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Today and in Perpetuity: A Canadian Consortial Strategy for Owning and Hosting Ebooks[☆]

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ABSTRACT

The Ontario Council of University Libraries (OCUL) is a provincial consortium of twenty-one publicly funded universities in Ontario, Canada. A consortially-built platform called Scholars Portal is our digital library for archiving ebook content and making it available 24/7 to university students and faculty. An Ebooks Committee has responsibility for coordinating the consortial acquisition of ebooks, within the context of an Information Resources Committee. This paper discusses the consortial strategy and philosophy for ebook licensing in OCUL, which involve a focus on ownership and local loading rights, for dual purposes of preservation and immediate access. Key processes, tools, and accomplishments of this innovative service model are highlighted.

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CONSORTIA AND THE EBOOK LANDSCAPE

The growing importance of consortia for ebook acquisition is very much in evidence. According to a 2011 report, colleges in the U.S. purchase 38% of their ebooks via consortial agreements (Ontario Council of University Libraries, 2011a, 2011b). This represents a substantial portion of ebook expenditures, and is higher than for public libraries (30%) or for special libraries (24%). Consortia in the digital age have been viewed originally as buying clubs that focused on negotiating lower prices for group purchases (Allen & Hirshon, 1998) and exerting greater influence in the development of scholarly resources (Alberico, 2002). Collective acquisition of digital content leads inevitably to a greater focus on cost-sharing and its management. Stern (2010a) notes that “Payment models for individual libraries already allow for complex funding options, but consortial funding allocations and reporting will be far more complicated and will require central tracking for annual analysis across the group.” This has become a fact of life for consortia acquiring digital scholarly content, and numerous models for allocating costs exist, whether based on central funding based on governmental sources, institutional funding, or a hybrid of the two. Many criteria can be employed to serve as proxies

for demand and value. What is crucial is that the criteria be perceived as equitable, transparent, consistently applied, and affordable by the members.

Cost–benefit analyses reflect the value of providing much greater access to scholarly material through consortia and saving the time of the user (Scigliano, 2002). Today, however, consortia are “pursuing complex cooperative collection development strategies, and what’s more, content production, hosting, and sharing” (Zeoli, 2011). In this context, consortia are playing a much larger market role in the scholarly communications ecosystem with respect to the development, acquisition, and integration of digital scholarship into the life of academic institutions (and other sectors as well). One can agree with Maskell (2008) that “consortia might be considered not as augmenting and strengthening the role of academic libraries in that cycle, but rather becoming an increasingly powerful intermediary between the publisher and the academic library.”

While there are numerous and powerful advantages for leveraging consortial action in acquiring digital content, there are challenges that are inherent to the structure and functioning of consortia. Hazen (2011, 199) observes that,

The internal workings of consortia reinforce the grounds for doubt. These bodies are instruments of their members’ collective will, but also are beholden to each participant’s priorities and claims. Group decisions are susceptible to lowest-common-denominator, weak-link-in-chain, and divide-and-conquer distortions. Consortia, in their current form, may be equivocal instruments of collective resolve.

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Human dynamics come into play in collective decision-making, thus testing the collaborative will and the common strategic objectives of the group. It is safe to say that there is a very wide spectrum of dynamics, goals, and resource capacities in library consortia as they evolve in their responses and strategies to the thorny challenges in the scholarly communications ecosystem. There will always be a tension between institutional and consortial interests; this is one of the trade-offs implicit in any collective action. Consortia carry out an extensive and ongoing dialogue with each other, and learn from best practices and experience elsewhere in the community. Considering how rapid has been the growth and influence of consortia on the marketplace, it is difficult to predict how this will evolve in light of the massive transformations we are witnessing in the publishing industry, in the re-invention of research in the digital age, and in the ubiquitous impact of information technologies on the delivery of education. What is clear is that ebooks are a disruptive force, in the best sense of the term, and that all consortia need to rethink their licensing strategies in relation to the value, purpose, viability, and integration of ebooks into their strategic thinking.

