



# Charlotte Initiative

*Environmental Scan Literature Review and  
Original Research*

*October Ivins and Joyce Ogburn*

# Outline

- Overview
- Literature Review- Joyce Ogburn
- Original plan and revisions
- Progress to date
- Preliminary Survey Data
- Work remaining
- Discussion

# Environmental Scan

Focus on Business Models, Pricing and Terms

Promote adoption of principles to publishers

Iterative process

- Literature review
- Survey
- Supplemental interviews
- Share findings with Working Group and Research Teams
- Share interim results publicly
- Re-survey, re-interview

Use market pressure, findings, and time to change behavior

# Phases Overview

- Part 1- Literature Review (Joyce Ogburn)
  - Kelly Denzer, Research Assistant
  - Rachel Fleming, UT Chattanooga
  - Joyce Ogburn, Appalachian State
- Part 2- Publisher Survey and Interviews
  - Kelly Denzer, Research Assistant
  - Beth Caruso, Research Assistant
- Part 3- Vendor Survey and Interviews (in progress)
- Part 4- Report (due April-June 2017)



# Charlotte Initiative

## *eBook Marketplace Environmental Scan: Findings from the Literature Review*

*Joyce Ogburn  
March 9, 2017*

# Key readings - Principles

- IFLA Principles for Library eLending - <http://www.ifla.org/node/7418>
- Macalester College Dewitt Library E-Book Rights Advocacy - <https://www.macalester.edu/library/collections/changingebooksforlibraries/advocacy/>
- The Oberlin Group Statement on Ebooks & Libraries - <http://www.oberlingroup.org/node/14801>
- UCLA Library E-Book Value Statement - <http://www.library.ucla.edu/about/collections/collection-development-initiatives/e-book-value-statement>

“The libraries listed below are poised, and eager, to build a substantial e-book collection. Yet, we are constrained by the use restrictions placed upon e-books... libraries should have the right of first sale to all purchased materials. In order for libraries to carry out their long-standing missions of building collections for use and sharing over time for their communities and the public good, it is imperative that e-book restrictions set by publishers and vendors change.”

DeWitt Wallace Library at Macalester College (2013)

# Key Readings - Overviews

- Canadian Association of Research Libraries, “E-Books in Research Libraries: Issues of Access and Use.” (2008)
- AAUP, “Sustaining Scholarly Publishing: New Business Models for University Presses: A Report of the AAUP Task Force on Economic Models for Scholarly Publishing.” (Withey, L., Cohn, S., Faran, E., Jensen, M., Kiely, G., Underwood, W., Wilcox, B., Brown, R. Givler, P., Holzman, A and Keane, K. , Journal of Scholarly Publishing, 42(4), 397-441. (2011)
- Blummer, B. & Kenton, J. Best Practices for Integrating E-books in Academic Libraries: A Literature Review from 2005 to Present. Collection Management, 37(2), 65- 97. (2012)
- CNI, “Executive Roundtable Report on E-Book Strategies.” (2013)



# Highlights of overviews and other sources

- Many models
  - DDA/PDA
  - E preferred
  - Packages
  - Title by title selection
  - Both E and P purchased selectively
  - Purchase E to replace P to free up space
  - Conversely, libraries don't want back lists because they already have the print
  - Evidence-Based Acquisition (EBA)
  - Short term loan to save money (STL)
  - Approval plan equivalents

# Mixed models are prevailing

- CNI – May require “Rethinking of library scope since e-books are acquired using a combination of access and ownership strategies”
- Blummer and Kenton – Advocate good planning because acquiring and managing ebooks is a convoluted process

# Workflow

- Discovery
- Acquisition
- Bibliographic records
- Less complexity
- Seamless

# Goals

- Libraries
  - Affordability / long term investment / persistence
  - Unique titles / fewer duplicates / breadth and depth
  - Access anywhere / DE / Course use
- Publishers and vendors
  - Revenue from a variety of sources / sustainability / control

# Differing Advantages

- What works for libraries doesn't work for publishers
- Vice versa
- Role of third party vendors and how they influence the market

# General summary

- Ebook and print markets and models are not in synch (although they can share discovery elements and systems)
- E more expensive than P and with more restrictive access
- Issues have been long standing, largely unresolved, still in flux
- Library decisions often driven by use
- Market, pricing and buying patterns react to new data and trends
- Libraries employ different approaches according to local and disciplinary needs
- Publishers and vendors striving for a sharing a market that is sustainable for both of them

# Gaps and Further Questions

- Print on Demand strategies – not much in the literature except AAUP report
- Keep coming up with the same solutions (open communication, experimentation) but they don't stick or the ground shifts. Caused by unwillingness to experiment or to take a risk or share results or new approaches?
- Where does Open Access fit in?
- Local decisions, large scale impacts? What are the strategies for long term preservation and access?



# Charlotte Initiative

## *Environmental Scan Research*

*October Ivins, Project Consultant*



# Publisher Survey and Interviews

- Willingness to comply with 3 principles
- Feedback on related policies and practices
  - Allow ILL? How?
- Absence/presence of proprietary software
- Support for course use
- Provisions for removal of purchased items
- Distribution channels
- Licensing terms publically available
- Perpetual access provisions
- Suggestions for library purchase of eBooks

# Adjustments

- Iterative harder than planned
- Survey, follow up; Post list of responding and non responding publishers
- Revise if/when positions change
- Post table of support for 3 principles (at conclusion with permission)
- Phone, face to face interviews with vendors
- Obtain ILL data for analysis

# Publisher Survey

- AAUP Members- Presses and non Presses
  - 40% Group 4 (10)
  - 33% Group 3 (18)
  - 25% Group 1, 2 (76)
  - 35% Non Presses (17)
- Other Non-Profits (Societies) (9) no respondents yet
- Commercial Publishers 47% (19)

# Non Press Examples

Group 3- 4 (7, 28% responded)

- **NSTAP Academic Press**
- Modern Language Association

Group 1, 2 (10, 40% responded)

- Brookings Institution
- W.E. Upjohn Institute for Employment Research

# Non-Profit Publishers not AAUP

- American Academy/Assn of Orthopaedic Surgeons
- American Chemical Society
- American Phytopathological Society
- ASCE
- CABI
- IEEE
- IET
- IOP
- SPIE

