

eBOUND
C A N A D A

EBOOK COLLECTION PRACTICES

A Report to the Canadian Publishing Community
on Trends, and Issues in Canada's Public,
University, and College Libraries

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EXECUTIVE SUMMARY

eBOUND Canada, a not-for-profit agency that assists independent Canadian publishers in developing and supporting digital publishing programs, commissioned the following paper in an effort to outline the challenges and opportunities faced by both publishers and libraries in the digital marketplace. One of the goals of this paper is to gain a mutual understanding of the various acquisition and lending models that are available today, and the key players influencing these models. This paper also intends to encourage collaboration in ways that support and build the publishing and library communities in Canada.

This report focuses on issues related to digital books and opportunities in the three major Canadian library book markets—public libraries, university libraries, and college libraries. School libraries are not included here as spending by Canadian school libraries (K–12) on new book material has almost vanished as a potential marketplace for Canadian publishers. While some information is included about the Québec market and many issues are undoubtedly similar, the focus is on English Canada.

There are consistent key findings in all three sections of the report. There are also major differences between trends affecting public libraries and those affecting post-secondary institutions.

Public Libraries

Canada's public libraries are amongst the strongest in the world. Like publishers, however, public libraries are both providing traditional book services to loyal and dedicated print users while, at the same time, observing and operating in a period of rapid change. Continued talks between library administrators, publishers, and vendors are critical to the future success of each of these important components, and to a healthy book industry.

Here are some key areas where the experiences of public libraries differ from those of Canada's post-secondary institutions:

- Materials budgets for most public libraries are keeping pace with both inflation and population growth. This is not the case for university and college libraries.
- While multiple ebook platforms exist and are used by Canadian public libraries, the vast majority of all use comes from one vendor: OverDrive. The marketplace is more crowded in the post-secondary marketplace.
- Canada's post-secondary libraries spend significantly higher percentages of their materials budgets on electronic databases than do Canada's public libraries.
- Digital preservation is a concern for all three sectors but the concern is more acutely felt in post-secondary institutions. Public libraries are primarily concerned with preserving regional material although some public libraries, such as Toronto and Vancouver, assume responsibility for preserving a wider range of Canadian material.

- The Open Access movement is more rapidly affecting Canadian post-secondary library holdings than is the case for public libraries. Open Access provides more assurance that material can be preserved; it also offers more simultaneous use options.
- While many post-secondary institutions may have an e-preference for some material, issues related to preservation, simultaneous use, and higher-than-print pricing mean that, even when a digital format is preferred, print formats may be selected.
- The post-secondary vendor marketplace is currently more volatile than the public library vendor marketplace. Dominant post-secondary database vendors (ProQuest and EBSCO) are acquiring academic book related companies in order to extend market share.

The public library sector also acquires material under different licensing/purchase models than are found in the post-secondary sector.

Public library models almost always focus on one-book, one-reader access to titles with each “copy” limited to a set number of circulations. Several larger publishers provide single-user copies of titles only for a limited period of time (a year or two) and require libraries to renew each copy if they want continued access. Each copy may or may not have also come with a limit on the number of circulations; the license expires whenever one of the two limits—time or circulations—is reached.

While one-book, one-user models exist in college and university libraries, they are less prevalent and are considerably less compatible with university and college needs. Post-secondary institutions exist to support the educational needs of students as well as the research needs of faculty members and other scholars. This changes the marketplace in several ways.

- Fewer authors of material acquired by post-secondary institutions produce their works with the primary intent to earn an income. Much of the material is produced as additions to scholarly research and much of this content is produced as articles in journals rather than as books.
- University presses, recognizing the needs of their funding institutions for material that can be preserved and can be used by many students or scholars at the same time, have a preference for Open Access models (where a university or groups of universities pay for the publication costs of books and, in return, receive open access rights).
- Patron-Driven Acquisition and Soft-Term Acquisition models exist in the post-secondary marketplace. Few such models exist in the public library world. These two models allow post-secondary institutions to provide catalogues listing enormous quantities of ebook titles that students and faculty can use, but which the library has not purchased. Each use creates a payment that is calculated as a percentage of the sale price of the item, and repeated use triggers a sale, with credit given for what has already been paid.

University Libraries

The university sector is complex, with multiple aggregator and publisher platforms offering many and varied means to purchase, subscribe to, and lease digital materials. Large ebook collections from major aggregators offer comprehensive and predictable access, but few libraries have the budget flexibility to enter into wide-scale deals and still rely on title-by-title selection to mirror their print book selection.

Patron-driven acquisitions are a new model viewed by libraries as a way to blend the big deal access with the title-by-title selection of only books users are reading.

Open Access experiments are developing with funding by publishers, foundations, and universities. At this point, there is no dominant model emerging.

Small scale experimentation with library partners to test new business and access models should be attempted by Canadian publishers, as well as comprehensive title profiling into book approval systems and expanded partnerships with Scholars Portal for long-term preservation of all Canadian ebook content.

College Libraries

Canadian colleges are experiencing an era of unprecedented growth. Together with a rise in online learning, this growth makes college libraries very attractive for the development of ebook collections. However, budgets allocated to the acquisition of print and electronic materials have not kept pace with the recent large increase in number of students and not all institutions have the required staff availability and expertise to efficiently select and manage ebook collections, although this last issue is addressed to some degree by group licensing services offered through library consortia.

College library collections span a broad spectrum, with many including K–12 and local interest titles. Few vendors recognize the particular needs of colleges. Titles from Canadian vocational trades, technical and association publishers are often unavailable on library ebook platforms, despite a perceived demand from college students. French content, especially from Canadian publishers, is still hard to come by.

College libraries surveyed for this study widely encourage Canadian publishers to distribute their titles in as many platforms and repositories as possible, using multiple access models, to better respond to the varied needs of this sector.

Major similarities among Public, University and College Libraries:

- Acquiring and budgeting for ebooks for all three sectors create complexities and confusion for librarians and for library users.
- Trying to find and use ebooks can be confusing for library users.
- The money spent on ebooks is increasing but is mostly funded through decreases in spending on print books.
- Print circulation is declining, even when print budgets are not reduced.
- A small number of print and ebook titles are extremely popular; most print and ebook titles do not circulate as much as either librarians or publishers hope or expect.
- The use of collection analysis statistics increasingly determines what materials libraries acquire.
- Library users do not understand one-book, one-use models as they relate to a digital world. Their perception is that when material is electronic it should be perpetually available.
- The use of Machine Readable Cataloguing Records (MARC records), in the ebook world is at best inconsistent. MARC records form the backbone of all library catalogues today.

Little seems clear except that new models are being tried and sometimes discarded, users are experiencing frustrations, and there can be a lack of understanding of the needs of publishers by selection librarians or—sometimes—by publishers and vendors for the needs of libraries.

It also seems clear that, from either the publisher or library perspective, the role of vendors in the ebook marketplace is far more powerful than was the role of vendor in a print-based publishing world.

INTRODUCTION & PROJECT BACKGROUND

In recent years eBOUND Canada, representative of independent Canadian publishers, and the Canadian Urban Libraries Council (CULC), which represents public libraries with populations of over 100,000 patrons served, have been working together to understand and jointly address the needs of their constituent organizations. Specifically, eBOUND and CULC have identified shared frustrations about the shortcomings of content distribution models, in which ebook vendors primarily set terms and control assets. It is important for libraries to understand the extent of vendors' influence over the distribution of content to public libraries.

It may come as a surprise to librarians, and to collection development staff in particular, to learn that Canadian independent publishers interact with ebook vendors very differently than do their larger, multinational counterparts. That is to say, digital book vendors generally offer better margins to larger publishers and allow large firms to set circulation limits for titles while independent publishers do not have the same latitude.

In contrast to the terms set by larger publishing firms, independent publishers are primarily subject to circulation terms set by the vendor. The terms of sale for trade ebooks offered by independent Canadian publishers through dominant ebook vendors mirror the general trade terms for print books, where typically 40 of the retail price is retained by the retailer. Large vendors—whether print or digital, retail or library, command even greater margins.

The portion of a sale retained by publishers is further reduced by royalty payments to authors and creators, as well as by payments to distributors and wholesalers. In most cases, there are no circulation limits on titles offered by independent publishers. Ebooks are usually offered at 1 copy, 1 user, with perpetual circulation (meaning no limit on the number of times an ebook can circulate), as dictated by ebook vendors in the library marketplace.

Large multinational publishers can set limits on circulation at their own discretion. Some multinationals set circulation limits (for example, HarperCollins currently allows 26 circs) and accordingly offer prices in line with print editions. Others provide unlimited circulation but set high prices for their ebooks (for example, Random House lists ebooks for \$95 with unlimited circulation). Many independent Canadian publishers feel that setting higher prices for titles to accommodate unlimited circulation would be detrimental to sales as it would not encourage libraries to experiment with their content.

Ongoing conversations between eBOUND and CULC recognize a need for publishers to work more directly with libraries to promote and identify content and materials that are relevant to Canadian libraries and patrons; to facilitate collection building; to examine existing channels; to understand limitations on both sides, and to potentially experiment with new pricing and lending models for ebooks. To achieve this, the role of ebook vendors in content distribution may need to be diminished or disrupted. Publishers must also gain a better understanding of the decisions libraries make in acquiring content, as well as what kinds of content are desired, and where libraries go to find it.

Presented in three parts, this paper explores the landscape in public, college and university libraries and explains the decisions that exist around budgets and resources for both print and electronic materials. The first section, written by consultant Ken Roberts, focuses on public libraries in Canada and discusses changes in recent years that affect collections, resources and purchasing. It presents an overview of the wholesalers and vendors that are active in the marketplace.

University libraries are addressed in section two, written by consultant Carol Stephenson. This section presents the complexity of content repositories, discusses the changing use of monograph titles and details Open Access as a movement that is being used to achieve goals such as preservation and simultaneous access. It also explains the essential nature of wholesaler partnerships.

The final section of the paper focuses on college libraries, and was written by consultant Thomas Guignard. This section discusses the limitations faced by college libraries in terms of access to available content, and identifies potential opportunities for publishers wishing to sell in the college space. This section outlines the unique ways college libraries buy content and how that content is circulated.

Methodology

A survey was designed for this study and administered to both university and college sector librarians. Much of the basis of the writing in the university and college sections of this paper draws on the results of that survey. The same survey was not applicable to public library sector outreach conducted for this project. The primary reasons for this are that all Canadian colleges and universities are fairly large institutions. There are few of them—less than a hundred universities and several hundred colleges—in comparison to several thousand public library systems in Canada with the vast majority serving small populations. Forty public library systems serve more than 70% of the Canadian public. Politically, it is not possible to survey only the large systems. Realistically, it is not possible to survey the smaller systems electronically. As well, the university/college survey instrument treats all responses as equally valid since all represent budgets that are significant. This is not the case with public libraries.

At the same time, there is far more consistent statistical data already available for public libraries. The largest systems have collected common data from across the country for several decades. We were able to use this data, which was not available for small libraries. We also specifically asked questions that the data does not include (Trends in ebook purchasing versus circulation) and were able to conduct talks with the selection staff of the most significant markets for publishers.

The Appendices include:

- 2014 preliminary full-time and part-time enrolment at Canadian University member institutions;
- A list of all publicly funded colleges in Canada along with consortia and network memberships and estimated student full-time equivalent or full-load equivalent; and
- Key Library Priorities for E-Content from the CLA Task Force.

We have also provided a glossary and list of abbreviations to accompany this paper.

About eBOUND Canada

eBOUND Canada is a not-for-profit organization born out of the digital efforts and aspirations of the Association of Canadian Publishers. eBOUND's purpose is to strengthen the digital engagement of independent Canadian publishers through digital asset management, distribution, retail agreements, professional development, research and related services and activities.

Our Consultants

Ken Roberts, Lead Project Consultant and Public Library Sector

Ken was Chief Librarian of the Hamilton Public Library from 1994 until his retirement in 2012. He has received both the Canadian Library Association's Outstanding Service to Librarianship Award (2012) and the Ontario Public Library Association's Lifetime Achievement Award (also 2012) as well as the Ontario Library Association's Larry Moore Award for Distinguished Service (2015). He is a former President of both the Canadian Library Association and the Ontario Library Association and is a popular speaker on the topics of positive organizational culture, leadership, technology and trends affecting the future of libraries. Ken has been a member of the Royal Society of Canada's Expert Panel on the Future of Libraries and Archives in Canada, and is also a former Governor General's Award nominee for Children's Literature.

Carol Stephenson, University Library Sector

Over the past 27 years as an academic librarian, Carol Stephenson has been engaged in issues affecting scholarly communication from roles at the university, provincial, and national level and from participation on publisher advisory boards. Carol is currently on study leave from Wilfrid Laurier University, investigating Open Access from the perspective of the researcher and funding models. From 2011 to 2014, Carol was seconded to the Ontario Council of University Libraries (OCUL) where she led negotiations and consortia licensing for electronic resources on behalf of the 21 Ontario universities, including working with eBOUND and the Association of Canadian University Presses (ACUP) on the original ACUP ebook deal.

Thomas Guignard, College Library Sector

Thomas Guignard is an engineer turned librarian, now ebook Project Manager at the Ontario Colleges Library Service (OCLS) in Toronto. Prior to that, he was Head of Collection Development at the École Polytechnique Fédérale de Lausanne (EPFL) in Switzerland. He also provides services as a library technology consultant, and is a volunteer instructor for Software Carpentry, a non-profit that organizes short computer programming workshops for academics and librarians. Thomas holds an MSc in Electrical Engineering from ETH Zurich, a PhD in Acoustics from EPFL and is finishing a distance-learning Master of Library Science from the University of Wales in Aberystwyth (UK).

PUBLIC LIBRARIES

Background

New technological capabilities, combined with broad access to the internet, have had a profound impact on the ways that people use public libraries in Canada.

The effect of new technology has:

- Reduced spending on printed reference material. Statistics published by the Canadian Urban Libraries Council between 1999 and 2013 tell us that reference material once constituted almost a third of all collection spending by large public libraries. Today, libraries spend almost nothing on printed reference material.
- Virtually eliminated spending on print material for school projects such as science fairs or projects that focused on animals, countries or civilizations. Parents and students now use internet resources including library databases.
- Reduced the size and use of adult nonfiction collections, particularly in areas where internet sources are easy to find and can be more frequently updated. Medical information, consumer reviews, and travel guides are examples of the types of material where internet resources now dominate.

Most large Canadian public libraries have moved from a purchasing model in which individual librarians or branch managers were responsible for buying “their” collections to models that stress centralized purchasing. There are a number of reasons and many impacts:

- Libraries have access to better statistics than ever before, allowing specialized staff to focus their spending. Instead of several branch librarians purchasing the same, rarely-used title, a single copy might be purchased and shared across the library system through “floating” or “shared” collections. An item requested by a customer moves to the branch the customer uses, and stays there instead of being shipped back to its original location. In the past, far too many books were purchased that simply did not circulate—at all. Now, additional copies are purchased if and when a book finds a readership.
- Some popular books tend to go “out of print” quickly. Centralized purchasing allows for faster decision-making, ensuring that material is acquired at the appropriate time.
- Demographics play a role in where books are physically kept. As an example, books written in specific languages tend to follow where those who speak these languages reside. Books on child-rearing tend to migrate to areas where young families live. This form of collection sharing only occurs within branches of a single library system.

Adult print fiction is the most popular print collection in Canadian public libraries. Adult print fiction use has, however, been declining over the last few years. While there have been increases in public library ebook fiction use, these increases do not offset the declines in print use. Many ebook users are using both the public library ebook resources and are also buying print and ebook material through vendors, such as Amazon or iBooks and are using subscription services as well.

Print material for children and young adults remains popular. Much of this use focuses on picture books and a small number of highly popular young adult novels. Studies indicate that young adult readers retain a high level of preference for printed books.¹ While a majority of young adult readers may state a preference for print, studies do not measure the intensity of this preference. In other words, if print versions are more difficult to find or are higher in price than ebook versions, this preference may not translate into consumer behavior.

Large Quebec public libraries buy Quebec-published material at a rate of about one book for every 20 people who live within their communities. Large public libraries in the rest of Canada buy English-language Canadian published material at a rate of about one book for every 50 residents. This is a huge difference. The reasons for such a difference are speculative but are likely to include the high cost of importing French-language material, the relatively low cost of many published children's books (which constitute many of the public library purchases), a sense of cultural protectionism, and a society that does not rely as heavily on American-published material.

Public Library Core Information

Each province tracks key library performance indicators differently. Figures from the Canadian Urban Libraries Council (CULC) are the most accurate source for Canada-wide statistics. To be a CULC library, a library system must have an urban population of at least 100,000 people. Regional library systems may also become CULC members if they have an overall population of at least 100,000 and an urban core with a population of at least 75,000. Most library systems that meet the qualifications choose to become members of CULC. Accordingly, CULC libraries serve over half of Canada's population. It can be assumed that Canada's urban libraries have more spending power per capita than do Canada's rural library systems and have more collection breadth.

CULC statistical information is self-reported and, while definitions exist, they are not always followed consistently. When figures appear that are considerably different from other library systems they are, however, questioned and occasionally corrected. Following are statistics collected by CULC in a 2013 survey.

¹ <http://www.theguardian.com/books/2013/nov/25/young-adult-readers-prefer-printed-ebooks>

2013 CULC Statistics

Information presented in this portion of the paper is drawn from Key Performance Indicators gathered and published by the Canadian Urban Libraries Council (CULC). The data that follows is from *CULC Statistics 2013*.

Table 1. Aggregate Core Information

Number of Library Systems	Population Served	Number of Borrowers	Number of Locations
32	16,187,018	6,485,159*	495**

Source: *CULC Statistics 2013*

* In some jurisdictions, multiple people use family cards while others encourage individual library card use. In general, an active library card is defined as one that has been used within the previous two years. Analyzing use statistics shows that approximately a quarter of all library card holders visit and use the library at least once a week.

** Includes all branches and central library buildings but excludes administrative offices. The average is one location for every 32,700 people served.

If we assume that the number of library card holders will stay consistent for all municipalities that did not respond to the CULC survey in 2013, we have about 15 million active public library card holders in Canada.

Table 2. Collection Information for All Types of Material (Non-Financial)

Total Circulation	Items Owned	Titles Owned	Items Added in 2013
176,705,853	38,854,075	14,354,575	4,316,181

Source: *CULC Statistics 2013*

Table 3. Total Expenditure on Books and Ebooks

Total Materials	Total Books	Total Fiction Books	Total Children's Books	Total Ebooks
\$83,292,326	\$49,693,534 (60% Of Total)	\$16,178,132 (19% of Total)	\$14,478,871 (17% of Total)	\$5,702,193 (7% of Total)

Source: *CULC Statistics 2013*

The most significant expenditures on material other than books are electronic databases and audio-visual material, at approximately \$15 million each. Periodicals and ebook spending evenly divide approximately \$11,500.

CULC libraries also spend just over \$3 million on mass market paperbacks.

As can be seen, this leaves little room for nonfiction material. This represents a huge shift for public libraries.

Table 4. Where Is the Money Spent? (All Material Types Excluding Databases)

Canadian wholesalers	Canadian Publishers	U.S. Wholesalers	Other Vendors
\$46,009,875	\$2,473,257	\$10,095,069	\$10,095,069

Source: *CULC Statistics 2013*

The most dominant Canadian wholesalers for print materials are Library Services Centre (LSC), Whitehots, and United Library Services (ULS), which operate in Western Canada only. Libraries often use pre-selection and automatic selection tools in order to acquire material quickly. The dominant ebook wholesaler operating in Canada is US-based OverDrive. At least one library system (Edmonton) is acquiring ebook MARC records through LSC, with DeMarque as the provider of these records.