A MYRIAD OF CHALLENGES

In Ontario as elsewhere, the ebook landscape has become a complex and challenging focal point for libraries in recent years. The chronic ‘messiness’ of ebooks is well-known, such as the difficulties in a common definition and format for ebooks; the challenges around pricing; DRM restrictions on use; lack of simultaneous publication with print; a clearer understanding of ebook use; and the need for a better integration of ebooks into the workflows of researchers. Part chameleon, part revolutionary, and part adolescent, the ebook challenges our assumptions on the nature and use of long-form scholarship in today’s world. It is therefore a time of much experimentation and questioning, as libraries try to harness the rich potential of the ebook to support learning and teaching in a sustainable manner.

The range of licensing options has expanded enormously—subscription, purchase, demand-driven, and pay-per-view acquisition models are proliferating. There are Big Deal-style complete collections (though not always complete!); subject collections; and bespoke or customized collections. There is major growth in the availability of backlist titles in digital form. There are workflow issues around the delivery of front list ebook titles, particularly in relation to timeliness. Polanka comments that, “Even when an ebook was made available for purchase, some publishers imposed an additional delay before ebooks could be included in leased collections. Lack of uniformity across the publishing industry causes ongoing problems for aggregators and libraries alike.” (Polanka, 2011). There is a wide range of preferences for book use: while a growing number of users are comfortable with ebooks and associated reader technology, a sizeable minority still prefers print books for some or all learning purposes (Revelle, Messner, Shrimplin, & Hurst, 2012). There are vendor integration issues around the impact on approval plans, duplication of content, MARC records, invoicing, and comprehensiveness of coverage. There is the lack of standardization of ISBNs for ebooks. Conference papers, online and in-person conversations in the library world are peppered with concerns on how to address these many challenges—and to respond to user expectations for digital content delivery, ease of use, and timeliness of availability. A search in the Academic Complete Database on the licensing of ebooks¹ yielded 1559 hits in total, as of this writing. The annual number of hits has increased on an annual basis: 270 for 2012, 264 for 2011, and 240 for 2010. Professional dialogue on ebook issues is exploding in many directions, such as patron-driven acquisition, which is “poised to become the norm” (ACRL, 2012) in academic libraries. Experimentation around the forms and functioning of e-textbooks is another indicator of the turbulent state of

the venerable monograph. The only certainty is that the future forms of the book will be diverse, media-rich, and predicated on business models that exploit new technologies for delivery, interaction, and discoverability.

Looming above this landscape, however, is the sobering financial cloud—all libraries are struggling to maintain strong collections in the context of financial restraint, which in many cases means a flat or declining budget. The loss of purchasing power constrains the options available for libraries vis-a-vis ebooks. As the serials and content budgets (mostly spent on digital content) are subject to inflationary pressures, the monies available for monographs is declining and under threat in many institutions. The vendors, encouraged by rapid developments in e-reader technology (e-readers, tablets, and smartphones), as well as a dramatic take-up of ebooks by the general public, are sensing many new opportunities in the ebook marketplace. The journals market is quite saturated. Hence the publishers and aggregators that are rushing to digitize front list and backlist titles, offering multiple licensing options and delivery channels, and overhauling production workflows so that the digital format becomes the default format of publication. This competitive arena is good for libraries, but it doesn’t obviate the need for consortia to carefully assess these options in light of strategic goals and significant challenges in working together with partners in the monograph supply chain.

THE ONTARIO COUNCIL OF UNIVERSITY LIBRARIES (OCUL)

In Ontario, Canada’s most populous province, there are twenty-one publicly funded universities. These range from the comprehensive research-intensive university (University of Toronto—over 70,000 FTE) to the small, focused undergraduate university (such as Algoma University—about 1000 FTE) and many others in-between. There are over 435,000 university students in the province. The Ontario Council of University Libraries (OCUL) is the consortium that represents these universities’ interests and that spearheads consortial activities. Founded in 1967, OCUL developed collaborative initiatives such as a province-wide interlibrary loan agreement to provide books free of charge, and a union catalogue of serials held in Ontario libraries. Since the late 1990s, a Projects Officer and an Information Resources (OCUL-IR) Committee have coordinated the licensing of digital resources; as of this writing there are about 180 licensed products for an annual expenditure of about 20M. The IR Committee includes representatives from each of the twenty-one member institutions. There are separate specialized groups that coordinate the purchase of digital maps, data sets, and geospatial resources. OCUL works as one provincial consortium within a partnership framework that includes other Canadian regional groupings through Consortia Canada and with other academic libraries through CRKN (Canadian Research Knowledge Network).