# Commercial Publishers- Responded

- **Bloomsbury**
- **Brill**
- **Business Expert Press**
- **deGruyter**
- **Edgar Elgar**
- **Elsevier**
- **IGI Global**
- **McFarland**
- **Wiley**

# Commercial Publishers- Not Yet

- **ABC Clio**
- **Berghahn Books**
- **Emerald Group**
- **Morgan & Claypool**
- **Peter Lang\***
- **Sage**
- **Springer/Palgrave**
- **Taylor and Francis/CRC**
- **Transaction Publishers**
- **Wolters Kluwer**

# Publisher Surveys: Preliminary Results

## Generally Support

- No DRM
- Unlimited Simultaneous Use
- Perpetual Access

## Challenge or question

- ILL
- Course Use



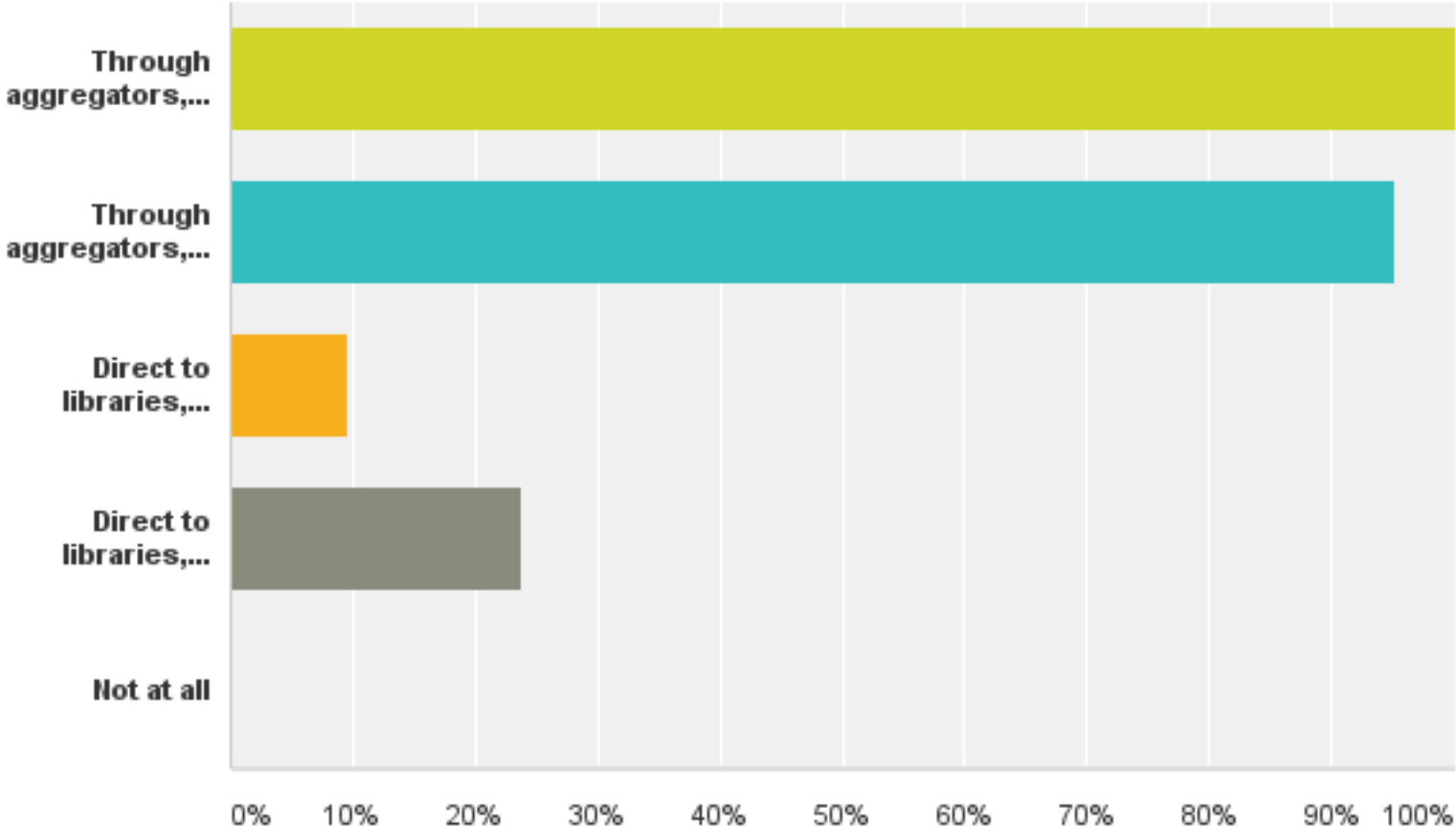
# View of Preliminary Survey Results

## Two sets of slides

- AAUP, 30 total but 6 incomplete and one test, so 23 usable
- All types, 23 but two incomplete so 21 usable

