptable and few restrictions are placed on usage. They may even be sold at a discount, at least when purchased in bulk. These two types of publishers sell different types of books to very different markets and this is reflected in their approach to eBooks. As a result, trade publishers emphasize downloading to devices such as Kindles or tablets, central to the individual consumer market, while scholarly publishers highlight discoverability across titles and, in some cases, long term access and preservation.

University presses are located somewhere between these two positions: research libraries are generally a fairly small segment of their market, and their revenues currently depend heavily on individual buyers and course adoptions. They see sales of the latter as especially vulnerable to unrestricted institutional access to eBooks. As a result, while they may have few reservations about making much of their output available to libraries on terms similar to commercial scholarly publishers, they are reluctant to do so with titles they see as potentially being assigned for reading in a course. While their move online has recently been accelerated by Project Muse and JSTOR’s entry into the eBook aggregator field, it seems unrealistic to expect university presses to make all their current output available on uniform terms. For example, Oxford, the largest university press, published approximately 2300 academic titles in 2011. Around 800 of these were available on its Oxford Scholarship Online platform. Of the titles not included, a small number are available through third-party aggregators, but many are not available in digital format for institutional purchase. Titles that are not available include textbooks, as well as editions and translations of classic works that are likely to be assigned in courses. Project Muse executives
have found that the relatively unrestricted character of their platform has resulted in reluctance of publishers to include many titles.

Commercial third-party aggregators, such as eBrary and NetLibrary, have constituted a major part of the eBook market since the late 1990s. In our meetings with representatives of commercial aggregators we have found that more emphasis is placed on the platform and its functionality than on the content or on its stability and long-term accessibility. The fact that the aggregators license rather than own the content they provide limits their role in providing long-term preservation. Non-ownership also often results in more restrictive licensing terms (e.g., limitations on printing) for libraries than for eBooks provided by publishers on their own platforms. Publisher and publisher-driven platforms seem more likely to be consistent with our institutional values than those provided by commercial third-party aggregators. However, in many cases such platforms may be viable options for small-scale acquisition of eBooks.

On a global level the picture appears even more complex. The majority of Yale’s monographic purchases come from countries outside North America and the U.K. and in languages other than English (and in many cases, in non-Roman scripts). However, the growth of eBook production and consumption has been much slower outside the Anglo-American orbit. Even in Western Europe most publishers are at least a few years behind the U.S. in the development of eBook options—with the exception of international publishers in Germany and the Netherlands who publish predominantly in English. (In France, Germany, and Italy eBooks make up well below 1% of the market, as opposed to around 8% in the United States.) And it is not just an issue of having a head start: The development of digital book publishing may follow somewhat different trajectories outside the Anglo-American world. Variations in copyright law and in the government regulation of the book trade will continue to have ramifications. Significantly, European copyright law does not recognize the principle of fair use. As a result it may be difficult to convince publishers to allow fair-use provisions in their licensing agreements, though we would be extremely reluctant to sign an agreement limiting those rights. Given these issues it may be advisable to proceed more cautiously in the development of eBook collections from foreign publishers.

Although the development of eBooks has resulted in increased direct interaction with publishers as well as third-party aggregators, traditional library book vendors continue to play a role in the management of this complex, hybrid electronic publishing world. Their success will require excellent channels of communication with publishers and vendors, as well as with libraries. Ideally, these vendors will provide libraries with timely and accurate knowledge of print and electronic options and handle the sale of such titles across platforms centrally.

On the production side, constraints on the publishing industry as it is currently structured suggest that a significant portion of scholarly and trade monographs will not be available to
research libraries in digital format under terms that are adequate for collection building, if at all. On the consumption side, while demand for eBooks is growing, print books continue to be used and valued by library users. Given these two factors we expect that in the near term, research libraries such as Yale will be operating in a complex, hybrid universe that will require increasing investment in electronic formats, while the need to purchase print will decline only gradually.

PART THREE: VALUE STATEMENT

YUL encourages eBook models that align with its mission as an academic library and that best support its constituents in their teaching, learning, and research.

We recognize that the electronic publishing environment is not identical to the print world. The values that are paramount to libraries in the print environment — content ownership, long-term access, the capacity to share content with peer institutions and consortial partners — do not always translate neatly to the digital, licensed environment. We also appreciate that eBook content has the potential to add value and enhance researchers’ ability to engage with texts and ideas. To fulfill our mission, we seek partnerships with publishers and vendors that enable us to balance the needs of our patrons with our concerns and responsibilities as stewards of a great research library.

