



Date: 07/06/2006

Battle for e Book Mindshare: It's All About the Rights

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ebrary

Meeting:	154 Acquisition and Collection Development with Serials and Other Continuing Resources
Simultaneous Interpretation:	No
WORLD LIBRARY AND INFORMATION CONGRESS: 72ND IFLA GENERAL CONFERENCE AND COUNCIL 20-24 August 2006, Seoul, Korea http://www.ifla.org/IV/ifla72/index.htm	

Introduction

This paper will discuss a variety of options available to academic libraries considering the acquisition of eBooks. Furthermore, this paper will also outline some of the key issues and potential future directions of eBooks.

One source of current information on the eBook market is published by the International Digital Publishing Forum (IDPF). The IDPF estimates that eBook revenues in 2005 were approximately 11.8 million dollars among 18 trade and educational publishers, accounting for 5,242 eBook titles. If one were to base the world of eBooks on the IDPF information, librarians would have a skewed view of their options. It is clear that the trade publishing aspect of eBooks is growing, but a wider view of eBooks is necessary to better understand the market as a whole. Especially in the area of academic publishing the available types of eBook resources is much more varied and accounts for close to a half a million titles between primary publishers, aggregators and databases vendors with revenues in excess of 20 million dollars annual.

On closer examination, one realises that the available options are promising and utilitarian. Specifically in the area of scientific, technical, medical and professional information the options break down into four main areas:

Ordering

- Direct from publisher
- Through a book services company
- Through an agent
- Through an aggregator

Purchasing Models

- Single or multiple book purchases
- Subscription databases
- Perpetual access databases

Distribution

- Direct from publisher
- Through an aggregator
- Through a database/platform vendor

Utility

- Value added services for students and professors
- Value added services for the library
- Continued growth of collections or availability from publishers or vendors

	Books 24/7	eBook Corp (EBL)	ebrary	EBSCO	Knovel	netLibrary	O'Reilly /Safari	Overdrive	Ovid	Swets	Thomson Gale Group	xRefer
Ordering												
proprietary system	•	•	•	•	•	•	•	•	•	•	•	•
integrated with book services company		•	•			•						
print and electronic available				•					•	•	•	
agent for publisher				•					•	•	•	
database vendor			•	•	•				•		•	•
Purchasing Model												
subscription (FTE)	•	•	•	•		•	•	•		•	•	•
subscription (Concurrent users)					•		•		•			
Subscription (swapping)												
Perpetual purchase single user		•	•			•						
Perpetual purchase multiple user	•		•									
Distribution												
Direct from publisher												
Vendor for publisher	•	•		•		•				•		
eBook Database vendor			•		•		•		•		•	
Utility												
Added search features	•	•	•	•	•	•	•	•	•	•	•	•
Added eBook features		•	•		•	•		•			•	•
Added services (MARC's etc.)		•	•	•		•			•	•	•	
Integration features		•	•			•						
Courseware features			•									
Personalisation		•	•	•	•	•			•		•	•

Table 1: A comparison of eBook vendor options

Market Overview

There are many vendors that supply eBooks to the STM marketplace and each has a distinctive advantage depending on the need of the library and its end-users. Table 1 demonstrates that there is no single source, option or strategy that is uniform for eBooks. Therefore, it is the requirement of the library to determine which mix of content

solutions will best meet their needs. This solution is a mix of content, functionality and services.

Ordering

The realistic situation with eBooks is no one option will meet all the needs of a library and that single source ordering can not accommodate the variety of uses. Purely, on the book ordering front several ebook vendors and publishers have partnered with library book services companies to help streamline acquisition. NetLibrary has a partnership with Baker & Taylor to offer its eBooks via TitleSource, Link Online, and YBP Gobi. NetLibrary has developed two ebook ordering tools, TitleSelect and TitleDirect, whilst ebrary has an agreement to offer its books through Blackwell's Book Services and is developing its own ordering system. EBook Library (EBL) has also partnered with Blackwell's Book Services to offer their eBooks via Blackwell's Collection Manager.

Agents have also become involved in the selling of eBooks, but this approach does not constitute book ordering services, but rather specific titles from publishers or select collections. For example EBSCO Information Services provides subscriptions to ebooks from Wiley InterScience and Pan American Health Organization, to be followed by Springer, Taylor & Francis, and Cambridge University Press in 2006. Swets Information Services provides subscriptions to eBooks from Taylor & Francis and Baker & Taylor. Also, Coutts Library Services has created Mylibrary and offers a database of intergovernmental agency publications and content from top publishers such as Blackwell Publishing, Elsevier Health, McGraw-Hill Publishing, Springer and Wiley Publishers. Of course many eBooks sold through distributors carry embargoes much like that of many e-journals aggregated databases.