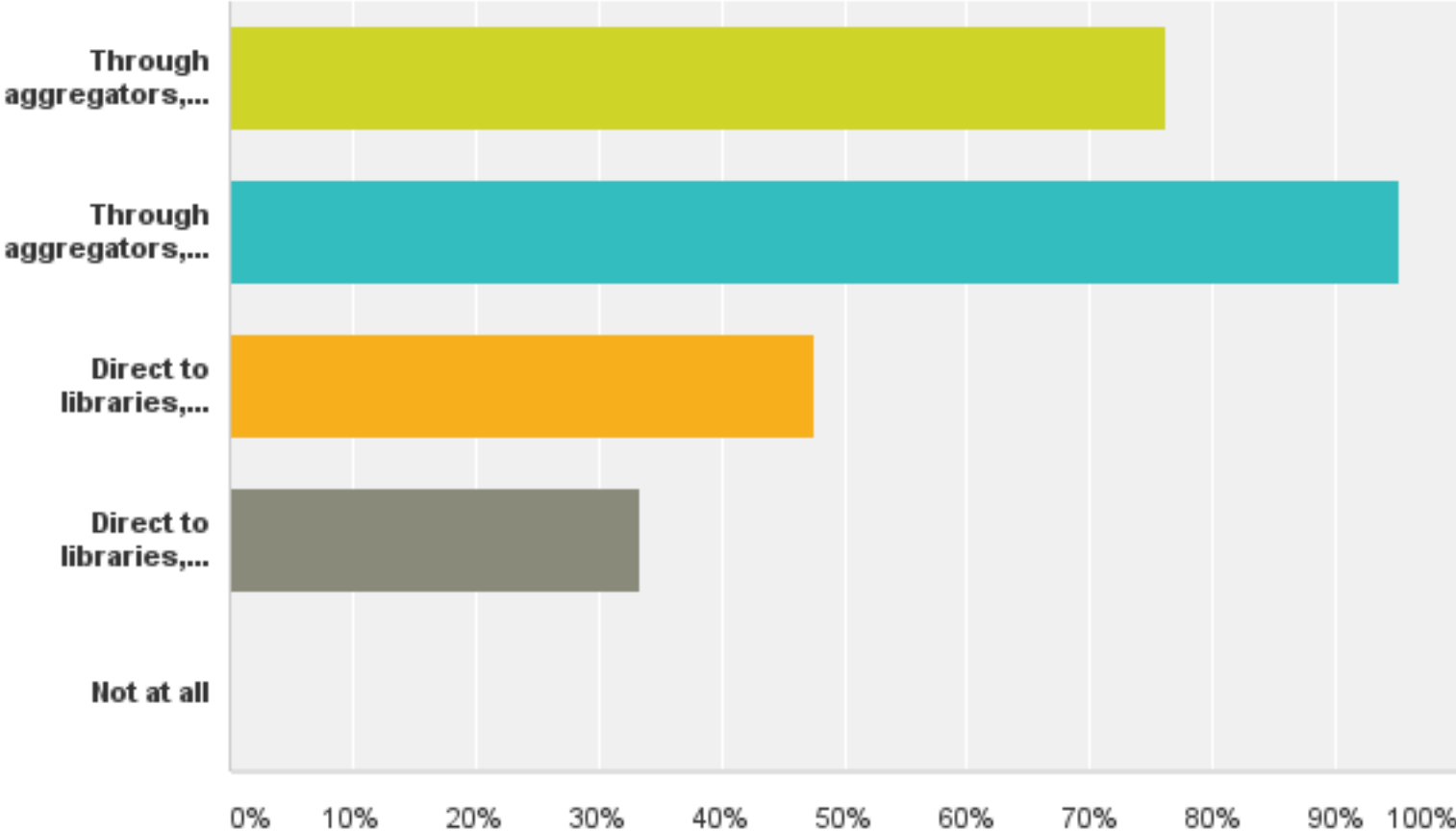
# Q8 In which of the following ways do you sell eBooks to academic libraries? Please select all that apply.

Answered: 21 Skipped: 9



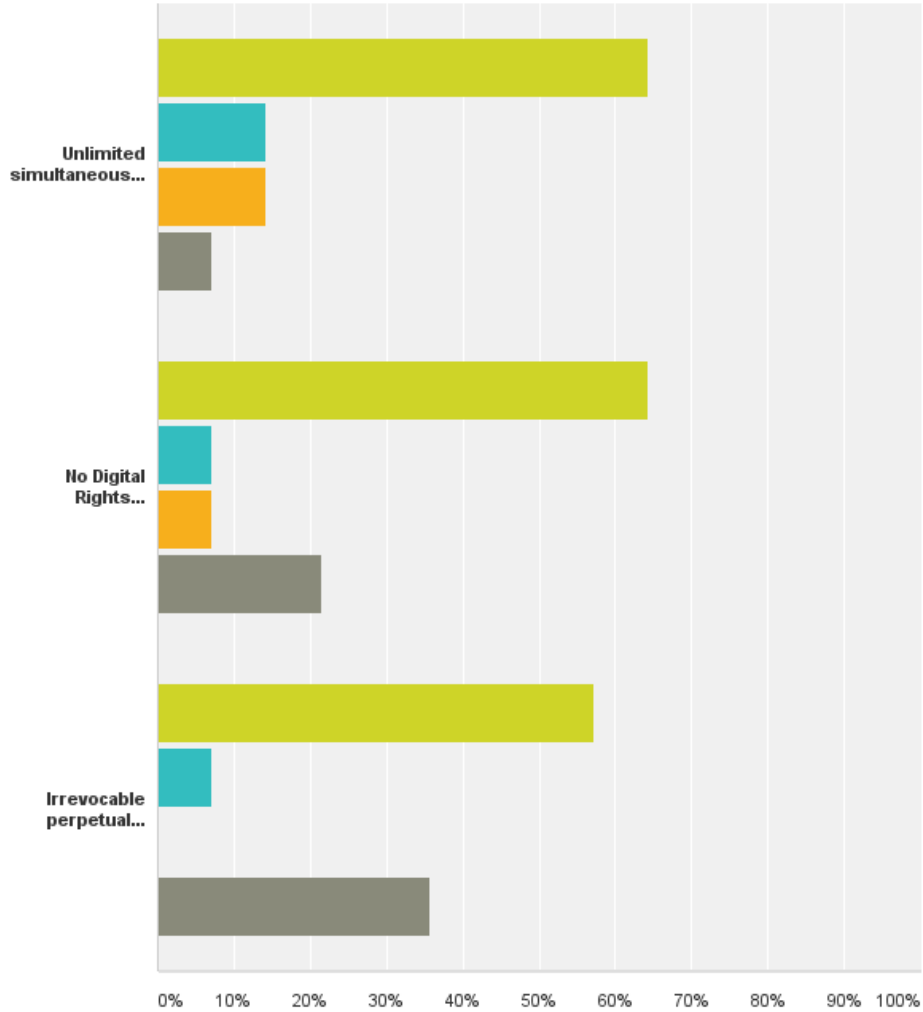
# Q8 In which of the following ways do you sell eBooks to academic libraries? Please select all that apply.