When evaluating eBook content and platforms, the Yale University Library supports the following premises:

- A collection of rights similar to first sale rights, including fair use, Section 108 preservation and interlibrary loan rights, and Section 121 disability access rights
  - Our patrons need to quote from books and collaborate with others when developing their own work.
  - We need to be able to move our books between platforms.
  - We need to allow students, faculty, and staff with print disabilities access to and use of eBook content.
  - Books that do not fulfill these basic functions cannot be considered part of our permanent collection. We may license book-like content for the convenience of our patrons, but unless we can secure the necessary rights listed above, these convenience copies cannot displace the purchase of a print title that includes all rights.

- Stability of content
  - No content should be altered, emended, or deleted from individual eBooks.
  - No titles should be removed from eBook packages without notice.
• When a new or revised edition of a title is available, we wish to retain the older edition.
• The ability to keep track of the revision date and content of eBook updates through versioning is ideal.
• Vendors or publishers should provide regular updates of changes in the content of eBook packages, including substitution of new editions, additions of new titles, or removal of content for any reason.

• Completeness and availability of content
  • An eBook should include all content contained in the print edition.
  • We favor the simultaneous availability of titles in both print and electronic formats. Selectors need to be able to make informed collection development decisions, and our patrons need access to the most current scholarship in the format that best suits their research practices.

• Pricing models that are flexible and reasonable
  • We wish to purchase eBook packages that are tailored to the needs of our local constituents.
  • We anticipate that we will continue to select some titles individually, not as part of larger bundles of content.
  • We support pricing models that allow us this flexibility, and that do not require minimum purchases.
  • While e-eBook publishing and our users’ needs are in a period of flux and as new business models proliferate, we believe that it may be appropriate to purchase both print and electronic access to some titles and collections. Under many existing pricing models, the cost of duplication across formats is considerably higher than buying two print copies, and is, therefore, not always sustainable given budgetary constraints. We encourage publishers and vendors to work with libraries to develop print plus online bundles that build in discounts for purchases in both formats.

• Platforms, technical capabilities, and modes of access that align with patrons’ expectations for electronic content
  • Patrons served by YUL use a diverse array of readers, tablets, and operating systems. We favor eBook platforms and electronic content that are compatible with as many of these devices and systems as possible.
  • We prefer multi-user access over single-user access. Single-user access leads to patron confusion and frustration, while multi-user access promotes a more seamless eBook experience.
• Perpetual access and archival rights
  o We prefer eBook licenses that grant the Library perpetual access rights, include third party preservation support through Portico, and acknowledge the Library’s option to include content in the LOCKSS program.

• Protection of user privacy
  o We prefer platforms that do not require patrons to create an individual account in order to use the system and view e-content.

• Support for discoverability
  o The availability of MARC records, as either individual records for single-title purchases or sets of MARC records for eBook packages, is crucial, since these records facilitate our patrons’ discovery of and access to eBooks.
  o If a new edition of a title is available and is added to a collection, we would like to receive a new MARC record.
  o We favor eBooks and platforms that are compatible with multiple link resolvers and discovery services.
  o The ability to move between and across texts, and to see the linkages and connections other scholars have made in these works, is valuable to researchers. To assist our patrons in these acts of discovery and engagement, we encourage the development of hyperlinks connecting to full-text from citations and references within individual eBooks.

• Availability of accurate, standardized usage statistics
  o Statistics allow the Library to analyze usage and user behaviors to ensure that our collections and services meet our patrons’ needs. To make comparisons over time and across platforms, we need data that adheres to common standards.
  o We prefer to receive COUNTER-compliant and SUSHI-harvestable statistics.
PART FOUR: SELECTOR GUIDELINES & VENDOR MATRIX

General Considerations Based on Our Value Statement

Content for the Library’s collection must be accessible to all users. Publishers must make allowance for screen-reader and other assistive technology so that the Library can comply with our obligations under the ADA, the Rehabilitation Act, and other legislation.

We should acquire materials in such a way that they are portable to other platforms if possible. In the medium term, we will inevitably end up with eBook content spread across many platforms. In the future, we may wish to consolidate content onto a single platform. Our licenses should provide for this if possible.

Licenses should allow for the scholarly sharing, preservation, and fair use rights we currently have with print materials. In some cases, these rights may be realized in new ways, e.g., preservation via third-party trusted repositories.

To ensure availability, single user copies should be avoided at all costs. Print is preferable to single user eBooks to avoid patron frustration. Products that impose annual limits on use cannot be managed as part of the Library’s collection. We should avoid DRM restrictions of all kinds if at all possible. DRM systems invariably lead to compatibility, usability, and support problems and ultimately to patron frustration.

We should avoid platforms that require patrons to create an account on that service in order to use the materials. This leads to confusion and usability problems and could raise user data/privacy concerns. When there is no alternative, YUL should seek to integrate the vendor sign-on system with Yale’s CAS to reduce user frustration.