Trends

Table 5. Canadian Public Library Print and Ebook Spending and Use Trends 2011–2014

	2011 Print Book Budget	2011 Print Book Circ	2014 Print Book Budget	2014 Print Book Circ	2011 Ebook Budget	2011 Ebook Circ	2014 Ebook Budget	2014 Ebook Circ
Winnipeg	\$1,625,024	4,032,920	\$1,806,842	3,652,127	\$40,000	116,840	\$278,888	267,762
Cambridge	\$396,278	824,713	\$309,060	695,072	\$17,600	25,835	\$45,000	78,019
Toronto	\$11,296,000	19,361,104	\$10,776,824	16,582,314	\$615,000	523,276	\$2,836,300	3,488,252
Oakville	\$567,400	1,359,311	\$539,500	1,165,566	\$52,995	16,140	\$41,606	80,406
Surrey	\$963,560	3,216,118	\$1,173,000	3,152,780	\$43,688	21,959	\$210,087	171,192
Edmonton	\$2,941,791	6,080,802	\$2,714,395	5,509,234	\$135,990	90,903	\$441,322	328,757
Victoria	\$938,473	3,547,364	\$912,431	3,206,621	\$67,434	40,703	\$180,415	235,977
Vancouver	\$2,912,888	6,552,469	\$2,099,648	5,709,153	\$161,652	46,558	\$194,946	323,347
Oshawa	\$632,025	1,098,593	\$416,726	1,113,634	\$14,678	9,339	\$34,500	82,088
Mississauga	\$1,336,884	4,731,880	\$1,177,255	3,707,994	\$96,792	60,451	\$278,867	284,802
Hamilton	\$1,816,991	3,298,243	\$1,773,640	2,548,112	\$98,800	134,710	\$305,368	417,797
Richmond Hill	\$589,600	1,437,676	\$524,100	1,270,120	\$0	--	\$30,000	64,444
London	\$1,189,500	2,531,779	\$905,000	2,178,611	\$52,000	58,040	\$101,025	170,384
Brampton	\$1,222,289	3,757,130	\$792,729	3,404,395	\$51,000	43,722	\$169,588	121,335
Waterloo	\$658,554	1,119,084	\$437,185	1,327,510	\$51,429	29,730	\$38,249	100,982
Whitby	\$305,684	967,349	\$291,609	839,292	\$61,089	21,232	\$87,431	90,645
New Bruns.	\$1,888,435	2,650,104	\$2,065,816	2,557,926	\$24,264	2,651	\$109,619	119,279
TOTALS	\$28,428,703	61,830,102	\$25,921,150	53,895,733	\$1,447,629	1,188,476	\$5,147,912	6,114,562

Source: CULC Statistics 2013

Overall, spending on print books is down almost 10% between 2011 and 2014 while the circulation of printed books is down over 12%.

In contrast, spending on ebooks has increased significantly and the circulation of ebooks is up over 500%. While 500% sounds like a huge number, public libraries were starting from a very low level of expenditure and use in 2011.

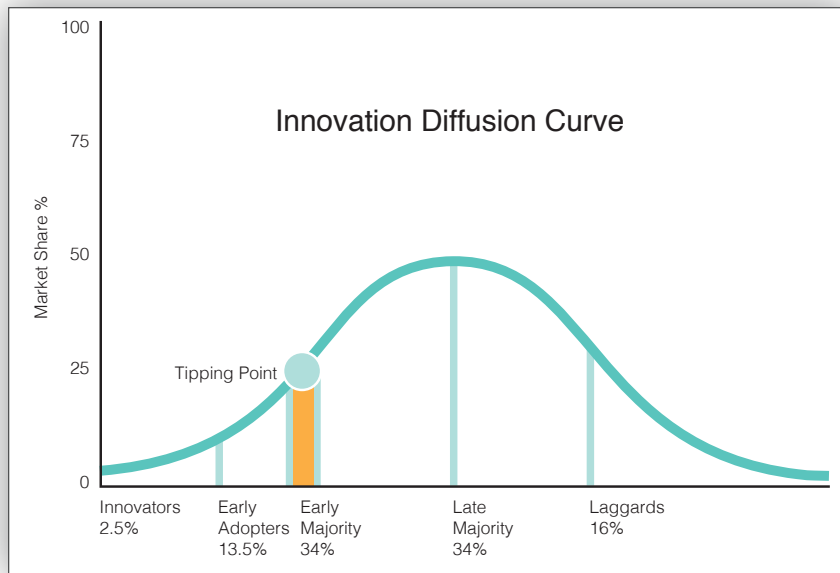
Public Library Ebook Use

Public libraries are finding that they can offset some decline in print circulation by making ebooks available. So far, this strategy has had limited success. The degree of success can be assessed in relation to the law of diffusion of innovation, and takes into account technical issues faced by Canadian libraries including platform, discovery, ebook format, and a library's ability to highlight Canadian content. The structure of purchasing and licensing models also significantly impacts the availability of ebooks in Canadian public libraries.

The Law of Diffusion of Innovation

The Law of Diffusion of Innovation suggests that for each new innovation, whether a product or a radical change in a business model, a bell curve of consumer acceptance exists. There are always a small number of consumer “innovators” who adopt a new product or service change quickly. There are “early adopters” who see the value of the innovation soon after the “innovators” start to use it. There are different types of “majority” adapters who then may begin to use a product or service. Unless a product or service can capture at least some of that majority audience, it will cease to grow and either fail or exist only as a niche product or service. The chart below shows the potential progression for a successful product or service. As can be seen, capturing the majority of users is where exponential growth occurs.²

Figure 1. Innovation Diffusion Curve



Source:Boundless.com³

Public library ebook use has not yet crossed that tipping point, although it is getting close. When it does cross the tipping point, ebook use may increase significantly and print use may also decline quickly. According to recent BookNet Canada figures,⁴ 17% of book sales generated by Canadian publishers are in ebook formats. This means that Canadian publishers are likely to see a faster increase in ebook activity. The rogue element in all predictions is ebook adoption and the unusual ways in which it has taken place. As has been commented upon on multiple occasions, ebook readers are the first significant technological innovation that has been adopted by an older generation first. For ebook use to reach that majority audience, it must receive acceptance by a younger audience.

² *Consumer Behaviour: The Psychology of Marketing* by Lars Perner, PhD. available at <http://www.consumerpsychologist.com/index.html>

³ Innovation Diffusion Curve available at <https://www.boundless.com/marketing/textbooks/boundless-marketing-textbook/products-9/the-spread-of-new-products-73/the-rate-of-adoption-367-10584/>

⁴ <http://www.BookNetcanada.ca/consumer-studies/>

Most library ebook customers are likely to use a variety of sources for their reading needs, whether print or electronic. Several issues drive behaviors, including expectation, ease of use, and cost. Ebook customers no longer accept the fact that some material might be unavailable. As an example, readers of sci-fi series once accepted that books in each series might temporarily be out-of-print. Many sci-fi readers no longer accept this premise. The younger, or 'Netflix' generation has an expectation of cheap availability of creative content.

Libraries are gaining ebook customers but these customers are also consumers in the ebook marketplace if the price is right and material is easy to acquire.

Technical Issues Faced by Canadian Public Libraries

Platform

Less than a year ago, trade ebook aggregators or vendors were highly resistant to the idea of allowing ebooks that libraries had purchased to be accessed and downloaded directly from a library's catalogue, even when the catalogue required a log-on mechanism. Vendors required library patrons to leave the library's catalogue and log in to use their separate, proprietary platforms. An implication for library customers was that library users either had no access to some content from one vendor or had to move back-and-forth between two or more vendor products in order to find content they wanted. Another significant implication was that search terms were those found on the vendor site and tended to be American, with no provision to display Canadian-specific metadata such as Canadian authorship.

Discovery Catalogues

Today, all of the major ebook aggregators provide APIs⁵ to commercial discovery layers that allow content to be viewed and even downloaded directly from a library's catalogue.

Discovery catalogues are designed to unify content and, potentially, to make irrelevant where material is housed. Discovery catalogues also provide a single user sign-on mechanism that provides a user with access to electronic products and services to which they have a right. In theory, because libraries have more control over their discovery catalogues and consequently over the cataloguing of their own holdings than they do over wholesaler or vendor catalogues, material can more easily be searched using Canadian-produced metadata and search terms.

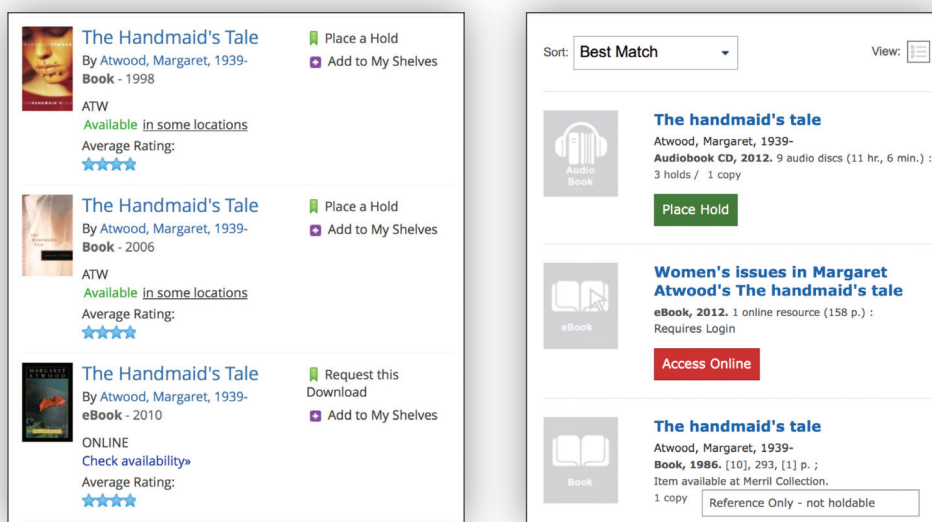
Because of the constant need to connect to back-end databases and systems that provide sign-in mechanisms, discovery catalogues can require significant bandwidth (depending on how they are structured). Public libraries will be cautious as they test the impact of unifying databases within their catalogues.

⁵ An API is an "Application Programming Interface" that supplies protocols and tools to allow different applications to interact with each other.

This functionality is slowly being introduced by Canadian public library systems. The image below (left) shows how ebooks now display in a typical Canadian public library catalogue that uses a discovery catalogue where APIs are being used. Notice that the ebook access is direct, with no additional log-in required.

The catalogue on the right is another example, this time with an added log-in required for ebook access and functionality. It will take a while for ebooks to be fully integrated.

Figure 2. Hamilton Public Library Online Catalogue



Source: Hamilton Public Library Catalogue

In both examples, all editions—print and ebook—display separately and link to whatever metadata and search terms were used in the cataloguing of each edition.

The transition to discovery catalogues means that we can see a medium-term future that is considerably different from today, provided that libraries use their discovery catalogues to unite material, and provided that library customers start to use the catalogue as their primary search tool. These two provisions may take time but most of the technical issues are now resolved.

If and when most Canadian public libraries have fully functional discovery catalogues, it should become easier for Canadian public libraries to use ONIX information and Canadian metadata. ONIX is the book industry standard format used by publishers to circulate title data. It should theoretically become possible for Canadian public libraries to purchase their material directly from Canadian publishers so long as it is stored on a Canadian server that manages the DRM and provides an API to public library catalogues. This possibility could keep a higher portion of the purchase price of each title in Canada.

This scenario cannot happen in the short term since not enough Canadian libraries have their discovery catalogues set up to display and distribute ebooks from multiple sources, and not enough library users have adapted their habits so that they are using the discovery catalogues instead of vendor interfaces. This could be a stumbling block that affects timing.

Kindle vs. Kobo formats

In a 2014 survey conducted by BookNet Canada, 93% of Canadian publisher respondents listed Kobo as a channel for ebook distribution. Only 88% listed Amazon as a channel for ebook distribution. The difference may have to do with the fact that Amazon requires specific and proprietary formatting of ebooks for use on the Kindle device.⁶

Due to the popularity of Amazon's Kindle e-reader in the United States, American public libraries must provide digital materials in Amazon's proprietary format if they hope to attract users. The methodology that Kindle uses to connect with library users allows Amazon to capture personal data about them, establishing direct contact with library customers.

In Canada, public libraries are either prohibited by legislation from providing such data, or are resistant to provide such information. The Canadian Library Association's ebook task force has expressed concerns about data privacy. The proprietary format used by Kindle is not one that Canadian public libraries tend to highlight or support.

The net result is that, for the foreseeable future, Canadian ebook content that is only offered to Kindle users is unlikely to be purchased by most public libraries in Canada.

Highlighting Canadian Material

We know that more than about 15 million Canadian residents use public library websites on a regular basis.⁷ This makes public library websites the most viewed places where Canadian readers can access Canadian content. In a crowded, difficult electronic environment where it is becoming increasingly challenging for Canadian publishers to make the public aware that many of their titles even exist, access to Canadian public library websites could help the Canadian book industry to find needed readers.

While many Canadian public library administrators are sensitive to the need for Canadian publishers to find new markets (as bookstore continue to vanish from the landscape) and are aware of the challenges that Canadian publishers face when trying to highlight their ebook material, they often lack the avenues to do so, or awareness of where new publisher content can be found. Talks between eBOUND and CULC resulted in an attempt to see

⁶ BookNet Canada, *The State of Digital Publishing 2014*. P. 30

⁷ This figure is based on statistics provided by CULC and represents the number of Canadians who use the library catalogues of Canada's urban library systems only.

if we could develop a more Canadian controlled platform and unify it with a Discovery catalogue. Since an attempt to find an appropriate vendor solution failed in 2013, it can be assumed that no solution exists today. Increased functionality in Discovery catalogues may help to improve the situation.

The most likely way to highlight Canadian content, apart from models that encourage the purchase of Canadian ebook material, is for co-operative ventures between eBOUND Canadian Publishers and CULC which highlight Canadian material on library websites. This could be as simple as online book talks or interviews featured on library webpages.

Purchase buttons have now been tried at several Canadian public library systems. The buttons have not, so far, produced many sales. Buy buttons do not, however, occupy prime real estate on library websites, and can be hard to find. It is encouraging to see growing “acceptance” in Europe of the fact that buy buttons may be needed to support a strong national publishing industry. The December 2014 paper, *A Review of Public Library E-Lending Models*, states that almost 50% of libraries surveyed supported the concept of a buy button.⁸ We may soon see more visible, embedded buy buttons in European libraries and their results could help alter the Canadian landscape.

If a buy button could be developed that is highly visible and works within a library's mandate, providing users with the ability to buy ebooks for friends who live elsewhere or to buy other books in series that the library does not own, buy buttons may be considerably more successful.

Understandably, there is concern among library boards about the possibility of buy buttons commercializing public library space, physical or electronic. Public libraries represent one of the few places where virtually no commercial advertising exists. However, corporate presence in public libraries has increased in the past few years with programs such as the TD Summer Reading Program as well as named rooms and spaces becoming more commonplace.

Richard Thaler of the University of Chicago wrote a book called *Nudge* that highlights “Choice Architecture.” Thaler's thesis is that people are highly susceptible to default setting or to the ways options are presented to them. He writes, “When somebody designs a grocery store, they imagine that people will walk through the store in a certain way. Of course, people are free to walk however they want, but the entrance is at one place, cash registers at another, and store designers know that those locations will influence the route that most shoppers take.”⁹

8 <http://www.lmba.lt/sites/default/files/Rapporten-Public-Library-e-Lending-Models.pdf>

9 <http://www.chicagobooth.edu/capideas/may08/5.aspx>

Using Thaler's logic, we do not know if a library buy button will work because the only library buy buttons that have been tried have not been designed to "nudge" users into considering the library as a place where they can make book purchases.

While there have been some limited pilots (e.g., Toronto and Edmonton public library systems), the only way that the potential success of a buy button could be tested would be for a sophisticated, well-designed pilot to be put into place, one designed to make users comfortable with the fact that they are being presented with an option to buy and that the option enhances their library experience while helping their local library.

Purchase/Licensing Models for Public Libraries

The goal, for most public libraries, is to find purchase or licensing models that provide them with a reasonable cost per circulation and a breadth of collection that contains titles that will cause readers to continue using the service. The goal is for users to be successful as often as possible and as simply as possible.

As can be seen from the figures that compare Canadian public library print and ebook spending with circulation, ebook circulations currently cost public libraries almost twice as print circulations. This is an issue since acquisitions budgets are unlikely to increase beyond inflation. As ebooks become an even more important part of public library offerings, public libraries will look for ways that these ratios can align much more closely.

It can be argued that the numbers do not accurately reflect all costs since ebooks neither occupy physical space nor require staff to check them out, re-shelve them, or move them between branches as holds. Like publishers, however, public libraries are operating business models that rely on both print and digital services. Print services have not diminished to the point where savings are available. Libraries are also concerned about the cost of providing the technology that supports digital services.

Current ebook models may provide a reasonable cost per circulation for extremely popular ebook titles but midlist ebook titles are not perceived as providing value. Depending on the models that are used, public libraries may become reluctant about buying mid-list titles when they are new.

Publishers want models that ensure they are maximizing sales and income. For some publishers and some authors, any public library circulation beyond a single use represents a potential lost sale. At the same time, sales cannot be made unless members of the public become aware of an author's existence, and have a desire to read their works combined with a willingness to pay for it. There is not sufficient research to show if libraries create users and demand, as many suspect, or if they eliminate potential sales, as others fear. While we cannot address this issue within this paper or with the information currently available, it does factor into ebook lending models that publishers propose for public libraries.

Here, then, is a brief summary of some of the more common models for public library ebook acquisition.

Unlimited simultaneous use models for public libraries are rare. Given current levels of use for most material and the expected cost to acquire material, such models are unlikely to proliferate. The cost would likely be prohibitively high for small numbers of circulation. The only way it could work would be with no cost for acquisition and only a cost per circulation, creating a much large catalogue of available material. These types of models are more frequently available in post-secondary institutions where many students need the same material on the same topics at the same time and where many titles are written by academics that publish for reasons other than income to be generated by book sales.

Most current unlimited simultaneous use models are based on an annual license fee that needs to be renewed. This is extremely problematic for most public library boards, fearful that future budget cuts could see an immediate loss of collections.

Unlimited simultaneous use models are unlikely to be popular with either publishers or with authors. In a recent paper, a US researcher states that trade authors report a significant loss of income when their material is available for unlimited simultaneous use through private sector platforms such as Kindle Unlimited, Scribd, or Oyster.¹⁰

Single Use/Limited Circulation is a dominant model. It is the model used by HarperCollins and by most Quebec publishers. It is the model that was proposed in the CULC/eBOUND attempt to provide a new ebook lending platform in 2013.

This is the model that most replicates the world of print. While an item is “purchased,” the limit on circulations creates an artificial construct to mirror the fact that printed books “wear out” with use. What the model does not reflect is the fact that public library technology now allows better statistical analysis of print and ebook collections; this analysis shows that many print books receive little use, as do many ebooks. Although HarperCollins places a limit of 26 circulations on each acquired copy of a title, most public libraries—with the possible exception of very large library systems—find that few titles other than bestsellers actually reach this upper limit. This is true even when only one copy of a title is purchased.

There is an advantage to this low-use finding. Material can be kept in the ebook collection and the collection itself will grow in size with each year’s new acquisitions; many of the acquisitions from previous years continue to be available. There is a disadvantage for public libraries. The cost per circulation is high, except for popular material. This may change with time as older titles receive trickle use.

¹⁰ There are numerous articles, blog posts and columns that speak to concerns about Scribd, Oyster, and Kindle Unlimited royalty models. The link to a post about Scribd is typical. While the Scribd model seems to break down if users really do download and read multiple titles, the Kindle Unlimited model places an emphasis on exclusivity, a dependency on self-published titles and a payment fund that is fixed in size, with author payments decreasing as activity increases.

One current disadvantage of the limited-use model is technical. If five copies of a bestselling title are purchased, a library is entitled to 130 total circulations assuming the ebooks are acquired under a 26 uses-per-item model. Each item can still only circulate one at a time so only five simultaneous circulations are allowed.

The model starts to break down when the first 26 circulations are used. Instead of assuming that use is spread over all five copies, the current OverDrive software (and others) deletes one copy, making only four simultaneous copies available. The same deletion takes place each time a new 26-use milestone is reached. The library is not, however, informed that circulations are almost expired until there are only five uses total left. This method of calculating uses constantly restricts the number of copies that are available and makes the 26 uses less than optimally effective.

Single Use/Limited Time (Limited Circulation) is a variation of the limited circulation model. When using this model, the public library system acquires the right to loan one copy at a time for each purchase but the license per copy expires after a year or two and must then be re-purchased, often at a lower cost. Again, the model tries to replicate the world of print and constructs a model where material “wears out.”

There is a hybrid variation that also attaches a limit to the number of circulations and declares each purchase “worn out” when a copy either circulates a number of times or the licensed period of use expires, whichever comes first.

For public libraries, this model is problematic. It works for extremely popular titles, where use is heavy for the months following publication, but it does not work for titles that have a small, changing band of loyal followers who create trickle demand for a title.

