

PDA AND THE UNIVERSITY PRESS

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I. Summary

Patron-driven acquisitions (PDA) is a method by which libraries acquire books that delays purchase until the moment of first use. The aim of this report is to provide guidance to publishers, especially university presses, as to how to offset any sales losses from PDA and, through a tighter weaving of publishers' and libraries' interests, even identify means to augment sales and to improve the service that libraries provide for their constituencies.

While patrons have always influenced the titles collected by libraries, beginning in 1998, with NetLibrary's entry into this market, library vendors have developed sophisticated systems to enable patrons to directly trigger purchase or rental activity. PDA deployment is becoming widespread, with about 400-600 academic libraries around the world now using such systems, a figure that is likely to increase sharply in the coming years.

Libraries generally look to PDA for three reasons: to reduce costs (by declining to purchase books that no patron has requested), to better align the library's collection with current user requirements, and to enable libraries to present a much larger number of titles to their communities. Publishers are rightly concerned that the goal of cost reduction by libraries will reduce publishers' sales, but may find that the second reason to implement PDA (better alignment of the library collection with the needs of the library's patrons) is congenial, especially for mission-based, not-for-profit publishers. The third reason, the presentation of a larger catalog, is in everyone's interest, as it serves to satisfy user needs even as it potentially opens up new opportunities for marketing additional books.

To get at the financial impact of PDA, it is necessary to come up with some good market estimates for the sale of books, especially university press books, to academic libraries. Based on a number of interviews with people active in the community now and extrapolating from data provided by the Association of American University Presses (AAUP), a reasonable estimate for library sales of university press books is about \$80 million a year, about 25% of the total sales volume for university press books. PDA

programs, which include titles that go far beyond the lists of university press books, have now reached about \$20 million in volume each year, with approximately \$13 million of that constituting the publishers' share. University presses make up approximately 25% of PDA volume, making the market for the presses somewhere in the range of \$3-\$4 million. Two notes of caution here: the figures are estimates based on piecing together a great deal of informal information and are thus subject to correction, and the market is growing rapidly, making it probable that these figures will be outstripped within a year's time.

PDA is not likely to be implemented by all libraries in a uniform or comprehensive fashion. For the most part, libraries are including PDA programs as simply one additional way they add titles to their collections. Even as PDA becomes more widespread, it is not likely that it will ever become comprehensive: all libraries may someday have PDA programs in place, but for some libraries PDA budgets will likely remain but a small part of overall spending on books. Thus publishers' concerns that PDA could rapidly and totally transform the book market overstate the case.

What could transform the library book market and PDA as well would be a large-scale marketing effort by Amazon, whose importance to all publishers and certainly academic publishers grows every day. While hard figures on Amazon's sales to libraries are not available, we estimate they could comprise as much as 10% of all book purchases by academic libraries, a figure that is far larger than is generally supposed. Publishers should be aware that Amazon's penchant for disrupting markets could be brought to bear on the academic library market as well and thus transform the very structure of this segment.

Publishers reviewing their marketing plans with PDA in mind may benefit from taking a number of specific actions. For one, rather than avoiding PDA for its potential to lower sales, publishers should consider participating in all appropriate PDA services. Publishers should also put renewed interest into the development and distribution of book metadata, as such metadata can help to stimulate sales in PDA programs. Publishers may also wish to work with PDA as a means to monetize titles that formerly were uncompensated in ILL programs. Publishers may also find that PDA provides an unexpected means to offset margin erosion brought about by Amazon's growing

dominance in the book industry and publishers should look with strong interest at the digital book aggregation services, some of them quite new, as a way of augmenting their positions with libraries.

Viewed historically, PDA is perhaps best understood as one new step in a long-term process of rationalizing the book supply chain, rationalization that is abetted by the thoughtful implementation of digital technology. As such, it appears to be an inevitable development, for which publishers are likely and wisely to make accommodations.

II. Introduction

A. Objectives

The report examines patron-driven acquisitions or PDA¹ with an eye toward its impact across the scholarly communications ecosystem. While the report draws on data and insights from the academic library sphere, it is written first and foremost from the perspective of the publisher, the university press publisher in particular. The primary questions explored here are:

- What is PDA and how will it affect a university press's operations?
- Is PDA a zero-sum game, with libraries winning and publishers losing?
- What is the scope of PDA?
- What are some of the structural issues that PDA is likely to lead to?
- Are there positive steps that a publisher can take to turn the advent of PDA systems into a marketing opportunity--as it were, to take the "zero" out of the zero-sum game?

PDA, while presenting short-term challenges to publishers, may present opportunities in the library market over the long run if publishers are able to more closely align their programs with the systems and requirements of libraries.

B. Background

PDA is by now an established means by which librarians acquire books. Under a traditional model (that is, non-PDA), the typical pattern is for publishers to publish new books and make them available to prospective customers. The books get shipped to wholesalers if they are print books; if they are in digital form, they may be hosted on servers of various aggregators or in some instances on the servers of the publishers themselves. Some of these books would be selected by librarians for purchase on a title-by-title basis; others would be purchased on approval or as part of ebook packages.

¹ For a good one-volume introduction to PDA, see Swords, *Patron-driven Acquisitions*.

When a library establishes an approval plan, it works with a vendor to set a profile of books that are deemed suitable for the library's collection. The vendor makes all titles that fit the profile available to the library, which then reviews the titles, keeping (purchasing) those titles that are most appropriate for the collection. What is determined to be appropriate is, of course, a matter of the size of the budget as well as the content of the books involved, but approval plans are designed so that only a small percentage of the books a library is sent to review will not be purchased from the vendor. Most of these purchases take place soon after the book is first published. The vendor receives payment from the library at this time. The publisher receives its payment from the vendor. Whether firm-ordered title-by-title or bought on approval, the books the library has purchased then wait to be discovered by a reader.

PDA turns this model on its head. Although titles are filtered through a profile similar to (and often based on) a traditional approval profile, what is sent to a library are not books to be purchased or declined, but descriptions of books--metadata--that is placed in the library's catalog. A library patron or user can search the catalog and come across a record for a book of interest. In the case of PDA ebooks, the record will be essentially identical to other ebook records in the catalog. The patron may not know whether that title is actually owned or is available through a PDA program. (Indeed, the user may not even know that there is a PDA program in place.) When the patron requests access to the book, if it is an ebook, it is then immediately made available. (There is a discussion of the different circumstances surrounding PDA for print books in the body of this report.) In most PDA systems, the patron may browse a bit of the book without the library incurring any charges (e.g., a review of the front matter, including the table of contents, and perhaps the ability to read a few pages of text). If the time spent with the book reaches a trigger point, there is a charge, which may be for the outright purchase of the title or for a loan or short-term rental. (The terms for book loans or short-term rentals vary by vendor; one formulation might be that a book can be accessed for up to one day by a user, for which the library will be charged a portion of the book's list price.) Thus the patron's actual usage is said to have *driven* the acquisition. And all this takes place silently behind the scenes.

It is a material point that with PDA, titles that are never requested by patrons will not be purchased. As many titles in academic libraries do not in fact circulate with any

frequency or may not circulate at all,² PDA may reduce library expenditures. This could be good for libraries whose book budgets are under pressure, but it negatively affects publishers' sales--which, in a difficult marketplace for academic books, could alter a publisher's operations overall. Even for those titles that are requested by patrons, the requested first use may come long after the date of publication, delaying the receipt of income by the publishers. Without any other changes in the system (e.g., cataloguing of a greater number of records by libraries, perhaps at a publisher's or a vendor's instigation), PDA would have to be viewed as a zero-sum game in which libraries win and publishers lose. Getting beyond the zero-sum game will be a primary focus of this report.

The impact of PDA on the supply chain for academic books cannot be taken in isolation. The publication of scholarly monographs has been under stress for many years. It is not unusual for a university press to have a total sale of 300 copies for some titles, a number insufficient to cover the costs of editorial acquisition, production, manufacturing, and distribution. The potential for PDA to exacerbate this problem is evident. Yet, pointing to PDA as a new problem for monograph publishers ignores the fact that there are already significant problems with this business segment and that the systems being developed for PDA may be useful for other purposes, including enhanced discovery. It is the bias of this report not to think of PDA simply as a way of increasing purchasing efficiency but as a piece of new infrastructure in the overall value chain. For publishers, PDA may be a negative, neutral, or a positive, but until they have a better idea of how it works, they will be ill-equipped to work with libraries and PDA in a constructive manner.

It should be noted that although much of what appears here applies to all book publishers that sell titles to academic libraries, the special emphasis on the university press world has important implications. University presses, like libraries (with whom they share an institutional parent), participate in the overarching mission of the broader academic community that they both serve. To some extent PDA can be viewed as a library-oriented service (which it is), but insofar as it provides for a more efficient allocation of resources, it is a benefit to the community as a whole. It is difficult to believe that university presses want libraries or anyone else to buy books that they do

² See Kent, *Use of Library Materials*.

not want or do not use. Thus some marketing practices to offset PDA that may be congenial for commercial publishers may be out of bounds for university presses.

C. Methodology

Data about book publishing and sales are often hard to come by and may lack sufficient granularity to be useful for publishers in crafting their programs. The reasons for this relative lack of data (no one knows how many books libraries purchase in the aggregate; no one knows how many books Amazon sells to libraries, etc.) are explored in the body of this report. But publishers cannot wait until definitive data is developed before deciding whether or not to publish a specific book or how to invest in new market channels. Therefore, this report aims to present actionable information based, in part, on incomplete and informal data. Some of the data presented here can be challenged (How can we be sure that libraries constitute 25% of total sales for university presses?), but it represents an educated guess and in some instances something more than that.

The methodology for this report was to survey librarians and publishers on PDA, both through online questionnaires, phone interviews, and a number of face-to-face meetings, and to supplement the information garnered from these surveys with meetings and interviews with representatives of the book supply chain and professional contacts. Working with both publishers and librarians was key to the research, as it made it possible to focus on issues that may not have been entirely visible from the vantage of only one side. For example, the role of Amazon in providing print books to libraries was ascertained in interviews with librarians, but this has large implications for publishers' marketing. A number of institutions were identified for more intensive treatment, with on-site meetings with representatives of both the university press and the library: The University of Chicago, Johns Hopkins University, New York University, Columbia University, and Cornell University. The questionnaires for publishers and librarians appear in the appendix, as does a complete list of institutions surveyed in one form or another.

All information gathered in this way that could be tied to a particular institution or organization is being kept confidential. The information that appears in this report represents the results of analysis and synthesis. The recommendations for action,

which are summarized at the end of this document, are the opinions of the primary author.

During the course of the research, I posted preliminary findings on the Scholarly Kitchen Web site: <http://scholarlykitchen.sspnet.org>.³ The feedback from those posts were then incorporated into this report. The aim was to use blogging as a way to solicit comments during the drafting of the final report; it was an experiment for this author, which appears to have worked well. The posts elicited comments, both online and off. Part of the effectiveness of this technique was the popularity of the Scholarly Kitchen venue itself, which has a wide audience, with posts attracting anywhere from 500 to over 5,000 accesses; the post announcing this project itself was accessed over 3,200 times. A serendipitous occurrence was that a fellow Kitchen blogger, Rick Anderson, also wrote several pieces on PDA,⁴ making the Kitchen into something of a gathering spot for online discussions concerning PDA.

D. Terminology

Throughout I use the term *patron-driven acquisitions* or PDA, though others working in this area prefer *demand-driven acquisitions* (DDA). NISO makes the following distinction between the terms:

- Patron-Driven Acquisition (PDA): acquisition of library materials based on direct or indirect patron input, including faculty requests and analysis of collection usage
- “Demand-Driven Acquisition (DDA): acquisition of library materials based on patron selection at the point of need.”⁵

³ Esposito's various posts on PDA can be found here:
<http://scholarlykitchen.sspnet.org/author/jesposito/>.

⁴ Anderson's various posts on the Scholarly Kitchen appear here:
<http://scholarlykitchen.sspnet.org/author/planxty/>

⁵ Michael Levine-Clark, “A Proposed NISO Work Item: Develop Recommended Best Practices for Demand-Driven Acquisition (DDA) of Monographs. Proposal for Consideration by the NISO Voting Membership Approval Ballot Period: May 21 - June 19, 2012.” NISO, 2012.

