REPORT

California Digital Library
Joint Steering Committee for Shared Collections
Ebook Task Force

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TABLE OF CONTENTS

Ebook Task Force Web Site http://www.cdlib.org/libstaff/sharedcoll/jsc/ebook/

I. INTRODUCTION

Task Force Charge
  1. Define operating guidelines and desirable features that will make ebooks most useful for instruction and research in the University of California.

  2. Evaluate the ongoing experiences at UC campuses (specifically at UCB and UCSD and their netLibrary experiments).

  3. Examine other academic library ebook experiments (other institutions, other content providers).

  4. Identify potential University-wide or multi-campus strategies that should be pursued or explored further.

The Ebook Task Force was formed in August 2000 to evaluate UC and other university experiences with ebooks, investigate the ebook market, and develop operating guidelines, principles and potential strategies for further exploration of the use of ebooks in UC. To gather information, the task force has participated in trials provided by e-book vendors, created a web site with information related to its charges (http://www.cdlib.org/libstaff/sharedcoll/jsc/ebook/), conducted literature searches, and surveyed both UC and other universities about their ebook experiences. Individual members have attended a variety of workshops and conferences related to e-books. The task force held two face-to-face meetings, had biweekly conference calls, and has exchanged and discussed a considerable amount of information via e-mail. Ebook trials and conferences attended are listed as Appendix I.

Underlying task force discussions has been the attempt to articulate how ebooks will be used, what features to promote, and how they should be preserved for long-term access. The variety of formats and purposes for books makes a straightforward analysis very difficult, if not impossible. There is some overlap of pertinent issues in the following sections of the report, since an issue may be a factor in more than one aspect of dealing with ebooks. The task force anticipates that continuing monitoring of the market, partnerships, standards and rights will be necessary, since we are finding partnerships and business models continuing to evolve.

The first section of this report summarizes task force discussion and findings in various issue areas and about investigation of both UC and other institutions' experiences with ebooks. The second section provides recommendations for guidelines and future strategies for ebooks. Each section of the report serves as a summary of discussion and findings. Appropriate appendices with further detailed information are noted at the end of each section.

II. BACKGROUND AND FINDINGS

Electronic books and texts have been available for some time for some public domain titles, and there is a sizeable corpus of titles available through such resources as Project Gutenberg, American Memory, and the University of Virginia Electronic Text Center. In addition, ebooks are appearing

as reference works, and as parts of subject specific or vendor specific packages, such as MIT Cognet and CIAO, which includes both ebooks and journals. Only recently have electronic texts been packaged and offered for distribution and sale as electronic books. It is the shift to the commercial production, sale, and distribution of ebooks that has changed how libraries need to deal with them. Task force research has concentrated primarily on the commercial availability of ebooks, though non-commercial projects and initiatives have also been reviewed.

Electronic books offer tantalizing possibilities for creatively expanding access and changing learning behavior and academic research. They have the potential to move readers from a locate-view-print-read mode to one of identify-acquire-read-incorporate. Books would never go out of print, and new editions can be easily created and updated. Titles can be queried for quick review and reference before checking out a full print title. Content could always be accessible, regardless of time or location of the user, and could be read on PCs or on portablebook readers. Students could carry all their textbooks on a portable reader. An individual could carry several titles at once on a portable reader, and over the course of an academic career, build a personal library. Added functionalities include full text searching, choice of font size, and interactive functions such as mark-up, citation creation, and notetaking. Print text can be integrated with multi-dimensional objects, sound, and film to create a whole new kind of monographic work. It is possible that there will be a disaggregation of the printed book package as the model for the ebook. Ebooks may become more marketable through their saleable parts, such as chapters.

Despite the considerable promise of ebooks, the task force has concluded that all the elements that would make the ebook market viable are not quite in place. The partnerships in the market, development of standards, software and hardware features, and business models are still regularly changing.