Public libraries will buy material using this model but will increasingly limit purchases to popular titles only. Public library materials budgets are unlikely to increase so many expired items will simply vanish. Collections will have little depth and few back copies. This model appears to work for bestselling titles but will prove very problematic for authors who could benefit from exposure of their material. Another problem with this model is that the Public Lending Right Commission is now moving to include ebook copies of books that are also available in print. The commission may also connect payment levels to the number of print/ebook copies of each title that public libraries have in their collections. Authors with ebook titles that disappear from collections after a set period of time, even when they are only lightly used, will find that their PLR payments diminish far more quickly than do payments to authors whose ebooks stay in library collections until all circulations are used—without regard for any time limitation. For many backlist and midlist titles PLR is frequently an author’s largest source of ongoing income.

Many public libraries are just now coming up to the time when they must either renew licenses or lose access to books that they have acquired. Many anecdotally report that they did not get enough uses of many titles during the limited-use period.

Single Use/Unlimited Circulation is a model offered to independent publishers by many of the major ebook vendors, and it closely mimics the circulation of print materials. When using this model, the public library system acquires the right to loan one copy at a time for each copy of a title purchased, and the license per copy never expires. However, it should be recognized that changes in ebook formats would require the material to be re-purchased.

The Need for a Nuanced Approach

If we look back to the purely print world, we see a nuanced approach to book marketing.

Popular books were often released only in hardcover and remained in hardcover until most dedicated readers purchased a copy. While these popular books remained relevant, quality paperback and/or mass market paperback editions were released and sold to a secondary market less prepared to pay for a hardback book. Other titles were produced as quality paperbacks or as mass market paperback originals. It was assumed that people who wanted to keep or share copies purchased hardcover books. It was assumed that many paperback editions were purchased as throw-away reads.

There is no similar, consistent ecosystem in the world of ebooks, at least in terms of sales or licensing to public libraries. Unlike the print world, where library collections sought to satisfy the reading interests of the general population, all books within a publisher's catalogue are often treated the same. That is to say, there is no difference between titles purchased with a view to preservation (hardcover) and titles purchased to satisfy popular tastes (trade paperback) or high, but short-term demand (mass market).

Independent Canadian publishers have little ability to set the terms under which their books are sold to public libraries through platform vendors. Efforts to allow more customized sales should be made. Smaller publishers continue to sell with little ability to create a nuanced environment, and successful vendors see no need to alter their business models for them. The result is confusion and a movement away from public library purchases of books that may not generate enough circulations. These are often books that would most benefit from the exposure that a public library tends to generate. A recent BookNet Canada survey indicates that the presence of mid-list titles in public library collections helps to create awareness of their existence.¹¹

11 *Checking Out Canadians: Are Library Users Interested in Reading Canadian Content*, BookNet, 2014.

Most public libraries recognize and understand the need for publishers to protect sales of bestseller material and, since many libraries often use all of their allocated circulations, they do not (usually) resent that a higher price is asked for bestsellers. Many collections librarians also accept limited—time licensing for these types of titles since all circulations will be consumed quickly and the library system will not need as many copies on an ongoing basis.

A willingness to experiment with lending terms has made public libraries more accepting of self-published titles. Smashbooks and other services are making it easier for self-published titles to be created and services such as Scribd and Kindle Unlimited are providing a marketplace for them. With the exception of titles by bestselling authors, books published through traditional publishing channels, and offered under traditional lending terms in libraries, are now competing for exposure with titles that are available on subscription service sites.

A more nuanced approach might see books with high print runs either withheld from the ebook market for a time (a stance not supported by the priorities of the recent CLA Ebook Task Force) or sold at an ebook new release price and at an even higher price—with more uses—to the library market. This may also allow mid-list titles to be offered at lower prices and with fewer circulations. In this model, a regionally popular book would receive higher sales within that region.

Models in Other Jurisdictions

Libraries in virtually all jurisdictions are dealing with the same issues as libraries in Canada. The July 2014 International Federation of Library Associations (IFLA) background paper on worldwide ebook issues highlights this. The report stresses, as one strong dynamic, the fact that the vast majority of all available ebooks are produced in English.¹²

In fact, most models that vary from those available in Canada exist in order to protect a language or culture against the threat of English-language ebook material. For example, most models that vary from those available in Canada and the United States are found in northern European countries, with books in the national languages as the clear priority.

The Austrian Library and Information Association (ALIA) produced a very good summary of these programs and of alternative models in the United States in 2014.¹³

The primary variations available in the United States tend to stress options for making self-published material available through consortia platforms. The largest such program is the Enki platform developed by Contra Costa County Library in California, made available to all California public libraries. It hosts more than 20,000 self-published titles.¹⁴

12 <http://www.ifla.org/files/assets/clm/publications/ifla-background-paper-e-lending-en.pdf>

13 <https://alia.org.au/sites/default/files/publishing/ALIA-Elending-Landscape-Report-2014.pdf>

14 <http://guides.ccclib.org/ebooks/enki>

We are seeing models in Europe that allow streaming (more prevalent in countries where wifi is ubiquitous), simultaneous use licenses (more common where protection of a national language is a government priority), and smaller portions of a book sequentially downloaded (an option dependent upon ubiquitous wifi). In general, uniquely European models would not work in a Canadian setting.

Playing with the Variables

Canada has one of the largest public library systems in the world—Toronto Public Library—but also has many of the smallest library systems in the world. Canada’s urban library systems serve approximately 70% of Canada’s population but generate approximately 90% of all public library circulation.¹⁵

The reality of the Canadian public library marketplace is that the popular titles generate significant print book activity, while mid-list titles do not. The result is that many books are priced on the assumption that they will have high circulation, but these expectations may not always be realistic.

Models that provide circulation (26, 40, or 52 circs) or time limits lack the fundamental understanding that these limits require a significant amount of tracking and maintenance by libraries. If the resources needed to manage availability for these titles are thin, it may mean lost visibility or sales for publishers.

Public libraries are beginning to assess ebook use—using cost per circulation figures—to determine which books they will acquire and which they will not. The potential result is that sales to libraries of mid-list titles, which might gain popularity by receiving exposure, are likely to decline.

It is also likely that the number of copies of a popular title that a public library system has in its collection will decrease more rapidly. Authors whose books are sold/leased to public libraries using these types of models will lose Public Lending Right payments more quickly than is the case with print books.

It would seem that one solution might be to offer mid-list/backlist titles in editions that mimic the mass market paperback world. They could be sold at a lower cost and with fewer circulations or could be sold with circulations in increments of 10, with each new increment offered at a slightly lower cost per available circulation.

Such a model would offer smaller library systems a less expensive way into the market since 10 circulations might suit them nicely and offer more incentive for all libraries to purchase mid-list titles.

¹⁵ Figures are based on CULC statistics.

As an example of a more nuanced approach, Dutch publishers and the Dutch National Library use three distinctive models for different types of books. “Head” books are defined as new titles expected to be extremely popular. “Shoulder” books are defined as mid-list titles and popular backlist titles. “Long-tail” titles are defined as ones that might ordinarily go out of print or receive little attention.¹⁶ If a mid-list title were to become popular, the cost or the terms of sale could change. However, this change would not affect the purchases made that helped the author and the title become popular.

Therefore, sales should not place time-limits on use. Canada does have Public Lending Right (unlike the UK and the United States) and time-limited sales negatively affect an author’s income by removing works from a library’s collection.

Final Comments on Public Libraries

Canada’s public libraries are amongst the strongest in the world. Unlike libraries in most of Europe and in many areas of the United States, Canada’s public libraries generally survived the 2008 economic crisis with few budgetary concerns.

Like publishers, however, public libraries are both providing traditional book services to loyal and dedicated print users while, at the same time, preparing for rapid change.

A small gathering of Canadian chief librarians recently shared thoughts about how many years it might take before ebooks were more popular than printed books. Not one person questioned the fact that such a question was being asked. All provided a number. The shortest period of time suggested was five years or less with most thinking that ten years was a more reasonable estimate.

The biggest concern, however, is not focused on the number of allowed circulations or any other technical issue. It centres instead on how hopeless library administrators feel about the fact that they have so little ability to voice concerns about decisions that deeply influence their ability to provide good service.

Continued talks between library administrators, publishers, and vendors are critical to the future success of each of these important components, and to a healthy book industry.

¹⁶ <https://alia.org.au/sites/default/files/publishing/ALIA-Elending-Landscape-Report-2014.pdf>

UNIVERSITY LIBRARIES

The Network of University Libraries in Canada

Universities are a \$30 billion-a-year enterprise in Canada, generating over \$12.4 billion in research activities in 2014. In 2013, 46,000 full-time professors at the ninety-seven public and private not-for-profit universities provided undergraduate and graduate programs to 1.7 million students.¹⁷ There are at least twenty-five universities that provide programs in French.¹⁸ Appendix A provides a list of universities with enrolment figures for 2014.

According to the Canadian Association of Business Officers (CAUBO) 2012-2013 annual statistical report, ninety-eight reporting university libraries spent more than \$326,786,000 on library acquisitions in 2012 (Table 6). Note that while there are 106 total institution names listed in this report, there are fewer reporting because affiliated university college financials are typically reported under the primary institution.

Table 6. The number of universities in each province with full-time equivalent (FTE) combined undergraduate and graduate student enrolments, total library acquisition expenditures for all institutions, and individual library acquisition budget ranges.¹⁹

Institution	Total schools	2012 Under 10,000 FTE	2012 Over 10,000 FTE	Total 2012 Library Acquisition Expenditures	2012 Less than \$1M	2012 \$1 to \$5M	2012 \$5 to \$10M	2012 More than \$10M	2012 No info
Alberta	9	5	4	\$34,996,000	3	3	1	1	1
British Columbia	11	6	5	\$39,802,000	4	3	1	2	1
Manitoba	5	4	1	\$12,317,000	2	1	0	1	1
New Brunswick	4	3	1	\$6,385,000	1	2	0	0	1
Newfoundland	1	0	1	\$8,530,000	0	0	0	1	0
Nova Scotia	11	10	1	\$10,963,000	8	2	1	0	0
Ontario	39	26	13	\$138,021,000	19	8	5	4	3
Prince Edward Island	1	1		\$912,000	1	0	0	0	0
Quebec	19	13	6	\$59,870,000	10	5	2	2	0
Saskatchewan	6	4	2	\$14,990,000	3	1	0	1	1

17 Universities Canada website (formerly Association of Universities and Colleges of Canada) <http://www.univcan.ca/canadian-universities/our-universities/>

18 Universities Canada University Study website <http://www.universitystudy.ca/>

19 CAUBO. (2012-2013). *Financial Information of Universities and Colleges Report*. Retrieved from <http://www.caubo.ca/resources/publications/fiuc/caubo-2012-2013-financial-information-universities-and-colleges>

University libraries are also members of larger consortia groupings that work collectively to provide cost effective services and electronic collections to their users. In Canada, the university libraries belong to one of the four academic regional consortia: Le Bureau de coopération interuniversitaire (BCI), Council of Atlantic University Libraries (CAUL), Council of Prairie and Pacific Libraries (COPPUL), and the Ontario Council of University Libraries (OCUL).²⁰ There are eighteen institution members in BCI that includes all the university libraries in Quebec. The fifteen Atlantic province universities are included in CAUL. COPPUL includes twenty-three full member universities from British Columbia, Alberta, Saskatchewan, and Manitoba. OCUL includes the twenty-one institutions in Ontario. Institutions license electronic resources within their regional consortia, with the exception that COPPUL also provides some licensing support for the larger CAUL libraries.

Seventy-five universities are also members of the Canadian Knowledge Research Network (CRKN) national consortia organization that handles licenses that have broad interest to all Canadian universities.²¹ There is also a number of additional smaller provincial, subject-focused or regional multi-sector consortia in which universities may participate for specific electronic resource licenses. Most of the library consortia in Canada also cooperate in the multi-sector informal group called Consortia Canada that does licensing on behalf of other consortia. Consortia Canada is a potential group to partner with for high-level cross-sector discussions about Canadian content for public, college, and university libraries. Consortia Canada is unique in that individual institutions are not direct members of Consortia Canada.²² The heads of all the Canadian Consortia also participate in the International Coalition of Library Consortia (ICOLC).²³ ICOLC is an important forum to discuss ideas and expand library/publisher partnerships beyond Canada.

Libraries that are affiliated with research universities can also apply for membership in the Canadian Association of Research Libraries (CARL) and the American Research Libraries (ARL). There are twenty-nine university libraries in CARL and fifteen university libraries in ARL.²⁴ These organizations act as advocates on behalf of research libraries in national and international policy and technology discussions. These organizations would be potential partners with publishers to advocate to government for policy changes to funding programs.

20 Le Bureau de coopération interuniversitaire (BCI) website. <http://erpac.crepuq.qc.ca/eetc.html>

Council of Atlantic University Libraries (CAUL) website. <http://www.caul-cbua.ca/>

Council of Prairie and Pacific Libraries (COPPUL) website. <http://www.coppul.ca>

Ontario Council of University Libraries (OCUL) website. <http://www.ocul.on.ca>

21 Canadian Knowledge Research Network (CRKN) website. <http://crkn.ca/>

22 Consortia Canada website. <http://www.concan.ca/>

23 ICOLC website. <http://icolc.net/>

24 Association of Research Libraries (ARL) website. <http://arl.org>

Canadian Association of Research Libraries (CARL) website. <http://www.carl-abrc.ca/>

Budget Constraints and Digital Collections

The goal of university library collections is to support the teaching and learning needs of undergraduate populations but also provide faculty and graduate students with research resources to support their unique scholarly needs. Many university libraries post their collection development policies on publicly accessible library websites.²⁵ Subject specialist librarians are typically the individuals responsible for selection of resources, with varying levels of input and consultation with faculty.

University libraries are generally funded from budget lines related to central administration. In some universities, the medical and law libraries are funded and administered separately from the main university library. While the library is often called the “heart of the university,” in reality, university libraries carry large operating costs that are often targeted when budgets are tight.

The 2012 CAUBO national average for library funding was less than 7% of the Canadian university total for operating expenditures.²⁶ University libraries receive increases to meet the growth of students, new programs, and research specializations. While most publishers increase prices annually based on inflation (or above), many libraries must continually cut resources to pay bills. Most academic publishers also require payment in US currency; a weaker Canadian dollar means less buying power and contributes to budget problems. The October 2014 article in the University of Calgary newspaper, *The Gauntlet*,²⁷ highlights the type of budget concerns libraries are facing.

Transition To Electronic formats

The transition to electronic formats gained a strong foothold around 1996, when Academic Press introduced the first “Big Deal.”²⁸ The Big Deal was a publisher package of all or many of their journals sold, as electronic format and in bulk packages, at far less than the per-title cost. The Big Deal was viewed as the solution to the “serials crisis” brought on by library budget constraints compared to unsustainable growth in titles and the cost of academic journals. The Big Deal transformed libraries because small universities with limited physical space and budgets could greatly expand their research collections. Publishers transitioned quickly from print as the primary distribution mechanism to online Big Deals, with add-on print options, and ultimately to online only. Consortia were vital to the success of this model because the historical print holdings of the group were generally the basis for the

25 Note: Examples of Library Collection Policies. Retrieved from University of Ottawa Library (<https://biblio.uottawa.ca/en/about/collections/collection-development-policy>), University of Alberta Libraries <http://www.library.ualberta.ca/aboutus/collection-policy/>, and Brock University Library <http://www.brocku.ca/library/about-us-lib/policies/collection-development>

26 CAUBO. (2012-2013) Financial Information of Universities and Colleges report. Retrieved from <http://www.caubo.ca/resources/publications/fiuc/caubo-2012-2013-financial-information-universities-and-colleges>

27 Kim, A. (October 9, 2014). \$850,000 from Provost's Office Prevents Library, Online Journal Cuts. *Gauntlet*. <http://www.thegauntlet.ca/850000-from-provosts-office-prevents-library-online-journal-cuts/>

28 Poynder, R. (September 2011). The Big Deal: Not Price But Cost. *Information Today* 28:8. <http://www.infotoday.com/it/sep11/The-Big-Deal-Not-Price-But-Cost.shtml>

pricing and holdings in the deal. On a per journal title basis, the Big Deal has provided tremendous value, but at the expense of other areas of collection development. Even with the negotiating power of the Canadian consortia CRKN, the multi-year licenses for the major publisher Big Deals are becoming unsustainable for institutions and severely limiting flexibility to develop other areas of the collection.

Unlike the Big Deal in which librarians, publishers, and users quickly embraced electronic journals as the most sustainable relationship for production, purchase, and access to academic journals, the transition to electronic formats for monographs has been met with more uncertainty. According to the 2011/12 CARL statistics, on average, of the money allocated for books and journals in Canada's research libraries, over 70% was spent on journals and less than 30% on books.²⁹ Electronic journal expenditures accounted for 85% of the journal expenditures compared to only 28% of the book expenditures used for electronic book format.³⁰ Carleton University library reported that the portion of the collections budget allocated to electronic resources has steadily increased from 54% in 2005-2006 to over 70% in 2012-2013. In comparison, the print monograph budget declined 32% between 2009 and 2012.³¹ The trend that Carleton's numbers reflect is typical.

The Diminished Role of the Monograph

Print monographs have always been an integral part of the collections program of any university library. Librarians selected monographs with a view to build a permanent repository of knowledge. Reallocation of limited budget resources to the Big Deal and reallocation of stack space to create more study space, have, however, dramatically impacted the role of print monograph acquisition in library collections. Another impact is low use. Through circulation studies and anecdotal evidence, it seems clear that university libraries are seeing decreasing use of their print collections. A circulation study by Cornell Universities showed that only half of the monograph purchases in the last twenty years had circulated.³² A study by OCLC and OhioLINK found that 80% of the circulation is driven by 6% of the collection.³³ Print still dominates, but print purchases by university libraries have recently decreased by 15% while ebook sales have increased an equal amount.³⁴ The changing role of the monograph has prompted Library and Archives Canada to begin discussion with university and government libraries across Canada about the state of print monographs and preservation.³⁵

29 CARL 2011/12 statistics, chart 5. Retrieved from <http://www.carl-abrc.ca/statistics.html>

30 *ibid*

31 Miller, L, D. Sharp, and W. Jones. (2014). 70% and Climbing: E-Resources, Books and Library Restructuring. *Collection Management*. 39:110-126. DOI: 10.1080/01462679.2014.901200

32 Cornell University Task Force on Print Collection Usage. (2010). *Report of the Collection Development Executive Committee Task Force on Print Collection Usage*. Retrieved from http://staffweb.library.cornell.edu/system/files/CollectionUsageTF_ReportFinal11-22-10.pdf

33 Gammon, J. and E. O'Neill. (2011). *OhioLINK-OCLC Collection and Circulation Analysis Project*. Retrieved from <http://www.oclc.org/content/dam/research/publications/library/2011/2011-06.pdf?urlm=162957>

34 Michael Zeoli, Vice President, YBP Strategic eContent Development and Partner Relations YBP personal communication (email), May 1, 2015. [Note: 2013 YBP statistics]

35 Library and Archives Canada. Last Copies website. <http://www.bac-lac.gc.ca/eng/services/last-copies/>

Survey

In order to learn more about the role of ebooks and print books in Canadian college and university libraries, the eBOUND team compiling this report created a web-based survey to ask academic librarians about future directions for ebooks, ebook functionality requirements for librarians and users, and details on acquisition of ebooks. The eBOUND Canada Electronic Books web-based survey (eBOUND Survey) was sent to university libraries who were members of the regional consortia (BCI, CAUL, COPPUL, OCUL). In addition, CRKN also sent the survey email invitation to all their members. College consortia and direct email was used to distribute the survey to college libraries. The survey ran from April 2 to May 4, 2015. Aggregated, anonymized feedback from the twenty-five university library respondents is referenced throughout this university section as the eBOUND Survey.³⁶

When asked about ebook budgets in the eBOUND Survey, few libraries are able to provide specific budget figures, but comments indicate that at least half of the respondents (n=25) plan to increase budgets for ebooks this fiscal year. Most libraries do not split budget lines for print or electronic books. *Library Journal's* 2011 ebook survey reported a 93% increase in ebook collections in academic libraries since 2011.³⁷ Since the 2011 figure was relatively low, the percentage increase sounds higher than the actual dollars involved.