Conversely, many publishers produce print and eBooks simultaneously. But to name a few, Pearson, Greenwood, Elsevier, McGraw-Hill and ABC-CLIO make both their print and electronic titles available. The important distinction is how urgently the library needs the title and how it will be used. If the title is part of a larger collection of titles used in a reference or research environment, then simultaneous access to print and electronic may not be critical, but if the materials are part of core curriculum, then the need may be different.

The important thing to remember about the ordering process is that it must match the need and use of the materials, but should not override the choice of content. It is foreseeable that there will be greater integration between book services companies and aggregators, but that is unlikely to solve ordering between all the variety of choices from publishers, vendors and aggregators.

Purchasing Models

The method by which libraries can choose to acquire access to titles has in all honesty fallen into two camps. Those who choose to access titles on a leased basis and those who choose to acquire access on a permanent basis. The fact is that choice is not black and white and that a library may want some titles permanently and others purely by subscription. These models tend to become convoluted when e-journals are used as a

basis for comparison. Unfortunately, the early success of e-journals has somewhat dictated the course of eBooks, but it is a vast oversimplification to assume that the two models are comparable. The nature of e-journals as a serialised form of documented peer review research is not an appropriate model of monographic publications that are systemic, referential or thematic. Therefore, libraries need to consider the different means by which their patrons will utilise their eBooks and what combination of models will best meet their needs.

eBook vendors have best understood this need for flexibility and therefore offer the greatest variety of options to libraries. For example ebrary offers annual subscriptions to its databases and subject collections priced according to libraries' FTE with simultaneous access by multiple users. Librarians can also select specific titles and build their own unique database. ebrary also offers a perpetual access model with either single-user access based on the list price of the book, or simultaneous access for multiple users based on the list price plus the libraries' FTE. Librarians can either hand-pick titles or use lists to help the selection process. EBL also has access models for simultaneous use by multiple users, title-by-title selection, and perpetual ownership, as well as a short-term rental option. Prices for the EBL titles are governed by the publishers and are roughly comparable to list price, plus a platform fee.

Companies such as Safari, Books 24x7, Novel, Thomson Gale, xRefer, Lucent Books, Greenhaven Press, Oxford Press and others offer subscription options to their specific book collections. The fundamental difference here is these publishers offer access to a very specific subject collection, reference source or unique content not available in any other form. For example, Knovel and Books 24x7 offer annual subscriptions to their databases depending on the collection purchased and the number of simultaneous users, whilst Safari purchasing is on a title-by-titles basis with the number of simultaneous users.

Therefore the library must consider the value of the content its applications and the pricing model. A subscription model may be advantageous for time sensitive content but perpetual access may suite materials that require preservation. But this entirely depends on the value proposition of the eBook collection available from the publisher.

Distribution

The distribution of eBook is governed by two factors: (1) the type of reading software that is utilised to display the eBook; and (2) the type of access model employed by the vendor (i.e. multi-user, single-user, unlimited).

When it comes to reader software there is a wider debate as to whether or not eBooks should be at all tied to a specific reading device. It is admirable to think that some day eBooks would be platform independent to facilitate a library's workflows, but the relative youth of this industry and its competitive environment will not likely see this happen soon. It is worth considering some use factors that must be overcome when dealing with eBooks:

- Download size – how long will it take to download some books that are hundreds of megabytes?
- Security – how easily can the book be reproduced or copied without copyright permissions?
- Customisation – can users create profiles or store bookmarks and highlights?
- Multiuse – can books be read by more than one user at the same time or are there sharing options for perpetual access titles?
- Searchability – how easy is it to find a title or information in a title?
- Accessibly – how easy is it for the visually impaired, deaf or hard of hearing to interact with content and does the eBook reader adhere to North American, European and International accessibility standards?