- Publishers have been conservative in moving into the ebook market, though some are beginning to provide a wider range of titles as ebooks.
- Technologies for reading ebooks are still not quite appealing, practical or cost effective enough to have much market penetration.
- Standards for an interoperable ebook format are still under development, and the need for interoperability is still not entirely accepted by the publishing industry.
- There is active discussion in the publishing industry about Digital Rights Management Systems that could tightly and precisely control access and secondary use of information.
- The current thinking is toward replicating an electronic version of a print book, and there does not appear to be much evidence of thinking about dealing with electronic books (e-born books) for which no print equivalent would also be marketed.
- The corpus of academic ebooks available is not yet that large or representative of many disciplines, although there are vendors such as Questia, netLibrary, and Ebrary and publisher specific projects such as the Oxford University Press/University of Pennsylvania project that are aggressively building ebook and e content collections. Some subject areas, such as computer technology, are covered more fully than other fields.
- Acquisition and collection management procedures are not yet integrated into normal processing routines, and most libraries are treating ebooks as projects.

II.A. HARDWARE AND SOFTWARE STANDARDS AND PROTOCOLS

Software
Monographic electronic texts have been available on the Internet since the early years of UNIX file exchange, file transfer (FTP), gopher, and finally hypertext transfer (HTTP) protocols. The original purpose of all of these protocols was the exchange and delivery of files principally for noncommercial scholarly and technical communication. These protocols are the standards that have, until recently, shaped the production and distribution of most electronic texts. Until the emergence of a distinctive electronic *books* industry, the presentation and use of electronic texts, including interactive elements, have been based on the capabilities and limitations of common personal workstation hardware equipped with freely available web browsers and browser plug-ins.

Currently there is no established standard format for ebooks that addresses both the publishers' needs to support commercial end-user distribution and that enable added value for the consumer. Ebooks may be in Ascii, PDF, HTML, XML, and proprietary formats requiring specific software or hardware for reading content. At this point, although publishers are creating books electronically, more often than not, text is created in a proprietary form that requires reformatting or scanning of the print version by vendors such as netLibrary in order to adapt them to an individual vendor's system. There are also companies forming specifically to provide ebook reformatting service for publishers, who are not undertaking such formatting themselves. Of the current formats, large vendors such as netLibrary and Questia are using HTML or XML as a default, and Ebrary is using PDF.

The Open Ebook Forum (OEB) is developing an Open eBook Publication Structure that would create standards ensuring interoperability with any reading access system, whether a PC or a portable device. The structure will include metadata, identifiers, and file structure for both software and hardware environments. . It is intended to allow publishers to provide their content without having to reformat it for each reading system, though it does not refer directly to reader hardware or software. For example, the proposed OeB standard supports capabilities for "flowing" text and text with variable and complex formatting. The framework developed to date is based on a conservative commercial model of a linear content package of information, not accounting for academic peer review, or recognizing the potential increase in more unconventional multimedia integration with text. Although conventional, the structure's goal of interoperability would make a significant step in the viability of the ebook market. One of the missing elements in the structure is the ability to share or loan information, which would be critical to a library role.

Potentially problematic is that, while interoperability (non-proprietary usability) is one of the foundations for providing library services, the highest priority in the area of standards development for the publishing industry is clearly that of digital rights management (DRM). The second close priority for publishers is the development of standards for metadata and identifiers—but only insofar as these will support the development of retail markets and the delivery of products to end-users.

Hardware
Until recently, electronic books, like electronic serials, have been made available on multi-purpose workstations running web browser clients. These are best suited to end-user delivery of brief texts that can easily be printed out. But portable reading systems for electronic books enable a shift

away from the "locate-view-print-read" model of use, toward "identify-acquire-read-incorporate" behavior. Because of the relative length of electronic monographs, reading online or printing out the entire text is not practical or desirable. A major factor in the viability of the ebooks will be the ease in reading and using them. A variety of devices are being developed to replicate some of the virtues of printed monographs, including portability and network-independence. For libraries, it will be important that ebook readers are functional and desirable, and that ebooks themselves will function on a variety of platforms.