Answered: 21 Skipped: 2



**Q9 Direct Sale: Which of these principles is your organization or firm willing to allow? That is, will you or have you already granted these terms under existing licenses?**

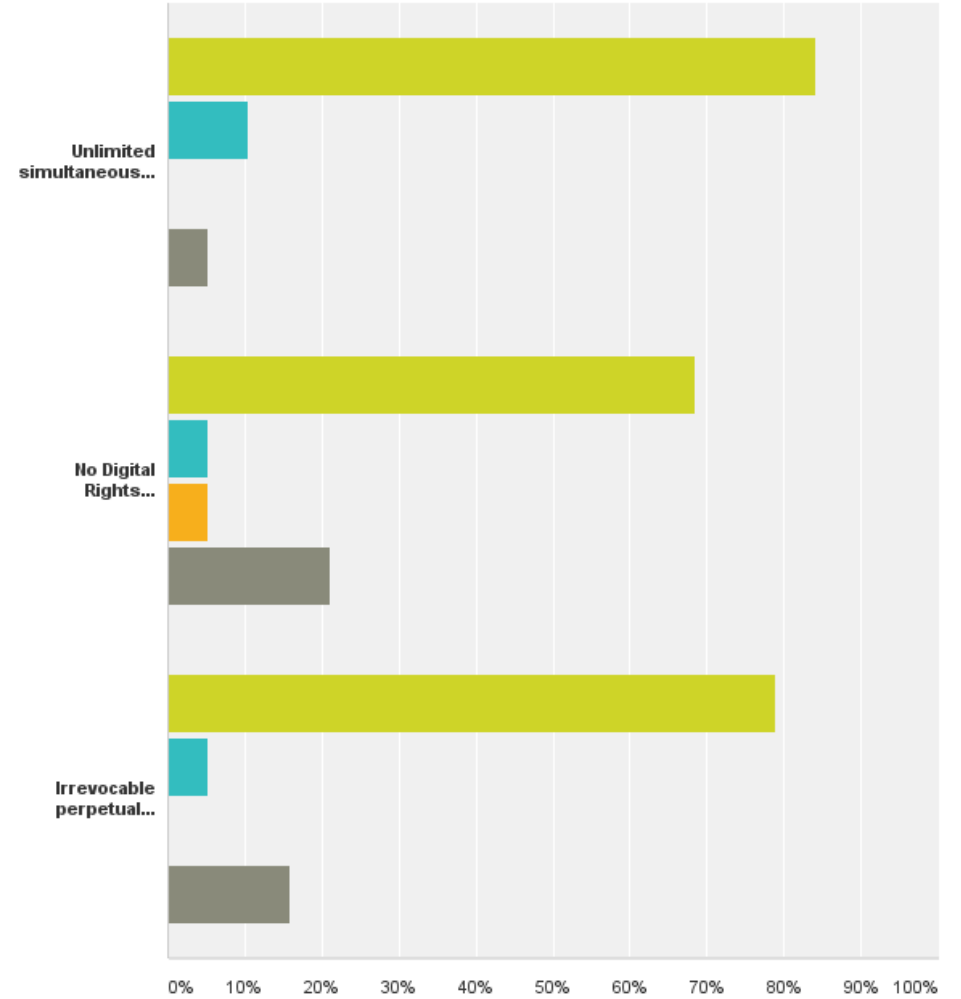
Answered: 14 Skipped: 16



■ Yes 
 ■ Under consideration 
 ■ No, but have received requests 
 ■ No, but have not received requests

**Q9 Direct Sale: Which of these principles is your organization or firm willing to allow? That is, will you or have you already granted these terms under existing licenses?**

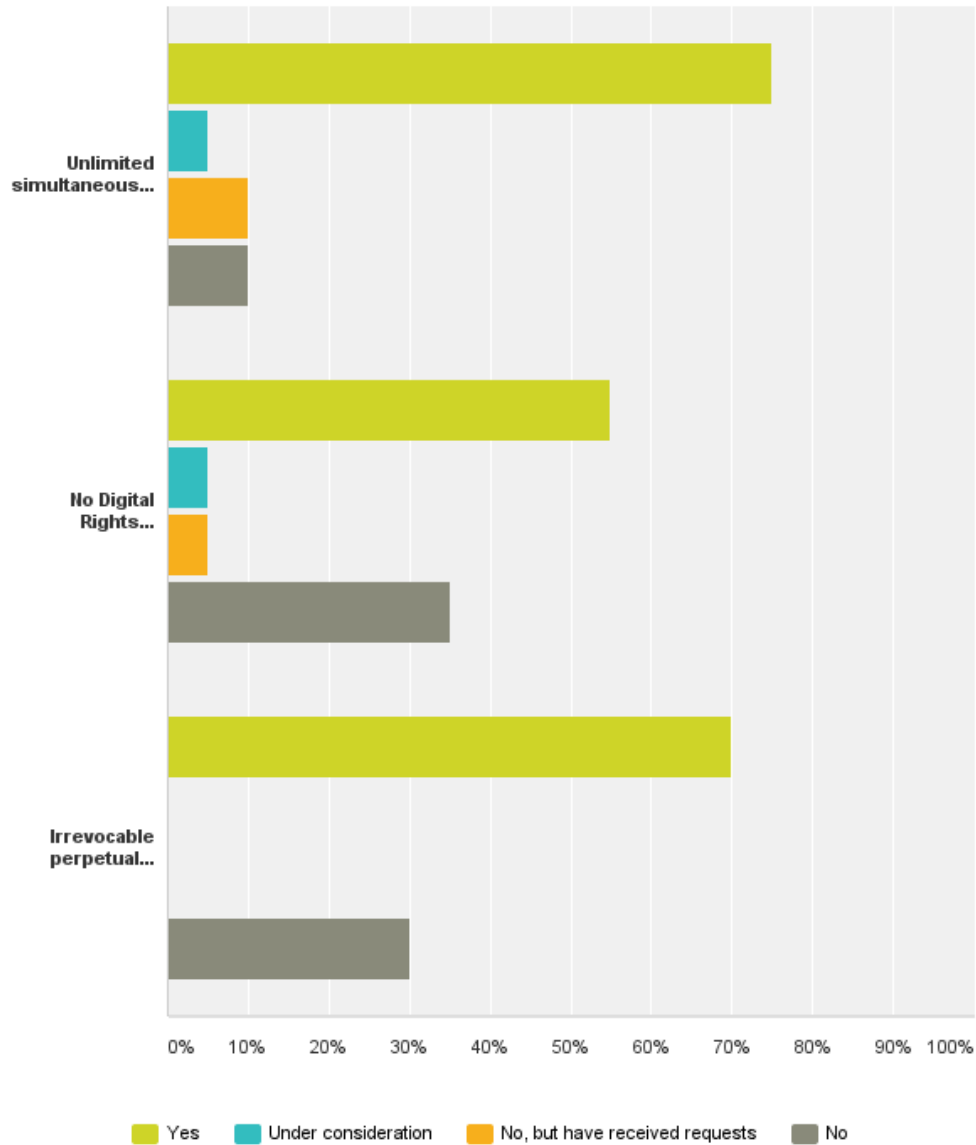
Answered: 19 Skipped: 4



■ Yes 
 ■ Under consideration 
 ■ No, but have received requests 
 ■ No, but have not received requests