We have seen as well a reference to patron-*informed* acquisitions, a term offered to make the point that librarians have not abdicated their responsibility in building library collections; and also patron-*initiated* acquisitions. Similarly, sometimes the "A" in PDA is said to refer to *access*. For purposes of this report, the differences in terminology are not germane.

E. Acknowledgments

This project has its origin in an internal report prepared by a committee at the Cornell University Library under the direction of Kizer Walker.⁶ That report analyzed current and historical circulation records for print monographs at Cornell in an effort to better understand use of the book collection in relation to research and teaching needs on campus. The Cornell report was prepared as part of a library-wide discussion of how usage should inform decisions about book selection and materials budget allocation. While it does not directly address the PDA issue, the report's findings about what is and is not used in the research library collection and the range of time that typically elapses between a book's acquisition and its first circulation are highly suggestive for libraries' and publishers' considerations of PDA. The report was brought to the attention of Terry Ehling and myself. As we began to develop a proposal for this study, we received the assistance of a number of people, but we particularly wish to thank Kathleen Keane, Director of the Johns Hopkins University Press, for agreeing to serve as principal investigator. The project was funded with the generous support of the Andrew W. Mellon Foundation.

As the project proceeded, a number of people assisted us in various ways. We especially wish to acknowledge the participation of Liz Mengel of the Johns Hopkins University Library, Rick Anderson, Interim Director of the J. Willard Marriott Library at the University of Utah, and Marlie Wasserman, Director of Rutgers University Press.

http://www.niso.org/apps/group_public/download.php/8559/DDA%20Work%20Item%20for%20Voting%20Member%20Approval.pdf

⁶ Kizer Walker, Richard Entlich, et al., Report of the Collection Development Executive Committee Task Force on Print Collection Usage.

III. What is Patron-Driven Acquisitions (PDA)?

A. Why Libraries Use PDA

As noted in the Introduction, PDA is a method of acquiring books for libraries that delays purchase until the moment of first use. In some respects it is not new--librarians have always paid attention to patron's requests and, in fact, book selection for academic libraries was largely a responsibility of teaching faculty up to the 1960s, and it remains so at some smaller institutions.⁷ But in the deployment of sophisticated systems to present book metadata to library users and to enable commerce to be conducted using the library catalog as a front-end, PDA is indeed relatively new. It would not be fair to call it "experimental," however, at least not any more, though some librarians do refer to their current programs as "pilots." Hundreds of libraries now have PDA systems in place and there are at least four vendors serving this market, with more on the way. PDA, as it is evolving today, represents an iterative process, as libraries start with small PDA programs, assess their results, publish these results, modify the programs somewhat, and test them again. There is no reason to believe that this quest for continuous improvement will end anytime soon.

At the simplest level, what we are calling here "traditional" methods of acquiring books for libraries, in which libraries purchase titles and then place the records in the catalog for patrons to review, is an instance of just-in-case collection management. In this respect, PDA can be seen as the logical (if radical) extension of a gradual shift in library collection development from just-in-case to just-in-time fulfillment. The "traditional" method of prospective collection building has eroded over the past 25 years as library budgets have tightened and the respective value placed on access and ownership has shifted. Acquisitions are more closely tied to immediate user need – and frequently to user request – today than in the past. But this is only a partial reorientation (affecting some libraries and some parts of the collection more than others) and the logic of just-in-case still drives much of the collection development enterprise, certainly in the larger research libraries. A librarian purchases a book because it is believed that someone at

⁷ [Dracine Hodges et al., "Resolving the Challenge of E-Books," p.196.](#)

that librarian's institution will want to read it. An important point to be made is that that prospective user may be affiliated with the institution in the present or at some time in the future, someone who will need to get access to that book many years from now; that future user is part of the library's constituency. Thus the library acquires a book just in case someone will want it at some point in time.

Just-in-case collection building derives from the world of print. In the print era a publisher would accompany the publication of a new book with a print run. The publisher would estimate how many copies it could expect to sell over a reasonable period of time. At some point the book was likely to go out of print when the book-printing technology of the time made it uneconomical to reprint the title. This potentially put libraries in a difficult situation. If a library failed to acquire a book when it was first published, it might be impossible to acquire it years later when a patron wanted it. In some respects publishers and librarians were playing a complex guessing-game together: the publishers were estimating which and how many books they could sell, and the librarians were estimating which books their patrons would want to read. Most of the time both publishers and librarians guessed right, but not always. No print publisher has been spared from having to pulp books that did not sell or having to turn away orders for titles that are no longer in the warehouse but are too expensive to reprint (because of the small quantities involved); nor has any academic library developed a print collection in which each and every book found an eager user. If this is waste, it has always been part of the system.

One way of viewing PDA is that it is an attempt to manage the level of “waste” downward. If some books circulate rarely, circulate only years after they have been purchased, or don't circulate at all, how can a library acquire books that circulate with greater frequency, circulate as soon after they are acquired as is reasonably possible, and do in fact circulate in the first place? The provisional answer that PDA supplies is to close the gap between purchase and actual demand through the use of technology.

With the advent of digital technology and its application in the book industry, books need never go out of print and may appear in ebook versions. A typical situation is for a publisher to create a digital file during the production process. That file can then be used to create printing plates for offset printing (what is sometimes referred to as

"traditional" printing), to be used in digital printing (for short-run printing or print on demand), or to be modified to appear in any number of ebook formats. To keep a book "in print," whether in print or electronic form, a publisher need only arrange to have the book file stored electronically somewhere, the cost of which is relatively low compared to the pre-digital publishing environment.

Digital technology on the publisher's side thus makes just-in-case collection building on the library side less important--not unimportant, but less important, at least for the purpose of preventing gaps that cannot be filled retroactively. The migration to PDA for some portion of a library's acquisition practice is thus best viewed as an ongoing rationalization of the supply chain, with all parties pursuing incremental innovations that are in their own interest.

Libraries, spared for the most part from having to worry about whether particular titles would be available in the future when needed, could turn their attention to just-in-time acquisitions.⁸ If all books in a collection circulated, this would not be necessary; and in fact in those libraries (most public libraries are a good example) where virtually every book circulates and some circulate until they fall apart, the attractions of PDA are very few. But in those libraries, especially academic libraries, where collections can include highly specialized works, circulation can be uneven.

How uneven can that circulation be? It's often bandied about that "40% of books in libraries never circulate," which is an oversimplification, though the generalization is useful for the purposes of this report.⁹ The 40% figure is an oversimplification because it ignores the different types of libraries, it doesn't reference the kinds of books that do or do not circulate, it uses the word "never," which is a long time, and it does not address different patterns of circulation for print and electronic books. But whatever the figure is at a particular institution, the smaller the number, the more efficient the collection.

⁸ It could reasonably be argued that with digital books and print on demand, the concern gets shifted to the arena of preservation and perpetual access rights.

⁹ The 40% figure derives from Allen Kent's study at the University of Pittsburgh, cited above. Kent's book was published in 1979. Since then, many libraries have done similar studies, including the previously cited work done at Cornell by Kizer Walker and his colleagues. For a general discussion of this topic, see Rick Lugg's blog post "Beyond the Kent Study."

Although high usage is not the predominant measure of a collection's worth for all libraries (large research libraries might build collections of record in certain areas with little regard to immediate use, for example), attempting to lower the number of non-circulating books is a perfectly reasonable thing for a library to do.

Saving money is not the only reason librarians are implementing PDA programs, however. There are at least two other reasons: more closely aligning the library's collection with the needs of users, and being able to present a much broader selection of titles. By making some portion of acquisitions demand-driven, librarians are assured that their collections are meeting the needs of their patrons. But it is that other point, the presentation of a larger selection, that is the most tantalizing for librarians and publishers alike.

Let's imagine a university press that publishes 100 new titles each year. A smaller academic library might purchase, say, 25 of them in the traditional just-in-case manner. A user going to the library's catalog can search, find, and check out any of those 25 titles. But let's suppose that the library has determined that it wants that press's output to be placed entirely into a PDA system. Now the records for all 100 titles appear in the catalog. A patron goes to the catalog and conducts a search. How many titles will that patron check out? If all patrons are aggregated together, will they check out more or fewer than 25 titles? From the library's point of view, the patron is being presented with a larger collection, and at no immediate cost to the library. The publisher "wins" if the patrons seek to access more than 25 titles. We will return to this point later in this report, but for the time being let us note that the expanded range of offerings brought about by PDA may alter the zero-sum game between libraries and publishers by adding value to both parties.

B. How PDA Works

A first step in building a PDA program for a library is to determine which titles are offered in the program.

During the course of the interviews for this project, we encountered some people who believed that PDA would likely result in lower standards for libraries. The reasoning was

that, traditionally, librarians were careful to select only those titles that were appropriate for an academic institution, but when anyone, including undergraduates and non-academic staff, from an institution could access the catalog and make purchases through it, some of the titles requested might have little academic merit. The fear here was that users would seek to use the library's PDA budget to get access to pleasure reading: mystery novels, celebrity biographies, and silly or sensationalistic books. On the basis of our research, we can assert that this is not true. In fact, the profile of PDA titles closely tracks the profile of titles purchased in the traditional manner.¹⁰ The anxiety about PDA's potential to "dumb down" library collections no doubt reflects, to some degree, a patronizing view of non-librarians' abilities to choose reading materials unaided. But it also rests on a misunderstanding of the librarian's role in PDA implementation.

In the early days of PDA, some librarians loaded their catalogs with metadata for a wide range of titles, only to find that the budget allocated to PDA was used up in months or even weeks. This was obviously not workable. To get the budget dollars to stretch further, the PDA program was married to the guidelines of an approval plan. In such a plan, the library identifies the characteristics of books that it would like to acquire. The parameters might include subject area, format, price, the name of the publisher, etc. So, for example, a library affiliated with a veterinary college might have an approval plan that looked for a wide range of titles in the life sciences, whereas a liberal arts college might skip some of these titles and focus on literature, history, and the arts. Approval plans have been a feature of traditional collections policies for decades.¹¹ They have been carefully thought out and are not generally regarded as controversial. Indeed, few library patrons know that approval plans are in operation behind the scenes.

By applying the profiling techniques developed for approval plans to PDA, librarians effectively eliminated titles of questionable academic interest. Thus, although PDA is very much driven by patrons, the titles that patrons can select have been filtered by librarians.

¹⁰ For a relatively early study of PDA's effect on collection scope, content level, and "balance," see Jason Price and John McDonald, "Beguiled by Bananas." Also: David C. Tyler, et al. "Just How Right Are the Customers?"

¹¹ For a history of approval plans, see Bob Nardini, http://www.ybp.com/pdf/approval_dekker.pdf.

Having said this, it is noteworthy that librarians do in fact review PDA usage statistics and change some collection policies accordingly. One PDA experiment included a number of test preparation titles, a category of book that the library had not previously collected. The test prep books shot up to the top of the usage lists, and the library subsequently began to collect them systematically, beyond the parameters of the PDA program. An interesting question is whether PDA will influence libraries to collect formal textbooks--that is, books designed specifically for classroom use--in the future. That would expand the mandate of most libraries, for which new money would have to be solicited and/or reallocated.

Let's return to approval plans and consider the university press world today, which publishes perhaps as many as 12,000 new titles each year.¹² In the traditional model (which is still very much alive today), all of those titles are sold to intermediaries (wholesalers, aggregators). Academic libraries typically acquire university press books via approval plans, so the 12,000 titles are filtered through an institution's approval profile. Thus a particular library may be presented with, say, 4,000 titles to choose from. For a number of reasons, for which the available budget is the most important, that library may purchase 1,000 titles.

With PDA, however, the numbers change. The presses still publish 12,000 books each year and our hypothetical library still has 4,000 titles recommended to it through the approval plan guidelines. But now, instead of purchasing just 1,000 titles, the library puts the records for 4,000 into the catalog. If a library patron now requests one of those titles through a PDA program, which is then purchased by the library, how have the library's standards been lowered? The library would have purchased all 4,000 titles if there had been enough budget, so PDA is not adding inferior titles to the mix. By marrying PDA to an approval plan, librarians safeguard the quality of their collections even as they reduce the cost of managing them.