The other important aspect of eBook access that a library must consider is how they expect their patrons to utilise and peruse their eBook collection. Notwithstanding the fact that each user can be different a library must develop as part of their acquisition and collection policy a clear strategy and guidance on best utilising eBooks. Because eBooks are still evolving, libraries can be in the vanguard for providing access to electronic content. eBooks allow for much greater access to information than was ever available in print books, but this can only be realised if the value of digitisation is utilised. Online access offers greater interactivity with eBooks than ever before. For example: Knovel provides online productivity tools in the form of interactive tables, equation plotters, graph plotters/digitizers and more; ebrary indexes the full-text of the eBooks into a database and with their InfoTools software enables access to dictionaries, databases, translators, highlighting, the library OPAC, and more directly from within the eBook; xRefer enhances its content by adding xreferences, which are cross-referenced links that connect related reference entries to one another and provide context for research.

Access

When thinking about acquiring access to eBooks two key issues that arise:

- Interdisciplinary use – if there is a greater need for information across disciplines or a systematic presentation of subject matter, then a collection or database approach may be warranted.
- Core subject use – if there are a core set of subject areas that require seminal publications, then a custom collection or single title approach may be warranted.

Of course, the purchasing model or leased versus perpetual also affects the access of patrons. Each model has a different value proposition depending on the vendor, so the library has a number of options depending on their population and use:

Option	Value
Perpetual purchase single user	Access to important titles for any user-base with limited use and budget
Perpetual purchase multiple user	Access to important titles for a large user base, but can be costly if there are a large number of titles and users

Subscription collection based on concurrent users	Cost effective for a limited number of users with a limited budget for a broad set of titles
Subscription collection based on FTE	Cost effective for any user-base with a need for broad, systematic and referential information
Subscription pick your own titles based on concurrent users	Effective where existing collections do not meet the needs for broad access to information. But this can be costly for a small user-base
Subscription pick your own titles based on FTE	Effective where existing collections do not meet the needs for broad access to information in a large user population

Utility

It has been observed that the success of any collection or eBook is the ability of the user to find it. Each and every vendor employs different solutions for adding greater value to interacting with eBooks. It is no longer just enough to put the eBook in the catalogue, but it is necessary to allow multiple methods for the user to find the information they seek. Some of these options are:

- Searching – the ability to search full collections, full text of eBooks, subjects, authors, titles, and more
- Navigation – the ability to navigate search results or a collection with visualisation, browsing or other aids
- eBook Features – the ability to mark records, export citations, highlight text, mark pages, link to other eBooks or citations, link to other databases and in effect enhance the research process for the user
- MARC Records – ability to obtain MARCs for titles or collections
- Usage Statistics – the ability to access usage information online
- Integration – the ability to integrate with the OPAC or other information systems
- Courseware – the ability to integrate with Blackboard, WebCT and other teaching aids
- Portability - the ability for users to securely read eBooks offline
- Personalisation – the ability for users to save results, searches, highlights, eBooks and other related information

Finally, all of these aids and utilities are designed to enhance the users experience with eBooks, but most importantly they should improve the patron's ability to finding and accessing the information they seek

Moreover, such companies and Knovel, xRefer and Gale Reference Group provide a twist on eBooks by adding a second layer of data extraction from the eBook content. The additional value-added capability allows them to provide unique information, manipulation and research options for the user.

Content

No discussion of eBooks is complete without some mention of content. This topic is a whole paper unto its self, but it is worth noting that content is still the primary decision maker, as it should be, for choosing an eBook(s).

The amount of content is growing rapidly, as publishers bring print and electronic publishing into parallel, but as is a young industry this is still relatively small in comparison to e-journals. As with any type of electronic content the library should consider how regularly the content is update, what print content may be missing from the eBook, what unique content is available to the eBook, how users may use the content for other purposes and what copyright and fare use permissions are attached to the content.

The Issues

The following is a discussion of some of the keys issues we have addresses in the marketplace with which we hope to provide some insight on the industry and its standards.

Currently, there are a large number of e-book formats, which makes it nearly impossible for libraries to cater to multiple devices patrons may own. When can libraries expect standardisation in viewing technology?