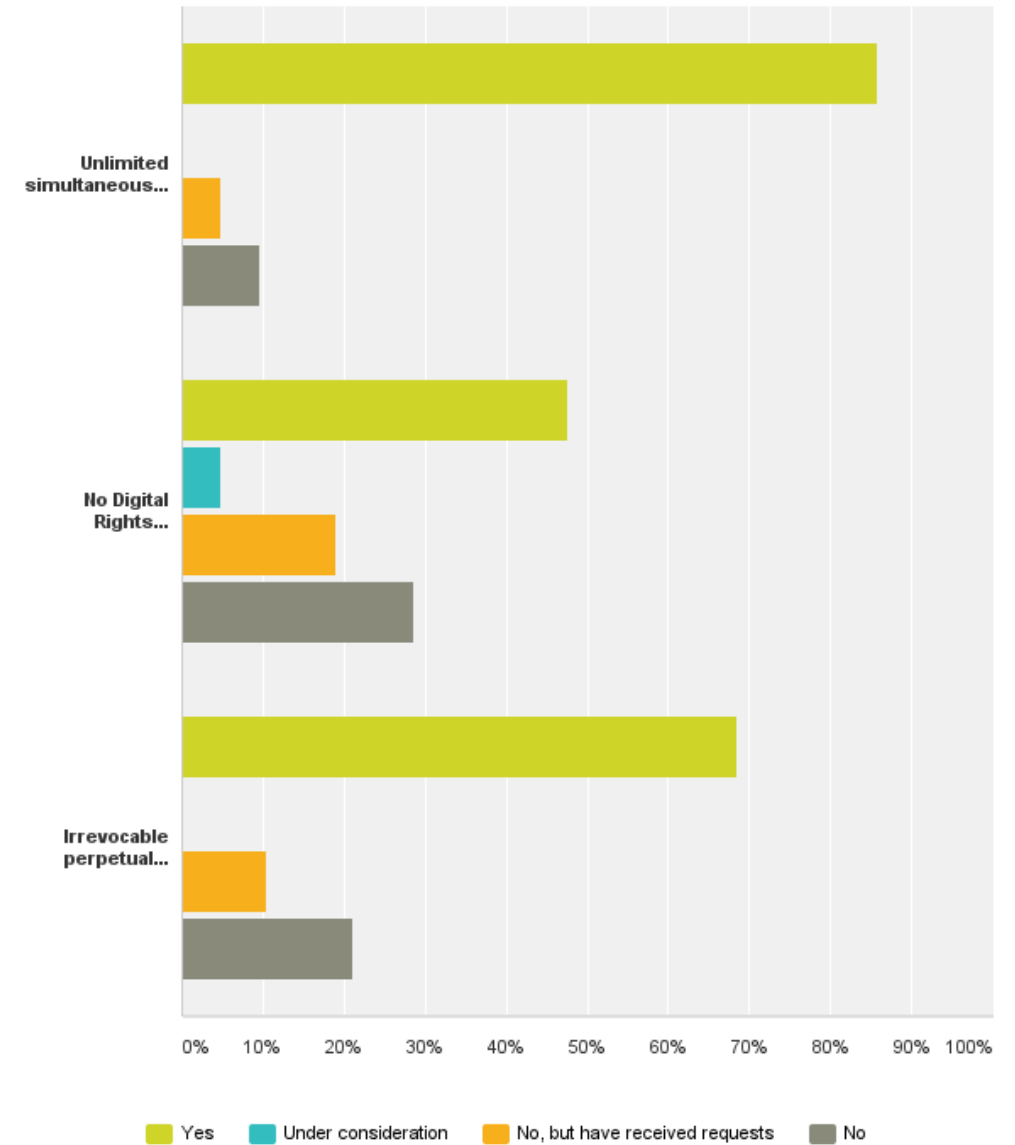
### Q11 Vendor Sales: If you sell to libraries through vendors and aggregators, which terms do your vendors support?

