Comparison and Review of 17 E-Book Platforms

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Comparison and Review of 17 E-Book Platforms

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Abstract

The University of Michigan Press, with support from the Mellon Foundation, asked John Lavender, of Lavender Consulting, to conduct a review of the American Council of Learned Societies (ACLS) Humanities E-Book collection (HEB) following its launch on Michigan's new Fulcrum platform. ACLS-HEB is an online collection of over 5,400 high-quality humanities books from over 100 publishers. Now that the market for e-books has matured, part of the review was a comparative study of e-book platforms run by publishers, university presses, and e-book vendors; 17 platforms were selected. The review looked at the key features offered by each platform; how they handled searching, content delivery, displaying results, ability to view and download, and other key features; there was no attempt to judge the value of the content. Following this review, Michigan Press felt that it would be beneficial to share the results with the wider community. As well as being of interest to publishers, the review will also be relevant for librarians making purchasing decisions and vendors selling e-book services.

In addition to synthesizing the results of the e-book platform review, this paper presents a librarian's perspectives on e-book assessment criteria. Courtney McAllister, Electronic Resources librarian at Yale University's Law Library, describes the importance of attributes such as accessibility compliance, library branding, and metadata. Library collections are shaped by a plethora of concerns and criteria. This paper seeks to outline some key elements to consider as part of e-book platform decision-making.

Comparison of 17 E-Book Platforms

Summary

There are a significant number of platforms offering humanities, social science, and science content. This review covered the most important platforms. Some of the publisher platforms are also open to other publishers (mainly university presses and societies), such as OUP, CUP, and de Gruyter. In terms of technology, there was a similarity in the functionality of platforms; the major differences, such as the ability to download a whole book in one click rather than by chapter, were down to individual publisher's decisions. No attempt was made to judge the quality of the content of these platforms but as most of them contained all the output from the publisher in question, including (in most cases) their deep archive, quality will be carried over from the print reputation of that publisher.

Background

In order to get a good view of the competitive platforms, 17 different e-book platforms were investigated and several yardsticks were used to assess them. The platforms were:

ACLS-HEB
Bloomsbury Collections
Brill eBooks
Cambridge Core (CUP)
De Gruyter Online Books
EBSCO E-Books Academic Collection
Elsevier Science Direct
Emerald Insight
JSTOR
Manchester Openhive
Oxford University Press Scholarship Online
Project MUSE
ProQuest Ebook Central
SAGE Knowledge
Springer Link
Taylor & Francis eBooks
Wiley Online Library

The University of Michigan Library was used to access the content. The library had access to most of the platforms. The few they didn't had open access books on the platform, so it was possible to use and test the functionality of each of the 17 platforms.

Some of the sites had only humanities content, while others had a mixture of science and humanities. There was also a mixture of individual publisher platforms and e-book vendor platforms.

It was difficult to get pricing information as most publishers protect that information and have non-disclosure clauses in their contracts with customers. Most of the publishers' sales models were purchase of titles in perpetuity; the e-book vendors (and some of the publishers) were offering subscription models.

The following processes were examined for each platform: searching, results, and content. Full reports on each platform can be found at this link: shorturl.at/dtvFN. Below is a summary of the results.

Overall Impression of Platforms

There have been significant developments in platform technology in recent years. Initially, if a publisher wanted an e-book platform, they needed to build it themselves. Now there are several commercially available software platforms, and most publishers use one of these offerings. As a result, there is much more similarity in platform functionality than in the past as each one keeps up with the others, in order to keep their publisher clients happy and not have them switch platforms. Therefore, most of the key functionalities for searching and so on were available on all of the platforms. However, in some categories, such as the ability to download content, there were restrictions set by the publisher, rather than technology limitations. However, there were some unique features on platforms that may add value, and these will be discussed here. On the whole, however, the similarity of platforms is the overriding point of reference.

Searching

All but three of the platforms (Emerald, ACLS-HEB, and CUP) offered quick search, advanced search, and browse. Of those three, only one (Emerald) did not offer browse. Most of the search functionality was similar; for quick search it was a "Google"-style box where you could type a word and search (other

than for Elsevier Science Direct, which had a fielded quick search), the advanced search added "and/or/not" searching plus other fields, and browse was searching by subject, title, or publisher. One question is how many users use the platform searching features as opposed to doing the search on Google or the library's platform, but, of those that do, it is probable that most use quick search. Most platforms allowed additional filtering of the results following a quick search, which duplicates what an advanced search would do; therefore, advanced search becomes a redundant tool. The usefulness of browse depended on the number of books on the platform. For example, Springer Link contained over 260,000 books so any browse category is likely to have many books for someone to view.

Four of the platforms (JSTOR, Taylor & Francis, SAGE, and Wiley) had search prediction, so either a book title, author, or keywords were suggested as the user began to type a search. JSTOR was the best example of this: not only were the words suggested but the number of results was shown before the search.