It's noteworthy that some libraries use the number of records in a PDA system, accordion-like, as a way to manage the PDA budget. Let's imagine a library that has

¹² Here and throughout, the figures for university press publishing are derived from reports shared by the AAUP.

allotted \$25,000 to PDA purchases and rentals in the year. Two months into the year, the library observes that well over half of the budget has been used up. How does the library make sure that the budget will not be exhausted? One method is to enlarge or reduce the number of records in the PDA system: a larger number of records increases sales, a smaller number reduces sales. Thus a library may begin a year with a great many records for PDA, note that the budget is being used up too rapidly, and then reduce the number of records in order to reduce the number of PDA accesses and costs. While no one we spoke to reported this, moving unpurchased PDA titles out of the catalog could result in a situation where a patron notes that a book appears to be in the collection in September (not knowing that it is part of the PDA system), but that when January comes around, the book record is no longer there. How might this ephemeral quality of PDA records affect patron perceptions of library collections over time?

For a library patron, PDA works almost invisibly--for ebooks, totally invisibly, though for print titles, a patron will be made aware that a PDA program is in place. (We review the special issues of print PDA elsewhere in this report.) A library patron searches the library catalog for materials of interest. That search turns up a number of titles. The patron does not know which books are owned by the library and which can be acquired through PDA. One title (part of the PDA program) looks promising; the patron seeks to access the title. If it is an ebook, it is made available immediately to the user. Behind the scenes there is a great deal going on, as various library systems must communicate with each other to effect the purchase (if the amount of use has crossed the threshold that triggers a purchase), but the patron sees none of this. (See Appendix A for a flowchart of library workflow for PDA.)

The terms of use for PDA vary by vendor (NISO is working on standards for PDA offerings now).¹³ A user may simply look at the table of contents and then stop reading the book, or a user may turn through a number of pages, or a user may decide to print out several pages, or a user may read the book in its entirety--whatever use or combination of uses the patron puts to the book, the system is tracking the behavior in the background. That tracking behavior is linked to business rules. For example, there

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http://www.niso.org/news/pr/view?item_key=c159438bba2d660a0da2b2359ce62a8d70cbc590

may be no charge for reviewing the table of contents. Looking at a prescribed number of pages may trigger a rental fee for the use of the book. Printing out a chapter may trigger the purchase of the book. There are many points in between as well. Some libraries may exercise the option to treat all uses as rentals or short-term loans, the cost of which is typically calculated as a percentage of the purchase price. Paying a small rental fee per use might not save money on high-use items; some libraries arrange with the PDA vendor that a book is automatically purchased after a certain number of rentals.

Posed to the patron, the question of how PDA works (for ebooks) is generally met with silence. But librarians and vendors have built a complex system that integrates PDA requests with a vendor's PDA platform, a billing service, approval plans, and other library systems. Libraries work with their vendors to put these systems in place and to negotiate the specific terms of use (e.g., how many rentals trigger a sale?).

For publishers, the situation takes a different turn. Publishers working with PDA typically have no direct contact with users or libraries. Except in a few instances where a large publisher may have its own PDA program, publishers work with third-party PDA vendors, who arrange for books to be included by negotiating licenses with publishers, and arrange for the implementation of PDA programs directly with the libraries themselves. For a publisher, PDA is thus very much like working with any other wholesaler or aggregator. Publishers are often reluctant to reveal their terms of sale (both for competitive reasons and to avoid accusations of price-fixing by regulatory bodies), but in various interviews it became apparent that many publishers offer PDA vendors the same terms of sale as those offered to wholesalers.

To be most effective with PDA systems, publishers would do very much the same things as they would in working with wholesalers. For example, they would provide high-quality, extensive metadata for each title. Just as they would make their books available through multiple approval vendors, they would also be careful to get their books into as many PDA plans as possible. One technical twist to this is that since wholesalers have a river of books flowing through their operations all the time, it is important to get books into the PDA systems immediately upon publication. In the context of PDA, the common practice of "windowing" (making a high-priced edition available upon publication and withholding a less expensive edition until later) could

work against a publisher's interests if the withheld edition is the digital version of the title. For some approval plans, withholding the ebook until later could mean that the title would have missed out on getting into the approval plan, since many libraries state a preference for ebooks over print.

C. The Faculty's Role

When the research grant for this project was approved, the Mellon Foundation specifically asked us to explore the role that faculty played in these new PDA programs. Were the faculty consulted? What is their view of PDA? This may be an unexpected question if one thinks of PDA pretty much as a behind-the-scenes operational issue (which indeed is the primary focus of this report), where efficiency and ROI were the relevant metrics. But the question puts the focus back on larger matters, such as why do we have libraries and university presses in the first place? Ultimately, although these organizations go about it in very different ways, and the disciplinary range of most university presses is more limited than a research library's, they both exist to support the pedagogical and research activities (including the dissemination of research) of the university, so referring new programs back to the intellectual center of the institution makes sense.

No clear pattern of faculty involvement concerning PDA was discerned in this report's survey. Some librarians presented PDA plans to their faculty advisory boards, some did not. Insofar as PDA is generally viewed by librarians as a back-office system, with most users having no idea a PDA system is in place, this is perhaps not surprising. Furthermore, inasmuch as PDA systems have been married to approval systems, which have been in use for decades and are by now too familiar to be worth calling to anybody's attention, it is not surprising to find that the faculty is not at the center of deliberations about PDA. PDA is in one sense something that is very new, and in another sense not new at all. While it may seem like a radical departure from established practice, librarians have thoughtfully integrated it into their existing operations. It is a refinement, not a repudiation of the library's gatekeeping function.

It's useful to step back and view PDA in a larger context, however. Rather than simply an operational enhancement, PDA can be viewed as one symptom of a shift from local

ownership to "access" – a reorientation of the library's relationship to the materials it provides to users that accompanies a shift to licensed electronic resources. That is a far bigger question than how a particular book is acquired.

The issue of PDA brings two philosophical choices for library collection development into sharp relief.¹⁴ Research libraries have traditionally pursued the goal of creating as close to a comprehensive collection as their resources would allow. Selectors identify the highest quality works and acquire as many of them as financially possible. This is the essence of "just-in-case" collection development. Underlying this approach to collection building is the notion that the collection has value in and of itself, separate from its utility to instructors and students, whether of the present day or the future. This view—the collection valued for its own sake—is one that we may carry around with us, usually without reflection. Such a view can lead to certain unchallenged assumptions. For example, someone might assert that the Harvard and Yale libraries are superior to those at, say, Pomona or Dickinson Colleges, despite the fact that those liberal arts colleges have as their missions something very different from what Harvard and Yale set out to do. This makes for an invidious comparison, imposing the standards of major research libraries on institutions that are not anchored in research. PDA may very well be a component, even a major component, of the practices at major research libraries, but the context of PDA is significantly different for them than for liberal arts colleges, since the aim and purpose of the two types of library are different. The former are likely to consider some degree of just-in-case collection building to be part of their mandate (although even the largest research libraries today tend to avoid the language of comprehensiveness) and the latter are likely to focus on providing materials of immediate interest to faculty and students, making PDA a relatively unproblematic issue.¹⁵

In its most extreme formulation, a PDA approach suggests that a library collection has no merit outside its utility to the current faculty and students, that the collection has no value in and of itself. It should thus be just-in-time. Indeed, there is no need to own

¹⁴ See Anderson, <http://www.against-the-grain.com/2009/06/v-21-3-imhbco/>.

¹⁵ For a "traditionalist" position against PDA for research libraries, see Wayne Bivens-Tatum, "PDA and the Research Library" posted on May 27, 2011, Academic Librarian blog: http://blogs.princeton.edu/librarian/2011/05/pda_and_the_research_library/.

anything if materials can be made available less expensively through rentals — and, as noted above, this places PDA within a longer trend away from outright ownership to access. A library built on the principle of access instead of acquisitions is a different kind of institution.

As a practical matter, however, this choice is not so stark. A reasonable projection for PDA is that over a period of perhaps 5 years, most institutions, even the largest, will have some money budgeted to PDA, but most institutions, especially the larger ones, will also do some prospective collection building. The kind of collection building will vary from institution to institution. In one scenario, the library of the future has a core collection, with books that are owned outright or licensed for perpetual access; and a ring of titles in the PDA offerings around the core collection. In another scenario, core titles that are now typically acquired through approval plans switch to PDA, but prospective collection building continues for titles that are more difficult to source, titles, that is, that require a more artisanal approach. Every type and size of academic library will do well to involve faculty closely in decision making surrounding changing acquisition strategies, since the issues at stake affect not only the research environment in which faculty and their students work, but the broader political economy of scholarship and scholarly communication.

Publishers will approach these questions in different ways. A commercial publisher, for example, will study PDA for its short-term marketing implications. If I put my titles into a digital PDA program, how will that affect my course adoption market? If I withhold my titles from PDA, will libraries feel compelled to buy my books outright or will my titles essentially miss out on some portion of the library market? The bigger question— of long-term access to the scholarly record—will come up as an issue that customers—that is, libraries—are raising and that has to be addressed, the better to sell more books.

Here is where university presses differ from commercial firms. A university press, as part of a university, participates in the overarching mission of the university; it is mindful of commercial considerations but it not dominated by them. Thus the question of the long-term access to scholarship is part of the debate that presses can and must contribute to. For a press the issue is not just how many books it sells but how those books contribute to the extension and preservation of the scholarly record. This in turn

implies that presses will approach PDA with some of a library's interests in mind. For example, a university press would be advised to participate in long-term preservation policies and to ensure that titles offered through PDA programs will always remain available.

There is, in other words, a wide-ranging discussion that must take place among all participants in the academic community. Simple access and short-term revenue goals may be satisfactory for particular institutions, but it is not an appropriate agenda for all institutions.

D. Policy Issues

Although PDA was created as a practical tool to assist libraries in developing their collections, it touches on broader issues. Many of these issues—surrounding subscription, perpetual access, preservation, etc.—are characteristic of electronic resources in general and not specific to ebooks in PDA programs. There are other questions as well, however.

1. Related to, but distinct from the fundamental question of the long-term preservation of ebook content (which falls outside the scope of this report), PDA raises the question of whether PDA titles exposed, but not purchased, in a library's catalog will remain "active" over the long term. In other words, will the PDA purchase mechanism last over time? Think, for example, of a book that was first published in 2000. A library put the record for that title into its catalog as part of its PDA program. It is now 2012 and no one has yet requested it. More years go by. Finally in 2020 a patron requests the title. Is it still available?

It's possible that this may be more of a theoretical question than anything else, inasmuch as, in a digital age, it is now much easier for publishers to keep books "in print" indefinitely. If libraries and publishers can solve the archiving question for ebooks (and good progress is being made here with Portico, LOCKSS, HathiTrust, etc.), it should be possible for a library to track down most any needed title. However, this does not necessarily mean that PDA records in library catalogs will trigger purchase and seamless access. Despite this, the question remains of whether the publisher and the

PDA vendor will prove to be reliable twenty years from now. This gets at the essential problem of just-in-time acquisitions: the product may not be there when you want it.

2. PDA could have an impact on which books are published by university presses. A worst possible case is that market demand drops by 40% (the assumed number of books that never circulate) and payment is delayed for the other 60%--which gets us to a figure in the range of \$32 million-plus, as explained in a later section. University presses, not all of which are in robust financial health, would likely begin to cut back. Titles with the strongest market potential would be spared, but more specialized titles could be dropped from the list and even those that are not dropped are likely to bear higher prices. This is the most dreaded possible outcome of PDA, where what begins as an administrative efficiency ends up determining a large amount of cultural output.

On this point it's fair to say that this development was underway even before PDA. Presses have been cutting back or rethinking their publishing programs with diminished library sales in their forecast for many years now. PDA does not create the problem, but it potentially aggravates it. The question is what to do about this. Libraries can reasonably make the point that they understand that university press publishing should be subsidized, but that they don't think it is their responsibility to provide that subsidy. (Libraries, which have little earned revenue, are almost entirely subsidized by their parent institutions and grants.) How can university press publishing be transformed? Is there a lower-cost method to publishing specialized materials? Or should we not be publishing such specialized works in the first place? These questions extend well beyond PDA and the scope of this report. However, academic libraries and university presses would do well to bear the interplay of their collecting and publishing strategies in mind and to seek mutually beneficial solutions.

3. A university press director might contemplate the policy issues concerning preservation and archiving and say, "Not my problem." But if a publisher wants help sorting out the last item (the books that won't get published), there is a moral logic in helping to sort out the others as well. We recommend that presses become active in discussions of archiving and preservation and to engage the broader issue of the proper management of electronic resources with librarians, faculty, and administrators.