Books that can be downloaded to users’ devices in a variety of formats are preferred. Currently, PDF versions can be read on many devices, but eInk readers such as Kindle and Nook work best with ePub versions.

Discoverability of books across platforms will be of paramount importance. Generally MARC records could meet this need as they are loaded into Orbis. As the Library moves forward with a discovery platform, vendors who make their eBooks full-text searchable by discovery providers should be preferred to those who only make MARC records available.

Meaningful usage statistics should be part of the vendor’s offering. We prefer to receive standardized COUNTER-compliant statistics, but recognize that best practices for analysis of eBook use may vary across presentation methods and time.
Should We Also Buy Print?

There are two ways of considering eBook content as part of the library’s collections and services. They are outlined in the following paragraphs.

One view is that until the Library can acquire ownership, including first sale, preservation, and lending rights, eBooks cannot replace print books as part of the Library’s permanent research collection. Furthermore, until the Library has robust, audited systems and staff in place to provide ongoing preservation of eBooks, they should not replace print copies as part of the permanent research collection. Providing access to eBooks should be treated as a value-added service that the library provides, but not as part of its core collection-building function. In no instance can a “subscription package” that features revolving title availability displace a print purchase.

Another view, on the opposite extreme, is that to ensure the efficient use of the Library’s funds, eBooks should generally replace the purchase of print copies. In rare instances, e.g. faculty-authored works, a print copy could be acquired in addition to an electronic copy.

This committee recommends some middle ground between these two extremes. Patron demand and disciplinary norms should inform decisions. The exact path can be determined on a case-by-case basis after consideration of the pros and cons of each approach.

Some Examples

EBSCO books and eBrary purchased titles are available for purchasing individual titles via GOBI. Multi-user versions should be purchased. Downloading should be disabled if it results in blocking access to other users. These books should be made available by loading records into Orbis. Because we acquire an ongoing license to use these books and they are housed on stable providers, this type of purchase might be more likely to displace a print purchase.

eBrary subscription package should not be considered when making selection decisions. These titles are not permanent and the Library has no way of knowing what titles will be available at any point. Because these titles are ephemeral, any important title found here should still be purchased in print; alternatively, an eBook purchase might be made (as above). See, e.g., The Craft of Research.

Project MUSE books are from mainly smaller university presses and are not complete lists. Because we have purchased the entire package and MUSE titles are all multi-user, selectors can use availability in MUSE to decide against a print purchase. MUSE will not remove titles once purchased. Individual title purchases outside of the packages on the MUSE platform may be appropriate for selectors in subjects where MUSE is strong, e.g. humanities. Ecollections and Acquisitions will need to set up MUSE for individual title purchases if this is desired.
Similar to MUSE and Cambridge, University Press Scholarship Online (Oxford) collections are available by subject and/or by press; Oxford and Chicago with several smaller presses are available. Single title purchases should not be pursued; bundles of titles are more cost effective and simpler to manage.

Books at JSTOR collections are multi-user and generally from larger university presses but are not complete lists. Multi-user collections can be purchased and considered when making print purchases. Single-user titles at JSTOR must not be purchased in any event. These titles are protected by DRM and have a limited number of downloads per year which is impossible for the Library to manage.
### DRAFT VENDOR SELECTION MATRIX