Results

Seven of the platforms contained books and journals. This can be an issue in terms of displaying search results, as for a journal the article title is the best way to show a result, whereas for a book the title is better, rather than the chapter. Except for Brill and JSTOR, the platforms including journals defaulted the search results to an article title/chapter listing, but, if "book" was selected from the filtering options, the results changed to book title. In the case of JSTOR, you could only view the chapter, which means the list can be very long even if there are only a few book titles, making it rather cumbersome. For those platforms that did not include journals, the default was by book title, although ProQuest and Taylor & Francis displayed the results with two tabs so it was possible to switch from book to chapter.

Search highlighting is an important issue. There is little point in doing a word search if those words are not highlighted in the results. Eleven platforms had highlighting both for the results and when searching individual books. Some also listed the chapters in a rank order or indicated the hits in a particular chapter, which was useful. In JSTOR, there was a "show snippet" feature in the results list, which provides the major hits for the word being looked for. The search then has to be reentered when you view a

book. In JSTOR, when the platform displayed a PDF, there was no highlighting in the document; however, there was when it was displayed in XML or EPUB.

Three platforms (JSTOR, EBSCO, and ProQuest) had the very useful feature of showing the search terms in context within the results list; there was a short part of the content on view where most instances of the word were found.

Most platforms (other than T&F, SAGE, and ACLS) indicated next to each title on the hit list whether the user had access to the content found, and all (other than SAGE and ACLS) only allow searches on the content the user has access to. SAGE was unusual in that it shows if the user does not have access to content, although this is done with a lock symbol on the top left-hand corner of the cover, which is not easy to spot. Librarians interviewed like this feature because they want to avoid the problems associated with users finding a book that the library hasn't purchased. Users, too, probably appreciate not having their time wasted. How the publisher indicates access varies by platform—on some platforms it can be difficult to interpret the indicators. The best way is through the use of open and closed padlocks.

All the platforms allowed a level of filtering of the results once a search had been done. As well as filtering by year of publication, type of content, and subject area, the best also allowed for additional word searching within the results. Six of the platforms (EBSCO, ProQuest, T&F, Emerald, ACLS-HEB, and Science Direct) did not offer this valuable, and rather basic, feature.

Content

All but three platforms offered content in XML/EPUB and all offered PDF. All but three offered only PDF to download content, although it was possible to copy and paste XML and EPUB in these cases. Only EBSCO did not allow downloads by chapter only—the whole book had to be downloaded. Eight of the platforms (JSTOR, OUP, MUSE, Bloomsbury, Manchester UP, SAGE, Emerald, and ACLS-HEB) did not allow the whole book to be downloaded in one click; downloading was chapter by chapter. Some, like CUP, allowed the whole book to be downloaded but it saved it in individual chapters, rather than as one file. EBSCO and ProQuest allowed downloading, but a downloaded book's use was time limited, depending on the agreement with the publisher. It

is understandable that publishers are resistant to whole book downloads in terms of people copying and circulating books, but this is such a useful feature for users that publishers should be offering it.

Eight of the platforms (ProQuest, EBSCO, De Gruyter, Taylor & Francis, Manchester, Brill, Wiley, and Emerald) did not offer word searching within a single book once it had been selected. This is a major drawback because none of them offered a live index either, so there was no way of using the power that electronic searching can offer within a book.

Cambridge also allowed the possibility of downloading to other locations, including Google drive and Kindle. However, the books had to be saved by chapter rather than as complete files, which is not ideal with Kindle.

Six of the platforms had useful links to metrics, including Altmetrics and WorldCat, as well as usage information for the book on their platform. Springer had the greatest range of information available, particularly on use within the platform.

Another interesting question is whether a book index on an electronic platform is useful. Six of the platforms had a book index live so it was possible to click through from it to the relevant page. Personally, I think this is a useful feature, but it may be an age/cultural issue. Taylor & Francis don't even show the index at all for their books.

Other Features

JSTOR had a text analyzer tool in beta. A file can be uploaded into JSTOR and the tool analyzes the text and suggests content on JSTOR that is relevant to that text. This seems a valuable tool, but it remains to be seen if it will be used in practice.

Springer offers a service called "mycopy" that lets a user order a black-and-white print copy of a book for \$24.95 (with some size restrictions).

ACLS-HEB had easy-to-see and use links to ancillary content for a book where it was available. The other sites did not have this; where there was content, it was shown as a link in the text.

Librarian Perspectives on E-Book Platforms

While the criteria previously outlined support methodical evaluation, there may be other

characteristics that librarians consider carefully when assessing an e-book platform. For many librarians, platform evaluation involves balancing user needs and technical or design features. Libraries strive to be responsive to user requests, and on-demand acquisition drives many collections decisions in technical services. However, librarians must also ensure they curate e-book content that is associated with accessibility features, good library branding opportunities, and accurate, robust metadata.

