Perspectives on e-books and digital textbooks and the way ahead

This article presents a range of perspectives on current issues around e-book and textbook supply and consumption in libraries and universities. It is an attempt to provide an analysis of the often-contentious issues arising and also offers an insight into the positions of all the various parties involved. Whilst there might not be agreement or consensus on the causes of issues and the way to proceed, the article attempts to coalesce various perspectives, in the hope of achieving a greater understanding of different stakeholders. Much of the debate in recent years has focused on the situation in the United Kingdom, but similar issues exist in many other countries and an insight into the international perspective is provided. We also offer some commentary on ways forward for both the short and longer term.

Keywords
e-books; textbooks; academic libraries; publishing; students; teaching

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Introduction

Late 2020 and 2021 saw the emergence of a fierce debate around the issues of cost, availability and access models for digital teaching texts in the UK Higher Education (UKHE) sector. The impact of the Covid-19 pandemic – which shut campuses and libraries and necessitated a sudden shift to blended and online learning – exposed problems with the academic e-book market. This situation was exacerbated by the response of academic book publishers to the market conditions created by the pandemic.

'the Covid-19 pandemic … exposed problems with the academic e-book market'

Many of the key players in a market dominated by a few major companies accelerated strategic plans to maximize revenue opportunities for their digital content – increasing prices and applying constrictive models that limit choice, availability, access and ownership of content by the consumer. The business models favoured by publishers for their premium digital content (namely selling one copy of each title for every student in a cohort – or the 'e-textbook model' as it is known in the UK), have been extended beyond commercially driven content to titles that would normally be seen as secondary or background reading. This has placed many alternative title choices, and the traditional breadth of reading associated with studying for a degree, outside the pocket and reach of some UKHE library services.

The traditional academic ecosystem based around face-to-face teaching (and the setting of resource lists which cover essential reading, recommended and background texts), raced to adapt to the blended learning paradigm precipitated by the pandemic. The pace of change left academic staff with overwhelming workloads. Established library strategies of lending print copies of otherwise expensive or digitally unavailable titles to students (purchased to an agreed 'copy: # students' ratio[1]) were irrelevant where buildings and stock could not be readily accessed.

Customers (academic institutions and libraries) in the marketplace could not adapt in time to the paradigm shift caused by the necessity for digital content, and by publishers' pricing and access models. 'Consumer' behaviour in terms of spend and product selection has not been able to respond and rebalance the market. Institutions are acting individually, as single agents with limited spending power against a very competitive and wealthy global market, over which UK influence is small.

The short-term solution is for institutions to either spend more (from emergency or strategic funds) in order to make provision of this content; or to rebalance their available budgets (concentrating spend on digital premium content), at the expense of print books and wider background reading. Neither of these solutions are sustainable long term. Institutions have many other strategic priorities for funding caused first by the pandemic, and then the shift to blended teaching – with its attendant need to maintain quality. Many must invest in wider infrastructure and have already incurred significant costs in repaying accommodation fees, or in bursaries to support students.

'frustration felt by the sector … at the situation and lack of alternatives has been articulated by the #ebooksos campaign'

The frustration felt by the sector (library and academic) at the situation and lack of alternatives has been articulated by the #ebooksos campaign, and its call for regulatory intervention in the market.[2]

Library perspectives

UK library perspectives

Pre-pandemic

The provision of access to information resources for teaching and research is just one of many services that a UKHE library delivers – but it remains a key activity, one most likely to be measured and reported on for teaching and learning (and perhaps least likely ever to achieve 100% satisfaction).

'Prior to the pandemic … print copies were used heavily and often preferred because of their lower cost'

The level of provision expected by students varies by institution and by subject, but libraries as a minimum provide some level of access to most items on a reading list, and a significant additional 'collection' to support wider reading and research.

Prior to the pandemic, library buildings and stock were accessible; print copies were used heavily and often preferred because of their lower cost. Libraries continued with a mix of formats, using print to supplement limited digital availability for core titles, or for wider reading and research materials under lower demand.

Academics running distance-learning courses will have already been aware that the material they wanted their students to read was restricted online. Most other academic staff have traditionally left libraries to deal with satisfying book requests as appropriate, unaware of the complexity of licence restrictions and pricing.

Now (living with Covid-19)

The pandemic highlighted issues with online access to resources in academic environments. Academics became aware that not all titles are available as a library e-book; library budgets were not resourced to pay for the new e-textbook model and did not have the mechanisms and workflows in place to identify, order and provide these titles to classes in a timely way.

These issues that libraries now face, are likely to continue:

- Budgets: how to deal with the reduced accessibility that print resources offer for online learners and supplement/duplicate this with more e-book licences where available (extra spend). In addition, how to find the additional funding for e-textbook models where none already exists.
- Workload: how to manage increased enquiries from academics, often at crisis point when material is required for teaching, how to help with identifying alternatives, and, how to set up mechanisms for e-textbook purchasing or assessing their value.
- Supporting blended learning: shifts in teaching practice are accelerating demand for features that enhance blended learning. This means functionality beyond what the library e-book model offers and working with different partners and stakeholders across the institution. Ownership and decisions around choice and funding are diverse across academic, faculty and professional services (e.g. learning technologists, IT departments and libraries).

'shifts in teaching practice are accelerating demand for features that enhance blended learning'

The result of these factors coming together has been enormous frustration at a time of increased demands on service. The campaign #ebookSOS has expressed this frustration, bringing the issues to a different and wider audience.[3]

Accredited or vocational subjects covered by the most commercialized textbooks (e.g. business, economics, medicine, law, etc.) are disproportionally affected. Many HE libraries will recognize the time spent in looking for affordable online options for these subjects, some of which typically have very large cohorts studying a specific module.