4. Another way of viewing PDA is as a component of a yet-to-be-built service that provides publishers with feedback on the actual use of books in libraries. It is troubling that such feedback is largely missing for books, although it is available for journals, where usage of digital materials is studied carefully by librarians and publishers alike. It is reasonable to ask publishers why they persist in producing books with small or no audiences. If publishers could view the usage data on their books, they could take that information and build it back into their editorial programs. But without the feedback mechanism in place--a service whereby a publisher could look online for the circulation records of thousands of titles--publishers are faced with the negative side of PDA (the potential for reduced sales) without getting access to the positive side (the ability to refine and improve an editorial program by incorporating circulation data into investment decisions).

IV. University Presses and the Library Market

If PDA is going to have a negative impact on the sales of university presses, that impact cannot be greater than the presses' current sales to libraries. It is a peculiar characteristic of scholarly communications that publishers do not know how many books wind up in academic libraries. Indeed, it is unlikely that anyone has a comprehensive grasp of total library book sales (libraries know some things, Baker & Taylor knows some things, Amazon knows some things, and so forth, but no one has put all the information together). This section reviews the reasons for this and attempts to come up with an educated guess as to the extent of university presses' exposure to PDA.

A. Press Sales to Libraries

The reason that publishers do not know how many books ultimately are placed in libraries stems from the structure of the supply chain. When a book is published, it is sent into the marketplace where a host of intermediaries move it along until it gets to the ultimate user. Those intermediaries may or may not let publishers know where the books end up; when the information is shared, it is provided in a general way, without the

identification of specific accounts. Publishers of books for the most part sell their products on an indirect (called *channel*) basis; their customers are not their consumers. Downstream, a reader wants to have access to books of all publishers and thus looks for books at points of aggregation: libraries, bookstores, online catalogs. Publishers, sitting upstream, stare at these aggregators and the wholesalers that service them and can only dream of knowing who actually reads the books they publish.

A university press sells books in a number of ways. Print books find their way into some brick-and-mortar bookstores and to wholesalers that service bookstores and libraries. A small number of university press books are sold directly from the publisher's Web site and some are still sold to this day from catalogs sent through the mail directly to scholars working in the field. Although publishers send marketing materials to libraries, libraries rarely order books directly from publishers; most of their orders go to Baker & Taylor and Ingram. (B&T acquired YBP and Blackwell, Ingram acquired Coutts.) There is also a small percentage of university press books that are sold overseas—that figure varies by publisher and subject area, but let's say the average is 10%.

There are two other important categories for university presses: books sold for course adoptions, typically for upper-level undergraduate and graduate courses, and print and electronic books sold through online vendors. The biggest by far of these online vendors is, of course, Amazon. Most presses report that their sales through Amazon are 25% or more of their total volume; for some presses, the Amazon share is up near 50%. At this time the split between print and digital sales through Amazon is, for academic titles, heavily skewed to print (as much as 90% of total revenue, not just for Amazon, and for many presses the ebook market share is less, but these figures are changing rapidly). There are other complicating factors in this analysis — how does one account for books sold as part of aggregations, e.g., EBSCO or Project Muse? — but this summary works as a general overview.

As for sales for course adoptions, presses have a hard time tracking them. The typical way to do it is to flag orders of 5 or more units and proclaim that these constitute course adoptions. After many conversations with press personnel, **both before and after** beginning work on this project, a consensus emerged that adoption sales are perhaps 20-25% of the total. These are, of course, only estimates and these estimates vary by

press, subject area, and whether the titles are monographs or trade titles — or what passes as a trade title for a university press. But these estimates are the best data we have.

So the average university press distribution, expressed in dollars, looks something like this:

<i>Libraries</i>	<i>25%</i>
<i>Export</i>	<i>10%</i>
<i>Course adoptions</i>	<i>25%</i>
<i>Amazon</i>	<i>25%</i>
<i>Other resellers</i>	<i>15%</i>

How did we get that library number? That figure comes from disclosures by the principal wholesalers to their publishing partners—that is, B&T and Ingram—as to where they ship books. If these wholesalers did not share this information, university presses would have no idea what their library sales are. Even so, these figures are imprecise.

When you combine Amazon's numbers with those for other resellers (that is, bookstores, including online venues), you get a figure of 40%, which presumably are what presses would generally understand to be sales to individuals, not including students. I will discuss Amazon's role in libraries at greater length below, but for now let's simply note that since libraries often buy books from Amazon, the library figure could be higher than 25% and the figure for individual sales lower than 40%. Amazon, however, will not disclose where its books end up, so the publishers are in the dark.

When presses report that their sales to Amazon are creeping up to 40% or so, almost certainly that means that Amazon is providing books for course adoptions and libraries, perhaps even for export sales, as well as to individuals. If Amazon would be willing to share aggregate numbers for where it sells books, publishers would have a better idea of their overall marketplace, which could help them in acquiring and marketing their titles. An exasperating aspect of this situation is that as Amazon's strength grows and as more and more press sales go through Amazon, publishers know less and less about who actually reads their books.

One way to figure out how many books Amazon sells to libraries is to ask librarians. Unfortunately, this is a big task. You would have to interview a statistically meaningful sample of librarians and get access to collection records. You would then map those records against publishers' lists and get a picture of which books ended up in what libraries. So you would take all the books from a university press and find out which of those titles appear in the test sample. Since the publisher knows the press's total volume, the extrapolated figures from the sample would provide the percentage of library sales.

It would take an great deal of cooperation by hundreds of libraries and every single university press to develop this data. There may be a backdoor, however: WorldCat. If WorldCat more readily supported data-mining and report generation, we could look at the collections of a great number of libraries from around the world.¹⁶ WorldCat can't tell us anything about multiple copies of a book in a collection — a problem for trade publishers, but for university presses, the prospect of selling multiple copies of a book to any one institution may be too much to wish for — but it can tell us which collection contains particular titles. We would then take that information and map it against publishers' output. The result: sales figures for university presses to libraries. But these options for using WorldCat in this way are limited and Amazon remains an obstreperous information source.

The irony of the small corner of the information industry that is known as the book business is the paucity of information about books. The book business is being upended by digital technology, but getting information to navigate these rough seas is almost impossible. Surely we should have as much information about books as we have information in them.

This has practical consequences. With university presses under so much financial pressure today, any number of solutions have been put forward as to how to “save”

¹⁶ WorldCat does offer the the WorldCat Collection Analysis tool (<http://www.oclc.org/collectionanalysis/>), which allows comparison of collections across institutions and supports reports of various kinds. It is an expensive service, however, and requires formal agreements from all the libraries whose collections are being analyzed.

them. Many of these proposals involve getting university presses to work more closely with university libraries. The question is, if libraries are a small and declining part of the university press ecosystem, should the presses be looking elsewhere — specifically, to sales to individuals, which make up the single largest segment for sales? On the other hand, if Amazon is indeed selling a large number of books to libraries, perhaps university press sales to libraries are not shrinking nearly as much as many fear. But we can't answer that question because we don't have the data.

Using our best estimates of university press sales to libraries, which puts the figure at 25% of total volume, we can estimate that libraries make up about \$80 million of press sales. This is based on a figure, extrapolated from AAUP data, of \$320 million for total sales of books by university presses each year. That means that if PDA totally wiped out press sales to libraries (a highly unlikely event), then the presses would have an \$80 million shortfall.

B. The PDA Marketplace

Estimates for the size of the market for PDA sales are difficult to come by, as the only reliable sources for this information, the PDA vendors themselves, are reluctant to release information that could put them at a competitive disadvantage. The figures cited here have been derived from the vendors and other participants in the academic book supply chain. They represent reasonable estimates, but they are not definitive. Some observers believe that the vendors have an interest in exaggerating the size of the market, as this may encourage other libraries and publishers to sign with them.

There appear to be about 400-600 institutions around the world with PDA services up and running right now.¹⁷ For some institutions, the PDA projects are deemed to be experimental or pilots, but for many, PDA has now found a permanent home. Most of the larger research libraries are now working with PDA in varying degrees, but the penetration of the academic library market is extensive and reaches to some small institutions. In certain respects, smaller institutions could stand to gain most from PDA,

¹⁷ One vendor informed us that the number of libraries with PDA programs in place is evenly divided between U.S. institutions and those based elsewhere in the world. Another vendor remarked that growth is fastest in the U.S.

and it seems likely that their investment in this area will catch up with the larger research libraries in time. Some of these programs are for print (under 10% of the total), some for e-books (the majority), and for some there is a hybrid structure, where the library may enable PDA for a title and then instruct the vendor to fulfill the order with an e-book if available, a print copy if not.

Perhaps more interesting than the number of institutions now using PDA is the rate of growth. It seems probable that the number of PDA programs will at least double over the next 18 months. There are several reasons for this. One is simply that the library community has been discussing PDA for several years now, which has yielded an extensive literature on PDA's implications and how it works.¹⁸ Another reason for the rapid growth is that library consortia are now sending out RFPs to PDA vendors. This means that one sales effort could result in 5 or even 25 libraries signing up for programs. PDA is thus likely to be near-ubiquitous in a few year's time. "Ubiquitous" means everywhere; it does not mean everything. Most libraries use PDA in conjunction with other means of acquiring books for their collections.

Publishers who are sitting on the sidelines concerning PDA may wish to reconsider their position. As the number of participating libraries grows, a publisher that does not have books in a PDA program could limit their exposure in the marketplace. Some publishers are withholding books from PDA programs because they insist that libraries buy their books outright and up-front, whether sold individually or as part of aggregations, rather than leave matters to a chance patron discovery. (Of course, the responsibility of a publisher is to take the chance out of patron discovery through superior marketing.) Do publishers — book publishers, at any rate — really have that kind of influence over a library's purchasing decisions? That is doubtful. A better strategy is to make books available in the various ways librarians may want them and to let the librarians choose. Thus books should be offered as print, as ebooks, as parts of aggregations, as "firm" sales, and as part of PDA programs. And the books should be made available to most, if not all, PDA vendors, inasmuch as some libraries may choose to work with a single

¹⁸ See, for example, this special two-part edition of *Collection Management*, v.35, nos. 3 & 4. 2010.

vendor and not having books in that vendor's catalog will effectively restrict access to the publisher's titles at that particular institution.

Getting at the dollar value of PDA is challenging because the estimates offered by people in the field vary widely. The numbers cited here derive from interviews with representatives of the book supply chain. The 400-600 libraries using PDA generate sales to their vendors of between \$15 million and \$25 million, including both sales and rentals. Those figures include the vendors' margin, so publishers received something in the area of 60-70% of that amount.

So, a rough estimate gives us a current PDA marketplace of \$20 million, with publishers receiving perhaps \$13 million of that. The university press share of that is roughly 25% or \$2.6 million (net to the publishers). PDA is a phenomenon of academic libraries, which explains why the university press share is as high as it is.

To put this into perspective, as noted above, total sales of university press books are in the range of \$320 million, with about 25%, or \$80 million of that, going to libraries. It's reasonable to forecast that PDA for university press titles will reach 10% of the total library market for press titles in a few years.

There are many qualifying remarks to be made about these figures. First, again, we really don't know how many books university presses sell to libraries; the 25% figure for those sales is an educated guess. Second, the presses differ considerably among themselves, with some having strong regional publishing programs and others having a primary focus on scholarly monographs; and among the larger presses there are significant general trade sales, with an occasional title reaching sales that would not be out of place on the lists of a Simon & Schuster or HarperCollins. It is clear that, with all the differences among the presses, PDA will affect them unequally. Third, with books now being made available in so many ways (in print, as ebooks purchased outright, as rentals, as part of PDA programs, as part of large aggregations), it is difficult to anticipate how these different offerings will be weighted in the collections of specific libraries. What we can say with confidence is that PDA is a small but rapidly growing marketing program and that is likely to be with us for many years to come.

There are at least two other economic considerations for PDA that publishers should be aware of. While some books may never be purchased through a PDA program (because no patron accesses the title), other books (the 60% of books that do in fact circulate in libraries today) may circulate, but will circulate later, which delays payments to publishers.