The ebook hardware market is definitely in its infancy even though the first readers were developed a few years ago. There are two basic kinds of readers on the market today: full sized, and palm sized. Of the full-sized readers available in the U.S., both are now produced by RCA, which bought both the Gemstar and the Rocket lines. The price of these readers is about $300 for the black and white screen and about $700 for the color screen. Black and white readers can hold as many as 40 titles. All use a proprietary file format.

Many people feel that the palm-sized readers are the most promising and there is a palm-sized device, the Franklin eBookman, that is an ebook reader with a screen only slightly larger than that of a PDA. (It also performs most PDA functions). The price range is from $125-$300. The eBookman uses its own proprietary file format but will soon also support the Microsoft proprietary file format.

A full-sized ebook reader developed in Korea, the "hiebook", should be available in the U.S. later this year. Ebook hardware is also being developed in France by Cytale. It is unknown if their product will be available in the U.S.

II.B. DIGITAL RIGHTS MANAGEMENT SYSTEMS

One of the most critical elements in the development of electronic publishing that will impact libraries is the development of digital rights management systems (DRMS). DRMS, which is still in early stages of development, is either hardware or software--or both--that enforce control over intellectual property. To some extent, similar controls have been evident in the licensing of electronic journals. The length of book content and the concerted effort by publishers to establish such software for ebooks have made this an even more critical part of the long-term use of ebooks for academic libraries, since such systems could place prohibitive controls on access, use and copying of information.

While copyright law has limited the rights of copyright holders, DRMS would allow for precise limits on the rights of users by defining access controls such as limit by user, by time, by fee, and by extent of content. There are serious implications for terms under which information is "purchased". Through "first sale" rights, current copyright law allows the owner of information to sell or dispose of that information without permission. For libraries, this allows functions such as interlibrary loan. DRMS, however, may limit this "first sale" concept radically, and it will be important to watch for DRMS conditions in any licensing. Concerns over any user's ability to share or lend information may be critical for selection and long term use intent for some e-books. NetLibrary, for example currently does not allow interlibrary loan of its titles. DRMS systems can

limit the portion of a document that can be copied or printed. Major system developments that warrant continuing monitoring are:

- ONIX, a book industry standard for communicating product information, which will include DRMS elements.
- Adobe Acrobat Web Buy, which controls access to a PDF document.
- XrML a joint effort of Xerox and MicroSoft
- Open Digital Rights Language (ODRL), a project of the World Wide Web Consortium (W3C).

II.C. ACCESS

The primary issues related to access include user awareness, hardware and software requirements for use, the number of simultaneous users, and "ownership" for interlibrary loan and archiving. It will be important to provide user access through channels that would normally be searched for identifying monographs. MARC records and metadata, as appropriate, should be available to easily integrate into a library's OPAC. Equally important, given the range of users in UC, will be that ebooks are not hardware or software dependent. A factor for libraries will be providing technical support for multiple reading devices—both online and portable.

For processing titles—ordering and cataloging—bibliographic information should follow standards (e.g. MARC) and be readily available in a format that can be adapted for local online integrated systems. Some ebook vendors are beginning to work with integrated library systems vendors. Ordering and payment for ebooks should not require a new workflow.

Development of standards for ebook formats, such as the OEB Structure, will influence accessibility and long-term archival options. The number of simultaneous users for a title will become an issue, particularly in a consortial arrangement. Currently, the vendors working with libraries require purchase of "copies" following the traditional print monograph purchase model. Depending on the type of information being purchased, e.g. computer science, a single user may not be using the entire book text, but only querying a portion of it. In other disciplines, a single chapter in an edited work may be what is needed, not the entire volume. Ways to accommodate partial book use need to be factored into licensing.

Two issues of ownership will also have major impact on the ways that academic libraries use ebooks over the long term in developing collections. Current law allows libraries to lend physical copies of books, whereas ebook lendability may be governed by DRMS systems, which can dictate specific uses and disallow all others. The ability to loan ebooks amongst UC campuses will be vital, and a serious consideration will be the ability of UC libraries to continue to act as resource libraries for other libraries within the state and elsewhere. Without lendability, ebooks may be seen as supplementary to a print version, since a print version, if available, may still be required for archiving and interlibrary loan. When the market evolves to a point where a print version is not also available, libraries will want to have the capability of "loaning" ebooks.