<table>
<thead>
<tr>
<th>Concurrent User Options</th>
<th>Publisher Sources</th>
<th>Publication Type</th>
<th>Formats</th>
<th>Book Selection</th>
<th>Acquisition Model</th>
<th>Device Compatibility</th>
<th>DI/Options</th>
<th>Required Software</th>
<th>Annual Use Restrictions</th>
<th>Pricing</th>
<th>Preservation</th>
<th>Reserves</th>
<th>Printing</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>EBSCOhost eBooks</td>
<td>Single, unlimited, platform-bound</td>
<td>Various</td>
<td>Academic</td>
<td>Title-by-Title and Package</td>
<td>Push Button</td>
<td>Major E-Books Platforms; Mobile Platforms (iOS, Android)</td>
<td>Option for download; download check for access</td>
<td>Intern/Intranet restrictions; Digital Software</td>
<td>No</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OJS</td>
<td>Customized</td>
<td>Wired</td>
<td>University of Chicago Press, other similar presses</td>
<td>Academic</td>
<td>Title-by-Title and Package only</td>
<td>Push Button</td>
<td>Major E-Books Platforms only</td>
<td>LTR</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>JSTOR</td>
<td>Single, multiple, only purchase, unlimited</td>
<td>Various, longer, shorter, journals, and complete sets</td>
<td>Academic</td>
<td>PDF</td>
<td>Push Button</td>
<td>Major E-Books Platforms</td>
<td>Limited number of downloads per year; expiration for章程</td>
<td>PDF reader</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Muse</td>
<td>Multiple</td>
<td>Various, shorter, university presses</td>
<td>Academic</td>
<td>PDF</td>
<td>Package</td>
<td>Push Button</td>
<td>Chapter download</td>
<td>Internet browser, Adobe Digital Software</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>eLibrary</td>
<td>Single, unlimited, PSA purchase features</td>
<td>Various</td>
<td>Academic and Trade</td>
<td>Title-by-Title and Package only</td>
<td>Push Button</td>
<td>Only</td>
<td>Major E-Books Platforms, mobile platforms, smartphone, and Sony Reader and Kindle</td>
<td>Full-time download; OverDrive Media Console, Adobe Digital Software</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OverDrive</td>
<td>Single</td>
<td>Various</td>
<td>Trade</td>
<td>ePDF, PDF, EPD, PDF, HTML, HTML, HTML, HTML, HTML</td>
<td>Title-by-Title</td>
<td>All major platforms and mobile platforms, smartphones, and Sony Reader and Kindle</td>
<td>Full-time download; OverDrive Media Console, Adobe Digital Software</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>McGraw-Hill E-Book Library</td>
<td>Single</td>
<td>McGraw-Hill</td>
<td>Academic and Trade</td>
<td>Vendor platform</td>
<td>Title-by-Title and Package</td>
<td>Push Button</td>
<td>None</td>
<td>Internet browser</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ovid</td>
<td>Single</td>
<td>Wolterhouse</td>
<td>Academic</td>
<td>HTML</td>
<td></td>
<td></td>
<td></td>
<td>Internet browser</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rittenhouse</td>
<td>Single</td>
<td>Wolterhouse</td>
<td>Academic</td>
<td>HTML</td>
<td></td>
<td></td>
<td></td>
<td>Internet browser</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Elsevier</td>
<td>Single</td>
<td>Various</td>
<td>Academic</td>
<td>HTML, PDF</td>
<td>Package</td>
<td>Push Button</td>
<td>Electronic Journal, Mobile Devices</td>
<td>Chapter download; Adobe Digital Reader</td>
<td>Adobe Digital Reader</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Springer</td>
<td>Single</td>
<td>Springer</td>
<td>Academic</td>
<td>HTML, PDF</td>
<td>Package</td>
<td>Push Button</td>
<td>Electronic Journal, Mobile Devices</td>
<td>Chapter download; Adobe Digital Reader</td>
<td>Adobe Digital Reader</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wiley</td>
<td>Single</td>
<td>Wiley</td>
<td>Academic</td>
<td>HTML, PDF</td>
<td>Title-by-Title, Title-by-Title, Mobile Devices</td>
<td>Push Button</td>
<td>Electronic Journal, Mobile Devices</td>
<td>Chapter download; Adobe Digital Reader</td>
<td>Adobe Digital Reader</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAGE</td>
<td>Single</td>
<td>Various</td>
<td>Academic</td>
<td>HTML, PDF</td>
<td>Title-by-Title, Title-by-Title, Mobile Devices</td>
<td>Push Button</td>
<td>Electronic Journal, Mobile Devices</td>
<td>Chapter download; Adobe Digital Reader</td>
<td>Adobe Digital Reader</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cambridge</td>
<td>Single</td>
<td>Cambridge</td>
<td>Academic</td>
<td>HTML, PDF</td>
<td>Title-by-Title, Title-by-Title, Mobile Devices</td>
<td>Push Button</td>
<td>Electronic Journal, Mobile Devices</td>
<td>Chapter download; Adobe Digital Reader</td>
<td>Adobe Digital Reader</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24x7</td>
<td>Various publishers</td>
<td>Trade Press (Business)</td>
<td>Vendor platform, some PDF availability</td>
<td>Aggregator</td>
<td>Subscription</td>
<td>Desktop computer</td>
<td>Online by Title</td>
<td>Internet browser</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Safari</td>
<td>Various publishers</td>
<td>Trade Press (Technology, Digital Media, Business books)</td>
<td>Vendor platform, view some books</td>
<td>Aggregator</td>
<td>Subscription</td>
<td>Desktop computer, mobile devices, iOS, Android platforms</td>
<td>Online by Title</td>
<td>Internet browser</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: This file is maintained separately for updating and legibility purposes. This version is provided as a draft sample only.
PART FIVE: BIBLIOGRAPHY

Task Force Reports, Value Statements, White Papers


Articles, Books, Videos