This situation is perhaps best explained with an illustration. Let's imagine a university press that publishes a book that ultimately goes on to sell 1,000 copies. When did those sales occur? Most occurred in the first year or two after publication. Sales figures of this kind vary enormously among academic presses and title by title, but it's not unusual to find that 70% of a book's total sales take place in the first three years after publication. However, the Cornell print usage study suggests that significant numbers of print books in a research library collection continue to circulate for the first time for as long as 12 years after they were acquired (after this interval, the Cornell data showed a steep drop in demand for books that had not yet circulated). If these patterns hold true for the (mostly electronic) books offered in PDA programs, presses could expect significant lags between publication and sale (since sale is triggered by the first significant use of the PDA book). Instead of receiving 70% of the income in the first 3 years, the publisher may receive a smaller amount, say, 25% (this figure would vary by publisher). Thus sales may remain at 1,000 copies, and the active life (up to 12 years or thereabouts for first-time circulation) of the title may remain unchanged, but the sales activity has been partially moved back some number of years, providing short-term financing problems for the publisher. (In the Cornell study, the highest rate of first circulation was in the first couple years after publication.)

Another issue is how PDA activity is anticipated in publishers' contracts with authors. Is PDA covered by the clause on sales of books or is it covered under the subsidiary rights clause? This is a somewhat arcane aspect of the book business, but it has large economic implications. Publishers typically pay authors royalties on every copy sold. These royalties range from as little as 5% of the publisher's net receipts to as much as 28%. (The higher figure is an average for hardcover sales by trade publishers. Typically royalties on trade books use the list price, not net receipts to determine royalties. A royalty of 15% of list yields about 28% of net receipts. University presses typically pay

lower royalties.) In the world of ebooks, many publishers pay authors a royalty of 25% of net.

Some publishers' income, however, comes from subsidiary rights, not the sales of individual copies directly by the publishers. For example, an American university press may license a German translation of a work. The income from the German publisher is viewed as subsidiary rights income, which typically is divided evenly between the author and publisher--in other words, the author would receive 50%.

The question is, even if sales of books through PDA are classified as traditional sales, bearing a royalty somewhere in the range of 5-28%, how about the short-term rentals that PDA enables? A rental is not a sale; such rentals may be construed as subsidiary rights activity, therefore perhaps doubling or more the publisher's payment to the author.

The good news for publishers about this particular question is that it can easily be corrected for new contracts. A new contract can simply eliminate the clauses that cover subsidiary rights income for ebooks and declare that all income from ebooks will be shared with the author on the same basis. Authors and publishers would then be free to fight endlessly about what that percentage should be, but they can stop fighting as to whether a particular income stream should be classified as a sale or a subsidiary rights license. This is little comfort for backlist titles as they are moved into PDA services, of course. Publishers will have to work with authors on a title-by-title basis to clarify those contracts, which will be costly and take a great deal of time. Indeed, it is reasonable to say that for some titles, this matter will never be cleared up.

It remains difficult to determine whether PDA sales are additive, subtractive, or neutral to publishers. Virtually every case study of PDA notes the savings for libraries, so it is hard to imagine that the current PDA programs are adding to publishers' revenue. How publishers can recapture some of that lost revenue will be the subject of another section below.

C. PDA and ILL

Although precise figures are not known, print books published by university presses make up a good deal of the traffic in interlibrary loan (ILL). Studying the intersection, or potential intersection, of PDA and ILL may provide some ideas for programs that will benefit university presses and libraries alike.

ILL emerged in the print environment. For print books, ILL makes perfect sense. Publishers of print books pretty much forget about them when they leave the warehouse (except when they are returned). In the past, after a print book was published, it would remain available (that is, in print) as long as it was profitable to keep reprinting it. Most books at some point went out of print. What copies remained were on library shelves or in the collections of individuals. So if a library had a patron who requested a title that was not in the library's collection, the only recourse was to search for the book among used-book merchants (not as easy a task as it is now with Internet commerce) or to borrow it from another library. Over time, the systems for loaning books got more sophisticated and efficient. To this day, ILL is a feature of all academic libraries, which are organized into networks for borrowing and lending.

ILL is not free. There are significant administrative costs in handling and shipping books around. Estimates for the total cost of a single instance of ILL vary widely (the range is usually put at \$25-\$50¹⁹), but whatever the actual figure is for a particular library, it is not possible to move physical goods around without incurring some costs. On the other hand, none of this money finds its way to publishers and authors. ILL, in other words, is a distribution method set up and managed by librarians with no involvement of publishers.

And that is why publishers for the most part don't like it. Of course, they don't have much to complain about if a book has gone out of print, but they have always believed that ILL erodes their market and that they should be able to find a way to profit from it.

With e-books, everything changes. Since the "first sale" doctrine of copyright law does not apply to digital texts (since exchanging a digital copy requires someone to make a new copy), publishers can and often do restrict ILL for electronic books. A few publishers

¹⁹ See, for example, this FAQ from the University of California at Santa Barbara: <http://library.ucsc.edu/services/borrowing/interlibrary-loan-faq>.

have broken this mold, but most publishers fear that ILL raises the dreaded scenario of selling a single copy of a book and then watching as it is loaned repeatedly from library to library, essentially obliterating any further market for that title. It is a property of digital technology that such digital sharing costs almost nothing and can be accomplished with a single mouse-click. For this reason, ILL may disappear in due course (at least for ebooks), because it would destabilize, even decimate, the market for books once all books are digital.

PDA, however, has properties that may mitigate this. Let's run through some scenarios:

The scenario for print books. Library A has a very large collection. Library B, which is located nearby, is much smaller. One day a patron of Library B requests a print book that is not in Library B's collection. Library B first attempts to purchase the title, but it is long out of print and is very expensive to purchase from antiquarian booksellers. So Library B turns to Library A for help. With an ILL system in place, the book is loaned to Library B for a specified period of time, after which the book is returned to Library A's collection. The patron's request has been satisfied (though it took some time to make the book available), but the libraries have incurred some costs in handling the loan. After the loan is complete, Library B does not have a copy of the book in its collection. So there is a fair amount of cost for a transitory gain.

The scenario for e-books, no ILL, and no PDA. Library A has the ebook in its collection, Library B does not. A patron requests the book from Library B, but with no authorized ILL program, Library B cannot provide the book by borrowing it from Library A. There is no monetary cost in this, but the patron leaves unsatisfied. No one is happy with this scenario.

The scenario for ebooks, no ILL, but with PDA. Once again, Library A has the book in its collection, but Library B does not. What Library B does have, however, is a relationship with a PDA vendor, which has the title in its catalog. The patron searches on Library B's OPAC, finds a record for the title, and requests it. It is delivered with the speed of an ebook. If the patron simply browses the book a bit, there is no charge. If the patron reads a significant chunk of the book, the library

is charged for a rental. If the patron reads a great deal of the book, the library purchases the title outright. In this scenario, Library A is not involved with the transaction. Library B is pleased to be able to provide the book to the patron, though it incurs some cost (though perhaps less than the cost of the entire book and perhaps less than the administrative cost of borrowing a print book). The patron is satisfied. And here is a new development: the publisher is compensated for the use by Library B.

An emergent property of PDA, in other words, is that it may solve the ILL problem for e-books from the publisher's point of view, but also to the satisfaction of librarians, providing a quick way to satisfy patron requests, perhaps at a reduced cost to libraries, even as publishers get a return on their investment.

It should be noted that ILL plays a role in the kind of collaborative, inter-institutional collection development that is growing in scale and importance among some research libraries. When two or more libraries coordinate their collection efforts, they reduce some redundancy in their acquisitions with the understanding that materials within the “collective collection” can be shared among the partners. Dividing collection responsibilities in this way between or among institutions is easier with print materials; with electronic materials, partner libraries look for consortial discounts. It seems likely, however, that an interplay of ILL and ebook PDA will emerge to serve the needs of these partnerships in some cases. A library consortium might choose to purchase a single print copy for archival purposes and/or to circulate among the libraries when print is needed; a consortial ebook PDA plan might be implemented to serve immediate needs.

This ILL scenario may even coax some publishers, who are wary about PDA, to participate in these programs. Speaking from a publisher's perspective (and fully aware that librarians may view this matter differently), I recommend that publishers do participate in PDA programs if for no other reason to begin to monetize what was, in the print world, uncompensated ILL. Since PDA may erode book sales, some publishers would rather that PDA would simply go away. But the ILL scenario restores some of the lost revenue.

Implementing such a program, however--that is, eliminating ILL for digital books and substituting PDA for it--is not something that can or should take place with a single grand gesture. The various parties to ILL have different interests and those interests must be taken into account in forging new PDA-centric programs. Libraries, for example, are not likely to embrace a wholesale elimination of ILL for digital books. Libraries expect ebooks to be at least as usable and accessible as print books and this expectation includes the ability to share copies with other libraries via ILL arrangements. Publishers feel that the ease of copying and distributing digital files make ILL a more threatening prospect in the ebooks context. And the various aggregators of ebooks--which sell the vast majority of ebooks to libraries--play a role in this, too, as they must mediate between the wishes of libraries on one side and of publishers on the other even as they look out for their own economic interests, which include keeping administrative costs down, which in turn favors offering programs that are simple in nature and that permit few exceptions.

The fact is that there are few publishers that can unilaterally declare an end to ILL for ebooks and get away with it, even if they touted the benefits of PDA to all parties. A migration to a program of "PDA over ILL" is going to take time and will require patient discussion by all parties, which will necessarily include extensive education about PDA. University presses are in a position to take the lead in these discussions, as their shared mission with academic libraries could enable them to develop mutually satisfactory policies, which could then in turn be used to influence the programs of ebook aggregators and ultimately the policies of even the for-profit book publishers.

Having voiced all these cautions, it nonetheless seems probable that ILL for ebooks will eventually disappear, to be replaced by widespread adoption of PDA services. The option for short-term rentals within the PDA programs is likely to satisfy much of the market demand that formerly went to print ILL.

V. Amazon and PDA

An unanticipated finding of the research for this report is the large role Amazon plays in library sales. While Amazon is the most significant force in the book business today, and while it is of special importance to university presses, which have an even larger share of their business with Amazon than do trade publishers, PDA is a library topic and Amazon is not a library vendor. Or at least Amazon does not appear to be a library vendor. During the survey of librarians about how they acquire books, however, it became clear that Amazon is supplying books to many, perhaps all, libraries. Indeed, one small library remarked that Amazon is its *sole* supplier. Amazon thus is the library wholesaler that no one ever heard of.

The scope of Amazon's sales to libraries is unknown, however, and getting at that number would be very difficult, since Amazon does not disclose its sales figures. One professional associate of ours, who has done extensive surveys of library purchasing, estimates that Amazon may comprise 8-10% of all book purchases by academic libraries. This associate is careful to say that this is only an estimate, that she would have to do a formal survey to test this hypothesis. And then there are all the qualifying remarks that must be made: while the figure may be 8-10% for books, that does not mean the same percentage would hold for university press titles; and the lists of university presses are diverse, which means the percentages will vary press by press. Still, even if the figure is half that estimate (that is, around 5% of total academic library expenditures on university press books), it's a big number.

This has some interesting implications. First, university press personnel have said for years that their sales to libraries are declining. The question is, since publishers don't know how many books are sold to libraries in the first place, how do they know that the sales are declining? The estimate in this report, that 25% of press sales goes to libraries, is at best an educated guess. It's reasonable to assume that the presses are looking at the reports they get from Ingram and Baker & Taylor when they say that library sales are declining. But if libraries are now purchasing more and more books from that secret wholesaler, Amazon, perhaps Amazon's sales are at least partially offsetting declines at traditional library wholesalers. (There is also another possible offset to the reported decline in library sales. When a press sells a book to Ingram or B&T, and those wholesalers then resell the book to Amazon, sometimes the book is

ultimately purchased by a library. For a press that is trying to do an analysis of sales channels, this sale would not appear as a library sale.)

This may not be a neutral tradeoff, however--that is, it may not be that a dollar lost in sales to Baker & Taylor/YBP is replaced by a dollar from Amazon. The reason for this is that different sales accounts get different prices (calculated as discounts from a book's list price), and many university presses now give Amazon a better deal than they give Ingram or B&T. This raises the interesting question of how a retailer, Amazon, gets a better deal than a wholesaler such as B&T or Ingram, and the answer is that Amazon's enormous market power has changed many of the rules in the industry. Thus Amazon's growth in the library market comes at the expense of traditional wholesalers and also at the expense of publishers' margins.

How much does this margin erosion cost the presses? It is hard to estimate these figures, but here is an educated guess. Let's assume that our colleague's estimate of Amazon's sales to libraries is essentially correct, that they comprise 8-10% of total book purchases. If the figure in this report for the presses' sales to libraries is correct (that is, around \$80 million a year), an extrapolation suggests that Amazon's library sales of university press books is in the vicinity of \$8 million. (Yes, this is a big leap without better evidence.) Now if we make another big assumption that Amazon gets on average a 5% better discount than presses give to library wholesalers, then Amazon is eroding press margins by 5% of \$8 million or \$400,000. Of course, the evidence for this figure is thin, but even if the figure is cut in half, what remains is a big number.