For archiving, it will be important to have some definition of ownership or perpetual access. Currently, vendor models allow for a mix--a premium price for perpetual access vs. a more modest price for annual access to a revolving group of titles, which allows annual review and weeding of collections. While this is possible on a small scale, as the corpus of titles grows, this kind of

weeding may not be as practical, and may defeat the intent of academic collections to develop research level collections. In some cases, titles may be removed from the vendor's system if not in high enough demand. Depending on the type of material being accessed, this will truly matter. Where currency is a factor, the ability to manipulate an ebook collection so easily to eliminate older editions is attractive. In other disciplines where long term research is essential, assurance of perpetual access will be vital.

II.D. BUSINESS MODELS AND LICENSING

At this point, there are only a handful of viable vendors, such as NetLibrary, that are offering ebooks to libraries, and direct publisher offerings are only recently beginning to appear. Most models are actually geared to end-users, and not to libraries. Library book vendors, such as Baker and Taylor, are beginning to make plans to offer ebooks as part of library approval plans and profiles.   Publishers are also experimenting with pilot projects partnering with university to provide access and archiving.   Detailed representative business models are in Appendix C-3.

The choices for acquisitions and selection of titles vary:
- individual title selection from the available titles
- subscription to the entire vendor's database (e.g. when a vendor's collection is focused, such as iBooks.com)
- selective subsets of a database

Huge databases are being developed--some with librarians selecting titles, others with information that publishers will allow to be converted to ebooks, so that creation of cohesive collections by major vendors isn't clear. The title selections, while growing, still are not large enough or representative enough at the academic level, except perhaps in selected fields such as computer science, business, and reference, which have a broader customer base than other academic fields. Ideally, there should be options for either individual title selection or bundled titles for specific topic areas or publishers that could be bought as a package either directly from publishers or through approval plan vendors.

Without standards in place, vendors like NetLibrary are reformatting text from proprietary versions of titles and charging for both content and access. The content is not always a complete equivalent of print versions where permissions for graphics and other materials are not given.   Due to concerns by publishers for digital rights management, ebook vendors to date are normally able to offer limited use rights for printing, downloading and copying. Interlibrary loan is normally not allowed, and classroom use is not always allowed.

Currently business models for ebook vendors vary considerably.   The publishing industry is looking at models such as:
- Print on demand
- Flat monthly subscription to a vendor's complete database
- Free browsing of a vendor's database with fees for printing and downloading
- Subscription to titles from a vendor selected either individually or in subject categories
- Personalization (creation of one's own document by selecting segments/chapters for several sources)

Pricing options vary to include
- one time purchase of a title with a premium for perpetual access
- purchase of a title with annual access fee premium
- annual subscription fees access with ownership
- annual subscription fee access without ownership

Other concerns are that even business models that claim free access do include advertising, so actually do come at a cost. The task force is also concerned that models where individual accounts are created on the vendor's web site may infringe on privacy, since it would be possible for vendors to report exactly what an individual had accessed in their system.

The business models of major ebook vendors so far claim a role for libraries as conduits to their customers, but it is not clear that libraries are truly considered a viable part of their marketing plans. Since the task force investigations began, one vendor has discontinued its product, and another has stopped accepting new library subscriptions. Although vendors openly claim libraries remain viable and valuable partners, and that, in fact print circulation increases for titles also offered in electronic form, the traditional roles of archiving and lending become murky.

II.E. ACADEMIC INSTITUTIONS EXPERIENCE WITH EBOOKS

UC Campuses

Through CDL and on their own, all UC campuses have had some experience with ebooks since 2000 or earlier. The first ebook acquisitions have included niche subject collections, publishers' collections, and historical or scholarly literary collections. Until 2000, none had experience with the new commercial ebook vendors.

One campus signed a license with netLibrary in April 2000, and was soon followed by another in June 2000. By March 2001, four UC campuses were actively engaged in experiments with netLibrary.

