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eBook Aggregators: A Primer

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The academic library market for eBooks is now well developed; often a library has more than one option to license access to a title. Most large publishers now have their own proprietary platforms and also license their books through multiple aggregators. However, before 2005, aggregators were the only commercial supplier of eBooks for academic libraries.[1]

Market History

eBook aggregators, companies that license access to eBooks from multiple publishers, have been part of the library marketplace since 1998, with the founding of **Netlibrary**. **Netlibrary** was the first company to license rights from publishers to convert print books to digital files for the academic library market.[2] **Netlibrary** offered eBooks to academic libraries through a variety of business models: purchases at the individual title level, subscription subject collections, shared consortial collections, and patron-driven acquisition.

From 1998 to 2001 other aggregators began licensing access to specialized eBook collections: **Xrefer** (now **Credo Reference**), **Books 24x7**, **Safari Tech Books**, and **Knovel Engineering Library** were all founded during this time. In 2001 **ebrary** began licensing eBooks to academic libraries through subscription collections, and in 2004 **MyiLibrary** and **Ebook Library** began licensing eBooks through the patron-driven acquisition business model.[3] **EBSCO** acquired **Netlibrary** in 2010, and **ProQuest** acquired **ebrary** in 2011 and **Ebook Library** in 2013. These four aggregators: **Ebook Library**, **ebrary**, **EBSCO eBooks**, and **MyiLibrary** continue to be the four major vendors in the academic library eBook aggregator market. There are also numerous smaller aggregators with specialty collections in areas such as: medicine, law, engineering, business, technology, reference, and international titles.

Sales Models

Aggregators license access to eBooks through a variety of sales models: patron-driven acquisition, title-level purchasing, collection purchasing, or collection subscriptions. **Carolyn Morris** and **Lisa Sibert** provide an overview of eBook acquisition models in the book *No Shelf Required*.[4] Each business model has its own benefits and challenges for libraries. Subscription collections provide temporary access to large collections of titles for a relatively low price. Titles are not owned in this model, and the aggregator can withdraw titles from the collection without warning.

Aggregators also license perpetual ownership at the individual title or collection level. When the title is purchased in this way the library has access to the title in perpetuity, either through the aggregator's platform or, if the platform becomes unavailable, hosted from the library's servers. The cost for perpetual ownership of titles is often the list price of the print book, or some multiplier of that price. These titles are often controlled by single use, multiple use, on non-linear lending licenses.

A single-use license limits use to one book, one reader. A multiple-use license provides some limited number of users at the same time or an unlimited number of users. Non-linear lending allows an unlimited number of readers to access the book at one time but limits the total number of uses within a one-year period. If the book reaches the number of allowed uses during the 12 months, access to the title is temporarily suspended until a new period begins.

Patron-driven acquisition, also known as demand-driven acquisition, turns library acquisitions on its head: putting the patron in charge of purchasing titles for the library collection at the time of need. eBooks enable this revolution in library purchasing because there is no delivery time necessary for access to digital content. Libraries using patron-driven acquisition load records into library discovery systems, and patron use triggers the generation of fees for temporary use or the purchase of titles.

Libraries can license content from aggregators through any combination of these sales models. Decisions about which models are best should be based on your unique community of patrons and their use patterns, the collections under consideration, and the price offered by the aggregator. Multiple business models and vendors can be used, but libraries may want to remove duplicates from their eBook collections to reduce unnecessary spending.

Benefits and Challenges for Libraries

Libraries choose to license content through aggregators for a number of reasons: to make use of patron-driven acquisition; to provide access through one preferred platform; or as part of a multi-vendor approach to building collections. Sourcing large collections of eBooks from an aggregator allows libraries to simplify their work processes for selection, invoicing, and MARC record downloads. Some libraries prefer to make eBooks available through an aggregator's platform because of the advanced functionality such as downloading of EPUB files, highlighting and exportable notes.

Some libraries choose to limit their use of aggregators due to concerns about digital rights management and preservation. In order to reduce publisher concerns for the security of their intellectual property when licensed through a third party, aggregator platforms must use more restrictive digital rights management (DRM) than what is offered directly from a publisher's platform. A disadvantage of buying perpetually owned eBooks through an aggregator is that the four leading aggregators do not have preservation agreements with **Portico**, **LOCKSS**, or **CLOCKSS**. This might be due to the third-party nature of rights management. The publisher, as the copyright holder, might be the only entity that can make such an agreement with a preservation service.