The library perspective outside the United Kingdom

The issue of both pricing and supply is not just limited to the United Kingdom, and during 2020 and 2021 there have been examples from across the globe where similar questions on a range of related concerns have come to prominence. These relate not just to specific issues of e-book or textbook availability and costs, but closely to intersecting matters. For example, the provision of open educational resources (OERs), prospects for controlled digital lending, wider concerns around digital ownership and, naturally, the role of libraries and publishers within this space.

USA

The country where the most significant developments and activity occurs is the USA. Historically, students bore the brunt of cost for textbooks and course readings not the academic libraries. Students had defined reading lists, which traditionally mandated that they purchased the required textbooks, usually from the campus bookstore, with no expectation that these books would be available from the university library.[4]

As federal and state funding for HE institutions in the USA vanished or was minimized, students came to bear more and more of the costs of an education that also included textbook and reading material provision. In recent years the debate has focused on two distinct but mutually connected themes, firstly a more nuanced discussion on the cost and student affordability of textbooks, and secondly, the options and support for OERs. The latter is receiving more attention and support in the USA, because of the issues around cost to students. As the sector moves towards digital options for textbooks and associated learning content, the impact of these technologies upon both pedagogy and student learning means they are here to stay, and so a sustainable future is now sought.

The US debate has moved forward from the prevalent publisher direct-to-student sales model, towards institutional supply options (what is known in the USA as 'inclusive access'). US institutions now offer a range of negotiated options for students to rent, lease and purchase e-textbooks, often via an agreement with the campus bookshop, but increasingly via intermediary aggregators or directly from the publishers themselves.[5] These models have come to replace campus bookshops entirely. In most cases, campus bookshops no longer exist as a physical space on HE campuses, they have become solely virtual buying portals for course materials.[6]

'US institutions now offer a range of negotiated options for students to rent, lease and purchase e-textbooks'

Some universities in the USA sign their students up for inclusive access deals from the outset. They have contracts with education publishers to provide required digital texts and study tools, sometimes at a discount to the individual unit price. Colleges then automatically bill students when they enrol for programmes, either as part of or in addition to their tuition fees.

Whilst these schemes provide students with unlimited digital access, there is disquiet about affordability where students have been charged back without being able to opt out.[7]

As a result, organizations such as SPARC and the recently formed Library Futures are developing advocacy and advice on how students, libraries and institutions can opt out of automatic billing in these inclusive textbook programmes.

These organizations support OERs development and have successfully advocated for federal funding to be provided for OERs development across the USA. The success of their advocacy can be seen in state level financial support for OERs on a sustained scale that can provide meaningful alternatives to commercial textbook supply, and overcome the typical barriers there are to developing meaningful OERs.[8] Examples of this approach include an OERs Grant Program in Texas from 2020: a competitive initiative that provided grants to selected individuals or faculty teams at Texas public institutions of higher education to adopt, modify, redesign or develop courses using only OERs.[9] In July 2021 the California Governor, Gavin Newsom, signed into law an unprecedented US$115 million (M) investment in the expansion of Zero Textbook Cost degrees and OERs at the state's community colleges. Building on a successful pilot that concluded in 2019, the funding will apparently 'support the development of degree and certificate pathways that students can complete without spending a single dollar on textbooks'.[10]

'These organizations … have successfully advocated for federal funding to be provided for OERs development'

Outside of the UK and USA

Globally these issues have generated debate and initiatives designed to counter the market imbalance. These initiatives demonstrate commonality with developments in the UK and USA, and potential for both sharing of experience and the development of solutions.

In Canada academic libraries have been increasingly vocal about what they see as the issues facing them and their students with regard to e-books and textbooks, suffering similar frustrations as in the UK and increasingly the USA. Much of this has surfaced on social media and a groundswell of opinion is growing. Speakers from the #ebooksos campaign were invited to speak at the ABC Copyright 2021 Virtual Conference in May 2021. Much common cause was aired with proposals for future collaboration and sharing of experience.[11]

'the main message that digital lending for e-books should be on a par with print books'

In Germany librarians from over 600 libraries provided their support for the 'Buch ist Buch' (a book is a book) campaign.[12] This resulted in a joint letter to representatives of the German parliament with the main message that digital lending for e-books should be on a par with print books. In addition, the accompanying ownership of these e-books should not preclude lending and that libraries should both own in perpetuity these e-books and have fewer restrictions around their circulation and use. The core issue of this campaign resonates with one major criticism from librarians in the UK and USA especially around perpetual ownership and how this option is being withdrawn from the digital book market.

Debate and discussion are also growing in South Africa. In March 2021 the Library and Information Association of South Africa hosted an online event focused on what they termed the e-book dilemma.[13] Again, similar issues around supply, costs, access and licensing were cited with the intention of including all relevant stakeholders in the discussion.

In Australia there have been attempts to look at different options for the supply of textbooks, as evidenced by a pilot scheme. In 2019 Western Sydney University (WSU) announced the extension of its partnership with a major aggregator to offer digital textbooks to first-year students at no cost.[14] Debates about OERs related to pricing of textbooks have been evident in the work of organizations such as the Australian Open Textbooks research team, who are campaigning around social justice principles related to the cost of textbooks and reading matter for Australian students and staff.[15]

In Ireland there has been a successful campaign to highlight the issues faced by libraries across all parts of the sector in terms of e-book supply and acquisition. This work has been co-ordinated by leading stakeholders in the Irish library sector including public and academic libraries often working in tandem with the Library Association of Ireland and the UK #ebooksos campaigners. In 2022 coverage of the campaign was also secured in major media outlets including radio and national newspapers.[16]

The academic perspective – both as teacher and author

One of the key actors within this whole environment is university academic staff. Without necessarily being aware of it, they exercise a great deal of agency within the dynamic that sees materials authored and developed, selected and placed within teaching, recommended to students, marketed to institutions and ultimately purchased.