This leads us to the central irony of Amazon and library sales: Although Amazon is the clear market leader in the sale of ebooks (through its Kindle device and Kindle apps), virtually all of Amazon's sales to libraries are for print. This is because publishers have been reluctant to grant Amazon the necessary licenses for Amazon to sell Kindle books to libraries. PDA, on the other hand, is predominantly a program for the sale of ebooks. It's not hard to imagine someone sitting at Amazon, wondering how to find a way into the library market for ebooks. Such a move, if successful, would be transformative to the library market--and could significantly disrupt the businesses that are highly dependent on book sales to libraries.

Amazon is no stranger to disruption, of course. Let's sketch a scenario that would put Amazon's Kindle ebooks squarely in the library market.

Let's imagine a continuum of libraries, with the largest ARLs on one end and community college libraries on the other. In between we have smaller ARLs, some public institutions, and liberal arts colleges. Amazon's sales along this continuum are not spread evenly, but it's fair to generalize and say that the smaller the academic library, the greater Amazon's role. That's to speak of Amazon's position purely in relative terms, however. Since the major ARLs are so much bigger than the libraries at smaller institutions, it's possible that the actual purchases by the major ARLs from Amazon are higher in absolute terms than the sales to the smaller libraries, even though Amazon is less important to a large library than to a small one. Unfortunately, the fact is that there is no data to support this hypothesis, plausible though it seems.

Curiously, there is a somewhat similar situation with PDA. As noted above, PDA is growing rapidly. It's not impossible to imagine that there will be 1,000 PDA programs in place by 2014 and to project further into the future and state that all libraries will someday be working with PDA. Here again, however, libraries will take to these new PDA program in various ways. The very largest libraries, for example, may lean toward traditional collection development programs, using PDA only in areas deemed to be nonstrategic to their collections. Smaller libraries, on the other hand, may opt to use PDA exclusively, preferring to develop a library based on access to community demand rather than one that mirrors the comprehensive cultural record in itself. And the libraries that sit between the biggest and the smallest will have differing levels of involvement with PDA, depending on the nature of their institutions, their philosophy of collection building, and the personal outlook of their senior staff. PDA, like Amazon's sales to libraries, is, in relative terms, more important to smaller libraries than to big ones, but in absolute terms, it is hard to draw any conclusions, as the purchasing power of a major ARL could make greater purchases and rentals from its nonstrategic PDA program than can a small library, where PDA may become central to the institution's operation.

So, Amazon and PDA alike: very important to the small institutions, less important to the large ones. But a factor for all libraries great and small.

There is no escaping the stubborn fact, however, that Amazon is selling print books to libraries, whereas most PDA sales are for ebooks. Amazon, of course, would like nothing better than to take its Kindle catalog to the library market, which would gobble up those titles greedily, and may attempt to develop a strategy to get it even deeper into the library market.

The motivation for Amazon is significant, as the library book market is said to be about \$1 billion in the U.S.²⁰ On one hand we have Amazon, the leading purveyor of ebooks, and on the other hand there is the library market, which is prepared to move to a largely digital solution much more rapidly than consumer markets—and Amazon's ebook program is locked out of that market. Amazon being Amazon, we should look for a bold solution. We should not be surprised to see Amazon's strategic problem solved with a flourish of the checkbook and the acquisition of a PDA vendor—or all of them.

In fact we don't know what Amazon will do and we won't know until it happens, if it happens. It is a mistake of strategy, however, to think of markets developing with an unbroken trend line; disruptions happen, and often these disruptions are willed into existence by ambitious commercial organizations. Publishers already have a glimpse of what Amazon is likely to be doing with consumer book markets and now should be thinking about a significantly restructured library market. The question is, What investments should be made today to ensure a publisher's viability and growth in the years ahead?

VI. Format Issues

A. A Conceptual Matter concerning Ebooks

This project uncovered a curious conceptual issue concerning PDA. There are a couple parts to this. The first is that PDA is often assumed to be only about ebooks. This is not

²⁰ This figure is a commonplace among book publishers, but I have not been able to determine its source, nor is it clear what is included in the estimate. It's entirely possible that the figure is an extrapolation by publishers of figures provided to them by Baker & Taylor. If that is the case, the actual figure may be higher, as it would include digital book aggregations in which B&T does not participate.

true; there is print PDA and hybrid PDA (see below). This point then almost imperceptibly shifts into a discussion where PDA and ebooks are viewed as one and the same thing. This is not the case. Ebooks are a much bigger topic than PDA.

An example of this confusion is when a PDA vendor touts the fact that a PDA system for ebooks can fulfill orders at a patron's request literally at the speed of the Internet. This, of course, would be true for all ebooks, not just ebooks in PDA catalogs. Another example, cited by most vendors, is the international reach of PDA: a university library may be able to service a branch in the Middle East remotely. Here again what's at issue is the advantage that digital books have over print books, not a property of PDA.

For publishers, it may be useful to think of electronic PDA sales as akin to what the same publisher does with Amazon and Barnes & Noble for ebooks. The metadata is loaded into the catalogs of the online vendors, but no sale takes place until a customer requests a copy of the book. Indeed, all consumer sales are patron-driven in essence. So from one point of view, PDA represents the migration of general retail practices to the institutional environment.

B. The Broader Context of PDA

Ebooks form part of a broader context in which PDA operates. Ebooks, whether offered via PDA or purchased prospectively, have some common problems operating within the library market. The key problem is that ebooks in the library context are not in the same form, nor are they read in the same way, as most ebooks outside of an institutional setting.

Let's step away from libraries for a moment and think of where the mainstream acceptance of ebooks has come. The first Amazon Kindle appeared on November 19, 2007--that is, fewer than five years prior to the drafting of this report. The Kindle followed the first iPhone by six months, but six months afterward--that is, in the summer of 2008--the first ereading app for the iPhone, Stanza from Lexcycle, appeared. Stanza was the defining innovation for consumer ebooks, as it separated the ereading application from a particular hardware device. All subsequent developments with ebooks have been in this direction: we now take for granted that an ebook can be read

on any computing device, whether a phone, a tablet, a PC, or anything else. Publishers thus work with their various distributors (e.g., Amazon, Kobo, Barnes & Noble, etc.) to get their books into the proper formats for ease of consumption. By some measures, ebooks now comprise about 25% of all trade book sales, perhaps just under 10% of university press sales (and growing rapidly), and a large and growing portion of college text sales (the figure is probably still in the single digits).

The convenience of reading on some of the new devices is extraordinary, whether the device in question is a dedicated ereader (like the original Kindle), a tablet, or a smartphone. And the ability to read the same book on multiple devices is astonishing: John Doe can read on a Kindle or Nook in his study, and the next day pick up right where he left off on a smartphone while standing in line at the supermarket or waiting for the kids to get out of soccer practice.

Library provision of digital or digitized books long predates consumer ereading devices. Many of the first digital books that were represented in library catalogs were books retrodigitized for preservation purposes beginning in the 1990s; these were images of printed pages, usually enhanced with OCR text, viewed on a computer monitor. Commercial ebooks sold to the library market in the intervening years have mostly presented a similar reading experience, one that is quite different from what readers have recently come to expect from the consumer market.

For the most part, the most popular formats are not available for titles provided by libraries. Thus the happy user of a Kindle logs onto the library's service and finds an ebook, which is then downloaded. But downloaded to what? If the download is a PDF, it's hard to display on most ereading devices; PDFs work best on larger screens. Other file formats may be available, but overall the experience of reading a library ebook is inferior to reading a consumer ebook.²¹ The distinguished researcher may also be a mystery buff, but the experience of personal and professional reading differs. It should be noted that recreational reading and scholarly reading have different demands that

²¹ It may be that one reason that academic titles have been slower to make their way into ebooks than consumer titles is that the academic reader wants to be able to use a book in ways that the consumer ebook applications do not fully support, at least at this time, e.g., annotating.

must be met by ebooks. The reflowable text that optimizes the experience of reading on a handheld screen makes citation nearly impossible, thus severely limiting how Kindle texts, for example, can be used for scholarship. Solutions for this disjunction will no doubt emerge over time, but for now consumer and library ebooks follow separate tracks.

This is not a PDA problem but an ebook problem, and this problem does not lend itself to a ready solution. The unfortunate fact is that most library ebooks are superior to print titles in terms of discovery, relatively cumbersome to read; consumer ebooks, on the other hand, do not offer the features that support scholarship. A breakthrough in the marketplace is needed, but it is hard to predict where it will come from.

Librarians, who have been very aggressive about building digital collections for many years, are not to blame for this, nor are publishers. The organizations that are leading the charge in ebooks are all outside the traditional nexus of publisher and library: Amazon, Apple, and Google. Interestingly, in one interview, a senior representative of the university press community commented that if PDA did not take into account how reading is evolving — with mobile devices and consumer technology companies leading the charge, and discovery increasingly migrating to social networks — we could end up in a new environment where 40% of the books remain unread—that is, we would end up right where we started.

C. The Place of Print

Although all hail the emergence of the digital paradigm, print persists.

Print plays a complicated role with PDA. To begin with, unlike ebooks, which are immediately uploaded to a library patron when requested in the context of a PDA service, print books necessarily involve a delay of at least a few days. This means that print PDA, unlike PDA for digital books, does not and cannot disappear silently into the background; a user knows that the book is being ordered. Of course, many people prefer print, so a delay of a few days may be acceptable. Print may also play a role when a digital version of a book is not available or when the two formats are not published simultaneously. While PDA is primarily used for ebooks, print is playing a

small role in PDA programs, a role that may be growing modestly, though all vendors agree that it is currently under 10% of the total market for PDA.

Many libraries set up their PDA services as hybrids. A preference may be stated for digital versions of a book, but if no digital version is available, the print book is ordered instead. This situation provides an important insight into the role of approval plans in library purchasing: the library is putting PDA records into its catalog not on the basis of what is available as an ebook but with an eye toward presenting records for the best and most appropriate books available, whatever the format.

Print is also valued as a preferred archival format. Although publishers can keep books available indefinitely through inexpensive digital storage, the problem of long-term digital archiving is not solved, although much progress has been made. Trusted archiving solutions for ebooks lag behind electronic journal archiving, but many book publishers are now cooperating with third-party archiving services such as Portico. A print copy is reasonably stable. Large libraries with multiple sites may purchase a print copy of a book for archival purposes, but then make electronic copies available through PDA, and similar models are being explored in multi-institutional consortia, as noted above.

There remains a print bias in the supply chain, and publishers should be careful not to trip over it. For example, approval plans, which are now an essential component of PDA services, may discriminate against the practice of "windowing," where a publisher withholds a less expensive edition of a book in order to give a more expensive edition the first shot at the market. This remains the preferred practice in trade publishing for print books, where a book is first published in hardcover and the paperback is withheld until some time afterward. (Interestingly, the duration of that market window is now shrinking in some cases, from the tradition one-year delay to something closer to six months.) Academic publishers may prefer to sell hardcover editions (often viewing them as library editions) over ebook versions of the same titles. The problem here is that the distributors have a river of new books flowing through their operations all the time (university presses publish around 12,000 new titles each year). If the ebook version of a book is withheld, and a library prefers ebooks over print for PDA programs, the digital version of the book may never get placed into any approval programs, as the distributors have already turned to the next batch of books flowing in. Thus to get full participation in

approval plans and hence in PDA programs, publishers must publish electronic and hardcover editions of a work simultaneously.

VII. A Future Scenario for PDA

A. The Vendors

There is a radical aspect to PDA (some librarians interviewed for this project continue to think of PDA as an extreme and high-risk method of building library collections), but PDA has by now been largely domesticated. In its early days it presented the specter of eliminating library selectors and turning the craft of building a library collection over to "the wisdom of the crowd." What we see today instead are PDA services that have been carefully budgeted and overlaid with the same approval guidelines as are used for the more traditional way to acquire books.

There is an analogous situation with the marketing of PDA programs. Presented initially as a somewhat radical alternative to traditional ways of acquiring books, PDA was often marketed as a stand-alone service. Early PDA offerings, for example, did not offer print and did not offer other options for purchasing books. All this has changed now. Most (but not all) PDA programs now are marketed within the context of other methods of acquiring books and print increasingly is an option. PDA, in other words, no longer looks like an upstart, but has become one of a number of ways libraries acquire books.