This has led to a very unique and innovative form of collaboration “with the goal of enhancing research supports and creating rich learning environments for Ontario’s diverse and growing student population.” (Ontario Council of University Libraries, 2011a) OCUL supports “Canada’s knowledge economy by providing the information tools and access essential for high quality education and research in Ontario’s universities.” (Scholars Portal, 2011a, 2011b). The centerpiece of collaboration is a cyber-infrastructure called Scholars Portal, launched in 2002, which preserves and provides access to a broad range of scholarly content that has been licensed by the consortium on a perpetual access basis (i.e. via purchase agreements with publishers). Scholars Portal was originally developed using seed money from the Ontario government in the late 1990s, and is now sustained by the twenty-one member institutions on a cost-share basis.

Local loading rights have been negotiated to enable the archiving of these resources in perpetuity. As of this writing, there are 33,900,615 full-text articles from 14,084 journals loaded on the journals server; 519,655 ebooks on the books platform (this includes

¹ Search string = Ebook* and (sales or price* or pricing or model or licensing or business or strateg*).

145,200 commercial titles and 374,455 open access titles digitized by the Internet Archive). Scholars Portal has become a powerful discovery portal for a wide range of scholarly research aggregated on a single platform. This also includes born-digital Ontario government documents catalogued by the Ontario Legislative Library. There is a growing number of social science datasets and geospatial resources housed on other Scholars Portal servers. Scholars Portal also provides services to support library and researcher workflows: it “supports the online inter-library loan platform [RACER] for Ontario’s universities and provides support for citation management systems, a virtual chat reference service and other tools designed to aid and enhance academic research in Ontario.” (Scholars Portal, 2011a, 2011b) The technological infrastructure and the twenty four dedicated staff are financed by the members of the consortium, and located at the University of Toronto, which acts as a service provider to OCUL (while being a member as well). There are three Scholars Portal staff that are specifically responsible for managing and archiving the ebook content that is received from publishers.

Negotiations with publishers for ebook content have been predicated on several key principles: 1) The best possible pricing, such that the consortial agreement is better than what any institution could achieve on its own; 2) Alignment with core licensing provisions as outlined in our model ebook license; 3) Perpetual access rights based on purchase agreements; 4) Local hosting on Scholars Portal; and 5) Prioritization of scholarly publishers’ collections based on a consensus of our institutional research and teaching needs. These principles will be explored in the course of this paper.

EBOOK PLATFORM

Scholars Portal Books is our locally-built platform for archiving and accessing scholarly monograph texts to support teaching, research, and learning. It is based on ebrary software purchased in 2009, following an RFP selection process. It is a ‘light archive’—it is regularly accessed by authorized users to search and browse the collection. The platform provides the ability to search individual collections, or across all public or subscribed collections. Searches can be refined according to various facets—subject, language, author, series, and type. The interface also provides related journal articles on the search term, thus providing an added benefit for students who may be looking for monograph and/or journal literature. Access to collections is based on entitlements associated with acquisition decisions made by each school, and carefully controlled by IP ranges. Shibboleth authentication is also available for federated identity management and appropriate access. Where required, DRM is in place to ensure that usage of the ebooks respects the terms of the license agreements. The platform allows for the highlighting of text, bookmarking, or saving of books, based on setting up personal accounts. PDF downloads are supported, and export to citation management systems such as RefWorks and EndNote is available. A bilingual interface (English and French) is available, in recognition that several of our institutions are either bilingual or include substantial numbers of French-speaking students and professors in their communities.