Answered: 20 Skipped: 10



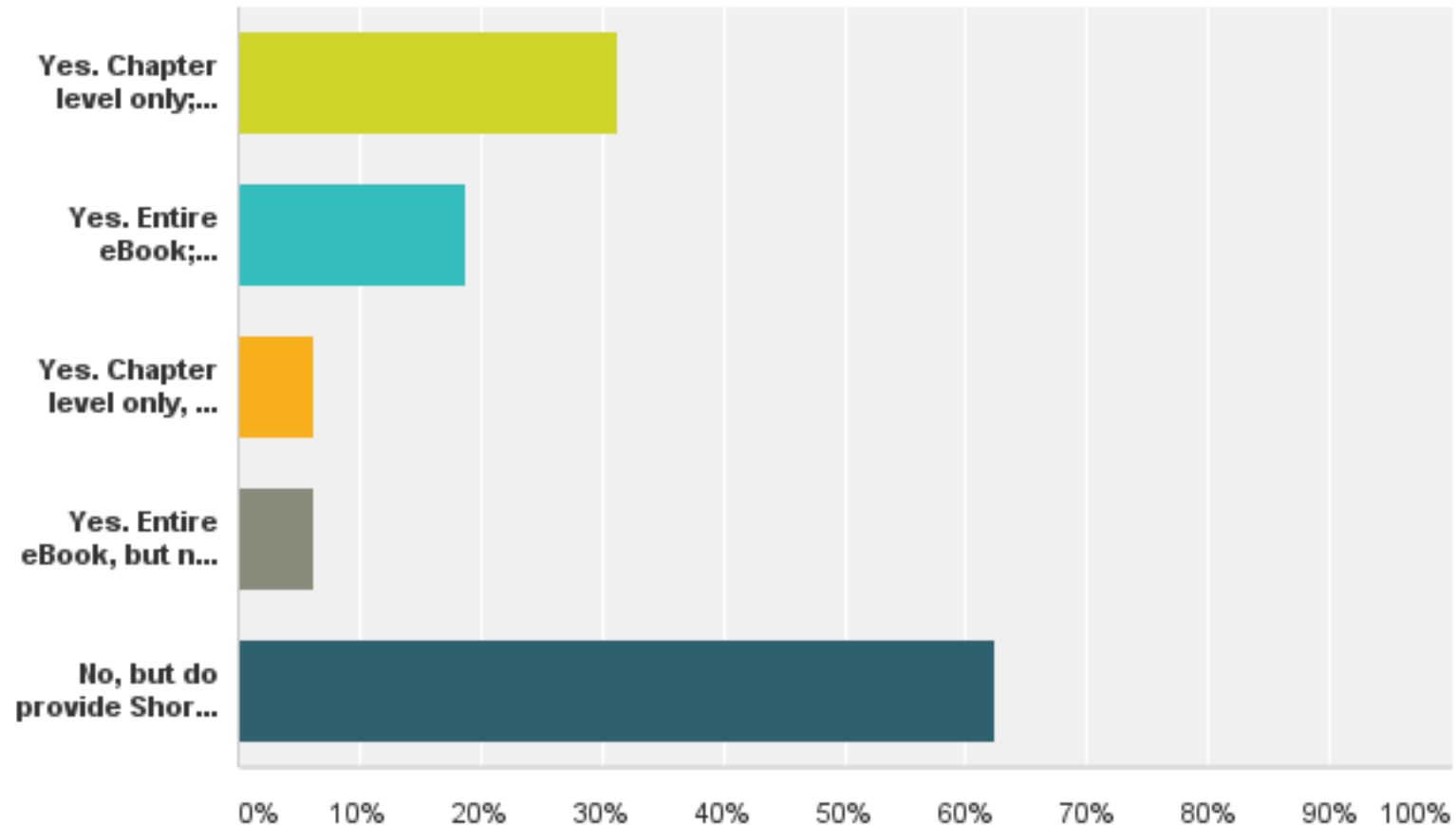
### Q11 Vendor Sales: If you sell to libraries through vendors and aggregators, which terms do your vendors support?

Answered: 21 Skipped: 2



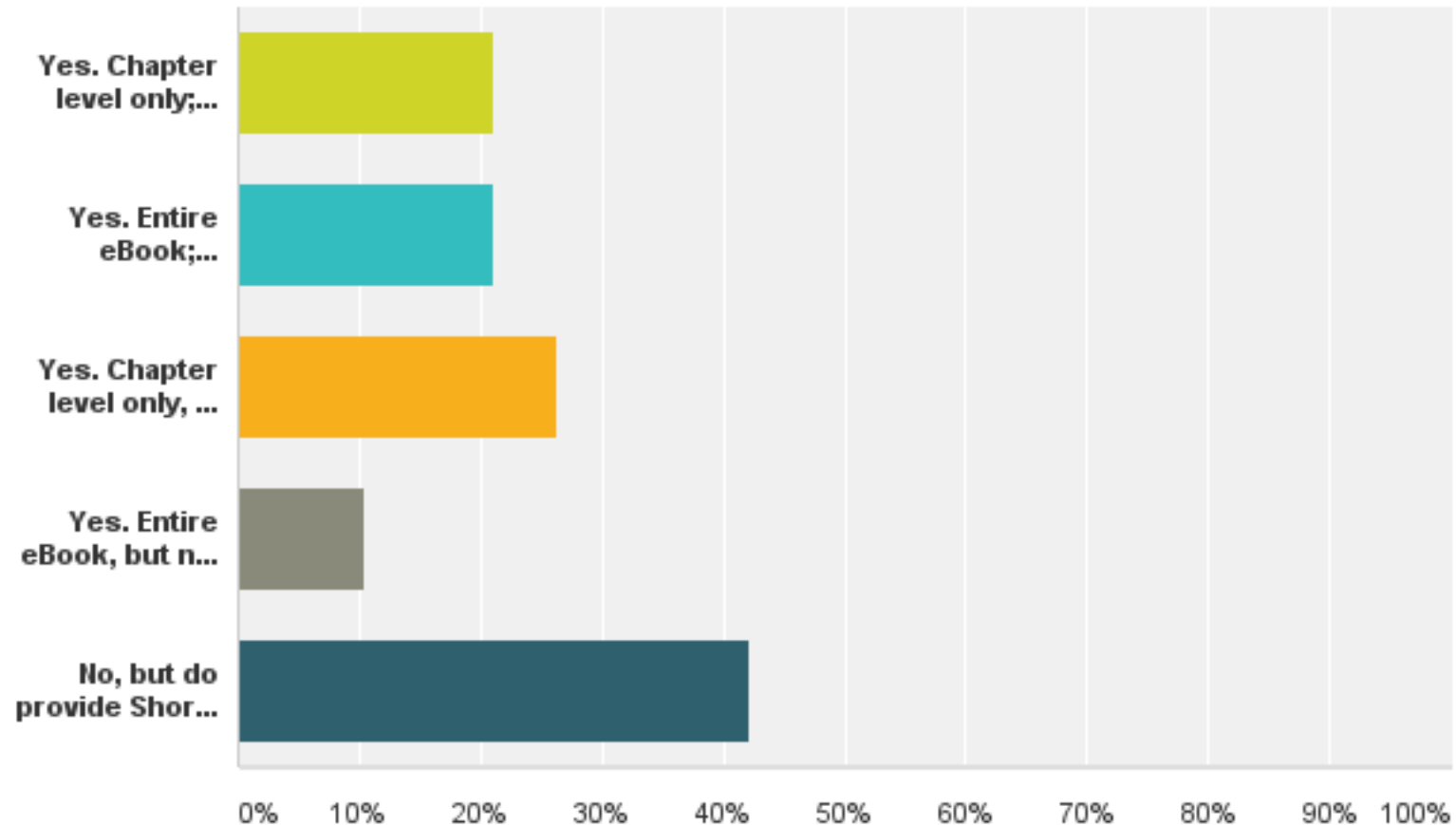
### Q13 Do you allow Interlibrary Loan for eBooks? If you have different terms for different eBooks or types of eBooks, please select all that apply.