There are two market conditions within their control which exist and contribute towards the current situation:

- the authorship of textbooks by academic staff for publishers, and the granting of exclusive rights to the publisher, with no say in the way the content will be priced and marketed
- the placement and embedding of titles on course reading lists by academic staff which creates a 'canned' market for publishers.

Institutions can and should help academic staff in both these scenarios: by offering advice and support on negotiating publishing contracts, by resourcing, recognizing and rewarding open authorship of teaching materials, by working across the sector to apply market pressure on publisher prices and by signposting sustainable alternatives to set readings.

Most institutions in the UK support academic freedom, and choices of text placement on courses is usually an academic decision related to teaching requirements. Practices vary obviously, but in UKHE the concept of a reading or resource list is well established. Some academics or programmes do not make heavy use of directed reading. Some arts and social science disciplines may favour long lists of wide-ranging sources. Other disciplines have a small, highly focused set of texts and resources. Although the concept of an 'essential', 'core', or 'recommended' reading is not ubiquitous, it is often used by academic staff to direct students to materials, and even suggest purchase.

'Publishers … exploit the dynamic through direct marketing to academic staff'

Publishers realize this and exploit the dynamic through direct marketing to academic staff by publisher sales representatives. Academic staff already struggling with workload to adapt their teaching to a blended learning environment during the pandemic understandably had little awareness of the implications of their decisions in terms of cost or availability to their library and students, or the time to consider more sustainable alternatives.

Once a text has been selected and heavily embedded in a course, competition from other publishers can be locked out. The university library can face difficulties in making sufficient

provision. Print books have no real relevance in a world where students are not able to access the library to borrow them, and restrictive e-book supply models do not offer enough choice or digital access at sustainable pricing to plug the gap.

Therefore, student experience suffers. This can be mitigated if there is an active dialogue with the library about resource selection for reading lists to help academic staff identify available, affordable or open readings and resources for a class.

The student perspective

Students no longer expect or can afford to buy books of their own to support their studies. Since the late 1990s direct payment of fees for students from England, Wales and Northern Ireland has made the cost of their education more visible, with extensive library facilities often marketed as an example of the services provided by universities.

'Students no longer expect or can afford to buy books of their own to support their studies'

Campaigns to expose the hidden costs of a degree, and surveys of student perceptions often place the cost of course books towards the top of concerns expressed. However, expenditure on these pales into insignificance alongside their other regular outgoings, particularly accommodation and living expenses (with the cost of living at the time of writing rising at the highest rate in 40 years). The cost of accommodation, and access to technology, feature prominently in National Union of Students campaigns:[17]

> 'the true costs of living, studying and simply existing as part of a further and higher education space is too high, from the course costs to living costs, too many students are being priced out of their education and experience. On-campus catering outlets, shops selling groceries, book shops selling core texts, on-campus laundry facilities, university housing, transport – all of these services, often run or managed by further and higher education institutions are turning a profit from fundamental parts of a students' life in an education institution. These are services students cannot do without.'

Any librarian who has worked with students supporting information literacy, will be aware that they often take a very tactical approach to finding, accessing and using content at point of need.[18] Searching for quotes within Google Books, Googling for content to support essay points and use of Wikipedia sources has been commonplace for many years. Piracy of content has been a constant threat to publishers' direct sales models.[19] Where students do purchase content they have a number of options; from cheaper second-hand books, Amazon and kindle editions, to subscription services that mimic the choice of familiar Netflix and Spotify type services. However, all of these costs are competing for priority with essentials such as mobile phone contracts, weekly food and social allowances and those same entertainment services.

The general expectation of many students for some years has been that institutions will provide a certain level of online access to all the resources they need. Libraries may have the same aim, increasing availability as well as responding to expectations, but the difficulties in doing this were not wholly exposed to academics and the wider institution until 2020 laid bare the gaps.

The maximum student tuition fee in the UK was set at £9,250 per annum in autumn 2016, and although initially meant to rise in line with inflation, this sum has repeatedly been capped by the Government with the 2022 review applying a further freeze until 2024–25. With inflation forecast to exceed 9% in the UK in 2022, this means that in real terms, the value of the tuition fee by the end of the current freeze cycle will be worth over 40% less than it was when first fixed in 2016.[20] This signals a significant shortfall between what students pay, what a degree costs institutions to deliver and the amount available for universities to reinvest back into facilities (such as accommodation, teaching rooms, equipment, technology and infrastructure, staffing, etc.), before they consider additional funding for library content.

Policies of inclusion across HE drive many proactive attempts to try to provide parity of access to all – explicitly expressed in the Access Participation Plans that UK universities have adopted to address progression or attainment gaps for different student demographic groups. The sudden shift to almost universal 'blended learning' in 2020, and the replacement of in-person examinations with online and open book exams depended on a level of simultaneous online access rarely available. However, library e-books with limited simultaneous user models have undoubtedly disappointed students, despite their flexibility compared to print.

The publisher perspective

'library e-books with limited simultaneous user models have undoubtedly disappointed students'

Publishers are also part of the debate and it is important to understand their drivers and viewpoints. There are a number of factors that inform policy, pricing and production from a publisher's perspective, especially with a view to strategic development of the market, and how they see the difference between e-books and e-textbooks. These themes provide a backdrop to how publishers and aggregators perceive the marketplace and pitch their products accordingly:

a. Higher costs involved in development, production and in driving sales – e-textbooks offer higher returns but also incur greater risks and costs.

b. Loss of 121 sales – traditional models of student purchasing of print copies, has seen further decline in sales due to the accelerating move to digital.

c. Changing business models – as a result of changing sales patterns including lack of sales through bookshops to students, publishers are looking at alternative sales and digital distribution models – direct to students, but also volume based, mass scale initiatives delivered via institutions.