Comments from the eBOUND Survey highlight the factors affecting expenditures on ebooks:

- “Our policy is to be e-preferred, so we will continue to spend an increasing amount on ebooks.”
- “One budget line buys approval books in print, PDA ebooks, and title-by-title selections that can be [electronic] or print. So we may increase or decrease the amount spent on ebooks next fiscal.”
- “Currency exchange and inflation on subscriptions [are factors affecting ebook expenditures]. The vast bulk of our total acquisitions budget is spent on year-over-year subscriptions. For many years we have had flat library budget allocations from our institution, and inflation eats away at our spending power every year. We manage this by cancelling subscriptions and buying fewer one-time resources.”
- “Leased ebooks are supported unless a consultation to cancel takes place. Each selector decides what to purchase with monograph money: print books, ebooks, ebook packages.”

³⁶ eBOUND Canada. (April 2015). *eBOUND Canadian Electronic Books Survey*. Unpublished Web survey to Canadian University and Colleges Libraries. [Note: There were Twenty-five responses from universities. This survey is referred throughout this document as the “eBOUND Survey”].

³⁷ Miller, R. (October 12, 2011). Dramatic Growth: LJ,s Second Annual Ebook Survey. *The Digital Shift*. <http://www.thedigitalshift.com/2011/10/ebooks/dramatic-growth-ljs-second-annual-ebook-survey/>

The summary of format preferences from the eBOUND Survey highlights mixed views on moving to electronic formats (Table 7). While there is a definite shift to electronic, the number of institutions responding with “no preference” or “depends” comments when asked about preference for electronic or print indicate that libraries are still very much in a hybrid print/electronic acquisition situation. Comments also indicate that while ebooks may be preferred, factors such as DRM that impacts usability and access, high ebook pricing compared to the print, and print and electronic formats not being released simultaneously are factors that might push libraries to purchase print instead of electronic. Children’s books and other image intensive books are still preferred in print. One library also responded that Canadian literature is purchased in both print and in electronic format.

Table 7. eBOUND Survey responses to the question “Does your library have a format preference for different types of books” expressed as a percentage of the total responses for each format (n=25).

Type of Book	Print	Electronic	No Preference	Depends	Don't typically purchase
Academic	4%	38%	23%	35%	0%
University Press	4%	35%	27%	34%	0%
Canadian university press	0%	40%	32%	28%	0%
Textbooks	4%	31%	15%	8%	42%
French language books	0%	31%	31%	15%	23%
Childrens books	46%	4%	4%	8%	38%
Canadian childrens books	48%	0%	12%	8%	32%
Technical books	0%	38%	23%	23%	16%
Canadian technical books	0%	35%	31%	23%	11%
Popular reading books	27%	8%	15%	8%	42%
Canadian popular books	48%	0%	12%	8%	32%

Vendors

Competition to protect market share and even to dominate the ebook platform market has seen significant change this year over the past year. ProQuest, which owns rights to the EBL and ebrary systems, will be releasing a new integrated platform, called ProQuest Ebook Central.³⁸ ProQuest will also now own the rights to the MyiLibrary book platform offered by Coutts. EBSCO owns their own ebook platform and purchased the collection of ebooks originally offered through the now defunct NetLibrary platform.

38 ProQuest. (January 30, 2015). *ProQuest Brands New Integrated Book Platform: ProQuest Ebook Central*. [Press release]. Retrieved from <http://www.proquest.com/about/news/2015/ProQuest-Brands-New-Integrated-Ebook-Platform—ProQuest-Ebook-Central.html>

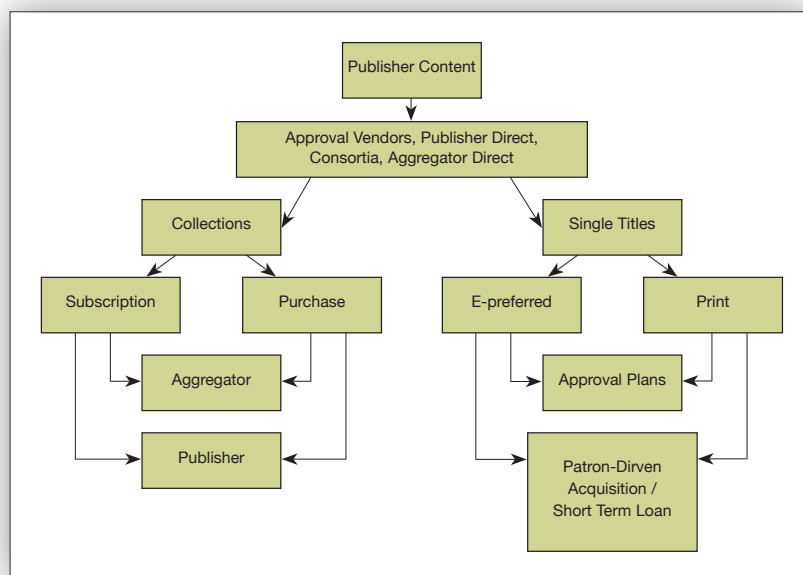
Table 8. YBP provided data on book prices³⁹ from the three major ebook platforms and offered more frontlist approval press titles in FY14 than the previous year with both ebrary and EBSCOhost presenting over 50% of all titles profiled.

ebook Aggregator	Approval Press ebooks added in FY14 (July 2013 to June 2014)	Frontlist ebooks profiled in FY14	% of Frontlist titles available as ebooks	Average Frontlist List price in FY14
ebrary	44,507	34,004	47%	Single User Access \$115.76
EBL	35,952	27,028	38%	Non Linear lending \$123.96
EBSCOhost	46,359	34,592	48%	Single User Access \$111.91

Ebook Models

The university ebook market has proliferated into a complex environment of business models and multiple delivery and access platforms, from a highly competitive and constantly changing field of commercial aggregators, scholarly aggregators and publishers. Most university libraries will use a number of acquisition processes and purchasing relationships to balance budgets and the desire to acquire ebooks to meet undergraduate needs and collect research level monographs in niche subject areas. The following chart summarizes the complexity of potential providers and acquisition model decisions that librarians navigate. Ebook acquisition models have created a shifting landscape of relationships between publishers, book vendors, aggregators, and academic libraries. Generally, acquisition models can be broadly grouped into models for 1) individual title identification and selection and 2) subscription or purchase of larger collections of ebooks. There is no dominant acquisition model for university libraries.

Figure 3. Acquisition Model Decisions



39 YBP Library Services. (September 2014). *Annual Book Price Update*. Retrieved from http://www.ybp.com/book_price_update.html

Single Title Selection

As Subject specialist librarians, collections activities are redirected to instruction and research services, librarians are relying heavily on approval plan services of approval book vendors such as YBP, Coutts, and Midwest. Approval plans provide an efficient way for librarians to identify, review, and select monographs from the corpus of scholarly and academic publishing and the multitude of acquisition options. Approval plans are set up with selection criteria to present librarians with new titles based on a number of factors including publication cost, discipline, publisher, language, and format. Approval book vendors also provide an integrated monograph acquisition backroom workflow for title matching to eliminate duplicate purchasing with existing collections, MARC record acquisition, and payment.⁴⁰

Approval Plans are used to place firm orders, receive new title notifications and have titles automatically delivered for review or purchase through print and ebook preferred (e-preferred) approval plans. Librarians can customize their ebook preferences to select individual ebooks based on parameters including publisher, year, user access models, DRM, platform, timing of print and ebook delivery, and price of ebook compared to print. Libraries use approval plans to help them understand which titles from a particular publisher are coming in print or ebook format, what platform the title is on, when the title is being released and the cost models available. The following example of a Canadian University Press title profiled in YBP highlights the complexity of options librarians must navigate (Table 9). One university response from the eBOUND Survey noted: “From an academic perspective, the variety of available platforms is bewildering.... While a discussion of how to improve/expand ebooks is justified, the industry should keep in mind that a lack of consistency and hoops to easy access is frustrating.”

Table 9. Purchase options for print and aggregator ebook models for a university press title. Obtained from YBP’s GOBI system⁴¹ May 8, 2015.

Supplier	Purchase Option	Price
EBL	Non-Linear Lending™ (yes to DDA)	\$179.98 USD
ebrary	Multiple User Option (MUPO) (yes to DDA, no to STL)	\$134.99 USD
ebrary	Single User Option (SUPO) (yes to DDA, no to STL)	\$89.99 USD
Project Muse	Unlimited user	\$79.98 USD
Print	Purchase, Handled on Approval	\$49.95 USD

40 Note: Approval book vendors offer libraries integrated workflow processes to help identify, select and purchase at a discounted rate, and process books from a number of producers. YBP and Coutts are the primary approval book vendors in Canadian academic libraries. MidWest is used to a lesser extent. Most university librarians use approval plans as their primary selection mechanism for identifying and purchasing books. YBP’s approval plan system is called GOBI. Coutt’s approval plan system is called OASIS. YBP and Coutts also manage Patron-Driven acquisition (PDA) plans and ebook options from a number of ebook aggregators.

41 Note: GOBI is YBP’s book selection system that librarians use to identify and select books for purchase

Patron-Driven Acquisition (PDA), also referred to as Demand-Driven Acquisition (DDA), isn't typically offered by publishers providing ebooks on their own platforms but is a model offered by the aggregator platforms. MARC records for collections of titles that fit broad parameters identified by librarians are loaded into the library catalogue. The user interacts with the ebooks on the aggregator's platform without being aware that the library has not yet permanently licensed the content. ebrary, EBL, MyiLibrary, and EBSCOhost all offer PDA programs with different business models that measure when user interaction with an ebook triggers an ebook purchase. Short-term loans (STL) are a variation on PDAs in which libraries rent access for users, paying between 5% and 30% of the cost of the title price. A number of STLs may ultimately trigger a purchase of the ebook. Non-linear lending is a unique model to EBL which provides 325 one day STLs to a book every year. A number of publishers are now backing out of STLs because their ebooks are not getting sufficient use to trigger a purchase. The University of California Press experienced 51% of their ebook use in PDAs as STLs, but only 2% of the STL books triggered a purchase.⁴²

While PDA with its various iterations is controversial,⁴³ 70% of the university libraries responding to the eBOUND Survey use PDA and of those, over 50% use it as a complementary strategy, 20% use it as their primary means to select individual ebooks, and 26% are experimenting in a pilot stage. Because publishers often embargo releasing frontlists to PDA programs, libraries wanting to ensure current title access from key publishers will need to integrate PDAs with other acquisition strategies. Canadian libraries are working with EBL, ebrary, EBSCOhost, MyiLibrary, and JSTOR and using YBP and Coutts to manage PDA programs. PDAs on a consortia level are still in the experimental stage in Canada, but it is on the horizon to expand as more libraries use PDAs consistently at the local level. The Novanet consortium of Nova Scotia libraries 2012 PDA⁴⁴ was viewed as highly successful by the libraries involved, providing users with over 20,000 titles, with only forty seven books purchased and 4,152 STLs totaling \$60,000. By contrast, the 2010 PDA pilot by OCUL, without any STL component, resulted in over \$150,000 spent and 500 titles purchased in a month's access to 40,000 titles.⁴⁵

Collections

The variety of collections options and platforms presents librarians with a vast, complex and impossibly varied list of "slice and dice" subscription and purchase options to select collections by year, publisher, and subject. The large academic publishers host their own content on their own platforms, scholarly publisher aggregations have developed collections of presses on their own platforms, and commercial aggregators continue to evolve their business models and compete for content supremacy.

42 Michael Zeoli, Vice President, YBP Strategic eContent Development and Partner Relations, personal communication. April 27, 2015.

43 Anderson, R. (May 31, 2011). What Patron-Driven Acquisition (PDA) Does and Doesn't Mean: an FAQ. *The Scholarly Kitchen*. <http://scholarlykitchen.sspnet.org/2011/05/31/what-patron-driven-acquisition-pda-does-and-doesnt-mean-an-faq/>

44 Slauenwhite, B. et al. (February 2014). *Novanet DDA Final Report*. Retrieved from http://aleph2.novanet.ns.ca/NovanetDDAReport_Final.pdf

45 Davidson, C. and T. Horava. (May 16, 2011). *A Leap of Faith: A Consortial PDA Pilot Project*. Presented at the Acquisitions Institute at Timberline Lodge. Retrieved from <http://www.slideshare.net/TonyHorava/acquisitions-institute-2011-ocul-pda-project>

The majority of university library respondents to the eBOUND Survey were acquiring a variety of collections from scholarly presses, publisher direct collections, and aggregated collections of academic content from commercial sources. At this point, there is no single dominant ebook aggregator or collection model. The majority of respondents were acquiring collections from Springer (22 of 25 respondents) and the Canadian Electronic Library (23 of 25). More than half of the respondents acquired subscription packages including PsycBOOKs, Safari, 24x7, Knovel, ABC-Clio, and the ACLS Humanities Ebook project. ProQuest's ebrary interface was the commercial aggregator platform used by more institutions than ProQuest's EBL, Coutt's MyiLibrary, or EBSCOhost books.

For Canadian university press publishers, the developments in the scholarly publisher environment present good examples of partnerships that university libraries have trusted with providing quality content, good platforms, and openness to discussion of models to meet publisher and library needs. Canadian university libraries acquire content from all these providers. Duke University Press⁴⁶ has a longstanding success rate with access to all their content DRM-Free, sustainable pricing, predictable content growth, and options for access or perpetual back-file purchase. The downfall of the other projects is the lack of comprehensiveness of title coverage across participating publishers. Oxford University Press University Press Scholarship Online (UPSO)⁴⁷ and Cambridge University Press University Publishing Online (UPO)⁴⁸ have established partner press programs on their own ebook platforms. The other two players are Project Muse's University Press Content Consortium (UPCC)⁴⁹ which includes Canadian content from universitypublishing.org, the Calgary Institute for Humanities, Presses de l'Université du Québec, University of Ottawa Press, and Wilfrid Laurier University Press and books at JSTOR⁵⁰ which includes McGill-Queen's University Press, University of Ottawa Press, and University of Toronto Press. None of the four scholarly aggregators (UPSO, UPO, UPCC, or JSTOR) dominates the scholarly press market at this point.

Ebook Functionality for Users and Librarians

While ebooks offer the potential to enrich the user's experience with ready access to more content than ever possible in a physical print environment, ebook models that limit full engagement with the content discourage libraries from purchase and users from accepting ebooks. There are a number of key functionalities that librarians need and repeatedly request. (Table 10). It is notable that while the majority of respondents to the eBOUND Survey agree that multiple user access is something they require, they also agree that single or limited user access is strongly undesirable. No other functionalities are identified by the majority of respondents as undesirable or not important. One university library

46 Duke University Press. eDuke Books Scholarly Collection website. <http://read.dukeupress.edu/>

47 Oxford University Press. University Press Scholarship Online website. <http://www.universitypressscholarship.com>

48 Cambridge University Press. University Publishing Online website. <http://universitypublishingonline.org/>

49 Project Muse. UPCC Books on Project Muse website. <https://muse.jhu.edu/about/UPCC.html>

50 JSTOR. Content on JSTOR: Books website <http://about.jstor.org/content-on-jstor-books>

response from the eBOUND Survey sums up the perceived difficulties of limited access: “the ebook experience has to replicate the [print] book experience as much as possible. Restricted DRM creates barriers and diminishes the end user experience. People engage with books in different ways, especially when they are studying. Let them have the flexibility to use the content in the ways that best suit their needs”. Another comment from this section of the eBOUND Survey presents a common concern about long-term access to ebooks: “Aside from DRM and the end user experience, the biggest problem with ebooks is the issue of preservation. Will the ebooks we purchase still be accessible in 5, 10, 30 years? It may be years before the book finds its audience”. This comment is notable because it highlights the long-term collection ideal toward which academic librarians continue to strive. This goal is increasingly challenging for librarians who work with budget restrictions and a highly fluctuating ebook environment.

Table 10. Ranked responses of “required” or “desirable”, from the eBOUND Survey, for a list of functionalities for the end user experience and for librarians to manage and provide access to ebooks.

Functionality for the end-user experience		Functionality for librarians to manage and provide access	
Required	Nice to have	Required	Nice to have
<ul style="list-style-type: none"> • Off-line reading at the chapter level. • PDF format. • Mobile device compliance. • Readable on ebook readers. • Keyword and Boolean search at the ebook title level. • Search functionality within the ebook. • Ability to search ebook content across the entire platform. • Multiple user access. • Printing, downloading, saving allowed at the chapter level. 	<ul style="list-style-type: none"> • Digital book exact format of print book. • Additional multimedia. • Off-line reading of the entire ebook. • ePub format. • XML format. • Printing, downloading, saving allowed for the entire ebook. • Users can add notes to personalize the reading experience. 	<ul style="list-style-type: none"> • ebook and print book released simultaneously. • COUNTER-compliant usage statistics.⁵¹ • Ownership and perpetual access rights for purchased books. • Free MARC records. • Accurate title lists. • Ability to post entire ebook on reserve. • Integration into discovery interfaces. • IP address authentication. • Single sign-on. • Accessible formats for all types of users. 	<ul style="list-style-type: none"> • Interlibrary loan allowances. • Data and text mining rights. • Digital Object Identifiers (DOIs) at the title level. • DOIs at the chapter level.

When the eBOUND Survey respondents were asked to recommend examples of platforms with a good end user experience, the majority identified Springer and Project Muse. The following table highlights the features Project Muse ebooks (Table 11) that are favored by respondents. Conversely, when asked to identify examples of problematic platforms from the end user experience perspectives, the majority of respondents identified ebrary collections and the titles in the ACUP collection on Scholars Portal that have limited user access and use plug-ins to limit access.

51 COUNTER compliant usage statistics are a set of standards for recording and reporting of online usage statistics for books, journals, and databases in a consistent, credible and compatible way Project Counter website. <http://www.projectcounter.org/faqs.html>

Table 11. Features list of the UPCC Books on Project Muse⁵²

- Unlimited simultaneous usage of book content, with no DRM and no restrictions on printing or downloading.
- Digital book released at the same time as the print book.
- Ownership and perpetual access rights for books purchased.
- Books in PDF format.
- Books searchable and retrievable to the chapter level.
- COUNTER-compliant usage statistics.
- Free MARC records for all books.
- Books fully integrated on the MUSE platform with the ability to search across combined book and journal content or limit searches by content type.

Promoting Canadian Content for University Collections

The majority of university library respondents to the eBOUND Survey purchase print and electronic title-by-title Canadian ebook content through approval plans with Coutts and YBP, Renaud-Bray, and on aggregator platforms including EBSCOhost, JSTOR, and Project Muse. For Canadian publishers, it seems vital that print and ebook content be profiled with the major approval book vendors (YBP and Coutts) to gain exposure and to ensure integration into the workflows and processes university libraries are using for identification, selection, and purchasing of books. YBP reports that they have profiles of over 11,700 Canadian books from university presses worth almost \$860,000 USD (2013-2014). Canadian University Presses represent 6% of the total titles from North American University Presses profiled by YBP during the same time period.

When asked about models or partnerships for the Canadian publishing industry to explore, university library respondents to the eBOUND Survey identify working with YBP and Coutts and with content delivery platforms from EBSCO, MyiLibrary, ProQuest's EBL and ebrary, Project Muse, JSTOR, and Oxford University's UPSO. Respondents are not suggesting that content be delivered through all these various platforms but emphasize that consolidation of all content on a common platform would simplify workflow, licensing, discovery, and use. One university library respondent from the eBOUND Survey notes: "I would like to see a comprehensive collection of Canadian ebooks available for acquisition (preferably via a PDA model), on one of the vendor's offered platforms.... This would reduce inadvertent duplication of titles, and the proliferation of ebook interfaces (libraries have too many ebook interfaces—confusing for users)."