Benefits to Publishers

It is clear that there are benefits for libraries using aggregators, but why would a publisher choose to sell eBooks through an aggregator?

Although many big publishers now have their own platforms for eBooks, most did not have the facility to host and sell eBooks directly until 2006, years after the aggregators were up and running. Many small publishers still do not have their own eBook platforms or the ability to sell eBooks directly. Publishers commonly use third-party book vendors to sell print books to libraries; so using an aggregator as a sales channel is another opportunity for their publications to reach readers. Publishers benefit from the aggregator's platform, which can offer enhanced security through digital rights management. Aggregators manage the technical aspects of eBook creation such as file format conversion, library support, MARC record creation, and integration with library discovery services.

Aggregators must balance the expectations of library customers with the expectations of publishers. Library customers often want lower prices, removal of DRM, and permission for interlibrary loan. Publishers often want reduced financial risk, security of their intellectual property, and the opportunity for their content to be discovered, used, and purchased. Although these expectations can be in conflict, as **Mark Huskisson**, Director at **Ebook Library**, explained, it is the aggregator's role to find "where the tension is taut, but not stressed, and is not pulled too far in one direction"[5]

Choosing an aggregator

Although aggregator business models have converged over the past four years, there are still significant differences between vendors. In preparation for this article the four main aggregators (**Ebook Library**, **ebrary**, **EBSCO eBooks**, **MyiLibrary**) were asked to submit information about their collections, platform functionality, and sales models. This information has been edited for accuracy and brevity. An excerpt of the response is shown in Figure 1, and the full report is available as a publicly shared **Google** document.[6] It is important to remember that this information was collected in October 2013 and will be outdated soon. The data can be used as an initial comparison, but it is important to contact each vendor directly for up-to-date, complete information.

Aggregators play an important role in the current academic library eBook marketplace. The availability of various sales models, and the diversity of publishing partners, provides an opportunity for libraries to easily develop robust eBook collections. Libraries will see increased demand for eBook collections as patron acceptance of, and preference for, eBooks continues to grow.[7] Aggregators will continue to play an important role if they continue to provide good value to publishers looking for alternative sales channels and to libraries looking for flexible sales models and platforms that provide patrons with desired functionality.