Once a consortial license has been signed, the publisher works with staff to transfer data and often metadata (although sometimes we need to get MARC records from a different source). Once staff receive the data, they analyze the files and the metadata to determine if there are any issues to address, such as incomplete or corrupt files, and setting up the entitlements for the participating schools. Once the problems are resolved, one of the programmers writes a loader and the books are loaded. The MARC records with the Scholars Portal URL are generated. The team then does a quality assurance check before distributing the MARCs to schools and opening up access. The lack of standardization of ISBNs for ebooks is an issue, i.e. multiple or problematic ISBNs. There is a wiki that provides ebook files and metadata to the institutions (organized by publisher/collection and

date). The process of working with publishers to source and load book files has been a learning experience for everyone involved. The ebook record specifications are provided on the wiki; there are general requirements on record creation as well as MARC field-specific requirements. The cataloguers within OCUL libraries has been very active in reviewing MARC records from publishers, discussing issues on cataloguing of ebooks and developing the above specifications.

It is no exaggeration to say that the Scholars Portal Books platform constitutes one of the most innovative and successful collaborative ventures in the consortial environment. This has been recognized by The Charleston Advisor that awarded OCUL an Ebook Innovation Award (Machovec, 2012). OCUL’s collaborative approach to providing its members with access to a growing collection of ebooks through the Scholars Portal Books Platform was cited by George Machovec for offering “greater local control, customized functionality, and permanence that can be depended upon.” (2012). Scholars Portal as an organization has won an Innovation Achievement Award from the Canadian Association of College and University Libraries (CLA, 2005).

THE EBOOKS COMMITTEE

In 2002–04, OCUL participated in a tri-sector consortial agreement for NetLibrary titles, through the COOL (Consortium of Ontario Libraries) initiative. This involved the colleges and the public libraries in a unique model of cross-sector collaboration for digital collection development. This was the first large-scale consortial acquisition of ebooks in Ontario. Each consortium was responsible for selecting its own titles, and significantly the pool of total titles was made available to all three sectors. It resulted in 9229 titles being purchased. NetLibrary was problematic in terms of the single user, single book model. The interface at that time was quite primitive, and there were challenges in obtaining access to titles and to MARC records. The coordination of this initiative was undertaken by three librarian members of the OCUL-IR committee as well as the Projects Officer. This experience—early in the evolution of the ebook marketplace—revealed the need for a designated group to oversee consortial offers for ebook collections. There was a multiplicity of questions around acquisition and licensing models, delivery channels, pricing, access methods, content availability, and MARC records.

The transition from print books to ebooks has been a long series of growing pains, as publishers, vendors, and libraries have struggled to define a sustainable scholarly supply chain that can meet everyone’s interests and workflow capabilities. As is well known, this has occurred in marked contrast to the journals industry, where the transition from print to digital has been relatively painless and well-accepted—the e-format is now the stable, standard model for production and delivery of journal literature. For many reasons—such as immature business models, licensing restrictions, usability problems, and lack of widespread availability of titles—this has not been the case for monographs in digital format. At the same time, there was growing interest in exploring and resolving these issues in order to advance the development of the digital library. As more academic libraries embraced strategies for enhancing their web presence and for creating, acquiring and managing digital scholarship, this became more important.

In recognition of this reality, OCUL-IR struck an Ebooks Committee in 2007. The committee’s mandate is to play a leadership role in ebook acquisition and licensing strategies. This creates efficiencies in the relationships with publishers and vendors for acquiring new content. The committee is composed of six members: two from small institutions (under 10,000 FTE); two from medium-size institutions (10–25,000 FTE), and two from large institutions (above 25,000 FTE). The Assistant Director of Scholars Portal (Collections and Digital Preservation) is also a member. There are two co-chairs drawn from this group. This composition ensures that any vendor or publisher ebook proposal is reviewed by members representing a wide range of interests and circumstances. Moreover, there was a recognition that ebook offers were becoming more and more time-consuming

to address. The committee serves a key coordination role in shepherding an ebook offer from the initial proposal, through to the call for interest, the fielding of questions and the seeking of clarifications from the publisher, the crafting of the final offer, the request for decisions, and then hopefully finalizing a license agreement with the vendor.