d. New content – publishers sense a demand and see an opportunity for artificial intelligence (AI) driven works and more courseware integration, either 'within' or complementary to their textbooks. This in turn leads to potentially higher revenues, and a more complete product offer tied in with other university systems and institutional priorities around teaching and learning. Pearson has been quick to adopt a lifelong learning strategy and position itself to capture part of the wider workforce and professional skills learning market by adding integrated products that offer data insights, credentialing, etc.[21]

e. Embed and leverage a greater influence on teaching and learning – the integration of new content and functionality means a transition from textbooks to learning solutions. This consolidation and tie in with course structure can suggest increased impact and value with respect to teaching and learning outcomes for students.

f. Ownership – with rights to access, use and reuse digital content controlled via digital rights management (DRM) technology and products often only licensed for a year, publishers have scope to control how their content is used in a way that print products never offered – including applying these controls differently to the same product licensed via different routes.[22]

The following points further explain the publisher perspective around development costs and pricing, enabling a more balanced and nuanced debate. These relate to factors and issues across all stages of the textbook production and supply cycle and are presented in summary here:

- Whilst the removal of or reduction in printing costs is a factor, the pre-press costs such as copy-editing, proofreading, typesetting and indexing still apply and are the same for both print and e-formats.

- On top of this, electronic file conversion, distribution and hosting all require investment of time and financial resources.

- Marketing is key to publishers realizing their return on their investment in 'premium' content, and a common goal is title 'adoption' on courses or modules in order to achieve 'sell-through' when a book is recommended for student purchase. A key contributory reason as to why textbooks are more expensive than monographs is not only because the content costs more to produce, but also because of the very large sales team working with academics to win adoptions of a textbook.
- The number of users who can read the same document simultaneously will impact upon both sales estimates and pricing.
- By definition, a 'licence' signifies payment for the use of something that is not owned but is used temporarily. This is one of the first psychological barriers that needs to be overcome by librarians, publishers, authors and readers. In fact, the printed book, although owned, also 'expires', so to speak, since the reiterated use of a single title by multiple users eventually causes the book to wear out and become unusable.
- Comparing the initial cost of purchase of a print book and its e-book equivalent is only part of the 'value' equation. Libraries must measure the physical processing as well as storage costs for print, against the ongoing maintenance costs for continued access to the electronic versions and develop a better understanding of the uses being made of e-books. Multi-user e-books are often more accessible and can be 'circulated' more immediately and repeatedly than their print equivalent on the same 'loan' period.

There is often a lack of understanding in the library community about how publishers differentiate between the production and sale of an 'academic' e-book as opposed to the production and sale of a textbook and in particular an e-textbook. Publishers, as viable businesses, must generate both sales and profits and it is fair to say that different product lines offer different profit margins. Textbooks and e-textbooks traditionally offer both higher margins, but also require higher investment and subsequently attract higher risk in recouping and exceeding this investment. Irrespective of views as to whether these risks and profits are justified, Table 1 is an illustrative example of the various costs and issues as seen from the publisher perspective. Acknowledgement of this perspective would help contribute to a greater understanding across all parties in the sector, a necessity for meaningful dialogue.

'Publishers, as viable businesses, must generate both sales and profits'

Sales models

Many publishers would argue that by selling direct they can offer a product and student experience that is superior to that sold by intermediary suppliers, but the reality is more complex. The product sold through established library suppliers incurs a cost to the publisher and is typically not the product they would choose to sell. The product offered by these suppliers is more aligned to the product requested by their library customer base: a multi-user licence (perhaps with one to five concurrent users) to individually selected e-book titles, purchased in perpetuity, and added to the library collection – for access by any member of the university. This mirrors the established library model of purchasing print copies for ownership and addition to the collection, placing them on the shelves and lending them out multiple times to multiple students.

Selling to this model is not profitable for publishers. They can only sell their product once, and they see it being used many times by many people. The revenue derived from sales to UKHE libraries is a relatively small part of global publisher business, and when the library serves several cohorts of students on a programme not all students need to buy their own copies. This cuts into the volume-based sales model publishers favour and is seen as a threat by them. Having learnt lessons from their over-reliance on declining print book sales, many publishers do not want to repeat history.[23] Some publishers (such as Elsevier) have withdrawn their content from third party library aggregator platforms (like ProQuest or Askew and Holt). Instead, their products can only be accessed direct from their own platform, or via selected intermediaries, giving them greater control over distribution.[24]

	Academic books/monographs (e-books)	Textbooks (e-textbooks)
Editorial	Receipt of proposal/manuscript Brief evaluation and consideration of proposal/manuscript by editor Limited paid peer review process Royalties-only contract offer paid at base rate Very little to no editorial/external involvement in shaping content Limited contact between author(s) and publisher, just checking progress Receipt and approval of final manuscript and send to production No third party copyright permissions required – the content is all original No photos/images or if a few then selected and paid for by author(s) Design often follows series or standardized look and layout Typically, one year process	Market research to establish key course markets, followed by active commissioning to match curriculum needs. Seek out new authors with appropriate profile to deliver latest content for core courses Regular travel and stay to universities/conferences internationally to develop relationships and secure authors/projects. Textbook proposal is developed over time between the author(s) and publisher/editor Develop ancillary teaching resources, either with author(s) or with hired third party including commission of bespoke videos, test banks, animations and teaching collateral e.g. PPTs, lecturer manual and additional case studies. Thoroughly review proposal typically by researching, inviting and setting up a project editorial board, who are remunerated Make business case to sign project, submitting investment required. Royalties paid at higher rates plus author grants and advances Project assigned to Development Team who lead on developing the textbook (both content and market) Work closely with author on shaping manuscript to ensure it delivers against course curriculum needs. Return to editorial board for draft chapter content reviews, who are again remunerated 'Market seeding' activities begin at draft chapter stage to raise initial interest in the text for course adoption (surveys, mailings, social media, etc.) Textbooks are subject overviews and summarize existing work so project typically has to include permissions costs. Search, selection and purchase of photos/images/visual matter in the textbook Meet with Design and Production to initiate page and cover design Organize student-focused groups/student involvement (paid focus groups, prize competitions and surveys). **Often three plus years editorial/author timeframe**
Production/ Manufac-turing	Often managed 'out of house' or by project vendor Less publication date-sensitive, standard seven-month schedule (to pub) Copy-edit and proofread focused on consistency, citations and references Unlikely to have online resources Light touch on typesetting requirements Alt text/image description not considered	Project managed by UK Production Editor; consideration of author relationship management (inc. repeat PE where possible for authors of new editions) Must publish in adoption month/for semester start; fast tracking (shorter schedule) can be necessary – time-sensitive publication window Copy-edit and proofread for consistency and comprehension/language, pedagogy, print/online resources cross-checking. Online resources for faculty and students formatted and proofread, Online resource website built, course cartridges produced where applicable, synced to publication date