We do not believe that their will be standardisation based upon the fact that there are several major client technologies that render text, audio, and video. The majority of these being: Microsoft Windows Media Player, Microsoft Internet Explorer Browser, Time Warner/AOL/Netscape Navigator Browser, Opera Browser, Mozilla Firefox Browser, Apple Safari Browser, Adobe eBook/Acrobat Reader, Macromedia Flash Player, Real Networks Real Player, Palm eBook Reader. All these software client technologies are limited in there ability to do anything more than viewing, linking forward and backward, navigating hyperlinks (i.e., Microsoft, Netscape, Mozilla, Opera) searching within the documents text (i.e., Palm and Adobe). Therefore, the end user experience is limited in scope based on the technology of the software manufacturer. Each of these companies, other than Adobe, have little to do with the print production side of content in books, journals, and magazines, all of which are the “need to know” information sets within the real “paid for” content areas of electronic information. Therefore, each of the software manufacturers, who is on the “outside” of the print side of the market, has little to benefit from making a standardised reader because their content production technologies are limited in scope

With the popularity of mp3 and palm devices, how will e-Book distributors further capitalise on these existing technology standards? Or is the industry still committed to creating its own handheld device like Sony’s Librie or some descendant of the Rocket e-book?

We do not believe that the device is the issue. It all depends on what the publishers will commit to from the editorial side to make an eBook more compelling than text and

images. Reading content on a Palm is not that attractive due to size of the font and image rendering. The tablet PC is just an extension of the laptop, and we do not see much value in that device for reading versus notations. The technology (hardware and software) is available for both types of content (audio and video) to be included with text. The biggest issue is that not all client technologies (i.e. Windows Media Player, Flash Player, Adobe Reader, Real Player, and the browsers) can tether the content or protect it as a download (DRM). Most client technologies protect just one portion of the content (i.e., text vs. audio and video, or video and audio vs. text). Portable wireless hardware is the main issue for success in the upcoming years. Another area where the download of content will become less of an issue is through wireless laptops. College campuses and offices are fast becoming wirelessly networked; therefore, the need to download content and take it with you is less of an issue. It will take these types of innovations to make content portable and rendered through any device and client player.

What makes for a successful e-book title?

One that has valuable, authoritative content, is easily searchable, easy to read with text and images, and connects to other data (i.e. Journal databases, HTML databases, OPACs) through a single interface. And most importantly, can be accessed by many users simultaneously.

One trend with e-journals is the removal from inclusion in full text databases to an increasing number of titles offered only from publishers. Are we seeing the same thing from e-book publishers as well (ABC-Clio, Gale, Wiley, Dekker)? Does this mean higher prices for libraries?

This only makes sense if librarians and end-users believe that searching individual collections with publishers is the best use of their time in finding, indexing, and archiving valuable authoritative content. We believe there is a place for "individual branded collections" and integrated/aggregated collections. It depends on the audience (i.e. academic vs. vocational) and budgets. But the real future of eBooks and the best value is in integrated connected full text content sets, regardless of subject and type that can be easily searched from anywhere and not based solely on citation information. This will enable the end-user to find what they need fast and efficiently.

What are the future pricing models? Is one viewer at a time sustainable?

We believe that the check-in/check-out model is really a print model. Perpetual multi-user access without check-outs takes advantage of the networked environment. The future of this kind of pricing is probably cover price plus a premium for multiple users and perpetual ownership (i.e. 1.25 or 1.5 times list price plus access fees based on FTE). For aggregated content the subscription model still prevails (i.e. database collections that are paid on an annual subscription basis). Why not leverage the utility of the Internet for 24/7 simultaneous access to information and allow multiple users to undertake information discovery and viewing of content from anywhere at any time.

How will e-books affect intellectual property?

We as an industry need to place value on the IP, otherwise, publishers will not create IP. It is as simple as that. Any content, audio, video, or text, needs to be protected and the

copyrights need to be enforced. If the asset is desired, marketed well, and consumed by end-users, there is a cost for purchase. If the asset is not desired, not marketed well, and ultimately not purchased by end-users, then publishers and distributors will not make money, and future investments in either a subject set, and/or author will not arise in the future. The main problem with IP on the Internet today is not enough enforcement and monitoring has taken place to deter end-users from copying and illegally sharing content. This is improving; both North American and Europe have taken steps in crafting legislation that should assist. We know that there is a digital generation out there and they want to consume content in the fastest, most accurate way possible. Workers in Fortune 100, medium and small size business across the global economy spend an exorbitant amount of time in front of a PC, therefore, they want efficient ways to find, use, and save digital content that lets them make more money. Publishers and distributors of digital content today are realizing what the cable industry realised twenty-five years ago, content that is valuable is monetisable. Eventually the majority of the entire market will "pay for content". It is just a matter of time before publishers today will charge equally for digital and print content.

How will e-book searching capabilities and e-book interfaces improve?