One of the committee members is designated as the lead negotiator, and works in collaboration with the Projects Officer. The committee examines ebook offers and responds to solicitations of interest from vendors. Through analysis and exchange of ideas, the committee determines whether a proposed offer or a solicitation of interest is worthy of being presented to the membership as a consortial proposal. There is regular consultation with members through a distribution list, where questions are raised and clarifications given. This allows for a consistent process, builds expertise, and ensures that Scholars Portal hosting issues are taken into account (as described above). Monitoring national and international developments, such as ebook business models, innovative consortial opportunities, and intelligence gathering in the publishing and scholarly communications field, are also important to this process. The committee formally reports to the OCU-IR group, at biannual meetings, where accomplishments and strategic directions are discussed.

This framework has been very successful in enabling the Ebooks Committee to assess offers in a systematic manner, and to be guided by objectives that are critical to the consortium's strategic goals. It should also be pointed out that the committee can proactively initiate negotiations with an ebook vendor, if there is sufficient interest percolating from the members (at least three institutions demonstrating such interest). This provides for greater flexibility.

THE MODEL EBOOK LICENSE AND VENDOR TEMPLATE

One of the key objectives in negotiation is to pursue conformity with the OCU model eBook license² (OCUL, 2011b). The ebook license, vetted by legal counsel, is predicated upon the standard database license agreement developed in 2006 to represent our technological, legal, and business interests in negotiating for e-content with vendors. The archiving of licensed content is pivotal to the value of crafting our own model license for ebooks (Gillies & Horava, 2009):

the local load provision is the heart of why OCU needed its own distinct model license agreement. Moreover, as the future of various publisher–library preservation partnerships, such as LOCKSS and Portico, is far from certain and vendor assurances of perpetual access are viewed with some skepticism by librarians, a local solution still provides the most reliable, responsible, and utilitarian option for digital archiving. (p. 110)

The license includes key provisions that affect ebook agreements, such as ownership and perpetual access, local loading rights, MARC records, file format, delivery issues, and usage rights specific to ebooks such as interlibrary loans. There is a clause on copyright legislation to ensure that no statutory rights under Canadian copyright law are eroded under a license agreement. This model license is monitored in relation to our rapidly changing environment and updated as appropriate. We are in the process of creating a separate local load license that would complement the standard ebook license; this will make the administration of license agreements better manageable, since entitlements to local loading can change over time, as institutions decide to join existing licenses. Moreover, local loading can apply to various content types, not only ebooks.

Another important element has been the crafting of an Ebook Template for Vendors³ (OCUL, 2011b) to be sent to vendors with

whom the committee is negotiating an offer. This is a series of questions intended to capture all the relevant information needed to assess the offer. It also signals to the vendor that we have carefully considered our principles and requirements for a consortial ebook agreement, thus pro-actively articulating what we require and value from a vendor. The template is therefore a reflection of our practices and experience in negotiating ebook license agreements. The vendor is asked to complete this template, which is distributed to members with the offer itself. This is especially important for negotiating with a new vendor, i.e. one with whom the consortium does not have any previous history for ebook acquisition. It is generally not necessary for a vendor with whom we are negotiating a successive ebook agreement.

The template requires that the vendor's offer be in accordance with the OCU ebook model license. This is a critical issue for us, since this license is our common blueprint for shared principles and interests in regards to ebook licensing and management. As mentioned earlier, an ownership model with perpetual access and local hosting rights on Scholars Portal is a key priority for us. The template poses detailed questions around pricing, such as list price, consortial discounts, minimal purchase, multi-year pricing, deep discounting for print, and any ongoing fees. There are various questions around content, such as inclusions, exclusions, front list description, backlist coverage, types of works, and enhancements such as tables of contents and cover images. There are questions around access and accessibility, such as formats, authentication mechanisms, printing and downloading options, and checkout terms (where applicable).

The template has evolved in relation to our experience with vendors and our platform and access requirements. We now provide detailed specifications on MARC records, such as the OCLC standard and the need for a unique identifier mapping the ebook file to the MARC record. In regards to the issue of accessibility (in the context of the Ontarians with Disabilities Act) we ask questions about compliance with these evolving standards. As authentication systems are providing alternatives to proxy server recognition, such as Shibboleth, we ask for the vendor's technical capabilities in this area. As researchers are becoming more interested in large-scale computational analysis of scholarly data, we are asking the vendor whether they support data or text mining of their licensed ebook content. These issues are also reflected in the model ebook license.