(Contd.)

	Academic books/monographs (e-books)	Textbooks (e-textbooks)
	Content/layout suitable for HUB xml Mostly monoprinting Can be included in POD (printed and distributed to recipient) or low run Quantities to warehouse restocked frequently Efficient, local printing	Complex typesetting process to ensure layout appropriate to market/discipline Alt text/image description for book and online resources considered/provided, depending on context/sales expectation. Consideration given to how pedagogy translates to web pdf and ePub Mono, 2 or 4 colour. Certain disciplines/course areas demand more expensive 4-colour printing Awareness given to POD enrolment requirements, given complicated layouts (plus managing extents) Often printed overseas and shipped to UK warehouse when colour printing, or printed in different territories depending on regional adoptions
Marketing	Light touch, inclusion in discipline marketing activity Inclusion in brand promotions where title links to a theme Reliant on author network	Free sample copies provided (100+ free copies but up to 500 free copies distributed, mix of print and e-book samples). Data research to identify suitable prospects for adoption across main adoption markets in UK, EMEA, APAC and North America Sales enablement support to enable the sales team to communicate the benefits of the title effectively, complex collateral requirements including competitor analysis, positioning frameworks and other sales tools Author support, including hosting webinars, developing author videos 12 to 18 month digital marketing campaign activity to raise awareness to faculty and students. Investment in paid-for advertising via key channels e.g. Amazon
Sales Approach	Ensure metadata accurately distributed into market Key booksellers informed of publication via ONYX feeds Light touch from sales team, include in bookseller promotions Ensure e-book files supplied to all channels	Ensure metadata accurately distributed into market Key booksellers informed of publication via ONYX feeds Ensure e-book files supplied to all channels Adoption-focus. Starts 6 to 9 months before publication to inform the field, campus-based sales team of the new title Sales people across UK, EMEA, APAC and North America travel throughout their territories, promoting the new title to appropriate faculty members Revisit interested faculty 2 to 4 times over 6 to 12 months, with aim of securing 'core, essential' adoptions on reading lists Strong competition from other publisher reps to 'win' the same key adoptions Liaise with local booksellers before term to ensure appropriate sales channels in place e.g. print stock available through local campus bookstores

(Contd.)

	Academic books/monographs (e-books)	Textbooks (e-textbooks)
Business Model/Market focus	Often low print sales expectation (100 to 500 units) Traditional hardback library sales an important part of mix Library e-book sales important component of sales mix E-books often available on limited concurrency basis, to support 'reference' use Specific parameters within editorial of whether these titles receive a library price, and at what stage in their life. Some titles made available with library list price on publication, depending on why the book has been commissioned – e.g. has it been developed for use as a key teaching resource	Challenging P&L at title level, with very clear minimum sales requirements to make a project viable Core model is the 'student-pays' model. Title is recommended to students by faculty as part of a module The title is commissioned on the basis of a minimum viable print/unit sales/revenue return. For brand new books, this can be high risk, high investment with no guarantee of adoptions/sales/success Traditionally, digital retail sales have been a small proportion of the title sales mix E-book availability is premised on individual student copy model Library channels/traditional library models and price points have posed significant risk to delivering the minimum Return on investment is a requirement for a textbook. E-textbooks models have grown in prominence but still represent a small overall % of a title's annual revenue performance May be made available with library pricing later on in the product life cycle and distributed via aggregators for perpetual access – but mostly where no future editions are planned

Table 1. A publisher's insight into the difference in development costs, effort required, product life cycle timescales and the risks incurred for an academic book versus a commercial textbook

These chosen intermediaries (such as Kortext, Vitalsource and BibliU) have now joined library supply frameworks and offer publishers a preferred sales model (one individual 'copy' of an electronic title per student). They unlock the direct e-textbook supply route not offered by other framework suppliers, delivering content to individuals at cohort scale via interactive user interfaces that support the delivery of online teaching. Flexible models that provide an agreed number of titles per student and discounted rates for selected cohorts of students (e.g. by programme, school, faculty or year group) were introduced after negotiation with Jisc to provide some transparency for the sector.[25]

'These … intermediaries … unlock the direct e-textbook supply route not offered by other framework suppliers'

Increasingly, these subscription offerings also feature the bundling of content. Models such as OUP's *Law Trove* product wrap together a basket of titles that can no longer be bought separately, but only as part of the overall package. Such packages may feature very high value titles mixed with lower selling products from the publisher's catalogue, creating the generation of revenue for these as well. These lessons have all been learnt from the big deal journal subscription models dominant within the HE library sector for the last 15 years.

The market

Market dynamics

The concept of academic books and textbooks has been shifting over the last two decades as digital technology shapes what can be done with (and what customers expect from) learning and teaching materials. The development of digital archives and collections

alongside traditional print formats is something that libraries, academics and students have become familiar with as a result of exposure to these resources. Increasingly, content is now indivisible from the technology that enables it. Rich media and interactive products (like those developed for teaching anatomy) are now available in the marketplace, and those that make use of augmented or virtual reality will follow shortly. Authorship is being blended with content creation.