The majority of eBook reading software today is not search oriented. The client technologies do not have enough features to let an end-user operate like they do when physically skimming a book, using multiple books or a database. We believe client technologies that do these things bring the user closer to a satisfied experience. Search is getting better, and so is rendering, but putting it all together and patenting the technologies is what it is all about. Therefore, we believe that the software will improve and editors and writers will create content developed for searching with an enhanced UI experience in mind. Today, we are still in a DTD-based, print layout model for eBooks, but this will change

The future of Digital Rights Management (DRM) with eBooks

The ever evolving nature of content use and distribution models will continue to force DRM technology companies to continue to refine their software offerings. In reality, the larger part of the DRM debate has really focused on protection of video and audio, therefore text has somewhat taken the back seat.

DRM as a whole encompasses a large number of technologies that govern the buying and selling of intellectual property (content) in digital format. This discussion will only focus on the specific technologies available to eBooks and their manipulation within copyright.

In the STM market most publishers and aggregators of eBooks have employed DRM capabilities offered through Adobe, Microsoft, Sony, Real Networks or utilised their own proprietary reader technology (such as ebrary). The important thing to remember is that DRM systems should ideal allow publishers to present digital content based on the rights associated with the content. The complexity arises from the fact that the traditional use of a book (i.e. one reader/borrower viewing page by page) is being

replaced by many new uses for the eBook content such as: course packs, courseware, lecture notes, training materials, student papers, dissertations, machine reading etc.

It is clear that there is a potential conflict between the library's role in preservation and the restrictions that DRM can impose. Specifically legal deposit libraries may need legal provisions to allow them to circumvent restrictions.

The way in which DRM restrictions are employed is also varied, but not necessarily sophisticated. For example restrictions can be based on a "key" to access encrypted content, ID/Password gaining access to a website, notification to a user if their actions have violated copyright restrictions or marking of content to detect breaches that are viewed after the event. Today, the typical type of DRM employed by eBook publishers is called technical protection measures (TPMs). Restrictions built into the system on either a global, site or user basis prevent the end-user from completing an action pre-determined under copyright (i.e. printing or copying more than 5% of the eBook). The reality is many vendors employ either browser-based security or Adobe Reader-based security to protect their eBooks. ebrary has taken a unique approach of indexing the full text of eBooks into a database and delivering this through their proprietary reader, which also functions as DRM software. The ebrary Reader delivers server-based content page-by-page and the TPMs prevent the user from downloading content and also limiting printing and copying.

The challenge is in making TPM flexible yet secure to adjust to the different business models offered by publishers, vendors and aggregators. More importantly, there is no interoperability between different DRM systems or content distribution channels, so this makes it challenging for the library to administer and manage in an efficient way. In fact, we may find that both librarians and end-users may be so put-off by the different TPM restrictions that this could negatively affect the purchasing of digital content. There is also a view that DRM technologies are also being used by companies to lock customers into one vendor. As long as this view prevails, the adoption of DRM and associated TPM solutions will be difficult.

There is some promise in the initiative undertaken by the Creative Commons, which offers alternative models to copyright or rather the idea of "some rights reserved" in creating license schemes that better meet the needs of the end-users. This may be one way forward for eBook publishers and aggregators.

Of course the eBook market will continue to see a mix of DRM software solutions and TPM approaches for some time to come. As the value of the content continues to grow so will the adoption and evolution of more subtle and sophisticated means to protect IP and copyright.

The future

It is always difficult to say what is likely to happen in the future, but the trends and patterns we have observed point to some interesting possibilities for electronic book content for libraries.

Our expectation is libraries will see improvements in the time-to-market for digital versus print books and this will help in the transition from print to electronic. No longer will there be the dreaded eBook delay and in fact we may even see the evolution of the pre-print databases much like in the e-journal world.

With the improvement of DRM software and distribution capabilities the time for electronic interlibrary loan and e-reserves may yet be here. With the development of efficient, cost-effective and secure electronic loan, another key aspect of library sharing may well continue.

On the classroom front, we expect that there will be greater interoperability between courseware and eBooks, but the interaction between the library and the classroom for course packs will see the greatest improvement.

Finally, as the debates of Open Access publishing continue in the e-journals world, it is likely with improved DRM software and more user-friendly XML publishing tools researchers will be able to undertake self-publishing using eBook technology tools and platforms. Of course this will probably add further fuel to the Open Access debate and present entirely new issues in copyright protection and enforcement or how universities generate royalties. Nevertheless, we can expect exciting times to come in the eBook industry that is continually maturing and evolving.

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