The majority of the four campuses selected the one-year purchase option rather than long-term access up to perpetual access at full price plus 50% (only one acquired multi-year access). Only one campus specifically attempted to address interlibrary loan in their license agreement.

To date, these UC campuses have committed approximately $120,000 to acquire 2555 titles using a variety of selection criteria, for an approximate per-title acquisitions cost of $47. It is not known how much duplication there is among these selections. Perhaps the most clearly popular selections were computing titles. The results of the four campus evaluations might indicate whether acquiring a "critical mass" of titles in a given subject area is useful, or whether it is more effective to acquire titles regardless of subject on an as-needed basis.

Cataloging has occurred separately at each of the campuses involved, and the campuses have used different approaches both to creating the records (several purchased netLibrary's MARC records, others used existing print MARC records and added links), and to adding links to electronic versions.

To date, campuses have used very similar approaches to outreach with faculty, students, and staff: direct emails, posters, web pages, and newsletter announcements.

With only one of the campuses having a year's experience with netLibrary, and two others having just begun their pilots, it is still very early to evaluate the UC experiences as a whole. Only one campus has formally surveyed its netLibrary users; another plans to do so in spring 2001.

No UC campus has been working with Questia or Ebrary and several expressed concern about their business models. On the other hand, netLibrary's authentication and one-book one-reader models are viewed as unsatisfactory by more than one campus. UC campuses have especially been hit by competing and incompatible authentication procedures for netLibrary and CogNet titles.

No UC campus has yet experimented with handheld and portable reading devices, and most reading of netLibrary titles as well as other ebooks appears to have been conducted online, despite the availability in fall 2000 of a download option in netLibrary.

In many respects, UC campus experiences with ebooks are similar to those of our peers at other academic institutions, although we as yet lack experience in consortial selection and access. In the last year, developments in the ebook industry have been rapid, and with the exception of netLibrary and to a lesser extent IT Knowledge (now defunct), librarians have not been targeted as a market. There is a clear sense from all campuses that we need more information and experience to help formulate a coherent response to commercial ebooks.

Other academic library ebook experiments

In February 2001, the task force sent a survey to 15 institutions currently providing access to ebooks; there were 10 respondents.[1] The goal of the survey was to gather data about their library's experiences with ebooks and to get their thoughts on the future of ebooks. The overall impression gathered from the surveys is that most institutions are still in the trial stage with ebooks. Although they recognize that there are substantial issues to consider and solve such as ILL, perpetual access and developing licensing models that support academic library goals, they have not yet tackled these issues.

Most respondents have been providing access to ebooks for 1-2 years. The top vendors were NetLibrary and ITKnowledge.

The range for the number of ebooks titles bought was 835 to 100,000 (Early English Book Online). Most bought under 20,000; four under 5,000. Most (7 institutions) bought ebooks across a variety of subject areas; some have a collection of computer and technology books and one has ebooks only in the social sciences.

There was an even split between annual licenses and perpetual access licenses with three sites not responding. Some institutions had different licenses for different resources.

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[1] The names of the institutions are not included per the request of several of the respondents.

Most (8 institutions) had not purchased portable reading devices; of those, two institutions were considering it for the future. For the two institutions that were offering portable reading devices they reported that it has been a positive experience.

In most cases, the institutions get the MARC record directly from the vendor or through OCLC.

The most common method of publicity was a link or announcement item on the library web site (6 institutions); writing articles for faculty or campus newsletters was the second most used method (4 institutions); creating flyers, sending targeted emails and including it in bibliographic instruction followed (2 institutions each).

All institutions stated that acquisition of ebooks has had little to no impact on their purchase of titles in print. Some commented that they felt that the role of ebooks was not to replace print but to serve as a duplicate copy or to be used for e-reserves.

Most institutions had not set up any formal mechanisms (7 institutions) to get feedback from users. Many noted that it was too early in the process to gather patron's impressions. Of those who gathered feedback, it was through surveys. Some found, through anecdotal evidence, that patrons liked having the online access, especially the 24x7 aspect. One institution did a survey of patrons checking out reading devices and found 81% said they would use the reader again and 78% said they had no difficulties operating it.