'Increasingly, content is now indivisible from the technology that enables it'

This paradigm is replacing the traditional focus on linear books and textbooks, with one based on technology enhanced, content-rich learning objects. At its most immediate, this direction of travel can be seen in the development of publisher 'courseware' platforms for the integrated delivery of digital textbook titles and in the addition of functionality to the title itself. Intermediary platforms (like Vitalsource, Kortext and BibliU), offer these interactive features and rich engagement analytics that allow teachers and libraries to track student touchpoints. Proprietary publisher platforms (e.g. MindTap by Cengage, MyLab by Pearson, Connect by McGraw Hill) offer all this and a 'wrapper' of courseware design that delivers formative and summative assessment tools to help consolidate learning. Publishers are repositioning themselves to deliver online and blended learning experiences. Increasingly they are branding themselves as learning solution providers rather than publishers.

Developing products around interactivity, technology enhanced platform support, learning analytics and individual engagement generates data – and thus potentially insight for all parties. It can also offer new product and revenue streams for publishers and platform providers – selling to institutions with ambitions for personalized learning and analytic capability to track, support and predict student success. Some companies are refocusing their offering around the provision of data rich services (e.g. Talis Elevate and Kortext), but there is little by way of open and common standards to enable comparison of engagement data or integration across platforms.

Arguably this all delivers a different and perhaps better product than the print equivalent, but it comes at a price. There is significant investment required in developing these platforms and their functionality, which adds to the cost of the product. Publishers are keen to see a return on this investment, and most prefer to sell their titles directly to institutional customers. The digital products being developed and sold now are no longer purchased and owned, they are merely licensed and leased under terms and conditions decided by the publisher. DRM technology controls this, and an annual subscription can provide assured and repeat revenue streams (for comparatively little marketing and sales overhead compared to adoption of a textbook).

Implications for libraries

Who bears the cost?

With this supply model, the cost in the UK is increasingly borne by the university, unlike the US model of 'inclusive access' (whereby the student picks up the cost of renting or purchasing their books via discounted routes negotiated by their college or consortia).

'the cost in the UK is increasingly borne by the university'

The combined spend on books across the nationally negotiated SUPC and LUPC library purchasing frameworks in the UK, rose from £55M in 2019–20, to £73M in 2020–21.[26] Most of this increase in library spending was driven by e-book orders (an increase of 46% to £35.1M), and e-textbook provision (a 281% increase to £25.1M). Over 82% of 2020–21 library sector spend was on electronic book formats and the Publishers Association disclosed that the UK academic market grew profits by 14% in 2021.[27] Pearson reversed its 2020 profit warning with an 8% underlying growth in sales for 2021.[28]

Much of the risk for a publisher has been removed. They do not have to market products directly to (or seek sales from) individuals in a class cohort, they just need to ensure that their product is well placed in the teaching on a programme and then market to the academic or institution. Intermediaries such as Vitalsource, BibliU and Kortext have also begun to

offer options that mirror those of their established competitors on the frameworks, such as concurrent user access, user activated and evidence-based acquisition.

The concept of selling direct to students has not disappeared. Rather, it has been adopted by new players in the market offering monthly personal subscription models for 'as much as you can eat' content (think Spotify and Netflix). Examples include Perlego,[29] and Pearson's 'direct to student' model.[30]

Sustainability within library budgets

The direction of travel demonstrates a move away from traditional notions of linear content and print products, towards platforms and products that develop closer tie in and dependency on the behalf of customers. The need for ongoing access results in repeat subscription costs. This commitment comes at the expense of choice for university libraries. Their ability to purchase (in perpetuity) and build collections that support the necessary range of wide and diverse reading required for deeper learning and knowledge, and for research, is eroded.

Publishers and intermediaries are not having it all their own way. The large-scale, institution-wide discounted supply models trialled under the Jisc agreements with Kortext and BibliU have not proved financially viable for many universities and were withdrawn from the framework.[31] The annual cost of making campus-wide premium textbook provision to all students, places these models outside the pocket of most universities. Institutions are also finding that the usage of texts is lower than expected, leading to questions about return on investment.

'Publishers and intermediaries are not having it all their own way'

At the time of writing, indications are that the proportion of UKHE spend directed towards electronic book formats under SUPC and LUPC frameworks during 2020–21 has not been sustained into 2021–22.

2021–22 has seen a decline in expenditure in excess of 37% on SUPC lot 5 (e-textbooks) during the previous year (August–January periods compared).[32] With the pandemic now having less impact on daily life, and restrictions on access to library buildings lifted, librarians are once more looking to more affordable print book provision.

This exposes the truth that the premium 121 e-textbook model is primarily suited to the most essential titles that are absolutely integral to degree study, and where every student must have access to the text. Typically, this means programmes built around a text, or accredited programmes (like nursing, medicine, law, etc.) where the content taught to must meet accepted standards. This is where the most value to the institution and student is derived from.[33] Outside of this scenario, not every programme teaches to set texts: it is more common for a wide range of reading to be recommended, students are expected to read broadly and they do not need to have immediate, personal access to every book on a list.

There is no one-size-fits-all approach across the sector. Each institution has different strategic priorities and financial pressures which dictate its willingness and capability to commit more resource to e-books. Competing influences and bids for money shape the institutional take on textbook provision (e.g. did an institution prioritize a pandemic accommodation rebate for students over provision of course books?). Some institutions provided top-up or additional funding for e-textbooks even before the pandemic, and many others started to provide additional funding once the pandemic had acted as a catalyst for them to consider other solutions. Early evidence suggests this activity is scaling back.