The consortium has also developed a 'local load toolkit'—this is a document providing OCU librarians with an overview of the rationale behind local hosting, and discusses specific criteria, issues, and talking points to address with publishers. This is significant because local hosting as an overarching philosophy for the consortium applies to various types of content other than ebooks (such as ejournals, primary source material, data sets, geospatial content, etc.) and many publishers are not familiar with the business implications and operational logistics involved in supporting local hosting of their licensed content. For some publishers, it takes awhile to understand what we are doing and why it is important to us.

On the question of local content management of ebooks, Polanka (2011) observes that,

Some libraries negotiate with vendors to obtain ebook files and host them on local servers. This provides greater control, but requires technological expertise to develop the interface and load content. A vendor may also send content files directly to libraries for archival purposes while at the same time providing access through its interface. Good intentions aside, the files are of little use to libraries without the servers, interface, and technological expertise to deliver content to users. (p. 5)

Developing the in-house technological expertise and the infrastructure to host the content has been a critical priority for OCU. This has meant an ongoing review of user services, hardware capacity and

² <http://www.ocul.on.ca/node/114>.

³ <http://www.ocul.on.ca/node/114>.

software requirements, and staffing in relation to the consortium's strategic priorities. As can be imagined, this represents a significant and sustained investment by the twenty-one members for our shared services and collections, today and into the future.

EBOOK ACCOMPLISHMENTS

The Committee has enjoyed much success in negotiating ebook agreements with various publishers that support ownership and local hosting arrangements. The first was a comprehensive front list agreement with Springer, and this set the standard for other agreements. These have included: Elsevier, Oxford, Taylor & Francis, SAGE, OVID, Wiley, SPIE, IEEE, Emerald, Morgan & Claypool, Thieme, and Brill. In some cases, this has not been comprehensive coverage of ebooks (based on what has been available). Institutions can decide whether to participate in a given agreement; this is an opt-in model for licensing. There is much content from Canadian publishers, as described further below. The model ebook license has served as a foundation for negotiations. This has been a milestone in articulating and asserting our licensing interests to provide the broadest possible access rights, legal protections, and requirements for perpetual access and local hosting. The model license has been deployed for ebook agreements, sometimes with only minimal changes required by the publishers. This depends on the dynamics of negotiations. Publishers have learned that we have core requirements if they wish to do business with us. As the scale of licensed content on Scholars Portal has grown, and our model has become widely known, publishers have become more familiar with our interests and requirements. The fact that there are robust security protocols, and that there have been no breaches such as systematic downloading of content, has been strong testimony to the viability of our approach.

There has been a national Canadian licensing agreement (via CRKN) for ebook backlist collections from Oxford, Cambridge, and Taylor & Francis that include the option of local hosting. A total of 8141 titles were acquired in 2008. These titles have been loaded onto Scholars Portal, and are accessible by the schools that have participated in this agreement with Ingram. There has been a patron-driven acquisitions project in 2010 with ebrary, involving sixteen of the OCUL institutions. This led to the purchase of 467 scholarly titles for the participating schools, and provided valuable experience in understanding the strengths and limitations of a consortial PDA project (Davis, Jin, Neely, & Rykse, 2012). These titles generally provided very good value for money, based on the tiered contribution model for financing the project. These titles have been loaded on the Scholars Portal platform. Also noteworthy is a pilot project in 2011–12 with Oxford for the UPSO (University Press Scholarship Online) front list collection—these ebooks are automatically delivered to Scholars Portal upon publication, for local hosting. As a consequence, the digital copy becomes the default format for supporting research and teaching. There were thirteen institutions that participated in this project. We look forward to evaluating this new delivery model for monographs, particularly in humanities and social sciences, and moving forward with the second phase of this agreement in 2012–13. University press ebooks, both Canadian and American, are of great interest to us. This is considered to be core research content that is of broad value to our faculty and students. We have struck an agreement (OCUL, 2013a) with the Association of Canadian University Presses and eBound Canada to acquire a comprehensive collection of over 3000 Canadian scholarly ebooks published from 2007 to 2012, with perpetual access and local loading rights. Scholars Portal will be the exclusive point of access for this collection. This number is expected to grow to almost 4000 titles by 2014. This is a ground-breaking agreement that will allow institutions to access the e-copy as soon as titles are published. Scholars Portal is thereby becoming an integral player in the evolution of the scholarly communications ecosystem in Canada. This will have important ramifications for the dissemination of scholarly Canadian content, and the participating institutions will be assessing the use and integration of these monographs in their communities. As duplication is problematic for libraries, there will

be impacts on acquisition practices around approval plans and firm ordering for print titles.