Most institutions purchased titles both through a consortium and on their own.

There was an even split among respondents as to whether their normal acquisitions and processing operations had changed to accommodate the purchase of ebooks. For those who noted that their procedures had changed, some comment that: NetLibrary purchases are now patron driven; currently one person does all tasks related to ebooks; there have been modification in the Acquisitions and Serials department positions to deal with electronic resource purchases; and one noted that they now have to involve a lot more people in the process than traditional purchasing.

Most (6 institutions) did not express concern about interlibrary loan. Several, however, noted that it was too early to tell.

None of the institutions cataloged free ebooks resources such as Project Gutenberg. Many provide links to them from their web page.

None of the institutions were currently working with Ebrary or Questia. Several noted that they were taking a "wait and see" position.

Institutions offered a long list of responses about their next steps with e-books and the future of ebooks in their organizations.

- Cataloging records needed (3 institutions)
- Ebooks will play an increasingly important role because of ease of access, searchability, value added services such as citation linking (2 institutions)

- Print will always be important; Users continue to prefer print (2 institutions)
- Ebook not panacea for book storage issue
- Some titles will be used a lot (e.g reference, computer and tech titles)
- Ebook will be made available in xml so that we can have diversity of display options
- Ebooks use will focus on e-reserves
- It will be important to involve more selectors/subject specialists
- It would be ideal if Netlibrary were part of their "approval plan/vendor catalog"
- We need to monitor usage so we can understand it better
- Ebooks represent a supplement to purchasing print monographs; ebooks will take over if they become available faster than print version
- Ebooks will become better integrated into instruction than print monographs
- Continue to acquirebooks, monitor usage and industry trends
- Need to develop and refine policies for acquiring electronic titles and develop mechanisms ensuring preservation.
- One institution formed a group that will monitor developments and assist reference/bibliographers in their assessment of ebooks
- Over time ebooks will become more important (most students seem to be using them now for reference not for extended reading)

Additional comments from respondents included:
- We need to consider how we will promote ebooks and educate users
- Technology is still not quite there
- Wireless or lighter laptops could be the future
- Print has many rights and powers that ebooks don't. We like ebooks but we must not allow ourselves to be locked into technology or legal/social paradigms that impair our ability to support open research, teaching, and public discourse of our community. We will favor vendors who support open process of scholarship and long-term preservation so we will not rush into ebooks.

III. RECOMMENDATIONS FOR GUIDELINES AND STRATEGIES

III.A. Ideal Ebook Features

While some of the large vendors are offering a large percentage of the ideal book features that are indicated on the outline [Appendix F], there are proprietary features of systems that provide opportunities for UC to influence vendors. For best use in UC, ebooks should be in a portable and in an interoperable format. Ebooks should not depend on proprietary software or hardware. There are a number of value added features of ebooks over print that should be considered standard for rationalizing the purchase of books in electronic format: advanced search capabilities, linking of text, browsability, "marking" and highlighting text, citation tools, bookmarking, and interactivity with sources such as dictionaries and media. Content should be true to any print original, including graphics, color, and original page display where appropriate. For ebooks with no print equivalent, there should be access to all types of content considered a part of the "book", such as graphics and sound. For delivery, users should have the option of printing, downloading, email and copying.

Ideally, books should link to outside references, such as cited sources, reviews, and other works by the author. For user awareness and access, ebook records should be easily integrated into OPACs in local library online systems.

III.B. Guidelines

The task force reviewed both the UC CDC *Principles for Acquiring and Licensing Information in Digital Formats* and the CDL *Checklist of Point To Be Addressed In A California Digital Library License Agreement.* The vast majority of the Principles and the Checklist items apply equally to ebooks as to journals. Both documents should be reviewed to change language apply to multiple formats, rather than the strongly journal bent of the current language. The following comments and additions are recommended to apply these documents to ebooks. Of major concern for ebooks are the pricing structure, fair use and interlibrary loan capability, archiving, and simultaneous use.