Exploring partnerships with OCU's Scholars Portal ebook platform was also recommended. Scholars Portal is a technology infrastructure, based at the University of Toronto Libraries and supported by the universities in Ontario, that provides locally developed platforms to archive and provide access to ebooks, ejournals, and data licensed for perpetual ownership and local hosting by Ontario universities and partners. Libraries purchase perpetual access through publisher or aggregator ebook platforms but also license with the provider to receive the full text of ebooks and associated metadata

⁵² Project Muse. UPCC Books on Project Muse Collection Features and Title Lists. Accessed May 28, 2015. https://muse.jhu.edu/about/UPCC.html#title_lists

for local hosting in perpetuity on the Scholars Portal ebook platform. Scholars Portal was originally developed, in 2009, by the Ontario universities to ensure they had long-term archival control over perpetually owned content. Scholars Portal now has content from every major commercial and scholarly publisher in addition to over 400,000 Open Content Alliance Open Access books.⁵³

A partnership of the Association of Canadian University Presses (ACUP), eBOUND and the OCUL institutions has been in place since 2013 when Ontario universities purchased a “made in Canada” aggregation of university press ebooks with the Scholars Portal Books ebook platform for perpetual hosting and access. The original pricing model was based on the print title price with differential discounting off three collection packages (backlist, midlist, and frontlist). There was a requirement to take all collection packages if participating in the offer. Three levels of DRM, including unlimited use, single user access, and single user view-only access, were allocated at the title level to balance the request from libraries for a comprehensive collection with the need to address publisher concerns of loss of print revenue for course-adoption titles. When targeting the collection to small institutions, a different pricing model approach was taken, based on full time equivalent (FTE) student enrolment at each institution and with the flexibility to take any of the three collection packages. The partnership between OCUL, ACUP, and eBOUND was expanded as an offer to all Canadian institutions with CRKN taking over the deal in 2014 with the FTE pricing model and collection package flexibility. In the small university and CRKN deals, most of the universities took only frontlist because of the higher cost for the larger midlist and backlist collections. Twenty-eight university libraries in Canada are now obtaining ebook content from ACUP through the Scholars Portal platform.

The three iterations of the ACUP/eBOUND/university ebook partnership highlight the need for continued experimentation, dialogue, and imagination to ensure models recognize the needs of libraries, their users, and publishers. One university library respondent from the eBOUND Survey noted “models should be flexible, scalable, sustainable, and recognize that the e-format is becoming the default for academic institutions.... In other words, there is an element of risk-taking necessary to create new business and licensing models. The OCUL eBOUND/ACUP agreement (now a CRKN agreement) was a ground-breaking accomplishment.”

Current investigations by the Lyrasis⁵⁴ consortia may provide ideas of new models to address the recurring “DRM theme” in the eBOUND Survey. As one university library respondent to the eBOUND Survey noted “Single-user options for ebooks do not aid post-secondary institutions in providing access to course reserves and content for teaching and learning.... Having restrictions on Canadian content in this way creates a shift towards identifying other content (whether that be US or abroad) that could fill its place (i.e. multi-user options). It creates a barrier to enhancing teaching and learning, and is

53 Scholars Portal Books website. <http://books1.scholarsportal.info/home.html>

54 Lyrasis website. <http://www.lyrasis.org/>

cost prohibitive for institutions.” At the recent ICOLC meeting, Lyris presented on a pilot with Harvard, Princeton, and Columbia University Presses to provide all their 2014–2016 titles DRM-Free. The pilot will include up to ten university libraries. The collections will be hosted at De Gruyter Online. Usage will be monitored for eighteen months, and at the end of that time, surcharges will be assessed for the cost of a print copy of the used title (generally around \$45 USD) each time the number of chapter downloads hits a threshold of 3.5x the number of chapters. Libraries can stop access to a title and suspend the usage counter at any time. If they pay for the equivalent of 10 copies of a title, then they get a complementary print copy. Deep discounts off print are available directly from the presses. At the end of the pilot on December 31, 2016, the libraries have perpetual rights to all content they bought with no more usage monitoring. The pilot will assess the impact on bookstore sales when the DRM-Free ebook is available and whether 3.5X the number of chapters is an appropriate use trigger.

The desire for exploration, experimentation, and partnership were evident in the following ideas, from the eBOUND Survey and follow-up conversations with key consortia leaders, about how to further develop and entice purchasing and enhance access to Canadian content:

- Establish business relationships with YBP and Coutts to ensure Canadian published print and electronic titles are profiled in their approval book systems.
- Develop affordable models that take into account different library mandates, sizes, and budgets.
- Explore options for models to meet specialized content demands. Based on follow-up discussions with BCI, the Quebec university library consortia, there is a strong desire for a French language collection of Canadian content. It was felt there was a potential Canadian market with over twenty-five universities and over fifty colleges providing instruction in French in addition to potential international markets.⁵⁵
- Explore DDA/PDA to see if there is a viable, sustainable way to provide that purchase model so it benefits both libraries and publishers. A PDA offer for backlist or for publishers that don't typically infiltrate the university market may be something to test with a few publishers and libraries.
- Regulate the perpetual access model for standardization (platform, file type, DRM, etc). The Lyris DRM-free pilot might be something to test on a small scale. Platform standardization with ProQuest may be strategic if it becomes the dominant ebook platform, which will depend on the success of their new Ebook Central platform (an integrated EBL and ebrary platform).
- Equalize pricing for electronic and print. It was noted that pricing books at a hardcover price already disadvantages libraries, which typically select softcover print, with an additional 13% to 18% higher cost.
- Consider reduced pricing for print when electronic versions are purchased. Approval book vendor integration would facilitate purchase tracking and invoicing for this cost model.

⁵⁵ Christine Hiller, Project Coordinator, Consortial Purchasing, BCI. Personal communication, May 5, 2015

- Explore partnerships with libraries to leverage and co-pay for existing infrastructure and preservation. Expanding the ACUP and Scholars Portal relationship to other publishers could be explored further. During the next two years, the Scholars Portal ebook platform, originally released in September 2009, will be updated and enhanced, to provide better preservation, discovery, and access as the collection grows beyond the current 635,000 titles.⁵⁶
- Investigate Open Access opportunities.
- Allow libraries to buy Canadian books in Canadian dollars rather than the US currency that most aggregators are charging for Canadian customers. Partnering with CARL on this may help with national level advocacy with US based aggregators.
- Continue to take risks and experiment with library partners.

The Future of Scholarly Publishing/OPEN ACCESS

The future of the monograph is a frequent topic of conference programs, blogs, and articles in both publisher and library venues. Internationally, private think-tanks, government organizations, publishers, and libraries are funding explorations to rethink the traditional view of the codex and consider alternatives to the traditional production and dissemination workflow. Projects are looking at how scholarly work is created and content read to consider what forms of production and consumption may be possible in the digital environment that goes beyond duplicating the print experience. From a business cost perspective, Open Access is gaining momentum with journals, partly pushed forward with policy requirements of funding organizations, including the NIH Access Policy⁵⁷ in the United States, the RCUK Policy on Open Access⁵⁸ in Great Britain, and recently the release of the Canadian Tri-Agency Open Access Policy.⁵⁹

University/publisher funding partnerships are also gaining momentum. Knowledge Unlatched⁶⁰ is a partnership between libraries and publishers to essentially crowd-source the cost for production of books with a goal to make specialist academic books more accessible on a global basis. The more libraries providing support reduces the overall cost for production of titles that are Open Access and produced under a Creative Commons license. The Association of Research Libraries (ARL) and the Association of American Universities proposed a subvention model for an institutionally-funded faculty book subvention.⁶¹ In Canada, a growing number of university presses including Athabasca University Press, University of Calgary Press, University of Ottawa Press, and Les Presses de l'Université de Montréal have partnerships with their institution to fund Open Access books. An example of this funding collaboration is the University of Ottawa Library pilot to

⁵⁶ Kathy Scardellato, OCUL Executive Director. Personal communication, May 8, 2015.

⁵⁷ US. Department of Health & Human Services. National Institutes of Health (NIH) Public Access Policy website. <https://publicaccess.nih.gov/>

⁵⁸ Research Councils UK. Open Access website. <http://www.rcuk.ac.uk/research/openaccess/>

⁵⁹ Government of Canada. Science.gc.ca. Tri-Agency Open Policy on Publications website. <http://www.science.gc.ca/default.asp?lang=En&n=F6765465-1>

⁶⁰ Knowledge Unlatched website. <http://www.knowledgeunlatched.org/>

⁶¹ Association of American Universities (AAU) and Association of Research Libraries (ARL). (June 12, 2014). *Prospectus for an Institutionally Funded First-book Subvention*. <http://www.arl.org/storage/documents/publications/aau-arl-prospectus-for-institutionally-funded-first-book-subvention-june2014.pdf>

fund up to five University of Ottawa Press titles annually for Open Access upon publication. More information on Open Access for monographs is presented in a review of open access monograph publishing, prepared for ACUP.⁶² While these current projects are admirable partnerships of how to share costs, scalability will need further consideration of integration into the production workflows of publishers and the acquisition workflows of libraries.

Michael Zeoli from YBP⁶³ cautions about broad misunderstanding surrounding Open Access and the institutional market. Making a book Open Access doesn't mean it should drop out of library distribution channels. World Bank sees its mandate as making every title Open Access, and they do. On the other hand, they pay very close attention that every title is profiled in YBP and available on approval plans, and that the content is available on every major aggregator platform simultaneously with print, so that it is available on eApproval Plans or simply for order. They depend on distributor and aggregator sales—and on the institutional market acquisitions—to ensure that it is financially viable to make their titles free.”

The University of California Press (UC Press) and the California Digital Library (CDL) have received a grant of \$750,000 from the Andrew W. Mellon (Mellon) Foundation to develop a web-based, open source content and workflow management system to support the publication of open access monographs in the humanities and social sciences. The news release on the Liblicense listerv⁶⁴ states “the proposed system will increase efficiency and achieve cost reduction by allowing users to manage content and associated workflows from initial authoring through manuscript submission, peer review, and production to final publication of files on the open web, whether via a publishing platform or an institutional repository.” This platform will support the new Luminos⁶⁵ program to publish Open Access monographs with a cost to authors starting at \$7,500 USD with additional funding support from institution subsidies, sale of print copies, and library membership. With the support of the Mellon Foundation, the University of Michigan Press is investigating a platform for publication and preservation of digitally enhanced humanities monographs⁶⁶ while Stanford University Press is exploring interactive scholarly works with traditional publishing programs.⁶⁷ The Mellon Foundation and the National Endowment for the Humanities (NEH) have provided \$1M to the Humanities Open Book project that provides funds to convert out-of-print books into freely available ePUBs. The program is available to academic presses, scholarly societies, museums, and other institutions that publish books in the humanities.⁶⁸

62 Association of Canadian University Presses. (January 2014). *Monograph Publishing in an Open Access Context*. Retrieved from <http://www.acup.ca/wp-content/uploads/2014/03/ACUP-report-open-access.pdf>

63 Michael Zeoli, Vice President, YBP Strategic eContent Development and Partner Relations, personal communication (email). May 1, 2015.

64 Liblicense Archive. (March 9, 2015). *UC Press and CDL Announce Mellon Grant*. [Press release]. Retrieved from <http://listserv.crl.edu/wa.exe?A2=LIBLICENSE-L;83177d14.1503>

65 University of California Open Press. Luminos Website. <http://luminosoa.org/>

66 University of Michigan. (March 27, 2015). *Mellon Funds U-M Press Collaboration to Create New Ecosystem for Digital Scholarship*. [Press release]. Retrieved from <http://ns.umich.edu/new/releases/22771-mellon-funds-u-m-press-collaboration-to-create-new-ecosystem-for-digital-scholarship>

67 Stanford University Libraries. (January 2015). *Stanford University Press Awarded \$1.2 Million For the Publishing of Interactive Scholarly Works*. [Press release]. Retrieved from <http://library.stanford.edu/news/2015/01/stanford-university-press-awarded-12-million-publishing-interactive-scholarly-works>

68 The Andrew W. Mellon Foundation. (January 16, 2015). *Humanities Open Book: Unlocking Great Books*. [Press release]. Retrieved from <http://mellon.org/news-publications/articles/humanities-open-book/>

A number of commercial publishers are exploring Open Access and alternative publishing formats. Palgrave MacMillan has established a book collection called *Palgrave Pivot* which are titles between 25,000 and 50,000 words and are published within twelve weeks of acceptance, post-review. The cost for an Open Access Pivot book is \$12,000 USD.⁶⁹ Brill has been offering an Open Access option since 2012, charging €5150 for an average-size book (up to 350 pp).⁷⁰ Cambridge University Press (CUP) offers a Gold Open Access monograph publishing option, charging authors \$10,000 USD to publish titles up to 120,000 words plus \$2,500 USD for each additional 30,000 words. The editorial, peer-review and production processes are the same as traditional publication books but the ebook is freely available upon publication. The book is published with a Creative Commons Attribution Non-Commercial (CC-BY-NC) license.⁷¹ Authors still receive royalties from ebook and print book sales. CUP also supports Green Open Access Archiving that allows authors of monographs to post portions of their work on personal websites and institutional or subject-based repositories.⁷²

Models in Other Jurisdictions

There are a number of European initiatives. The UK Arts & Humanities Research Council (AHRC) is funding the two-year, Academic Book of the Future project, in collaboration with the British Library, looking at how scholarly work in the Arts and Humanities will be produced, read, and preserved in coming years.⁷³ The report on monographs and Open Access for the Higher Education Funding Council for England (HEFCE)⁷⁴ and the JISC National Monograph Strategy Roadmap⁷⁵ are additional discussion papers on the future of the monograph. The German Research Foundation (DFG) has provided approximately 800,000 Euros in funding for two projects in Linguistics and Transcultural Studies for two years. The projects are using Open Monograph Press as their platform.⁷⁶ OAPEN (Open Access Publishing in European Networks) is a dissemination platform for Open Access monographs from a number of publishers, primarily in the area of social sciences and humanities. The University of Ottawa Press has ten of its titles on OAPEN.⁷⁷

69 Palgrave MacMillan. Palgrave Open Access Publishing for journal articles, Palgrave Pivot and monographs leaflet. Retrieved from http://www.palgrave.com/resources/docs/Open/openleaflet_web.pdf

70 Brill Open Website <http://www.brill.com/brill-open-0>

71 Creative Commons. About the Licenses website. <https://creativecommons.org/licenses/>

72 Cambridge University Press. Cambridge Open Access Books website. <http://www.cambridge.org/us/academic/cambridge-open-access/cambridge-open-access-books>

73 Cambridge University Press. Green Archiving Policy for Books website. <http://www.cambridge.org/us/academic/cambridge-open-access/cambridge-open-access-books/green-archiving-policy-books>

74 Higher Education Funding Council for England. Monographs and Open Access website. <http://www.hefce.ac.uk/pubs/rereports/year/2015/monographs/>

75 Showers, B. (for JISC). (Updated March 17, 2015). *A National Monograph Strategy Roadmap*. Retrieved from <http://www.jisc.ac.uk/reports/a-national-monograph-strategy-roadmap>

76 Public Knowledge Project (PKP). (January 7, 2014). *Funding for Two German Open Access Scholarly Monographs and Monograph Series using OMP*. [Press release]. Retrieved from <https://pkp.sfu.ca/funding-for-german-open-access-scholarly-monographs-and-monographic-series-using-omp/>

77 OAPEN website. <http://www.oapen.org/>

Final Comments on University Libraries

This university section attempted to provide an overview of the complexity of the university ebook environment with aggregator and publisher platforms offering a dizzying array of purchase, subscription, and lease options. The large academic publishers host their own content on their own platforms, scholarly publisher aggregations have developed collections of presses on their own platforms, and commercial aggregators continue to evolve their business models and compete for content supremacy. Big Deal ebook collections offer the benefit of comprehensiveness and predictability of access. But few libraries have the budget flexibility to enter into wide-scale big deals and still rely on title-by-title selection to mirror their print book selection through Approval vendors. PDAs are a new model viewed by libraries as a way to blend the big deal access with the title-by-title selection of only books users are reading. Open Access experiments are developing with funding by publishers, foundations, and universities. At this point, there is no dominant model emerging.

University collections librarians recognize that, for Canadian publishers, it will be impossible to infiltrate into every option of this complex mix of platform specifications and cost models. Developing a sustainable future for Canadian ebooks should include experimentation with library partners (on a small scale) to test new business and access models; industry-wide, comprehensive title profiling into book approval systems; consolidation into one commercial and/or one scholarly aggregator; and expanded partnerships with Scholars Portal for long-term preservation of all Canadian ebook content.

COLLEGE LIBRARIES

An Overview

For publishers, Canada's colleges are probably the least understood sector providing library services. To gain information for this report, college librarians across the country completed the same survey that was sent to university selection librarians, and outlined in the previous section of this paper.

In 2014, more than 30% of the Canadian working-age population was in possession of a post-secondary certificate or diploma,⁷⁸ more than any other Organization for Economic Cooperation and Development (OECD) member country.⁷⁹ As these figures do not take into account college graduates who went on to complete a university degree, they are likely underestimated. Community colleges, vocational colleges and Québec's CEGEPs (Collèges d'Enseignement Général et Professionnel) are therefore a critical element of Canada's post-secondary education infrastructure.

With more than 430 campuses in all thirteen provinces and territories, colleges reach a diverse population of approximately 900,000 full-time and 1.5 million part-time learners,⁸⁰ amounting to a total of more than 560,000 student Full-Time Equivalent (FTE). Table 12 provides a breakdown of these figures per province or territory while Appendix 1 lists all publicly funded colleges in Canada.

Canadian colleges, present both in large urban areas and in rural contexts, cater to a unique demographic and are firmly rooted in the local communities. Large numbers of part-time and distance-learning students highlight the aim of colleges to bring quality post-secondary education to all Canadians, regardless of geographic location.

Depending on the institution, programs are offered in English and French as well as in Métis and other Aboriginal languages. The focus is primarily on education, although an increasing number of colleges also invest in applied research, often in collaboration with industry.

Colleges are opening new campuses in urban and rural areas. Faced with increased competition between institutions, colleges are reaching out to emerging markets outside Canada to attract international students. Some colleges are opening campuses abroad. As a result, the number of students enrolling in Canadian colleges is experiencing unprecedented growth. Ontario colleges reported an increase of nearly 50% in audited student full-time equivalent (FTE) between 2007 and 2011.⁸¹

78 Statistics Canada. *Canada at a Glance 2015*, Table 9. <http://www.statcan.gc.ca/pub/12-581-x/2015000/edu-eng.htm>, accessed May 15, 2015.

79 The Conference Board of Canada, *College Attainment scorecards* (June 2014 data). <http://www.conferenceboard.ca/hcp/provincial/education/college.aspx> and <http://www.conferenceboard.ca/hcp/details/education/college-completion.aspx>, accessed May 15, 2015.

80 The Association of Canadian Community Colleges (ACCC), *Annual Report 2013-2014*. Available at <http://www.collegesinstitutes.ca/news-centre/studies-reports/>, accessed May 15, 2015.

81 Compilation of statistics published by the Head of Libraries and Learning Resources (HLLR) of the Ontario Colleges. Available at <http://www.hllr.org/page/statistics.aspx>, accessed May 15, 2015

Table 12. Estimated total number of colleges, campuses and audited student Full-Time Equivalent (FTE) or Full-Load Equivalent (FLE) per province.

Province	Colleges	Campuses	Student FTE/FLE
Alberta	14	56	55,500 [†]
British Columbia	15	59	63,000 [†]
Manitoba	5	22	11,500 [†]
New Brunswick	3	12	6,800 [‡]
Newfoundland and Labrador	1	17	8,800
Northwest Territories	1	3	1,000 [†]
Nova Scotia	3	16	10,200 [†]
Nunavut	1	6	1,200 [‡]
Ontario	24	105	226,900
Prince Edward Island	2	15	2,600 [†]
Québec	55	76	163,200
Saskatchewan	10	44	16,000 [†]
Yukon	1	1	700 [‡]
Canada total	135*	432	567,400

* Depending on the counting methodology, a different figure for the number of public colleges in Canada can be reached. The Council of Ministers of Education cites a total of 183 colleges.⁸² The difference is likely due to a different way of counting institutions in situations such as Nova Scotia, where a single organization oversees thirteen local colleges.

† Current figures unavailable, quoted figure based on reported FTE from previous years.

‡ Full-time equivalent estimated from student enrollment figures.

The organizational landscape of the Canadian colleges shows a diversity of approaches. In some provinces, community colleges are grouped under a single organizational umbrella. The Nova Scotia Community College (NSCC), for example, oversees all thirteen campuses. Other provinces have a series of independent institutions that may cooperate on some activities such as student application or the procurement of goods and services. On a national level, colleges are represented by the Association of Canadian Community Colleges (ACCC), recently renamed Colleges and Institutes Canada. Some colleges are administratively affiliated with universities while others are forming partnerships with universities in order to offer complementary curricula. Such college-university partnerships often share library facilities.