Answered: 16 Skipped: 14



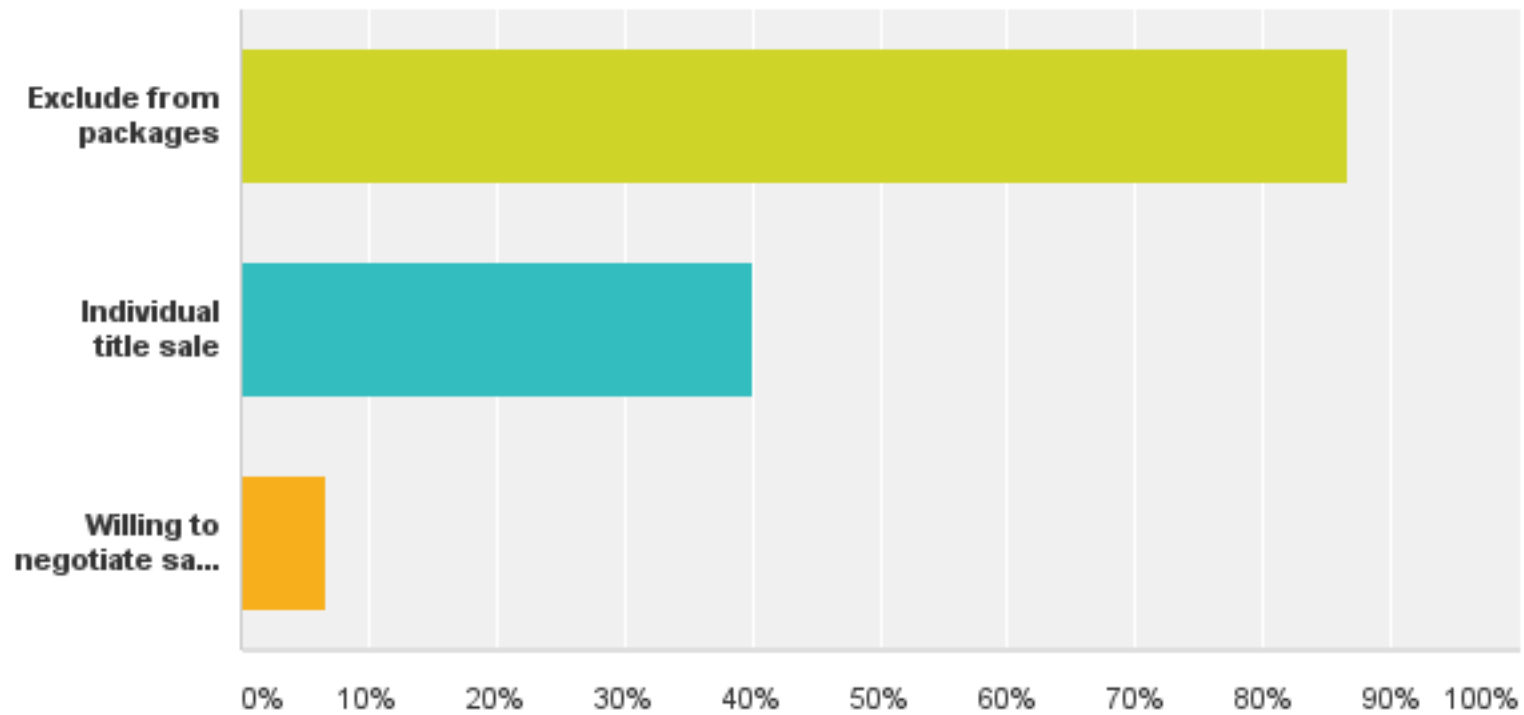
### Q13 Do you allow Interlibrary Loan for eBooks? If you have different terms for different eBooks or types of eBooks, please select all that apply.

Answered: 19 Skipped: 4



**Q15 Do you have different policies for eBooks that are potential course adoption or course use titles? Please check all that apply.**