Review of the CDC Principles
Collection Development
When considering whether or not a digital resource offers significant added value over print equivalents, it will be important for ebooks that there be more extensive *features*. This is meant to cover such ebook desirable features such as marking, citation formats, dictionary access that has not been so prevalent in electronic journals.

Where the Principles recommend "improved resource sharing due to the ubiquity of digital resources," it should be emphasized that access to ebooks should include simultaneous use of a single title.

Cost and Pricing
Pricing for ebooks should include two separate and distinct elements:
- an initial one time purchase price, which is less than the equivalent print version
- separate **small** ongoing fee for access and archiving costs

Conversion of ebooks from proprietary versions should not be passed on to purchasers, but it is recognized that the added features for manipulation of text and the maintenance/archiving carry some costs and value. To accommodate the fact that it is likely that 20% of the titles purchased will have 80% of the use of a collection purchased, one possible pricing model would include access fees that would allow the potential for simultaneous access of a single title, through floating "tokens", very similar to the pooled ports for other databases. The number of tokens would be negotiated to represent, for example, at least one single use for every title purchased in a particular database/system. Such tokens would allow so many users for a particular body of ebooks, regardless of which titles are being accessed simultaneously. In this model a single title may have multiple simultaneous uses, but all simultaneous uses would not exceed the total number of tokens allowed for that database/system.

Licensing
Favor business models that shape e scholarship through open scholarly communication through fair use and interlibrary loan.

Licensing should recognize purchase of titles as "first sale" according to copyright to allow for fair use and interlibrary loan.

To protect privacy of users, checking out a title should appear as a black box to vendors with no individual user information. Systems should not require users to register, or ask questions that would reveal personal identity.

Review of the Checklist
Content/Access
Completeness of content: All graphics and other media should be included. If a print equivalent exists, paging for print should be included in addition to online paging.

Content should be separated from access features. Underlying content should be transferable in a non-proprietary format into a variety of reader software options to maximize reader choice of additional features, and be available for interlibrary loan outside the UC system.

Vendor supplied metadata should provide access to titles through common bibliographic access points for OPACs and databases, and should be able to accept open URL queries.

Licensing
Fair use, such as classroom use and interlibrary loan should be allowed. It will not be feasible to create a print copy of entire monographs for interlibrary loan, as is done for journal articles.

Means of authentication. Users should not be required to sign in individually for access to titles.

Management
Statistics should be provided for title by title usage, by campus.

III.C. POTENTIAL UNIVERSITY WIDE OR MULTI-CAMPUS STRATEGIES

Because of the fluidity of the ebook market, and the continuing development of standards for software and hardware that still need to mature before a truly viable ebook market can survive, the task force recommends a range of pilot projects, so that UC can participate in the development of standards, and develop partnerships with academic publishers and other consortia to continue to monitor developments.

General
Create a mechanism for ongoing monitoring of the ebook market, given its fluid state at this point.

Provide training and education about ebooks for librarians and other library personnel in the UC system.

Standards
Participate in the development of the OEB structure to ensure a library and a scholarly communication perspective for the standards developed.

Join the World Wide Web Consortium and contribute to the development of elements of the standard , especially of identifiers, metadata and interoperability of files and structures that are essential for academic use, such as fair use.

Work with other major academic consortia and libraries to influence development of standards for fair use, archiving, non-proprietary software and hardware for interoperability of formats, ADA compliance markets.

Licensing and operations
Experiment with an ebook vendor for system-wide access, targeting high use materials, such as reserve book materials and core reading lists for grad students.

Provide shared cataloging
- Provide shared cataloging for all titles via MELVYL and campus OPACs.
- Test impact of cataloging access by shared cataloging of free ebooks in projects like Project Gutenberg

Since several campuses have contracts with NetLibrary, coordinate efforts toward system-wide access to titles, and to address issues of common concern, such as authentication and simultaneous access.

Archiving
Experiment with archiving ("BSTOR" or "eRLF") of single print copy or single e-copy in system. Look to JSTOR model for backlist titles.

Partner with an academic publisher, such as UC Press, to provide access and archiving, and to promote interoperability.