

Shaping a Strategy for E-books: the JISC E-Books Working Group

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This paper outlines the strategy being developed for the growth of electronic books within the UK higher and further education sectors but the intention is that the broad strategic analysis will be of interest to all librarians.

E-books are one of eight collecting areas within the content services activity of the Joint Information Systems Committee. JISC itself is a committee of the education funding councils and has specific responsibility for promoting the exploitation of information and communication technologies, including content services. A comprehensive framework is in place for content acquisition and includes policies on collection development, licensing and charging.

Each collecting area, which includes such core resources as journals, primary data and discovery tools amongst others, has a working group responsible for leading development. The E-Book Working Group comprises key stakeholders, including publishers, librarians, academic staff and the British Library. Its overall mission is to provide strategic leadership and to focus on the following objectives:

- Monitoring and influencing the e-book industry for the benefit of the academic community
- Acquiring content for both the higher and further education sectors
- Achieving sustainable economic models for the purchase of e-books
- Promoting the exploitation of e-book content
- Understanding the impact of the introduction of e-books on institutions, libraries and their users
- Advising on content creation i.e. the authoring process.

Formed back in March 2001, one of the first questions for the Group to address was to agree a definition of the term 'e-book'. It has been broadly defined to include electronic reference works, monographs and textbooks, which may be delivered via the Web (the most likely platform in the short term) or by a hand-held device. There are many such devices on the market but they have yet to find real impact within the educational sector.

The Group published an issues paper in September 2001¹, which outlined the critical factors. They included an industry overview and forecasts, the publisher perspective, distribution and the role of intermediaries, an economic overview, marketing and exploitation, authoring, technical overview and standards.

The paper gave an analysis of the e-book industry, divided into three distinct phases:

1. Intensive entrepreneurial activities in the late 1990s, particularly in the US, with large-scale digitisation projects and the rapid growth of new e-content companies
2. A reaction to the first phase, as capital dries up and sales are lower than expected
3. A new phase, in which we now find ourselves, which provides a new sense of realism of the actual growth of e-book demand and consolidation within the industry

The changes on the supply side for e-books have produced the following major considerations for librarians:

- *Availability* of electronic format – are the books libraries wish to acquire available in e-book format?
- *Quality* of material – of the material available to the librarian, is it of sufficient quality?
- *Distribution* – by what means does the librarian choose to acquire e-book material?
- *Pricing models* – what does the librarian consider a reasonable price to pay and what is the preferred economic model?

The late 1990s saw not only a proliferation of e-book services, but also experimentation with business models for sale of the material. NetLibrary, for example, quickly repositioned itself to focus on the library market and offered a 'one book, one user' outright purchase model, closely mirroring practices

within the world of the printed book. Questia, on the other hand, deliberately sought to cultivate a relationship with the end-user and aggressively marketed a subscription, time-based, 'all you can eat' approach. The strategy of Ebrary was to recreate the feel of a bookshop or library, enabling the user to browse free of charge and only pay at the stage of output i.e. printing, saving or emailing the material. Recently-developed projects include the Taylor & Francis eBookstore, a fully flexible model offering many options, including outright purchase of a title, subscription to a collection of e-books, or output of a specific portion of a book. Another publisher-led project, this time by Butterworth-Heinemann, has sought to move the book on as a genre and to develop textbooks into on-line learning services, include hyperlinks, discussion areas, and supplementary material. A number of leading publishers are developing collections of research monographs, arranged around discipline-based clusters.

We can see, therefore, that the economics of e-books will be very different from what we have been used to as librarians, and that the relationship between librarians, distributors, publishers and the end-user will inevitably change. The two major facets of this will be the financial transactions used to purchase e-book material and the flexible form of content delivery.

The JISC E-Book Working Group has already secured a number of successful contract negotiations. They include a national licence for Early English Books Online (EEBO), an online collection of more than 125,000 titles published between 1473 and 1700. A priority for the Group has been the development of a general reference portfolio, offering the community collections of reference works which are likely to be found on the shelves of all libraries within our sector. The first of these has been Oxford Reference Online², a resource which brings together 100 dictionary and reference titles published by Oxford University Press, and xreferplus³, a collection of 120 quality reference titles published by 23 of the world's leading publishers. A key acquisition for research in science, technology and engineering has been the Wiley electronic reference works⁴, including many leading titles such as Kirk-Othmer and Ullmann's.

The development of a marketing plan is seen as crucial to the activity of the Group. At the earliest opportunity, we created a 'virtual' network of e-book representatives, nominated by their universities to be responsible for e-book development. We are currently undertaking a major study to map the market for e-books within the UK, based on a mix of qualitative and quantitative research with librarians and academic staff. Another study will consider economic models for e-textbooks.

The market mapping exercise has already got under way, with two focus groups held over the summer in the areas of management studies and engineering, and the rest scheduled for the autumn. Key questions for the groups include:

- What are the current challenges in managing a print collection?
- How far does going electronic provide answers?
- What are the priorities in acquiring e-book material?
- What are the preferred economic models?

Early feedback from pilot studies has highlighted some of the problems facing librarians:

- providing access to high demand textbooks and being able to meet the demands of distance learners
- achieving value for money
- keeping collections current and relevant
- minimising routine administration
- solving the problems of lack of space
- marketing collections to users.

In short, e-books were felt to have the potential to tackle many of these issues but the major concern for librarians was affordability. Priorities for acquiring e-book material included core readings, reference works, specific subject areas that lend themselves to chunking of material and where there is high awareness of information technology, and meeting the needs of specific user segments such as part-time and distance learners. There were mixed views on the question of economic models. The full results of the mapping study will be published during 2003.

In conclusion, the Group has agreed a content development plan for academic year 2002/03, which will include the acquisition of core reference materials and a critical mass of material specifically to meet the needs of UK higher and further education. Our acquisition policy will be further shaped by the results of the market mapping exercise. A comprehensive marketing plan will be ready by the end of 2002.

REFERENCES

- 1 Woodward, Hazel & Edwards, Louise. Shaping a strategy for e-books: an issues paper. Available at: <<http://www.jisc.ac.uk/dner/ebooks/strategy1.html>>.
- 2 See <<http://www.oxfordreference.com>>.
- 3 See <<http://www.xrefer.com>>.
- 4 See <<http://www.interscience.wiley.com/>>.