It is probable that PDA programs increasingly will be marketed as a component of a broad menu of offerings. A library will have the option of acquiring complete collections, the option of buying some titles "firm"--that is, up front and just in case--and of buying titles through PDA. The same vendor will offer all of these options and will also make print titles available through the same tools.

B. Selecting from the Options

This raises the question of why a library would choose one option over another. For example, if a title is offered from a vendor as part of a PDA program, why would a library

choose to purchase the book up front instead? Similarly, if PDA is available, why would a library purchase an entire collection of books in one fell swoop? There appear to be three possible reasons:

1. **Price.** Vendors are likely to discount books offered in full collections. A library thus could purchase 1,000 titles in a political science collection for a special price. The price would be higher for a firm sale of a single title and higher yet for a sale through PDA--offset in part by the short-term loan option available through the PDA program. In other words, over time the vendors and the publishers that supply them will employ price discrimination as a way to win back some margin lost to PDA.
2. **Administrative efficiency.** One librarian interviewed for this study commented that she was most likely to focus on the purchase of aggregations of ebooks for university press titles for the simple reason that it would be easier to do so. "Journals are easy," she said. "Books are a mess." This librarian, who was expressing some exasperation with the complexity of book acquisitions, was mindful of the hidden cost in acquisitions: the staff time that went into the process. It is easier to buy a thousand books at one time than one book at a time, even if the single purchases are mediated by a largely automated PDA system. Of course, not all libraries can afford the luxury of purchasing entire collections, so the option of administrative efficiency has to be weighed against the overall book budget.
3. **Integration into library systems.** Over time there may develop some advantages in purchasing books one way over another insofar as the type and form of a purchase could have an impact on discovery. Can a library provide full-text search for a title that it does not own? While new search tools are always being developed, it's possible that PDA systems, however well developed the metadata in them comes to be, will trail firm sales of individual books and the acquisition of collections in discoverability. Here again enhanced discovery may be a luxury not every library can afford.

C. The Publisher's Option

Except for those publishers (only the very largest) in a position to sell their books directly to libraries, bypassing wholesalers and other aggregators including PDA services, it will be in the interest of publishers to play the vendors off against each other. A publisher will not want a library vendor to compete with exclusive rights to a title; rather, the publisher will want the vendor to compete on service, including the innovative and integrated use of IT. For this reason, publishers are best advised to participate in not just one, not even several, but in *all* PDA services.

Such a strategy has other implications. If the forecast in this report is correct and all vendors will provide multiple options for how to acquire books, then publishers are likely to put all their titles into the programs for every vendor.²² In effect, every vendor will have the same catalog to market. The differentiators will be price and service, including IT.

VIII. What's a Publisher to Do?

PDA presents the theoretical possibility of being an unalloyed bad thing for publishers, as it could, in the worst-case scenario, reduce university press sales to libraries by at least \$32 million, as discussed above. However remote that possibility may be, publishers contemplating PDA are thus likely for the most part to view it warily and to wonder how they will make up that lost money. Some publishers have proposed that they withhold titles from PDA programs so that libraries are forced to purchase the books outright. It takes a highly confident publisher to believe that his or her books are of such inarguable quality that a librarian would submit to this kind of dealing. In any event, we find it hard to believe that this is what the university press community wants. Does anyone want librarians to acquire books that don't circulate? Do we not want libraries to allocate their funds to the books and other materials that are most useful to their patrons? Playing hardball with academic librarians over PDA does not seem like an enlightened strategy.

²² An important exception is books that are used for course adoption. Publishers are understandably reluctant to make such titles available to libraries as ebooks because the library copy could cannibalize course adoption sales.

Thus the question is what publishers can do about PDA short of declaring it an evil. This section explores some strategies to whittle away at that \$32 million problem and perhaps even to make it into a net positive.

A. The Metadata Imperative

PDA poses new marketing challenges for book publishers. In the traditional model, most of a publisher's efforts are expended around the time of publication. Just prior to publication there is a period where interest in the book is generated by catalogs, social media, the distribution of review copies, and so forth; in the period immediately following publication, there is a strong effort to gain media coverage of the title. But over time the marketing effort tapers off. Titles continue to be listed in catalogs; sometimes new catalogs, online and off, are developed for specific audiences (e.g., a list of all works in anthropology for the anthropology mailing list), but a complete re-energizing of the marketing requires a new event. This could be the publication of a paperback or electronic version of the book or perhaps the creation of a new edition, replete with a new introduction and updates to the text. As the book ages in the marketplace, the marketing staff turns away, directing their attention to the many new books coming through the pipeline. Historically, publishers have not been overly concerned about the overall life cycle of the book. Post-publication, a book became the concern of libraries and the individuals who purchased it.

With PDA, publishers face a situation where the actual purchase of a book could take place many years after publication. The largest share of purchases will continue to take place in the first year or two after publication (this will vary considerably by publisher), but some portion of a title's overall sales will be pushed back, taking place only when a library patron discovers a title and uses it. Publishers thus have the new marketing challenge of stimulating demand for many years. If they don't, the book's metadata will sit in library catalogs, but a reader will be less likely to discover it. Without such a request for access, there will be no purchase. This is the essence of PDA.

How then to drive sales of PDA titles? The obvious answer is to continue to market the books, but this is more easily said than done. Marketing costs money and only makes

sense when the incremental cost of an ongoing marketing effort is more than offset by increased sales (specifically, the increase in the gross margin must exceed the direct cost of the new marketing expenditures). For many academic titles, which may have a small commercial reach, the challenge is to find cost-effective ways to bring books to readers' attention. That means (obviously) no television ads or taking out a page in the *New York Times Book Review*, but it may also mean not being able to afford small advertisements in specialized scholarly journals, whether in online or offline editions. The unfortunate fact is that old books compete with new books for resources, and new books almost always win.

Publishers are thus likely to view marketing in the wake of PDA pragmatically. Since sales through PDA are triggered when a patron, viewing the library's holdings in a catalog, accesses a title, publishers will seek (a) to have as many books represented in that catalog as possible and (b) to have the descriptions of those books be as complete as possible so as to aid discovery and prompt a user to want to read more. Practical book discovery for PDA, in other words, is largely a matter of search-engine marketing, where the search engine or engines consist of a variety of tools that lead a user to view a specific book record.

Before digging in deeper on searching the catalog, it's important to recognize that there are useful means to bring users to the catalog in the first place, though all of them fall under the general rubric of search-engine marketing. For example, a publisher may have a regular blog in which authors contribute guest posts. While the direct or organic traffic to the publisher's own Web site may be small, those blog posts will be picked up by people who begin their searches on Google or other Internet media. Let's imagine, for example, an undergraduate who is to write a paper on the economic causes of the American Civil War. The student perhaps begins with Google Web Search and finds that there is a link to a blog post by John Doe on that very subject. The link brings the student to the publisher's blog and Doe's post. The post cites Doe's book on the Civil War, and the student then discovers that that book is listed in his or her institution's catalog. That listing may be part of the PDA program. The student requests access to the book and a transaction is consummated silently. This marketing is not free, of course, as the publisher must allocate resources to creating and maintaining the blog, but it is a method for keeping books in front of prospective readers.

Some searches will begin not with Google or Twitter or any other Web service but with someone searching directly on the library's catalogue. And here we have an interesting question: Just what is the library's catalog and how can a publisher influence what information gets placed within it?

It's tempting to think not of the catalog, singular, but catalogs, plural, as libraries have multiple access points to their collections, but it's probably more accurate to think of the catalog as an inventory of library holdings linked to various discovery services. For publishers, these discovery services are key. Most libraries use one of five options for patrons' discovery: a proprietary search interface (only the largest libraries would invest in this); the Summon service, which is offered by Serials Solutions/ProQuest; EDS, the abbreviation for EBSCO Discovery Services; WorldCat Local, a service of OCLC; and Primo, a service of Ex Libris. This is where publishers need to concentrate their efforts, as a strong representation of a title in these services could lead to more patrons discovering and requesting it.

Let's look at this by choosing a single title as an example: *1491* by Charles Mann. This book was published by Random House, the largest trade house, which has no problem in getting its books distributed just about everywhere (which is why it is being offered as an example). If you search for this title on WorldCat, you will see that the book is available in thousands of libraries. If you go to the publisher's site, you will find a succinct description of the book. The presentation at Amazon is much more extensive than that on the Random House site. The representation at Amazon's direct competitor, Powells.com, is good, but not nearly as fleshed out as on Amazon. The information about the book is far more limited in the catalog at the Princeton University Library (which was chosen randomly)—so Amazon is making a greater effort at making the book discoverable than either the publisher, at least one competitor, and one major research library. Interestingly, the University of Chicago Library has a much longer entry on this title, and at the bottom of the page there is a reference to Syndetics, a unit of R.R. Bowker (and linked corporately to Serials Solutions and ProQuest). Syndetics is credited with having provided enriched metadata for this entry. The Chicago library staff has committed to a strategy of increasing discoverability by adding metadata to its catalog. This is precisely what publishers would want.

If you surf through dozens of libraries, working with a group of titles for which you compare entries, you will find that some libraries have very extensive descriptions of the books in their catalogs, some have brief listings, some include outside reviews, some have links to the GoodReads Web service, and some include links back to Amazon, where a patron can make a purchase. There is a tremendous range of implementations. For publishers, this means that one important marketing goal should be to raise the level of metadata in all library catalogs.²³ At a minimum, we recommend that every publisher go through the exercise of comparing entries on a number of books and comparing them with entries for books from the largest publishers (e.g., Random House, HarperCollins, Oxford University Press, Cambridge University Press).

Ironically, every year publishers provide their metadata for free to Bowker, which proceeds to package it and sell it to retailers, wholesalers, and libraries. It would be in the publishers' interest if all that metadata were freely distributed to libraries. In this regard, it's interesting to contemplate the precedent of Oxford University Press, which makes the metadata to all its books available as a free download from the OUP site.²⁴ If OUP's books have better metadata associated with them across the Internet, it is not an accident.

Let's be clear about what's at issue here. PDA potentially erodes the sale of books, but publishers have means to offset this. Good metadata enables better discovery, which in turn leads to more patron interest in a title—and that leads to a request for access and a sale or rental from a PDA program. Publishers have been inconsistent about creating and distributing this metadata, which in turn leads to lower sales. An effective marketing program for publishers operating in the PDA environment is to create high-quality and extensive metadata and see that it gets distributed to discovery services. Publishers should not stop providing information to Bowker, but they may wish to begin to provide it directly to libraries free of charge.

²³ The technical staff at publishing companies may wish to review the work of Ken Chad, who studied the role of metadata on PDA in a JISC-sponsored survey: <https://ebmotmet.wikispaces.com>.

²⁴ http://www.oup.com.au/help_and_advice/booksellers

This is a moving target, and it is moving in the right direction. New services are now springing up that provide apps for libraries' Facebook pages.²⁵ While the use of such services is still in the experimental stage, an interesting aspect of these apps is that they permit users to enhance the descriptions of books. Thus we now have the authoritative information about a book provided by the publisher mingling with user-generated content, not unlike what we find on the Amazon site. The tools of discovery continue to grow.

B. The Bookstore in the Library

A discussion of metadata segues easily into one use of metadata, as a component of a virtual bookstore.

One way to think about PDA is that it sets up a bookstore in the library. It's not what we usually think of as a bookstore — there are no dusty shelves or a chic coffee bar. Nor is this what we have come to expect from online bookselling, where Amazon sets the standard. The library bookstore is a new phenomenon, but there is a chance that it will become more widespread, perhaps even ubiquitous in the coming years.

What's distinctive about the PDA bookstore is that it operates within certain clearly defined parameters. To begin with, there is the matter of agency. Although an order request is made by a patron, the purchase itself is made by the library from the library's budget. Another aspect of the PDA bookstore is its invisibility: a patron making a request does not know that some of the titles listed in the library's catalog are not actually owned by the library; the patron has no idea that the library is in fact a kind of bookstore. (As discussed above, this is not the case for print books.) The PDA bookstore is also characterized by its deliberately limited selection: titles are placed into the catalog on the basis of approval plan guidelines to make sure that they are appropriate for an academic library. For example, a library may have a policy of not purchasing formal textbooks or test preparation guides.