Value for money is something that libraries are often asked to prove. Large upfront investments are hard to both evaluate and evidence in either pedagogical terms or as a return on investment. University textbook schemes are often a marketing driven initiative, and institutions expect to see a rigorous and evaluative analysis, especially if the initiative is tied to outcomes like student recruitment, progression or attainment. Sustained, central financial support can be difficult to secure.

Some publishers and intermediary suppliers believe there is more money in the sector and a larger profit to be made (with an eye on widening access funding, university strategic funding or similar). However, from an institutional viewpoint the case for long-term funding and its appropriateness often needs to be proven and embedded within the resource-planning processes of the university.

Summary and way forward

The current scenario is unsustainable. Inflation means that student fee income is depreciating quickly in value from the level set in Autumn 2016, limiting the revenue universities have to reinvest back into services, facilities and student support initiatives. Increased student recruitment during the period may offset this factor if efficiencies of scale can be exploited in the delivery of learning and teaching. However, 121 pricing models at the tariffs currently pursued by publishers make this unfeasible for library provision (which is just one of the service components provided to students by universities). With the cost of living rising, students are also less able to afford their own books.

This, the restriction of content models and the levels of price increase applied by publishers, have led to claims of a broken market in the UK and calls for intervention by the Competition and Markets Authority.

If this does not happen, the answer has to lay within the sector itself. The increased levels of spend on e-books and e-textbooks by institutions throughout the pandemic was fuelled by short-term strategic investment and now appears to be levelling off. Online teaching is being replaced by blended learning or a return to face-to-face delivery, and access to campus facilities means that print lending is feasible again. This places libraries and institutions in a better position to negotiate with publishers.

'the sector will need to collaborate and co-ordinate a response in a way it has not previously done'

In order to do this effectively, the sector will need to collaborate and co-ordinate a response in a way it has not previously done for the provision of teaching and learning content. There are lessons learned from the delivery of the open access agenda, negotiation of read and publish agreements, and there is good practice adopted outside the UK that can form a template for action. The wider institution must also be engaged, and in particular the importance of the academic as a stakeholder and agent within the dynamic should be realized.

As a sector, UKHE must come together in recognition of the following factors it has at its disposal which together have a bearing on the market, and if consolidated and co-ordinated, would lead to a more meaningful dialogue with publishers around digital textbook pricing and access models. These factors are:

- the ability to act as a cohesive sector with shared goals and aims
- the consolidation of sector purchasing spend, and leveraging that to negotiate better terms
- the authorship of content by academic staff employed within the sector
- the selection and positioning of products through the placement of titles on resource lists.

Academic staff

Libraries have been at the forefront of the open access debate for over two decades and have played an important role in the cultural and ethical change required for open scholarship by engaging researchers with open access policies, FAIR data and responsible metrics.

Backed by top-level funder mandates and policies, academic staff (many of them on joint teaching and research contracts), now understand the open access debate and the benefits

and altruistic good that can result from making their research open. They are aware of how the ecosystem depends upon their production of research (supported either by their employer or a funder), and how their unpaid contributions as peer reviewers and journal editors turn this into capital for publishers. They are given direct support on how and where to publish their outputs and how to navigate publisher copyright provision to enable this.

However, librarians do not routinely have the same conversations concerning the parallel issues related to commercial book publishing. There is much work to do to engage academic staff and support them with linked concepts such as:

- Commercial book contracts – they need to consider who retains the rights to electronic versions and whether the content will be developed and marketed as a product that can be affordably provided to class cohorts. (Library services already provide advice about rights retention and open monograph publishing and have helped academics to understand how the journal publishing model relies on their input to function.)
- The implications of adopting titles directly marketed by publishers and putting these on courses as core titles or recommended for student purchase (compared with how researchers have been made aware of the dangers of predatory journals and publishing).
- The cost implications to the institution and student of their reading list choices (librarians already advocate strongly for the benefits of 'open' in terms of providing equity of access to all demographic groups).

The Jisc Learning Content Expert Group in the UK recognized this situation and published a briefing paper for academic staff to be used as a starting point for dialogue about resource selection and book contract negotiation.[34] The #ebooksos campaign has also produced guidance on negotiating book contracts.[35]

'Publishers … flipping their supply models to premium 121 e-textbook provision for titles that would normally be regarded as background reading'

Establishing sector consensus

A unified vision on what the UKHE sector is looking for should be agreed upon; ultimately, only so much money is available to spend within the market.

Much of the debate has centred on how the cost of e-books is too high. Publishers have brought this upon themselves by flipping their supply models to premium 121 e-textbook provision for titles that would normally be regarded as background reading. Yet very few of these titles need to be provided by libraries on an individual basis to class cohorts.

Librarians do get stuck on the recommended print retail price (RRP) as a reference point, and the concept that a single user e-book licence purchased in perpetuity should cost no more than this. They sometimes forget that the e-book format offers an entirely different value proposition because of the extra functionality and accessibility built in, the 'just-in-time' convenience and cost saving to users of off-site access, and the ability to 'circulate' each 'copy' to more people with a much quicker turnaround (no return and shelving delays or costs).

'The sector needs to understand and benchmark pricing better so that is has realistic expectations of market value'

Librarians accept that a print law textbook will cost more than an English literature primer, or that one marque textbook publisher may charge a premium over another, but do not understand what drives this pricing difference from a publisher perspective and consequently wrestle with the notion that a single user e-book licence may legitimately attract a higher pricing point than its print sibling. Similarly, factors such as annual licensing, 121 bulk purchasing for classes, restricted DRM and flat reproduction of linear content offer less value.

The sector needs to understand and benchmark pricing better so that is has realistic expectations of market value to inform negotiation. It needs to identify what its priorities are, and the platforms, titles and publishers it wants to work with. It needs to explore whether it can accept some limitation in the choice of platform, product, titles or publishers in exchange for better pricing across the sector, and whether the sector would be willing

to consolidate some of its institutional-level book expenditure, to support consortia negotiation direct with publishers.