The consortial strategy for managing ebook licensing and acquisition in Ontario has implied an educational process in our relations with vendors. We have invested time and energy in sensitizing vendors to our core principles; we have communicated our priorities and objectives, in the unique context of the Scholars Portal infrastructure and its centrality for how we do business. This has involved a significant amount of information sharing, negotiating and decision-making. Ownership and local hosting of ebooks are cornerstones of our philosophy and a demonstration of stewardship of our licensed scholarly resources. Some publishers have readily accepted this model, while in other cases there was significant discussion needed to convince key players and gain approval. Many discussions on the implications and logistics of hosting ebook files and associated MARC records have occurred. Negotiating these matters has made us more assertive, more experienced, and more focused on our strategic goals.

Moving the goalposts of vendor relations to adopt our frame of thinking has been an important theme during the past several years. The deployment of the model license and ebook template to assert our requirements and interests have been important milestones in this regard. This has mitigated risk for the consortium as a whole and for the individual members—we only agree to terms and conditions for ebook agreements that meet our requirements, and we have walked away from negotiations that haven't lead to a positive outcome. An important spinoff has been the growth of expertise among the committee members in ebook issues in general and the dynamics of negotiation in particular.

What will be the attributes of the scholarly monograph, assuming it survives, in an information culture where so many competing alternatives for disseminating research exist? What will be its intellectual form and structure, what media will it involve, and how will it be used in different and novel ways to address research and learning needs? All players in the ecosystem are seeking a sustainable, forward-looking strategy that can transform the scholarly monograph into a viable form that aligns with the business models, technological options, and supply chain realities of the digital era. We feel that our strategy will safeguard our collective investments in long-form monograph scholarship and serve our patrons effectively into the future. We are proud that in February 2013 Scholars Portal received certification as a trusted digital repository for journals, following an audit process with the Center for Research Libraries, and thereby became the first Canadian library organization to receive this distinction. It is hoped that this certification will eventually extend to ebooks as well.

This milestone demonstrates OCUL's commitment "to the long-term preservation of scholarly resources for the benefit of future students and researchers" (OCUL, 2013b). Stern (2010b) observes that "Preservation of digital and born-digital materials is still a topic of debate. Consortia are the logical groups to explore these details and to develop best practices to ensure safe storage, functionality, and access". Preservation of knowledge and information resources for future generations has been a core value for librarianship, but the ground has shifted dramatically as we leave the print era behind—the quantity and range of scholarly works in digital formats has increased exponentially in recent years, and preservation planning today requires a new paradigm of thinking. We have squarely addressed the challenge of long-term preservation for our community, while building a large-scale digital library of books to be accessed and widely used on a daily basis.

CONCLUSION

Based on a shared vision and technological infrastructure, the OCUL consortium has developed a comprehensive and ambitious strategy regarding ebook acquisition. Ownership, preservation, and integration on our own platform are key goals that have inspired us. Our strategy is one that few consortia can afford to adopt, as it requires a long-term

commitment to a shared technological infrastructure, significant staff support, and the ability to share costs in a sustainable manner. We now have a critical mass of ebook content. We have experience in negotiating numerous agreements with publishers, and in the logistics of loading and archiving ebooks and associated metadata. We have learned many lessons along the way and we have developed a collaborative ethos that has served us well. While there are always challenges in working with publishers, and working within a consortial framework, we now have a large measure of control over our collective investment in scholarly ebooks, today and into the future. As the market for monographs rapidly evolves, we expect there will be more opportunities for our Ebooks Committee and for Scholars Portal, whether it be in new 'business' models, new content, new partnerships or developing innovative roles in the scholarly communication supply chain. It is an exciting time to be engaged in the messiness of ebooks.

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