Accessibility

Unique content can add value to a library's collection, but only if it is presented and organized so that all affiliated users can engage with the material. For example, content that does not support assistive technologies or tools is not sufficient to meet a library's needs or serve all their users. When examining a prospective e-book platform, accessibility compliance is a growing concern. Because accessibility compliance ensures that e-book content can be of value to all library affiliates, it is a vital part of collections stewardship. Voluntary Product Accessibility Templates (VPATs) can gesture to a publisher or vendor's general stance on accessibility. However, the voluntary and nonbinding nature of a VPAT means that a library has no leverage to hold a publisher or vendor accountable for their accessibility statements.

Incorporating accessibility language in a license agreement brings more formality and legitimacy to the pursuit of accessibility compliance. Model licenses, such as those developed and updated by consortia and communities like LIBLICENSE, can help libraries raise concerns about accessibility in a clear, actionable manner.

When negotiating an accessibility clause, it is also important to consider the size and scale of the publisher or vendor a library is working with. Smaller publishers or niche vendors might take more time to roll out accessibility features, such as compatibility with screen readers and other assistive technologies. Large publishers, with teams of developers, might be more agile and can implement changes quickly. Regardless of the particular publisher or vendor's size, it's vital that librarians pursue a transparent roadmap for accessibility compliance.

Accessibility itself can be difficult for a librarian to determine when exploring an unfamiliar platform. The Web Content Accessibility Guidelines (WCAG)

are a useful and widely accepted standard, but how does one determine whether an unfamiliar platform adheres to WCAG? Mune and Agee (2015) outline some criteria and testing strategies that can help librarians gauge where a platform falls on the continuum of accessibility.

Library Branding

Accessibility is a vital aspect of e-book platform evaluation, but there are other features a librarian might consider, as well. Platform branding might not seem like a major concern; however, many of a library's users may never set foot in their physical spaces. As our electronic collections grow, interactions between the library and its users increasingly occur in digital environments. This can have tremendous benefits, such as conserving library shelving space, facilitating more immediate access, and meeting users at their point of need. One drawback is that the lines between library-licensed content and what is freely available online becomes fuzzy or indistinguishable from the user's perspective. Without clear indicators to remind users that they are engaging with library resources, it can be difficult to see how the library is actively supporting users who may never receive in-person assistance.

Good, clear library branding should be visible at the platform and item level. Libraries might choose language or logos that they feel will be easily understood by their users. Regardless of the specific language employed in platform branding, it should consistently be visible on as many platforms as possible, so the user will have a reliable signpost to anchor their understanding of what is, and is not, a library-provided resource.

Library branding is one way to reiterate the role of the library in providing access. It also helps users understand what they would lose access to, once their institutional affiliation changes or lapses. Platform features that further disambiguate institutional and open access can be extremely valuable. Using a green open lock to indicate all legitimate access, regardless of whether the content is licensed or open, may confuse users about what they can access after they graduate, or once their visiting scholar status lapses. Access language that differentiates open content versus licensed content can be extremely helpful. Commingling licensed and open content on a unified platform encourages cross-discovery, but the impact of item-level labels should not be overlooked.

Metadata

As librarians curate e-book collections, metadata is the vital bridge between user and resource, between discovery and access. Librarians may have a refined awareness of what kinds of e-books are available on which platform, but library users often rely on Web-scale discovery layers, or library catalogs, to chart their course to relevant e-books. Because their journey does not typically revolve around platform-level searching, making e-books visible and discoverable in library systems is very important. The best e-book platform will be woefully underutilized if its contents are not well documented or expressed in MARC records that will match user queries.

Well-structured MARC records with accurate and plentiful access points create a virtuous cycle wherein users discover and access relevant content. This, in turn, generates usage data that helps libraries justify the expense associated with current and future subscriptions or purchases.

E-book metadata that is computer generated may have skeletal access points. There may not be subjects in the 650 field, a series title, or sufficient description in the 520 field. E-books with minimal metadata may be cut off from potential users, since the likelihood of a query intersecting with the sparse access points is relatively slim. Misspellings or structural errors can thwart even known-item searches.

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Metadata content is very important, but so is the relationship between records and library entitlements. The timing of MARC record delivery, for example, can impact the overall value of an e-book platform. If MARC records are pushed out to libraries before the content is available on the platform, users will encounter dead ends that might lead to frustration. Similarly, if content is being removed from an e-book platform, libraries need to have sufficient notice to delete or suppress the MARC records associated with titles that are no longer available. Careful coordination among vendors, publishers, and librarians helps ensure that successful, streamlined access is the standard and dead ends are a rarity.

Conclusion

There is a lot for librarians to consider when deciding which e-book platforms to acquire. This survey and general analysis did not make any judgment on the quality of the content on these respective sites, but discussed their merits or shortcomings in terms of functionality, accessibility, metadata, and branding.

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