It also needs to engage the wider institutional perspective on the issues so that there is top-level understanding and buy-in for any objectives.

This is what UKHE managed to do in the context of read and publish journal agreements. It agreed common sector goals and objectives for each publisher, it had complete buy-in at all levels of the institution across the sector (senior university executives, through researchers, to library services).

Negotiation

Most of the sector's spend on teaching and learning content goes through the SUPC framework to intermediary suppliers who have little leverage on pricing. However, the lesson learned from national read and publish negotiations is to deal directly with the publisher.

This is what happened when Jisc was mandated by the sector to negotiate with journal publishers and deliver new agreements that met Plan S criteria, and funders' requirements.

The policy context (of UKRI, Wellcome and REF OA requirements, together with the Plan S initiative), which acted as a driver to address the journal publishing model, does not apply to the domain of teaching and learning content. Yet, much of the infrastructure put in place for those negotiations can be redirected.

Read and publish journal negotiations are led by a top-level Universities UK/Jisc Content Strategy Negotiation Group (UUK CSNG).[36] This is chaired by a university pro-vice-chancellor and comprises representation from senior academic research and innovation roles, library directors and other key stakeholders, ensuring high-level engagement within institutions and across the sector. Behind this is a structure of support, with a Content Strategy Group providing real world guidance on tactics and the practicalities of any agreement, and a well-organized communication plan to share updates across the sector.

The Jisc Learning Content Expert Group will be brought into this structure, reconstituted as a sister group to the journals' Content Expert Group, and providing insight and guidance to the UUK CSNG, which itself will reform to include representation and knowledge that reflects the content requirements of teaching and learning across the sector.

This will place learning and teaching content on the same level as research and provide comparable strategic oversight and engagement across the sector. It will provide a platform through which the sector can identify its shared priorities for negotiation: the publishers, models, disciplines and products (e-textbooks, e-books, courseware, core titles or background reading, level of access, licensing or ownership) it needs.

Working closely with partners (such as the SUPC, APUC, and HEPCW regional procurement frameworks[37]), it will be possible to co-ordinate and leverage more of the sector's spend to achieve a balanced outcome with publishers.

Whilst this spend does not rival that on journals (over £118M on Jisc journal subscription or read and publish agreements in 2021), it is nonetheless significant (£73M on the SUPC books framework for 2020–21 and £5.6M on Jisc e-book agreements in 2021).

There is enough money in the system for the sector to negotiate with, especially if spend 'off-contract' (placed directly with publishers by libraries) and in the wild (through separate university, faculty or school initiatives), can be incorporated, although the context is a UK academic book market worth over £600M.[38]

Open educational resources

One opportunity for the sector to exploit, is the development of open textbooks and OERs. These have not been a success in UKHE because the right factors have not been in place. There is no infrastructure in place to support the market development, design, promotion,

discovery, maintenance and preservation of OERs (see Table 1), and no sustainable funding stream to underpin this activity. OERs have not been adopted by academic staff and 'placed' within the curriculum in the same way a commercial textbook might be or given the same quality stamp that lends perceived academic value.

OERs will not replace the choice and quality of the commercial book market but do offer an alternative model that can run in parallel alongside it. Especially if the development of OERs is co-ordinated to the market needs of the sector, producing products that fill a requirement – perhaps targeting those accredited, vocational and professional disciplines that are hardest to address and form the core of publishers' profits.

'OERs will not replace the choice and quality of the commercial book market but do offer an alternative model that can run in parallel alongside it'

The right environment would need to be created to support OERs. Examples of this are evident globally. The level of resourcing put aside by the California State Governor has already been referenced, and sustainably financed initiatives such as Rice University's Openstax and ISME's OER Commons are well supported and adopted nationally in the US. Content is even redistributed via commercial providers (such as Kortext).

Within UKHE, the process would need to begin with a cultural change. The reward system that enables academic staff to write trade or textbooks for commercial contract would need to be balanced with something that incentivizes and recognizes open authorship through workload allocation models, sabbatical opportunities, annual performance review, recruitment and promotion. The parallel is open research, where REF eligibility, grant funding and prestige follow open scholarship.

Some institutions are already introducing this culture. The University of Edinburgh has a well-established OERs policy, which is effectively implemented.[39] NUI Galway has followed suit and set up an Open Press based on the popular US Pressreader platform.[40]

This offers a model for the production and delivery of OERs across the sector. UKHE has a number of high-quality, not-for-profit university presses which have publishing capability and expertise. Their focus has traditionally been more on scholarly monographs, edited texts and academic books, but they do produce highly commercial textbooks, and have well-established marketing models and sales routes.

Mobilizing this industry within the sector is within reach if the presses themselves are prepared to work towards the common good. Sustainable funding streams would need to be developed and, whilst there are very different costs involved in the production of monographs compared to textbooks, some of the models developed for these scenarios (e.g. publish to open, Knowledge Unlatched, etc.), may provide a template.

If university presses are willing to co-ordinate product development, it would avoid duplication of effort and competition. A model for this already exists in the shape of the Scottish Universities Open Access Press (established to co-produce research monographs).

Taking this a step further could mean the development of national infrastructure to support OERs development and publishing. The tools and paradigms already exist; the CAUL Open Educational Resources Collective is an example of a sector-developed infrastructure and approach to open textbooks.[41]

Finally, there is nothing to stop the sector from commissioning open educational content from commercial partners. This would turn the current debate around on itself, making the publishers' role that of service, rather than content providers.

In the long term, OERs have the potential to be as disruptive to the market as the pandemic has been.

Abbreviations and Acronyms

A list of the abbreviations and acronyms used in this and other *Insights* articles can be accessed here – click on the URL below and then select the 'full list of industry A&As' link: http://www.uksg.org/publications#aa.

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