This section concentrates on publicly-funded colleges and CEGEPs defined by Statistics Canada as “colleges and institutes.” These institutions are those offering “certificate, diploma and transfer or continuing education and professional development programs requiring less than three years of full-time study.”⁸³ Several colleges in British Columbia and Ontario, however, offer both 2-year and 4-year programs and expend their research activities, further blurring the line between colleges and universities. In addition to the publicly funded institutions considered in this study, 51 private, religious or indigenous

82 The Council of Ministers of Education, Canada. *Education in Canada : an overview*. <http://www.cmec.ca/299/Education-in-Canada-An-Overview/index.html#04>, accessed April 17, 2015

83 Orton, Larry. *Statistics Canada's Definition and Classification of Postsecondary and Adult Education Providers in Canada*. Ottawa: Statistics Canada, January 2009. 81-595-M No. 071. <http://www.statcan.gc.ca/pub/81-595-m/81-595-m2009071-eng.pdf>, accessed April 17, 2015

not-for-profit institutions also offer government-recognized post-secondary education across the country.⁸⁴ Finally, a full panorama of college education in Canada would not be complete without mentioning the more than 500 for-profit members of the National Association of Career Colleges (NACC). Although these institutions are not the focus of this study, their need for ebooks and other electronic resources is likely to be similar to those of the public colleges.

Library Services in Canadian Colleges

Canadian college libraries are as varied as the colleges themselves. Larger institutions tend to have established libraries, with appropriate staff, budget and amenities. Smaller colleges and institutions that have been established more recently tend to have smaller or less formal library services, often affiliated with other campus facilities such as hospitality services. It is not rare for a college library and bookstore to be a single administrative entity. Textbook sales are often an important source of revenue for the library when they are combined with bookshop services. Libraries that rely on bookstore sales anecdotally reported a tendency to worry that the replacement of textbooks with electronic material might negatively affect their operating budget and threaten their ability to provide good library services.

While larger institutions have subject librarians on staff who are responsible for selecting materials in a given field of expertise, smaller institutions often rely on faculty members for the development of collections.

Where there is a close partnership or administrative affiliation between a college and a university, college libraries tend to have established shared borrowing privileges and coordinated collection management policies. Unless the college is formally affiliated with a university, however, acquisition budgets are separate, and access to electronic materials is negotiated separately. For example, while Durham College and the University of Ontario Institute of Technology (UOIT) in Oshawa, Ontario share common library space, print collections and staff, the two institutions have separate acquisition budgets and manage two distinct sets of electronic collections. Authentication processes for students and staff sharing the same facilities are different.

Library staff working in similar situations report that even when there is interest from college and university administrations to merge library budgets and manage a single electronic collection, pricing models for electronic materials make it difficult to combine college and university resources. Vendors use multiple factors to price their electronic collections, including the number of student FTEs and the type of institution, typically offering a lower price per student to colleges. For combined organizations, the higher pricing is often quoted.

⁸⁴ The Council of Ministers of Education, Canada. *Education in Canada : an overview*. <http://www.cmec.ca/299/Education-in-Canada-An-Overview/index.html#04>, accessed April 17, 2015

Depending on the province, college libraries either participate in regional or provincial library consortia or have formed their own interest groups. College libraries in Alberta are part of The Alberta Library (TAL), a consortium that manages most university, college, special and public libraries throughout the province.⁸⁵ The British Columbia Electronic Resource Network (BC ERN) serves both private and publicly funded post-secondary libraries in the province, as well as Yukon College.⁸⁶ Several colleges in British Columbia, Alberta and Manitoba are members of the BC Libraries Cooperative⁸⁷ (BCLC) and/or the Council of Prairie and Pacific University Libraries⁸⁸ (COPPUL). A small number of Manitoba colleges participate in the Manitoba Library Consortium⁸⁹ (MLCINC). The Nova Scotia Community College is a member of the Novanet consortium⁹⁰ together with the province's universities, as well as participates in the Council of Atlantic University Libraries, as is P.E.I.'s Holland College.⁹¹

All Québec CEGEPs are members of the Centre Collégial des Services Regroupés⁹² (CCSR) as well and operate a provincial documentation centre, the Centre de Documentation Collégiale⁹³ (CDC). Ontario college libraries are served by the non-profit Ontario Colleges Library Service⁹⁴ (OCLS), and coordinate their efforts through the Heads of Library and Learning Resources⁹⁵ (HLLR) operating group. Consortia further coordinate their operations through membership in Consortia Canada,⁹⁶ which aims to ensure institutions across the country benefit from similar licensing terms.

Nursing and public health programs are often offered in collaboration between colleges, universities and hospitals, resulting in ad-hoc consortia serving those institutions: the NEOS Library Consortium in Alberta,⁹⁷ the Electronic Health Library of British Columbia⁹⁸ (e-HLbc), the Health Knowledge Network (HKN) serving institutions in Saskatchewan and Manitoba,⁹⁹ and the Ontario Learning Resources for Nursing (ORLN) initiative. Such programs were created to ensure that nursing students retain access to required resources across the various institutions they are expected to attend in the course of their collaborative programs.

While the selection of print and electronic collections remains the prerogative of each member institution, library consortia offer economies of scale to both vendors and libraries. Acting as a group, libraries represent larger budgets and negotiate licenses on behalf of a larger number of users, allowing them to acquire content at a lower cost per user.

85 The Alberta Library (TAL) members list, <http://www.thealbertalibrary.ab.ca/members>, accessed May 15, 2015

86 BC ELN members list, <http://www.eln.bc.ca/institutions/select.php>, accessed May 15, 2015

87 BC Libraries Cooperative members list, <https://bc.libraries.coop/our-members/>, accessed May 15, 2015

88 COPPUL members list, <http://www.coppul.ca/organizations>, accessed May 15, 2015

89 <http://www.mlcinc.mb.ca/>, accessed May 15, 2015

90 Novanet consortium members, <http://www.novanet.ns.ca/about/member-libraries-2/>, accessed May 15, 2015

91 CAUL-CBUA members list, <http://caul-cbu.ca/about/institutions>, accessed May 15, 2015

92 <http://ccsr.qc.ca/fr/accueil.asp>, accessed May 15, 2015

93 <http://www.cdc.qc.ca/>, accessed May 15, 2015

94 OCLS colleges list, <https://www.ocls.ca/colleges>, accessed May 15, 2015

95 HLLR college representatives, <http://www.hllr.org/page/college%20representatives.aspx>, accessed May 15, 2015

96 Consortia Canada member consortia, <http://www.concan.ca/institutions/index.php>, accessed May 15, 2015

97 The NEOS Library Consortium members list, <http://www.neoslibraries.ca/node/156>, accessed May 15, 2015

98 e-HLbc members list, <http://ehlbc.ca/organizations>, accessed May 15, 2015

99 HKN members list, <http://www.hkn.ca/who-we-are/our-subscribers>, accessed May 15, 2015

For vendors, a single negotiation for a consortium reduces overhead. It is important to remember, however, that libraries rarely consolidate their acquisition budgets and content selection process: the decision to purchase, license or renew a product remains at the level of each participating library and individual invoicing remains a necessity. In general, libraries prefer when vendors first approach consortia when introducing a new product.

A list of colleges presented in Appendix B documents each institution's membership in regional and health consortia as of May 2015.

College Library Budgets Under Pressure

Detailed acquisition budgets for all Canadian publicly funded college libraries are not easily available. Based on published college library budgets for Ontario and self-reported figures from a subset of colleges across Canada,¹⁰⁰ the annual acquisition budgets for print and electronic materials in all colleges are estimated at approximately \$15 million dollars.

The proportion of funds allocated to electronic resources normally varies from 40% to slightly above 50%, with French-language colleges and CEGEPs generally reporting figures at the lower end of this range. There are a few colleges that do not invest in electronic resources.

It is expected that the percentage of collection budgets spent on electronic material will grow. The budget allocated to electronic materials (journals, databases and ebooks) in the Ontario colleges has grown by 70% in the past five years. If this trend continues, the total expenditures on electronic materials by Canadian colleges could easily reach \$20 million by 2020.

As stated previously, colleges across the country have seen a dramatic increase in enrolment in the past decade. College library budgets, taken as a group, have not increased to reflect an increased number of students being served. For example, while the number of audited student FTEs in Ontario grew by 50% between 2007 and 2011, library acquisition budgets increased by only 26% during the same period. This figure has been adjusted for inflation.¹⁰¹

The difference between the number of students and available funds means that college libraries now spend about 15% less on each student they serve than they did in 2007. Since student FTEs are typically used by vendors of electronic content to price their products, the gap is a significant problem. Compounding the problem, the majority of vendors are based in the USA and their products are invoiced in US dollars.¹⁰² Even

100 *eBOUND Canadian Electronic Books Survey*. April 2015. Unpublished Web survey to Canadian University and Colleges Libraries. College Library Responses (41 respondents). This survey is referred throughout this document as "eBOUND Survey".

101 Inflation between 2007 and 2011 : 7.47% as per the Statistics Canada Consumer Price Indexes for Canada monthly, calculated via <http://www.bankofcanada.ca/rates/related/inflation-calculator/>, accessed April 20, 2015

102 Source : xe.com historical currency data.

without these complications, the prices for electronic subscriptions typically increase by 4–5% annually.¹⁰³ The combination of these factors reduced the amount of available material to students by almost 50% in the past five years alone.¹⁰⁴

It is not surprising that college libraries across the country report that they are forced to make drastic changes in their collection development policies to account for intense pressure on acquisition budgets. Several survey respondents confirmed that while they once purchased both print and ebook titles for some material, they now choose between the two formats. Many college libraries also report that they will only opt for an ebook version if it is significantly less expensive than its print counterpart.

Ebook Collections in Canadian Colleges: Current Situation and Trends

In general, larger institutions have established ebook collections while smaller colleges often report an interest in developing ebook collections but also state that they currently (early 2015) have no ebook titles. French-language institutions in particular report much lower number of ebooks in their collections, a situation that is largely linked to the limited selection of French-language electronic content suitable for colleges.

One of the major advantages cited for ebooks is the fact that they can be acquired as part of large database collections that vendors have already aggregated by subject. This allows the quick addition of numerous titles to a collection and makes it somewhat easier for students to find needed material. The English-language colleges that participated in our survey report that ebooks account for anywhere from 15–80% of their total monograph collections. The figure is generally closer to 10% for French-language colleges.¹⁰⁵ This discrepancy reflects individual college emphasis, or lack of emphasis, on distance education as well as the degree to which monographs are needed to support learning in different disciplines.

EBSCO ebook collections (Academic and College Complete) are amongst the most popular multi-publisher products purchased by colleges, with over 50% of survey respondents reporting that they acquire at least one of EBSCO's collections on offer. Forty percent of colleges also report subscribing to Gibson Library Connections, Canadian Electronic Library/Bibliothèque Électronique Canadienne and 20% to both Safari Tech Books Online and McGraw-Hill ebooks. For title-by-title ebook acquisitions, the ProQuest ebrary and EBL platforms are favored by 40% of college respondents, while 15% report using the MyiLibrary platform offered by Coutts Information Services. This distinction is likely to be irrelevant soon, however, with ProQuest's acquisition of Coutts and its

¹⁰³ International trends captured by the International Coalition of Library Consortia (ICOLC), Fall 2014. Restricted access.

¹⁰⁴ *eBOUND Canadian Electronic Books Survey*, college responses (n=41). April 2015. Unpublished.

¹⁰⁵ *eBOUND Canadian Electronic Books Survey*, college responses (n=41). April 2015. Unpublished.

ebook platform.¹⁰⁶ Regardless of the platform being used, 50% of the English-language respondents and 20% of the French-language respondents report currently purchasing title-by-title ebooks from Canadian publishers.

Trade title platforms such as OverDrive (5%) and Books24x7 (10%) are less common, and several colleges report a desire to end their subscriptions to those platforms due to high costs per use and a lack of academic titles. Among the academic publisher platforms, Project MUSE is the most prevalent in the colleges with 15% of respondents subscribing. Individual French-language colleges cite CAIRN, NumiLog and pretnumerique.ca as examples of platforms they are using, but they are not as prevalent amongst colleges as the above-cited platforms, which mainly offer English-language content.

A third of the English-language respondents reported having a Patron-Driven Acquisition (PDA, sometimes also named Demand-Driven Acquisition or DDA) program in place, while only one out of 20 surveyed French-language colleges is using this method. One college indicated that PDA is their primary mode of ebook acquisition. All other institutions consider this acquisition model to be complementary to their collection development policies.

The development of ebook collections in Canadian colleges is mainly a response to shifting institutional priorities that aim to improve access to resources for all campuses, including remote locations. Colleges cite the increase in distance learning programs across the country as the major drive for acquiring ebooks. Librarians also report that there can be a discrepancy between optimistic provincial e-learning expectations and the technical realities of what is available to students in rural areas. A college in British Columbia, for example, reported that a significant number of its distance-learning students still rely on slow dial-up internet connections, making the download of ebook titles from home impossible. Indeed, recent reports indicate that upwards of 20% of rural areas in Canada had no broadband access as late as 2012.¹⁰⁷ Furthermore, a college in Québec warned that students may lack the proper equipment to read digital content, relying on publicly available computers or mobile devices not supported by all ebook vendors.

In general, in a favorable budget situation and if required content is available, electronic titles are preferred where demand is large. Digital formats are also preferred for reference texts. English-language colleges report a slight preference for university press titles (both Canadian and international) in electronic format, while French-language colleges tend to favor acquiring hard copies of those titles. Print is markedly preferred where the physical

106 ProQuest to Acquire Coutts Information Services and MyiLibrary from Ingram Content Group. Media release. April 30, 2015. <http://www.proquest.com/about/news/2015/ProQuest-to-Acquire-Coutts-Information-Services-and-MyiLibrary-from-Ingram-Content-Group.html>

107 Canadian Radio-television and Telecommunications Commission (CRTC). Communications Monitoring Report 2013 : Broadband availability and adption of digital technologies. January 2014. <http://www.crtc.gc.ca/eng/publications/reports/policymonitoring/2013/cmr6.htm>, Accessed May 16, 2015.

and visual format is relevant to the user experience with content, such as children's books (notably purchased by colleges that offer Early Childhood Education programs, which represent about half of the population sampled for this study), architecture and other pictorial titles, and for popular reading titles. Short content such as journal articles and reference entries are reported to be good candidates for electronic format, while there is still debate whether long form electronic monographs respond to a real demand from faculty and students.

In general, French-language colleges tend to have a stronger preference for print, notably for textbooks and French titles. The unavailability of this content in electronic format is the most-cited deterrent for the development of ebook collections, even though institutions in Québec have reported a desire to favour electronic content in the future in an effort to free shelf space and to broaden the diffusion of French-Canadian content.

As noted above, Canadian colleges are suffering from the combined effects of diminishing per-student acquisition budgets and the rising costs of electronic materials. As a result, institutions rarely have dedicated ebook budgets. Instead, ebook purchases are funded from the monographs budget. Several colleges are reporting that an increasing proportion of the monograph budget is being allocated to ebooks as there are no other funds. A francophone college that recently started the development of an ebook collection reported that 50% of its monographs budget is now allocated to ebooks. A college in Ontario reported that while they did purchase the same titles in print and electronic format in the past this period is largely over and publishers have to expect electronic sales to replace print sales. Colleges also report that maintaining their subscription to databases and journal packages is increasingly difficult under the current budget constraints, and often cite ebooks as a "sacrificial" content type that will be cut in priority if databases become too expensive.

Several institutions also lament the fact that important content is often available only as subscription, or as part of a large collection, with tier-based pricing models that prevent smaller institutions from participating. Consortia initiatives such as the Ontario Colleges ebook Consortium Project¹⁰⁸ (for large ebook collections), or the Novanet ebook Demand-Driven Acquisition pilot project¹⁰⁹ in Nova Scotia can help those institutions benefit from the conditions that are being offered to larger libraries. However, not all provinces are in a position to offer such initiatives, which often rely on external funding during their exploratory phase. Vendors and publishers are therefore encouraged to price their products in a way to make them viable even for very small institutions.

108 Ontario Colleges Library Service (OCLS). *ebook Consortium Project goals*. <https://www.oclsl.ca/services/research/ebook-consortium-project>, accessed May 17, 2015

109 Novanet ebook DDA Pilot Project. <http://www.novanet.ns.ca/public/novanet-ebook-dda-pilot-project/>, accessed May 17, 2015

Quality Requirements for Ebooks

Publisher and vendor experimentation with various business models for ebooks has resulted in a multiplication of platforms, incompatible formats and complex digital rights management (DRM) mechanisms. Together, these factors make the usage of ebooks by college faculty and students complicated and are universally cited by respondents to our survey as the major deterrent preventing wider adoption of ebooks.

While efforts have been made by platform vendors to streamline the process of discovering and reading titles, these efforts typically address workflow within a specific platform and do not recognize that in order for libraries to provide access to a variety of content, it is very likely that they need to subscribe to various platforms. This requires users to switch from one platform or content repository to another as they request titles. Vendors market their own platforms, but readers are not interested in accessing content from a specific platform. Readers are interested in accessing particular titles, and are disconcerted when they are redirected to different platforms, each with their own rules, features and limitations.

While libraries recognize the need for multiple platforms to exist and foster competition, they warn that without a standardization of features, accessing ebooks will continue to prove a struggle for users. Regardless of vendor or platform, a user should be able to access titles that offer the same features and are bound by the same usage rules. Moreover, the content provided by libraries needs to be “device neutral,” and not require users to download proprietary apps and create different accounts for each vendor platform.

Colleges report a growing frustration at the failure of vendor representatives to acknowledge these issues. Solutions have been developed by the libraries themselves to work around the problems of multiple platforms, such as Scholars Portal offered by the Ontario Council of University Libraries (OCUL), in which electronic titles benefit from a unified interface and clearly stated usage rules thanks to the local loading of content in a database managed by the library consortium. However, such a solution requires an extensive information technology infrastructure, expertise and staff—these things are outside the reach of smaller institutions.

A crucial element for making content accessible to users regardless of vendor or platform is quality metadata. More than 80% of the college libraries that participated in this study indicate that their library catalogue is the primary place where users find content, whether print or electronic,¹¹⁰ and 25% now let their users search through a Discovery Layer interface. Thirty percent require a way to easily integrate titles with course reserve packs and Learning Management Systems. Yet, a majority of colleges still rely on an A-to-Z list

¹¹⁰ *eBOUND Canadian Electronic Books Survey*, college responses (n=41). April 2015. Unpublished.

of platforms and collections for providing access to ebooks. The provision of quality metadata records for inclusion in local catalogues is therefore still necessary for the efficient discoverability of ebooks. Unfortunately, colleges often report receiving incomplete or delayed sets of records, requiring the constant monitoring of the catalogue to ensure timeliness and quality of results. As this process is very staff-heavy, it is only affordable for larger institutions.

Smaller colleges with limited resources have indicated that the absence of dedicated cataloguing staff and unreliable provision of metadata by vendors are amongst the factors preventing them from investing in ebooks. Consortia initiatives such as the Ontario Colleges ebook Consortium project aim to address this issue by centralizing part of the metadata management process, but many institutions still rely entirely on vendors for the provision of metadata.

Colleges with Discovery Layer interfaces have the option of using vendor-provided knowledge bases to simplify the management of their ebooks. These tools theoretically offer libraries the option to add content from an entire platform or collection to the content that is searchable through the Discovery Layer. However, libraries then rely entirely on vendors to keep the knowledge base up-to-date and error-free. The process of correcting a record from a vendor-provided knowledge base is slow and frustrating. When, for example, a title recommended for a course is not displayed properly or fails to appear in search results through faulty metadata, librarians will typically discover the situation on the day when most users request those specific titles. Having to wait until the next update of the knowledge base to solve the issue is not an acceptable solution for libraries. Libraries also desire the ability to curate content by determining which titles should be prominently displayed for specific search terms. This process also requires the ability to quickly remove titles from a collection if they are judged irrelevant. With vendor-created collections and vendor-controlled knowledge bases, libraries have lost this important part of their duties, as a librarian from Québec explained.

Apart from quality metadata, college libraries cited the following features as ones they felt were required:

- **Full-text search functionality** (within book content). This functionality should be available regardless of the platform or vendor that is providing access to content. Such global search is only possible if vendors release their index data in an open format, which is rarely the case.
- **Full mobile and ebook Reader compatibility.** All ebooks, regardless of vendor or platform, should be readable on mobile devices including e-paper-based readers. This requires the possibility to download all titles for offline reading. When asked if they preferred the ability to download content at a chapter or title level, colleges indicated a small preference towards full title downloads. Many platforms require users to download an app that is specific to a particular vendor, or require users to create accounts, which unnecessarily complicates the process of downloading content.