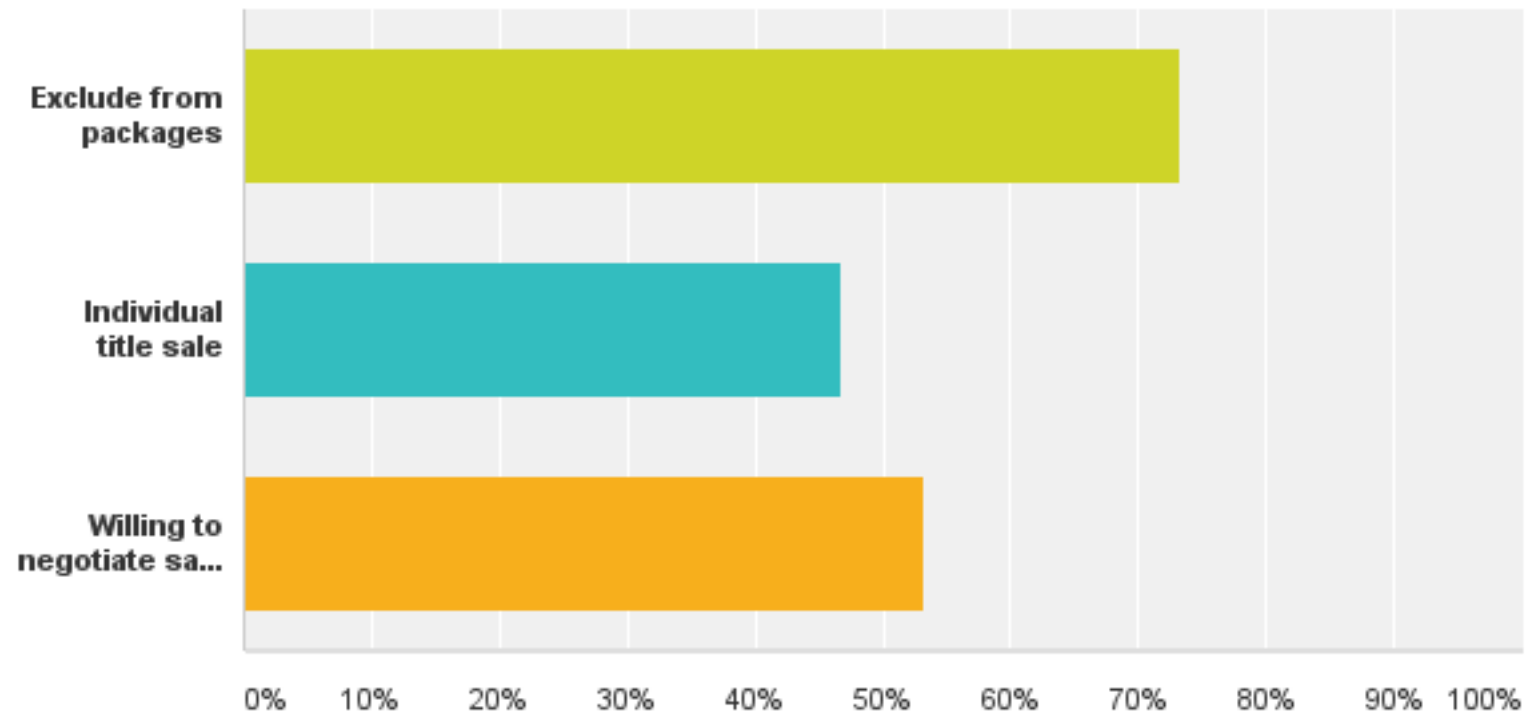
Answered: 15 Skipped: 15





**Q15 Do you have different policies for eBooks that are potential course adoption or course use titles? Please check all that apply.**

Answered: 15 Skipped: 8



# Publisher Survey: Comments

“For a publisher to stay in business, they must sell books. Making eBooks at libraries available to multiple users simultaneously would mean selling one copy of a book which could be made available through ILL, deeply diminishing sales and a publisher's ability to recoup their investment.” AAUP

“While most publishers already support the Principles when ebooks are distributed via our own platforms, we also balance concerns with financial sustainability and copyright protection with the access we allow on third parties, where we have no visibility of the control and management of use of the content.” Commercial

# Aggregator, Vendor Interviews

- ACLS Humanities Ebook\*
- EBSCO
- Gale/Cengage
- JSTOR
- Overdrive (?)
- ProQuest
- Project MUSE\*
- Rittenhouse\*
- University Press Scholarship Online (OUP)
- YPB GOBI
- Coutts\*

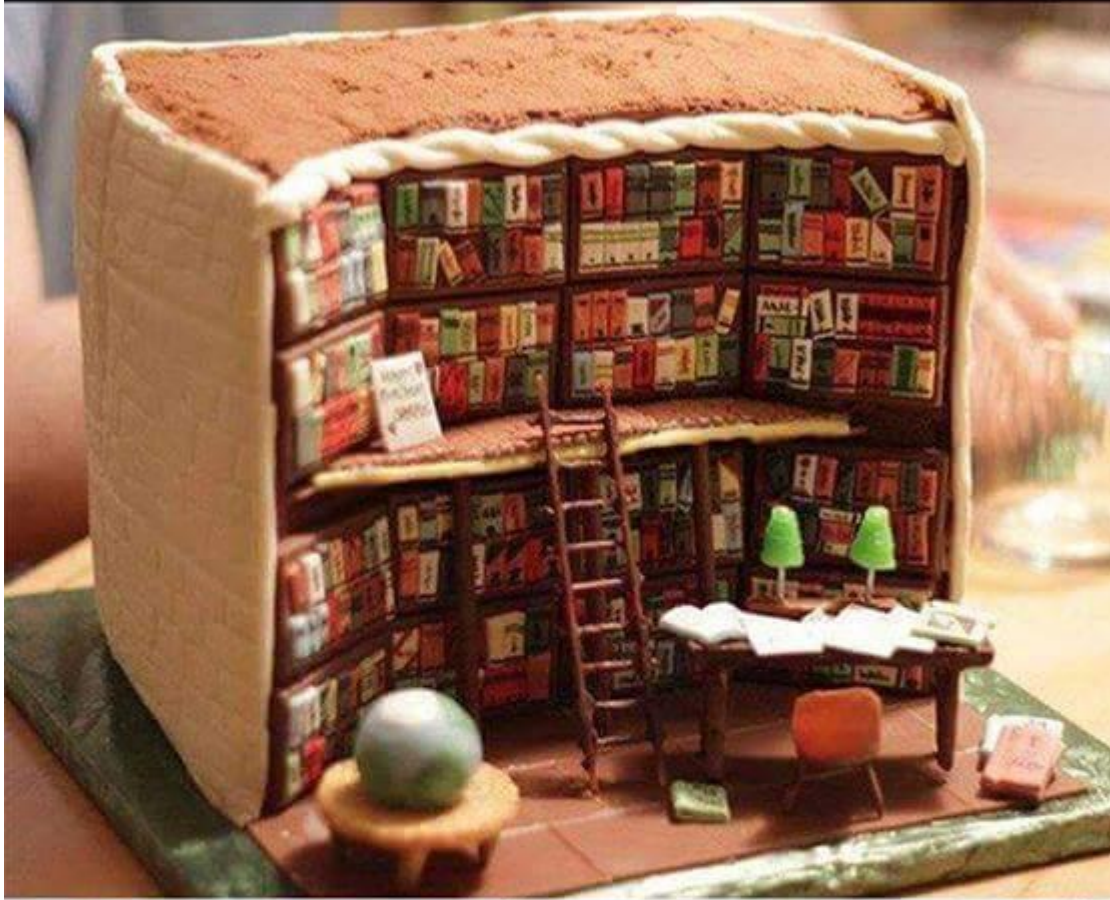
# Other Business Model Interviews

- BiblioLabs
- DPLA
- Knowledge Unlatched
- Lever Press
- Luminos
- Unglue.it
- Who else?

# ILL Statistics Analysis

- Data from OCLC
- 5 years of data, all ILL transactions
- 13 libraries in Working Group
- Identify and extract data for 6 UPs in project
- Let each press compare to their sales numbers
- What correlations occur?
- Any insights?
- Next steps?

OMG, it's a library cake!



# Thank you

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