eBook Aggregators: A Primer — Figure 1

Ebook Aggregator Comparison				
Vendors	**ebrary**	**Ebook Library**	**MyiLibrary**	**EBSCO eBooks**
Data was collected from vendors in October 2013. Please contact vendors directly for updated information.				
Content				
Number of titles	500,000+	400,000+	Nearly 435,000	Nearly 477,800
Scope	ebrary's collection includes academic subject areas, but also has very targeted content for corporations, government institutions, medical libraries, public libraries, and K12 libraries.	EBL's catalog contains content in a broad range of disciplines with a strong selection of titles in Science, Technology, and Medicine (STM), Business, Social Sciences, and Humanities with a focus on frontlist titles.	MyiLibrary provides access to ebooks from all LC Classes, focusing on academic, scholarly, scientific, technical, engineering, and medical content	EBSCO eBooks titles cover a wide variety of academic subjects. EBSCO also offers content in subject areas relevant to corporate, medical, public, K-12/school and government libraries.
Number of new front-list titles being added this year	Estimate 50,000 titles will be added in 2013.	Anticipate adding 120,000 in 2013	Averaging 60,000 or more per year in new content	Anticipate approximately 90,000 frontlist titles to be added in 2013.
Number of publishers	600+, representing 1200+ imprints	520+ publishing partners	>1,550 publishers	Nearly 900 publishers.
Number of university press publishers	ebrary has comprehensive selection of titles from 150+ university press partners worldwide.	[no answer provided]	>80 university presses	Approximately 132 university press publishers.
Average delay for ecopy after print release date? Provide specific time periods for specific publishers if available.	ebrary works closely with publishers to make sure their new ebook titles are published as close to the print edition as possible. We track these percentages on a monthly basis. Taylor & Francis=70% of titles are within 8 weeks of print; Cambridge UP-65% of titles are within 8 weeks of print.	[no answer provided]	The majority of the more than 1,550 publishers on the MyiLibrary platform provide simultaneous eContent for their new print titles on the MyiLibrary platform. Some publishers may have a 6-8 week time frame before e catches up with print, but this gap appears to be shrinking.	The time between a print publication and eBook availability on the EBSCO eBooks platform varies greatly and could be anywhere from 30 days to six months, dependent on publisher decisions and EBSCO's processing. Some publishers may simultaneously release electronic and print editions, while others may place a six-month embargo on the electronic version. Titles are prioritized based on demand.
Sales models				
Purchase by title price (describe cost relative to hard cover list price)	Single user pricing is usually close to the hard cover list price. Multi/unlimited user and three-user pricing is set by the publisher and is comparable to pricing from other ebook aggregators: between 1.2 and 2 times the hardcover list price. ebrary offers "Extended Access" as a way to automatically upgrade from single user to multiple user access to prevent turn-aways. Titles purchased at the title level are owned in perpetuity.	Most of EBL's titles are priced close to the hard cover list price with the non-linear lending model. Non-Linear Lending provides access to unlimited simultaneous users for a limit of 325 loan instances per year. Some EBL titles are licensed as "unlimited" or "textbook" titles, and pricing is set by the publisher and is comparable to pricing from other ebook aggregators: between 1.2 and 2 times the hardcover list price. Titles purchased at the title level are owned in perpetuity.	Single user MyiLibrary price averages 1.2 x print price; multi-user (3 concurrent) averages 2 x print price. Access Model (325 uses per year with free annual renewal): price ranges between 1.2 and 2 times the hardcover list price. Titles purchased at the title level are owned in perpetuity	Single user pricing is usually close to the hard cover list price. Three user and unlimited pricing is set by the publisher and is comparable to pricing from other ebook aggregators: between 1.2 and 2 times the hardcover list price. EBSCO does not charge a platform fee. Titles purchased at the title level are owned in perpetuity
Discounted subject collections	Subject collections are available often with discounted cost. ebrary's on-staff librarians curate collections of ebooks in an array of different subject areas.	EBL does not have pre-packaged, discounted subject collections, but libraries can define their patron-driven acquisition collections using profiles that use subject headings and many other parameters.	Ingram Coutts can provide customized subject collections with discount based upon number of titles and publishers included.	EBSCO's Collection Development Librarians provide numerous subject-specific content packages.
Patron Driven Acquisition	Yes. There is a free browse period. Short term loans are triggered at 10 minutes of active viewing; 10 pages excluding TOC or index; copy/paste; print; download request. The library can set the number of short term loans before auto-purchase based on their local needs	Yes. There is a free browse period. Short term loans are triggered after five minutes of viewing; copy/paste; print; download request. The library can set the number of short term loans before auto-purchase based on their local needs.	Yes. MyiLibrary does not provide a free browse period. MyiLibrary ebooks can be borrowed before purchase via WorldCat ILLiad. This is outside of the PDA program.	Yes. There is a free browse period. Short term loans are triggered at 10 minutes of viewing; 10 pages viewed; copy/paste; print; download request. "Loan to own" the library can set the number of short term loans before auto-purchase based on their local needs.
Contact information	sales@ebrary.com	info@eblib.com	800 263-1686	information@ebsco.com

Endnotes

1. **Lynn Connaway** and **Heather Wicht**, "What happened to the e-book revolution?: The gradual integration of e-books into academic libraries," *Journal of Electronic Publishing* 10, no.3 (Fall 2007), *http://quod.lib.umich.edu/j/jep/3336451.0010.302?view=text;rgn=main* (accessed November 14, 2013).

2. **Lisa Bransten**, "Netlibrary Targets an Early Market for E-Books," *Wall Street Journal (Eastern edition)*, November 4, 1999.

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4. **Carolyn Morris** and **Lisa Sibert**, "Acquiring Ebooks." In *No Shelf Required: E-Books in Libraries*, ed. **Sue Polanka**, (Chicago: ALA Editions, 2010), 95-124.

5. **Huskisson, Mark**, Director **Ebook Library**. Email Interview by **Deborah Lenares**. October 24, 2013.

6. "Ebook Aggregator Comparison," Shared Google document, last modified December 3, 2013, *https://docs.google.com/spreadsheet/ccc?key=0AmFxsB-ZWgkyddEV3a3FaNk8wVTd0TG5uM2U2RExyNlE&usp=sharing*.

7. **Deborah Lenares**, **Steve Smith**, and **Robert Boissy**, *Ebook Use and Acceptance in an Undergraduate Instituion* (New York: Springer White Papers for Librarians, 2013), accessed November 4, 2013, *http://static.springer.com/sgw/documents/1370809/application/pdf/H6593_CB_WhitePaper_eBooks_Undergraduate+Inst.pdf*.