- **Multiple user access.** As ebooks are often acquired to provide convenient and remote access to heavily used titles, models that restrict the number of concurrent users are ranked as undesirable by a large proportion of colleges.
- **Compliance with accessibility guidelines.** As provinces pass regulations to ensure equity of access to education regardless of physical ability (such as the Accessibility for Ontarians with Disabilities Act, AODA), libraries are being required to provide content in a format that is suitable to be used with accessibility-enhancing technologies, such as screen readers. Titles protected by Digital Rights Management systems typically prevent the use of such technologies, requiring libraries to manually request access to alternate formats from vendors, a slow and costly process both for libraries and vendors.

Vendors of ebook platforms are marketing a variety of features allowing users to interact with content. However, while recognized as being “nice to have”, those features are largely regarded as secondary with regards to the requirements discussed above. College libraries consider the following as nice to have:

- Multimedia features such as the inclusion of videos in titles.
- Ability to print and copy.
- Ability to annotate or take notes.
- Presentation of ebook text as an exact copy of the printed book.
- Hyperlinks within the text, including index and references.
- The preferred formats are PDF and EPUB, with XML indicated as a “nice to have”.

Digital Rights Management measures are accepted by librarians only as a compromise on the cost of collections. Such limitations run contrary to most of the required features discussed above, but as DRM-free or less restrictive options, such as unlimited access, are often much higher-priced (if available at all), colleges have learned to make compromises. One Saskatchewan college librarian, for example, notes that for titles included in course reserves, a perpetual and unlimited access is crucial and the library accordingly budgets more to secure this type of content. DRM-free titles for the rest of their collection are highly desired but “unrealistic” in regards to college budgets. Librarians also note that where a limitation on the number of concurrent users is unavoidable, the ability for users to place “holds” on such titles is necessary.

Demand for Canadian Content

Despite the drawbacks discussed above, ebooks are an increasingly common fixture of college libraries and there is demand for more such content. Several colleges regret that not enough content is available from Canadian publishers, or that such content is not being profiled clearly enough by vendors. Following are a few notes from college libraries regarding access to Canadian ebook content.

A common element expressed by respondents is that content providers must recognize the diversity of libraries and understand that no single solution will meet the requirements of all institutions. Colleges prefer the current efforts undertaken by Canadian publishers to make sure their content is accessible through existing platforms, to an alternative that would see publishers developing their own platform. Large subject ebook collections available via subscription can represent a good opportunity for colleges to rapidly increase their collections at a relatively low cost per usage.

A majority of the colleges that participated in this study report having a subscription to at least one collection offered by EBSCO, a provider of research databases, journals, magazine subscriptions and ebooks. The EBSCO model offers much-desired unlimited access and their platform meets the functionality requirements of most libraries. Several colleges have expressed an interest in more Canadian content being made available through EBSCO. Noting the importance of quality metadata, they encourage Canadian publishers to help ensure that EBSCO is able to provide up-to-date metadata records to libraries.

Subscription collections should however not be the only approach undertaken by Canadian publishers. Title-by-title perpetual acquisition is a model that is favoured by several colleges. English colleges tend to prefer that this content be available through Coutts' MyiLibrary platform. French-language colleges use a variety of vendors and strongly support including local bookstores as part of the ebook acquisition workflow. This reflects the importance of prenumerique.ca and NumiLog.

Pricing Models

In general, college survey responses reflect a belief that the price of ebooks should be equivalent to print prices or should even be less for one-book, one-use models. Some survey respondents state that they would accept a mark-up over print of up to 25%, as a perceived incentive for publishers to offer ebook versions.

The general opinion of respondents is that backlist titles should not be priced above print editions. Respondents understand that there will be a higher cost per title for unlimited access models but seem to expect that the price will remain “reasonable” and that, ideally, it can be negotiated to allow for local situations.

The pricing model used by OverDrive for unlimited access is viewed as unrealistic. The subscription models used by EBSCO (for academic content) and Books24x7 (for trade publishers and general interest) are preferred by several respondents. Annual platform fees, such as those charged by ebrary, are universally disliked.

Some respondents expect discounted ebooks when they already own the print version, especially when the library owns multiple copies. Conversely, a discount for print copies of owned ebooks is also desired. Colleges report concern that as publishers transition from print to electronic, higher per-title prices will prevent libraries from offering collection breadth as acquisitions budgets lose purchasing power.

Colleges that operate a Patron-Driven Acquisition model report an interest in adding more Canadian publishers to profiles, with a slight preference for the YBP platform. Again, prices close to print seem to be expected.

Regardless of acquisition model, there are expressed hopes that Canadian publishers digitize their entire front list of current titles and then work to digitize earlier publications. Both French and English-language colleges report that the absence of bestselling titles on course reading lists is a major element preventing them from spending more on ebooks. This is particularly true for Canadian trades, technical and association publishers. These occupational publishers often offer ebook sales to individuals only, using formats and license agreements that specifically prevent the sharing of such content. Because such titles are unavailable on a library ebook platform, libraries are unable to acquire and distribute such content.

Several respondents urge publishers to recognize that library sales play an important role in the visibility of their titles. Every title should therefore be made available to institutional customers, at a price point that makes such shared access sustainable both to publishers and libraries.

French-language textbook and K–12 publishers¹¹¹ are also conspicuously absent from ebook aggregators, a situation that prevents libraries from providing important materials for their users. Several respondents noted that the electronic version of a textbook is not regarded as an alternative to students purchasing individual copies but as an additional access medium that allows full-text searching and quick reference, notably in the preparation for exams.

Respondents suggest that Canadian publishers should not rely on vendors such as YBP to profile their content to libraries. Vendors tend not to include imprints that do not publish regularly in library profiles, a category in which several smaller Canadian publishers fall. Profiling by publisher is also not considered as a reliable approach to showcase Canadian content. Respondents recommend focusing on local authors regardless of publishers.

111 The following publishers have been cited by several French-language colleges as being the ones that should either digitize their content or consider institutional ebook models better suited for libraries : Chenelière Éducation/TCMEDIA, Éditions CEC, Éditions du Renouveau Pédagogique ERPI, Autrement, Fides, La Découverte, Boréal, Groupe Modulo, BTLF, Québec Édition, APUC, etc.

Titles and series that specialize in aboriginal studies are also often absent from profiled content. In general, bundles and vendor-defined collections are considered to be a good value per title, but several institutions report that a large number of titles are irrelevant for colleges and lower the value of an aggregated collection. Bundling titles at a reduced price is appreciated, especially for backlist titles, but libraries should have the ability to customize their collections.

In summary, respondents felt that Canadian content should be available in a variety of acquisition models, priced accordingly, with libraries free to choose the model that is best adapted for each title or collection. Preferred platforms are MyiLibrary, EBSCO, Books24x7 and prenumerique.ca. ProQuest's ebrary platform is also often cited as offering good search and reading functionalities, but its pricing model is criticized.

Alternative Models

Of all the technical issues that prevent a wider adoption of ebooks in college libraries, the majority appear to be related to concerns about DRM. While libraries recognize the need for publishers to ensure sufficient revenue to maintain their existence, they warn that complex methods to restrict access and usage of ebooks are not a sustainable solution for college libraries. A healthy publishing industry is an important element in Canada's cultural and educational ecosystem, but the industry may be in danger of losing college library markets.

Colleges are looking elsewhere for solutions. Open textbook initiatives are being discussed by many colleges,¹¹² and may result in a new model that excludes publishers and their long experience in producing textbook content. While libraries generally applaud these initiatives and welcome the ease of managing Open Access titles, the exclusion of publishers is certainly not a desired outcome. The respondents of the survey suggest that publishers look at Open Access and other initiatives as this represents growing competition. As we have seen with the internet, convenience and ease of use trump concerns about content.

Models such as those explored by the Knowledge Unlatched pilot¹¹³ reveal the potential of discussing transparently the revenue from library sales that is necessary for a title to be commercially viable. Using this model, if libraries can guarantee a certain level of revenue, the content is available to them in an unlimited format. Respondents seem ready

112 Notable examples include the BCcampus OpenEd initiative (<http://open.bccampus.ca/>, accessed May 17, 2015), the Affordable Learning Georgia Initiative (see Gallant, Jeff (2015) "Librarians Transforming Textbooks: The Past, Present, and Future of the Affordable Learning Georgia Initiative," *Georgia Library Quarterly*: Vol. 52: Iss. 2, Article 8. Available at: <http://digitalcommons.kennesaw.edu/glq/vol52/iss2/8>, accessed May 17, 2015), the Virginia Community Colleges, open source textbook pilot (<http://the-digital-reader.com/2015/05/13/virginia-launches-statewide-open-source-textbook-program/>, accessed May 17, 2015), etc.

113 Montgomery, Lucy (2014) "Knowledge Unlatched: A Global Library Consortium Model for Funding Open Access Scholarly Books. Full Report on the Proof of Concept Pilot 2014," *Journal of Cultural Science*: Vol. 7: Iss. 2. Available at <http://www.knowledgeunlatched.org/wp-content/uploads/2015/01/KU-Full-Pilot-Report-CS.pdf>, accessed May 17, 2015)

to cover their share of the cost of producing knowledge in Canada but expect a quality product that can be advertised and distributed in ways that customers expect. Given the nature of the responses, there may be disagreements about what constitutes a reasonable cost to colleges for such a service.

Final Comments on College Libraries

Canadian colleges are experiencing an era of unprecedented growth. Online learning is also on the rise, allowing students to gain access to education regardless of their geographical location and occupation. The combination of those two factors makes colleges a very attractive market for the development of ebook collections. Several challenges have been identified. Budgets allocated to the acquisition of print and electronic materials have not kept pace with the recent large increase in number of students, resulting in fewer resources available per FTE. Due to a large disparity in size and organizational models, not all college libraries have the required staff availability and expertise required to efficiently select and manage ebook collections, although this issue is partially addressed by group licensing services offered through library consortia.

Many titles acquired by colleges are similar to those appearing in university library collections, with a preference for titles in engineering, the applied sciences and nursing. Several colleges also acquire children's books and K-12 materials to support their education programs. Some college libraries also hold local interest titles, as well as general literature and trade materials. As a result, their collections span a broad spectrum. Few vendors recognize the particular needs of colleges. Titles from Canadian vocational trades, technical and association publishers are often unavailable on library ebook platforms, despite a perceived demand from college students.

Collections offered by the market-leading vendors tend to include few titles in languages other than English. French content, especially from Canadian publishers, is still hard to come by, although recent initiatives such as the prenumerique.ca platform are successfully addressing the issue. Platforms and collections rarely offer comprehensive coverage both in English and French, forcing bilingual institutions to subscribe to multiple products. Survey respondents encouraged publishers to distribute their titles as widely as possible, on multiple platforms and under multiple access models, to better respond to the varied needs of the colleges.

Appendix A:

2014 Preliminary full-time and part-time enrolment at Canadian University member institutions.¹¹⁴ Programs taught in French are indicated with a *.¹¹⁵

Province	Province	Regional Consortia	Under-graduate Students	Graduate Students	Total
Alberta	Athabasca University	COPPUL	14,445	1,260	15,705
Alberta	Concordia University of Alberta	COPPUL	1,415	115	1,530
Alberta	MacEwan University	COPPUL	12,690	0	12,690
Alberta	Mount Royal University	COPPUL	9,240	0	9,240
Alberta	The King's University	COPPUL	695	0	695
Alberta	University of Alberta*	COPPUL	30,620	6,660	37,280
Alberta	University of Calgary	COPPUL	22,895	6,630	29,525
Alberta	University of Lethbridge	COPPUL	7,305	495	7,800
British Columbia	Emily Carr Institute of Art + Design		1,780	50	1,830
British Columbia	Kwantlen Polytechnic University	COPPUL	10,590	0	10,590
British Columbia	Royal Roads University	COPPUL	1,290	3,350	4,640
British Columbia	Simon Fraser University*	COPPUL	19,270	3,970	23,240
British Columbia	The University of British Columbia	COPPUL	41,190	9,705	50,895
British Columbia	Thompson Rivers University	COPPUL	7,035	238	7,273
British Columbia	Trinity Western University	COPPUL	1,815	540	2,355
British Columbia	University of Northern British Columbia	COPPUL	2,235	560	2,795
British Columbia	University of the Fraser Valley	COPPUL	7,695	30	7,725
British Columbia	University of Victoria	COPPUL	15,725	3,215	18,940
British Columbia	Vancouver Island University	COPPUL	5,765	445	6,210
Manitoba	Brandon University	COPPUL	0	0	0
Manitoba	Canadian Mennonite University		996	27	1,023
Manitoba	The University of Winnipeg	COPPUL	7,720	185	7,905
Manitoba	Université de Saint-Boniface *		735	60	795
Manitoba	University of Manitoba (includes St. Paul's College, St. John's and St. Andrew's)	COPPUL	23,475	3,340	26,815
New Brunswick	Mount Allison University	CAUL	2,365	20	2,385
New Brunswick	St. Thomas University	CAUL	2,155	0	2,155
New Brunswick	Université de Moncton *	CAUL	4,435	480	4,915
New Brunswick	University of New Brunswick	CAUL	8,095	1,175	9,270
Newfoundland & Labrador	Memorial University of Newfoundland	CAUL	13,525	3,070	16,595
Nova Scotia	Acadia University	CAUL	3,870	365	4,235
Nova Scotia	Cape Breton University	CAUL	2,660	230	2,890
Nova Scotia	Dalhousie University	CAUL	14,165	3,545	17,710

114 Universities Canada. *Enrolment by University*. Retrieved from <http://www.univcan.ca/canadian-universities/facts-and-stats/enrolment-by-university/>.

115 Universities Canada University Study. Retrieved from <http://www.univcan.ca/canadian-universities/study-programs/>

Nova Scotia	Mount Saint Vincent University	CAUL	2,695	525	3,220
Nova Scotia	Nova Scotia College of Art and Design (NSCAD University)	CAUL	860	30	890
Nova Scotia	Saint Mary's University	CAUL	6,380	495	6,875
Nova Scotia	St. Francis Xavier University	CAUL	4,325	335	4,660
Nova Scotia	Université Sainte-Anne*	CAUL	440	10	450
Nova Scotia	University of King's College	CAUL	1,050	50	1,100
Ontario	Algoma University	OCUL	1,405	0	1,405
Ontario	Brescia University College		0	0	0
Ontario	Brock University	OCUL	15,850	1,455	17,305
Ontario	Carleton University (includes Dominican University College) *	OCUL	22,600	3,420	26,020
Ontario	Huron University College		1,215	15	1,230
Ontario	King's University College at The University of Western Ontario		3,390	45	3,435
Ontario	Lakehead University	OCUL	7,050	805	7,855
Ontario	Laurentian University (includes Sudbury) *	OCUL	7,400	675	8,075
Ontario	McMaster University	OCUL	24,650	4,090	28,740
Ontario	Nipissing University	OCUL	4,350	220	4,570
Ontario	Ontario College of Art & Design	OCUL	3,900	215	4,115
Ontario	Queen's University	OCUL	20,100	4,200	24,300
Ontario	Redeemer University College		765	0	765
Ontario	Royal Military College of Canada *	OCUL	1,630	425	2,055
Ontario	Ryerson University	OCUL	30,100	2,265	32,365
Ontario	Saint Paul University		285	410	695
Ontario	St. Jerome's University		0	0	0
Ontario	Trent University	OCUL	7,050	420	7,470
Ontario	University of Guelph	OCUL	23,300	2,405	25,705
Ontario	University of Ontario Institute of Technology	OCUL	9,040	530	9,570
Ontario	University of Ottawa (includes Saint Paul University)*	OCUL	33,250	6,300	39,550
Ontario	University of St. Michael's College		4,665	115	4,780
Ontario	University of Toronto (includes colleges)	OCUL	65,800	15,950	81,750
Ontario	University of Trinity College		1,725	105	1,830
Ontario	University of Waterloo (includes colleges)	OCUL	30,300	4,525	34,825
Ontario	University of Western Ontario (excludes colleges)	OCUL	23,825	5,525	29,350
Ontario	University of Windsor	OCUL	12,500	2,470	14,970
Ontario	Victoria University (includes Emmanuel College)		3,215	50	3,265
Ontario	Wilfrid Laurier University	OCUL	16,350	1,285	17,635
Ontario	York University*	OCUL	43,850	5,000	48,850

PEI	University of Prince Edward Island	CAUL	3,790	385	4,175
Québec	Bishop's University*	BCI	2,530	30	2,560
Québec	Concordia University	BCI	25,905	5,255	31,160
Québec	École de technologie supérieure (ETS) *	BCI	5,520	1,430	6,950
Québec	École des Hautes Etudes Commerciales (HEC)*	BCI	7,540	2,345	9,885
Québec	École nationale d'administration publique (ENAP) *	BCI	0	1,080	1,080
Québec	École Polytechnique de Montréal (UQAM) *	BCI	5,440	1,710	7,150
Québec	Institut national de la recherche scientifique (INRS) *	BCI	0	590	590
Québec	McGill University*	BCI	25,750	8,065	33,815
Québec	Télé-université (TÉLUQ) *	BCI	0	0	0
Québec	Université de Montréal *	BCI	31,445	10,875	42,320
Québec	Université de Sherbrooke *	BCI	12,590	7,290	19,880
Québec	Université du Québec à Chicoutimi (UQAC) *	BCI	4,545	1,040	5,585
Québec	Université du Québec à Montréal (UQAM) *	BCI	28,755	5,825	34,580
Québec	Université du Québec à Rimouski (UQAR) *	BCI	4,665	840	5,505
Québec	Université du Québec à Trois-Rivières (UQTR) *	BCI	9,440	1,895	11,335
Québec	Université du Québec en Abitibi-Témiscamingue (UQAT) *	BCI	2,015	395	2,410
Québec	Université du Québec en Outaouais (UQO) *	BCI	4,825	865	5,690
Québec	Université Laval *	BCI	29,305	10,145	39,450
Saskatchewan	Campion College		615	0	615
Saskatchewan	First Nations University of Canada		710	0	710
Saskatchewan	Luther College		395	0	395
Saskatchewan	St. Thomas More College		0	0	0
Saskatchewan	University of Regina (includes colleges) *	COPPUL	11,165	1,280	12,445
Saskatchewan	University of Saskatchewan (includes federated and affiliated colleges)	COPPUL	16,185	2,940	19,125

APPENDIX B:

List of all publicly funded colleges in Canada, known membership in regional library consortia and health resources networks, and estimated student Full-Time Equivalent (FTE) or Full-Load Equivalent (FLE). Refer to page 4 for details on consortia memberships.

Province	Institution	Regional consortia membership	Health network membership	FTE/FLE
Alberta	Alberta College of Art and Design (ACAD)	TAL		960 [†]
Alberta	Bow Valley College	TAL		5,120 [†]
Alberta	Grande Prairie Regional College	TAL	NEOS	1,950 [†]
Alberta	Keyano College	TAL	NEOS	1,384
Alberta	Lakeland College	TAL	NEOS	2,300 [†]
Alberta	Lethbridge College	TAL	HKN	3,930 [†]
Alberta	Medicine Hat College	TAL		2,400
Alberta	NorQuest College	TAL	NEOS	3,880 [†]
Alberta	Northern Alberta Institute of Technology (NAIT)	TAL, COPPUL	HKN	13,080 [†]
Alberta	Northern Lakes College	TAL		1,250 [†]
Alberta	Olds College	TAL	NEOS	1,290 [†]
Alberta	Portage College	TAL		960 [†]
Alberta	Red Deer College	TAL, COPPUL	NEOS, HKN	3,481
Alberta	SAIT Polytechnic	TAL, COPPUL		13,500
British Columbia	British Columbia Institute of Technology (BCIT)	BC ELN, COPPUL	e-HLbc	13,335
British Columbia	Camosun College (CAM)	BC ELN, BCLC	e-HLbc	7,070 [†]
British Columbia	College of the Rockies (COTR)	BC ELN, BCLC	e-HLbc	1,730 [†]
British Columbia	Douglas College (DOUG)	BC ELN, COPPUL	e-HLbc	8,380 [†]
British Columbia	Collège Éducentre			
British Columbia	Langara College (LC)	BC ELN	e-HLbc	7,080 [†]
British Columbia	College of New Caledonia (CNC)	BC ELN	e-HLbc	3,170 [†]
British Columbia	Nicola Valley Institute of Technology (NVIT)	BC ELN, BCLC	e-HLbc	540 [†]
British Columbia	North Island College (NI)	BC ELN	e-HLbc	2,300
British Columbia	Northern Lights College (NL)	BC ELN	e-HLbc	1,490 [†]
British Columbia	Northwest Community College (NW)	BC ELN	e-HLbc	1,670 [†]
British Columbia	Okanagan College (OC)	BC ELN, BCLC, COPPUL	e-HLbc	4,751
British Columbia	Selkirk College (SEL)	BC ELN	e-HLbc	2,320 [†]
British Columbia	Vancouver Community College (VCC)	BC ELN, BCLC	e-HLbc	6,540 [†]
British Columbia	Justice Institute of British Columbia (JI)	BC ELN, COPPUL	e-HLbc	2,400 [†]
Manitoba	Assiniboine Community College	BCLC		1,290 [†]
Manitoba	University College of the North			500 [†]

Manitoba	Red River College of Applied Arts, Science and Technology	MLCINC		9,500
Manitoba	École technique et professionnelle, Université de Saint-Boniface	BCLC, MLCINC		190 [†]
Manitoba	Manitoba Institute of Trades and Technology			
New Brunswick	New Brunswick College of Craft and Design			260 [‡]
New Brunswick	New Brunswick Community College (NBCC)			4000 [‡]
New Brunswick	Collège communautaire du Nouveau-Brunswick (CCNB)			2500 [‡]
Newfoundland and Labrador	College of the North Atlantic (CNA)			8,752
Northwest Territories	Aurora College			1,060 [†]
Nova Scotia	Nova Scotia Community College	CAUL		10,190 [†]
Nunavut	Nunavut Arctic College			1240 [‡]
Ontario	Algonquin	HLLR, OCLS	OLRN	19,490
Ontario	Collège Boréal	HLLR, OCLS		1,675
Ontario	Cambrian	HLLR, OCLS	OLRN	3,540
Ontario	Canadore	HLLR, OCLS	OLRN	2,707
Ontario	Centennial	HLLR, OCLS	OLRN	11,290
Ontario	Conestoga	HLLR, OCLS	OLRN	11,002
Ontario	Confederation	HLLR, OCLS	OLRN	3,166
Ontario	Durham	HLLR, OCLS	OLRN	10,743
Ontario	Fanshawe	HLLR, OCLS	OLRN	13,688
Ontario	Fleming	HLLR, OCLS	OLRN	6,649
Ontario	George Brown	HLLR, OCLS	OLRN	20,768
Ontario	Georgian	HLLR, OCLS	OLRN	10,563
Ontario	Humber	HLLR, OCLS	OLRN	22,274
Ontario	La Cité Collégiale	HLLR, OCLS		4,769
Ontario	Lambton	HLLR, OCLS	OLRN	2,816
Ontario	Loyalist	HLLR, OCLS	OLRN	3,229
Ontario	Mohawk	HLLR, OCLS	OLRN	12,495
Ontario	Niagara	HLLR, OCLS	OLRN	8,856
Ontario	Northern	HLLR, OCLS	OLRN	1,214
Ontario	Sault	HLLR, OCLS	OLRN	2,426
Ontario	Seneca	HLLR, OCLS	OLRN	22,029
Ontario	Sheridan	HLLR, OCLS	OLRN	17,263
Ontario	St. Clair	HLLR, OCLS	OLRN	8,445
Ontario	St. Lawrence	HLLR, OCLS	OLRN	5,769
P.E.I.	Holland College	CAUL		2,600 [†]
P.E.I.	Collège Acadie Î.-P.-É.			
Québec	Cégep de l'Abitibi-Témiscamingue	CCSR		2,610
Québec	Collège Ahuntsic	CCSR		7,100
Québec	Collège d'Alma	CCSR		1,026

Québec	Cégep André-Laurendeau	CCSR	3,158
Québec	Collège André Grasset	CCSR	
Québec	Cégep de Baie-Comeau	CCSR	650
Québec	Cégep Beauce-Appalaches	CCSR	1,807
Québec	Collège de Bois-de-Boulogne	CCSR	2,736
Québec	Champlain College - Lennoxville		
Québec	Champlain College - St. Lambert		
Québec	Champlain College - St. Lawrence		4,637
Québec	Cégep de Chicoutimi	CCSR	2,602
Québec	Dawson College		7,781
Québec	Cégep de Drummondville	CCSR	2,021
Québec	Cégep Édouard-Montpetit	CCSR	6,733
Québec	Cégep François-Xavier Garneau	CCSR	5,544
Québec	Cégep de la Gaspésie et des Îles	CCSR	1,114
Québec	Collège Gérald-Godin	CCSR	1,097
Québec	Heritage College		1,200
Québec	Cégep de Granby-Haute-Yamaska	CCSR	2,024
Québec	Institut de technologie agroalimentaire – Québec		
Québec	Institut de tourisme et d'hôtellerie du Québec		
Québec	Cégep John Abbott College	CCSR	5,672
Québec	Cégep de Jonquière	CCSR	3,451
Québec	Centre d'études collégiales en Charlevoix	CCSR	
Québec	Cégep de La Pocatière	CCSR	1,061
Québec	Centre d'études collégiales de Montmagny	CCSR	
Québec	Collège LaSalle	CCSR	
Québec	Cégep Limoilou	CCSR	5,474
Québec	Collège Lionel-Groulx	CCSR	4,766
Québec	Cégep de Lévis-Lauzon	CCSR	2,896
Québec	Collège de Maisonneuve	CCSR	5,340
Québec	Cégep Marie-Victorin	CCSR	3,767
Québec	Cégep de Matane	CCSR	632
Québec	Collège Mérici	CCSR	
Québec	Collège Montmorency	CCSR	6,500
Québec	Cégep de l'Outaouais	CCSR	4,507
Québec	Cégep régional de Lanaudière	CCSR	5,708
Québec	Cégep de Rimouski	CCSR	3,001
Québec	Cégep de Rivière-du-Loup	CCSR	1,109
Québec	Collège de Rosemont	CCSR	2,843
Québec	Cégep de Sainte-Foy	CCSR	6,515
Québec	Cégep de Saint-Félicien	CCSR	1,032

Québec	Cégep de Saint-Hyacinthe	CCSR		4,114
Québec	Cégep Saint-Jean-sur-Richelieu	CCSR		3,200
Québec	Cégep de Saint-Jérôme	CCSR		5,000
Québec	Cégep de Saint-Laurent	CCSR		3,500
Québec	Cégep de Sept-Îles	CCSR		624
Québec	Collège Shawinigan	CCSR		1,149
Québec	Cégep de Sherbrooke	CCSR		5,267
Québec	Cégep de Sorel-Tracy	CCSR		1,019
Québec	Cégep de Thetford	CCSR		969
Québec	Cégep de Trois-Rivières	CCSR		4,242
Québec	Collège de Valleyfield	CCSR		2,072
Québec	Vanier College			5,965
Québec	Cégep de Victoriaville	CCSR		1,511
Québec	Cégep du Vieux Montréal	CCSR		6,428
Québec	Centre de Documentation Collégiale (CDC)			
Saskatchewan	Carlton Trail College			500 [†]
Saskatchewan	Cumberland College			500 [†]
Saskatchewan	Gabriel Dumont Institute of Native Studies and Applied Research	SaskLib		200 [†]
Saskatchewan	Great Plains College		HKN	650 [†]
Saskatchewan	North West Regional College			800 [†]
Saskatchewan	Northlands College			750 [†]
Saskatchewan	Parkland College			1,000 [†]
Saskatchewan	Saskatchewan Indian Institute of Technologies (SIIT)			1,000 [‡]
Saskatchewan	Saskatchewan Polytechnic	COPPUL, SaskLib	HKN	9,909
Saskatchewan	Southeast Regional College	SaskLib		650 [†]
Yukon College	Yukon College	BC ELN	e-HLbc	700 [†]

[†] Current figures unavailable, quoted figure based on reported FTE from previous years.

[‡] Full-time equivalent estimated from student enrollment figures.

Appendix C:

CLA Ebook Task Force Key Library Priorities for E-Content (2015)

- 1. Availability:** Commercially available e-content should be available from all publishers for lending by libraries at their time of publication. Libraries need continuous access to content to build core collections and ensure customer needs are met.
- 2. Fairness and Flexibility:** A range of pricing options and terms need to be available to libraries to allow them to develop collections of different size, range and focus. (Licensing models should not be subject to unreasonable premiums and price increases, time and use restrictions that prevent libraries of all sizes from establishing diverse collections.)
- 3. Access, Preservation and Research:** Libraries must be able to maintain digital access within license terms and the ability to copy a digital text for historical preservation purposes and/or print disabled accessibility, if required, such as in the case of orphan works, and text mining for research purposes (academic libraries).
- 4. Resource Sharing:** Resource sharing through mechanisms such as interlibrary loan, consortiums, and reciprocal borrowing, need to be available for e-content. For instance, interlibrary loan of monographs could be established based on the principle that, one copy remains one copy, meaning that users of the lending library would not have access to the work if it is on interlibrary loan.
- 5. Transferability:** Libraries need the ability to transfer content to another platform within the terms of the existing license to ensure libraries are not bound to a particular platform.
- 6. Protection of Privacy:** Libraries and their users must be able to make informed decisions about the control and use of personal information including reading choices. Libraries seek the option to minimize the transmission of personal information that can be linked to individual users.

Glossary and List of Abbreviations

ACCC	Association of Canadian Community Colleges, also known as Colleges and Institutes Canada.
ACUP	Association of Canadian University Presses.
Aggregator	Platforms offering libraries content from a number of content from publishers, often combining them into harmonized collections to facilitate purchasing for librarians and access for users. Ebrary, EBL, MyiLibrary, and Ebscohost are examples of platforms that aggregate content from academic publishers and scholarly presses. JSTOR, Project Muse's UPCC, Oxford University Press' UPSO, and Cambridge University Press' UPO aggregate content from scholarly presses.
AHRC	Arts and Humanities Research Council, United Kingdom
AODA	Accessibility for Ontarians with Disabilities Act, a legislative framework that notably mandates libraries to provide, upon request, educational resources in a format that is accessible by a person with a disability.
Approval vendor	Approval book vendors offer libraries integrated workflow processes to help identify, select, purchase at a discounted rate, and process books from a number of producers. YBP and Coutts are the primary book jobbers in Canadian academic libraries. MidWest is used to a lesser extent. Most university librarians use Approval Plans, set up with book jobbers, as their primary selection mechanism for identifying and purchasing books.
Approval Plan	An approval plan is a collection development tool provided by book jobbers to help libraries identify specific subject areas and other book parameters. The Approval Plan dictates which titles librarians will be made aware of to select for purchase. Approval Plans can be set up as "E-Preferred" so electronic copies will be selected for purchase ahead of print, if both formats are realized simultaneously.
ARL	Association of Research Libraries, an organization representing 124 libraries from comprehensive, research institutions in the US and Canada.
BC ELN	British Columbia Electronic Resource Network, a consortium of private and publicly-funded post-secondary libraries in British Columbia and the Yukon.

BCI	Le Bureau de coopération interuniversitaire, the consortium representing all the universities in Québec and additional affiliated members.
BCLC	BC Libraries Cooperative, a consortium and advocacy group representing mostly public libraries, and some post-secondary libraries across Canada.
Books24x7	An ebook platform for libraries, hosting mainly trade publishers and aimed at public libraries.
CARL-ABRC	Canadian Association of Research Libraries, an organization representing 29 libraries from research institutions in Canada and two federal government libraries.
CAUBO	Canadian Association of University Business Officers.
CAUL-CBUA	Council of Atlantic University Libraries, the consortium representing all the universities in Newfoundland, Prince Edward Island, Nova Scotia, and New Brunswick.
CEGEP	Collège d'Enseignement Général et Professionnel, general, vocational and pre-university publicly-funded college in Québec. CEGEPs differ from other provinces' colleges in that they also offer a Diploma in College Studies that is required in Québec for attending university.
CEL	Canadian Electronic Library/Bibliothèque Électronique Canadienne, a collection of ebooks marketed by Gibson Library Connections.
CCSR	Centre Collégial des Services Regroupés, an organisation providing collective services to Québec's colleges and CEGEPs.
CDC	Centre de Documentation Collégiale, a documentation centre serving Québec colleges and CEGEPs.
CDL	California Digital Library.
COPPUL	Council of Prairie and Pacific University Libraries, a consortium representing libraries in British Columbia, Alberta, Saskatchewan and Manitoba and other affiliated members.
COUNTER	Counting Online Usage of NeTworked Electronic Resources are a set of standards for recording and reporting of online usage statistics for books, journals, and databases in a consistent, credible and compatible way.

Coutts	Coutts Information Services, recently purchased by ProQuest from the Ingram Group, is a book jobber used by libraries in all sectors to manage the identification, selection, and acquisition workflow and physical processing for print and electronic books. OASIS is Coutt's book selection system. Coutts also provides the MyiLibrary ebook platform. Owned by ProQuest.
CRKN	Canadian Research Knowledge Network, a national consortium representing 75 universities across Canada.
CULC	Canadian Urban Libraries Council. All Canadian library systems serving populations of over 100,000 people plus regional systems serving over 100,000 with an urban centre of at least 75,000 people are eligible to be members of CULC. Most who qualify do join. CULC does not act as a consortium but does participate in major initiatives. It is the most representational voice for public libraries across the country and has members in every province.
DDA	Demand-Driven-Acquisition, see PDA.
DFG	German Research Foundation.
Discovery Service	Web-Scale Discovery services provide users with a single integrated searching, discovery, and access point to the library's online catalog and other databases and full-text collections. Discovery Services pull from a pre-harvested central index so it is critical for content producers to have their content indexed into these systems. Most universities that have implemented Discovery Services are using one of the following: Summon by ProQuest, WorldCat Discovery by OCLC, EBSCO Discovery Services but EBSCO, Primo (and eventually Alma) by ExLibris.
DRM	Digital Rights Management, referring to a series of measures aimed at preventing the unauthorized use and copying of digital content.
E-Preferred	See Approval Plans.
Ebrary	An ebook platform for libraries. Ebrary is owned by ProQuest.
EBL	Ebook Library, an ebook platform for libraries. EBL is owned by ProQuest.
EBSCO	ESBCO Industries Inc. is a for-profit international library discovery services provider and vendor of aggregated collections of electronic content including books, journals, and databases. EBSCO provides the EBSCO Discovery Service and the EBSCOhost, which encompasses their search platform to their suite of electronic content.

EPUB	A file format for the distribution of ebooks, often allowing content to be dynamically displayed according to device size and user preferences. EPUB files can be protected with Digital Rights Management (DRM) measures.
FTE	Full-Time-Equivalent, in this context referring to student full-time-equivalent, a unit that is used to measure the relative size of a higher education institution and used by vendors to tailor the pricing of their products.
FLE	Full-Load-Equivalent, sometimes used instead of Full-Time-Equivalent (FTE) to express the size of an institution.
HEFCE	Higher Education Funding Council for England.
HLLR	Heads, Libraries and Learning Resources, representing all publicly-funded colleges of Ontario.
ICOLC	International Coalition of Library Consortia, an informal organization of over 200 international consortia that collectively work on advocacy and collaborative projects.
ILL	Inter-Library Loan, a service offering patrons from one library to request materials from another library.
JISC	A consortia of higher education institutions in the United Kingdom. JISC licenses electronic content but also provides advocacy, think-tank, and system services for libraries.
K-12	Kindergarten to Grade 12, here referring to education materials aimed at students until the end of secondary school.
LMS	Learning Management System.
Lyrasis	An academic library consortia in the United States (US) that invites membership from a libraries and other cultural organizations for electronic collections licensing. Lyrasis has negotiated a number of ebook deals with participation by ARL libraries in the US and Canada.
MARC	MAchine-Readable Cataloguing, a set of digital format standards for the description of items catalogued by libraries.
MidWest	MidWest Library Services is a book jobber used by libraries in all sectors to manage the identification, selection, and acquisition and physical processing workflow for print and electronic books.

MLCINC	Manitoba Library Consortium.
MONOGRAPH	A monograph is a stand-alone work on a subject or aspect of a subject that is often written or compiled by a single author. In academic libraries, the term monograph is used to distinguish a stand-alone work from periodicals. The term includes books.
MUPO	Multiple User Access to an ebook title. SUPO is a method of applying DRM to an ebook. See also SUPO.
MyiLibrary	An ebook platform for libraries. MyiLibrary is provided by Coutts, which is now owned by ProQuest.
NACC	National Association of Career Colleges, regrouping private institutions offering career training, e.g. massage therapy, bartending, culinary arts, etc.
NEH	National Endowment for the Humanities, United Kingdom.
NIH	National Institutes of Health, United States.
NISO	National Information Standards Organization. Industry organization consulted for the development of COUNTER compliant standards.
Non-Linear Lending	A purchase/access model used by the EBL ebook platform to provide MUPO access to ebooks on a renewing cost based on the number of times a user views a book in a period of time.
Novanet	A consortium of libraries in Nova Scotia.
NSCC	Nova Scotia Community College.
NumiLog	An ebook platform for libraries, hosting French-language content.
OAPEN	Open Access Publishing in European Networks.
OCLC	Online Computer Library Center Inc., a library technology company providing systems and technical services support, including cataloguing and ILL systems, to libraries in all sectors. OCLC also provides aggregated collections of electronic content. OCLC provides the WorldCat Discovery Service.
OCLS	Ontario Colleges Library Service, a non-profit organisation serving the publicly-funded colleges of Ontario.
OCUL	Ontario Council of University Libraries, the consortium representing all the universities in Ontario.

OhioLINK	Ohio's Academic Library Consortium.
Open Access	A term used to refer to the unrestricted online access to scholarly research, peer-reviewed articles, journals, theses and ebooks.
OverDrive	An ebook platform for libraries, hosting mainly trade publishers and aimed at public libraries.
PDA	Patron-Driven-Acquisition, sometimes referred to as Demand-Driven-Acquisition. A model that allows libraries to expose an extensive catalogue of resources prior to acquiring them. Patrons wishing to access individual titles on that catalogue trigger the purchase (or loan) of that title, for which the library will then be billed.
PDF	Adobe Portable Document Format, a proprietary file format that is often used to distribute ebooks and other electronic documents that are to be displayed as they would in a printed format. PDFs can be protected with Digital Rights Management (DRM) measures.
Perpetual Access	Ebook titles a library purchases permanent access (and typically archival) rights to compared to subscriptions in which the library only has access for the period the library continues to pay the content provider for access. The terms of perpetual access are laid out in the License with the content provider and may be a one-time cost or may include a minimal annual platform maintenance fee.
prenumerique.ca	An ebook platform for libraries, jointly developed by libraries, publishers and vendors in Québec to host French content.
ProQuest	ProQuest is a for-profit international library discovery services provider and vendor of aggregated collections of electronic content including books, journals, and databases. ProQuest provides the Summon Discovery tool. ProQuest also owns EBL and Ebrary and recently acquired Coutts Information Services.
RCUK	Research Councils of the United Kingdom.
Scholars Portal	A service of the Ontario Council of University Libraries (OCUL) providing a shared technology infrastructure and shared collections for all 21 university libraries in Ontario. Based at the University of Toronto Libraries, Scholars Portal provides locally developed archiving, discovery, and access platforms to commercial and

scholarly press ebooks, ejournals, and data collections licensed for perpetual access and local hosting by Ontario universities and partners. Scholars Portal has contracted with every major academic commercial publisher and scholarly press for local hosting of journals and Scholars Portal also provides the technology infrastructure to support university library public services and academic research.

STL	Short term loans. An electronic book is made available on one of the ebook platforms, to users of a library, for a period of time (one day to one week typically depending on a library's preference for setup of the purchasing plan). The cost of the loan is provided at a fraction of the book's purchase price.
SUPO	Single-User-Access to an ebook title. SUPO is a method of applying DRM to an ebook. See also MUPO.
TAL	The Alberta Library, a consortium of university, college, special and public libraries in Alberta.
UPCC	Project Muse' University Press Content Consortium.
UPO	Cambridge University Press' University Publishing Online.
UPSO	Oxford University Press' University Press Scholarship Online ebook platform.
XML	eXtensible Markup Language, a language for encoding documents in a format that is readable both by humans and computers. ebooks can be distributed as XML files, which are typically not protected by Digital Rights Management (DRM) measures.
YBP	Yankee Book Peddler, is a book jobber used by libraries in all sectors to manage the identification, selection, and acquisition workflow and physical processing for print and electronic books. GOBI is the YBP's book selection system. Owned by EBSCO.