²⁵ <http://www.thedigitalshift.com/2012/04/social-media/new-apps-bring-opac-functionality-to-library-facebook-pages>.

Perhaps the most notable aspect of the PDA bookstore, though, is the fact that it is not open to the general public. While anyone can search an OPAC, only authorized members of the institution's community can check out a book. If the PDA bookstore were a "true" bookstore, there would be no such restriction — it's hard to imagine Barnes & Noble telling prospective patrons to shop elsewhere. The fact that the PDA bookstore is anchored in the university community is essential to its conception and operation. It is the nature of the community that gives rise to the approval plan guidelines and thus determines what books can be purchased through the library.

An opportunity for publishers is to work with libraries to expand this bookstore while keeping its community dimension in mind. If the PDA bookstore also enabled patrons to purchase books on their own account for their personal collection, the library would provide another service and its patrons would have access to a broader selection of titles. Not incidentally, the library could receive a commission on every book sold through this service. This would likely be controversial among librarians, but I suggest that libraries consider this new service to be source of revenue.

How would this work? A student at Distinguished University is thinking of taking the law boards. She sits in her sorority house and goes online to the OPAC, where she searches for books and other materials that will help her determine what she has to study and when she can take the test. She finds a number of digital resources and accesses them. One article is on the current composition of law schools; it is in the library's collection, and she reads a large piece of it. Then she finds a book on job prospects for future lawyers. It is in the PDA program (though the student does not know this); she accesses it, skims a few pages, and then moves on. The library is charged for a short-term rental for that access. Finally, she comes upon a test preparation book for the LSAT. She tries to access it, but is presented with a dialogue box, which says that the book is not available, but she can purchase it in electronic or print form on her own account. She types in her PayPal account number; a few seconds later she is viewing the test prep book on her laptop. So, three different accesses, and three different sets of business rules.

The survey of libraries specifically asked if librarians favored widening the scope of their programs to include individual purchases. Most of the librarians we surveyed did not like

the idea at all; some did not understand it; some shrugged and said, Let's think about it. Yes, let's think about it. A bookstore within a library's OPAC would be a good thing for patrons and the library. It would also be good for publishers, which creates an opportunity for some self-interested negotiations.

As many librarians know, some publishers are holding back from participating in PDA programs. The libraries want the publisher participation, but how to get it? The concern these publishers (a sizable number) have is that PDA will erode firm sales to libraries. This is probably true, but there is no hard evidence as of now. These same publishers, acting on this assumption, are those that want to withhold titles from PDA to "force" libraries to buy the books in the traditional manner. This is not an enlightened trade practice, as it is more likely that the libraries will decline to purchase the books entirely. But if this is what some publishers believe, it may be possible to move them in a different direction with incentives.

The principal incentive is more exposure to prospective customers. As publishers watch helplessly as their traditional distribution chain is being destroyed by Amazon, they are increasingly desperate to find new ways to sell their books. A bookstore in every library (the ALA says there are over 120,000 libraries in the U.S. alone) would more than offset the closing down of independent bookstores and the bankruptcy of Borders. Libraries have some negotiating leverage here.

What libraries can negotiate for is the inclusion of all publishers in PDA programs. And libraries can negotiate for a commission when community members make purchases on their own account. They can also try for more; they could ask, for example, for perpetual access rights to library-purchased material and liberal policies on reserve room reading. It's hard to predict where these discussions will end up, but until they start, they can go nowhere.

For publishers, the possibility that OPACs could become discovery engines for book sales could create significant new marketing opportunities. Here is an opportunity to end the sometimes adversarial relationship between book publishers and librarians. A bookstore in every library is a step toward constructive discussion.

C. Other Offsets to Sales Declines from PDA

While a renewed focus on developing and distributing metadata and the possibility of helping to evolve OPACs into bookstores are the most dramatic offsets to anticipated sales declines through PDA, there are other things that publishers can do, some of which have already been mentioned in this report.

1. Exchange PDA for ILL. As noted above, ILL is a meaningful library strategy for print books, but for ebooks publishers have a strong interest in moving ILL over to PDA. This is actually one of those rare instances where all sides win, as ILL is costly for libraries to maintain (for print books). Thus publishers should lobby to offer PDA options that would satisfy librarian expectations of ILL without increasing (and maybe decreasing) costs to the borrowing library.
2. Increase prices. This is inevitable, as PDA is likely to reduce sales volume, at least in the short term, and delay payment for even those titles that are eventually sold. Thus publishers may seek to capture more revenue per copy sold with higher prices. Of course, no one likes higher prices, but the costs of academic publishing have to be borne in some way.

It's possible that we may see more of the strategy that Princeton University Press is pioneering, developing digital abridgements of many of its titles.²⁶ The complete work may be purchased by a library, but students may opt for the lower-priced abridgements instead, especially since so many monographs used in the undergraduate curriculum only have a few chapters assigned from them. Thus the high price for a complete library edition is balanced with a low price for abridged digital student editions.

3. Improve margins. As discussed above, a sale through PDA may carry a higher margin for the publisher than a sale to Amazon. Inasmuch as Amazon is now evolving into a library distributor of some size, this strategy may prove to be economically rewarding for publishers.

²⁶ <http://press.princeton.edu/blog/2011/10/18/short-takes-big-ideas-pup-unveils-new-digital-series>.

4. Participate in digital book aggregations. There are many services marketing digital book aggregations now, with more on the way. One of the designers of one such service told me that the digital book aggregation was intended to preempt PDA--that is, persuade a library to purchase an aggregation of digital books so that sales would not be lost through PDA. Whether or not that is the best motivation for developing a digital book aggregation, it is clear that some libraries have an appetite for such aggregations, which move books from the just-in-time status of PDA to the just-in-case of a firm, prospective sale.

IX. Conclusion

Whether PDA is a good thing or a bad thing depends on where you sit in the value chain. For libraries, it potentially saves money, aligns a library's collection more closely with the active research of its constituents, and makes it possible to present a much larger number of titles to students and faculty alike. For anyone using such a library, it would appear to be a good thing because of that large number of titles that have been made available. For publishers PDA is a challenge, contributing to reduced income in the short run, but potentially becoming a neutral and even a positive force. The real issue for publishers with regard to PDA is how they react to it.

It's probably best to think of PDA as one more step in a long-term process by which libraries study their operations and improve their efficiency. With the current climate being so dynamic (the dramatic rise of the ebook could not have been predicted even five years ago), it is likely that there will be a great deal of back-and-forth as publishers and libraries learn to accommodate each other's needs and goals. The most likely scenario for PDA in the future is that it becomes just one of many ways that libraries provide materials to their constituents. It will become virtually ubiquitous, and publishers' participation in such programs will likely be taken for granted.

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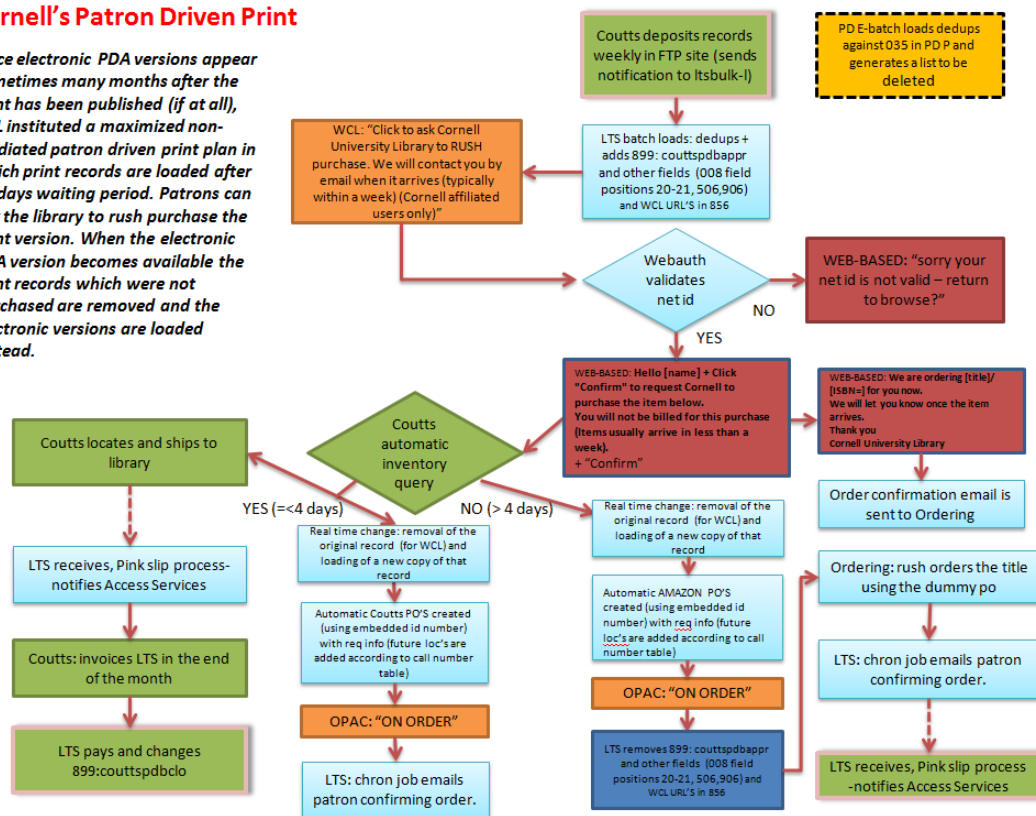
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Appendix A: PDA Workflow for the Cornell University Library

Implementing a PDA system at a library is a complex task, as it involves the integration of multiple library systems. The following illustration shows the workflow for just one aspect of the PDA system in place at Cornell, the part that manages PDA for print titles.

Cornell's Patron Driven Print

Since electronic PDA versions appear sometimes many months after the print has been published (if at all), CUL instituted a maximized non-mediated patron driven print plan in which print records are loaded after 60 days waiting period. Patrons can ask the library to rush purchase the print version. When the electronic PDA version becomes available the print records which were not purchased are removed and the electronic versions are loaded instead.



Appendix B: Publishers' Questionnaire

PDA Questionnaire for Publishers

This questionnaire is designed to solicit information from academic publishers on patron-driven acquisition (PDA) of books by libraries. The PDA project is described at the Scholarly Kitchen: <http://j.mp/qQdaDU>. In some cases I will ask to follow up with publishers by phone or email for additional information.

To keep this simple, the questionnaire was written using Microsoft Word (.doc). You can write your information and comments directly on this document. [Most respondents filled out a form online with Google Docs.] This will make the document longer, and that's okay. After you write your comments, save the document before emailing it to me. *Please rename the document, even if you just add your initials to the file name, so that the many copies of this document don't get mixed up.* Use the project email address: **hopkinspdaproject@gmail.com**. (My primary contact information is esposito@gmail.com _____.)

The information in these questionnaires will be shared only with my colleagues on the project team (Terry Ehling and Kizer Walker). The responses will be aggregated and synthesized and discussed analytically in the body of the report we will be creating. The names of your institution and yourself will not be linked to the information without your permission.

Thank you for your help. I look forward to hearing from you.

Joseph J. Esposito

Joseph J. Esposito
esposito@gmail.com

A. Contact information

1. Your name:
2. Your title:
3. The name of your institution or company:
4. Your email address:
5. Your phone number:

B. Information about your press

6. Roughly, how many NEW books do you publish every year?
7. Roughly, how many books do you have available (your total catalogue), including print, POD, and digital books? A book is considered available when someone can purchase it.

8. Do you any relationships with ebook companies (e.g., Ebrary, NetLibrary, Project Muse) that sell ebook aggregations to libraries? If so, name them all.
9. Separately from the companies cited in #8 above, do you work with any intermediaries or wholesalers to get individual copies of your books, whether print or digital, into libraries? If so, name them.
10. What percentage of your sales (expressed in dollars) goes to libraries? You may want to break this down by type. For example, you may want to report one set of figures for scholarly and reference titles, and another set for trade books.
11. How do you measure your library sales? (This may be a difficult question for some publishers. Do you reach libraries through Coutts? YBP? How do you know when your books ultimately wind up in libraries? You may write as detailed an answer as you wish.)
12. Do you sell ebooks as individual titles through Amazon, Barnes & Noble, Google Ebooks, and Apple's iBookstore? Others? Here again you may want to distinguish between scholarly and reference titles on one hand and trade books on the other.

C. Strategy and the business environment

(If you are not familiar with some of the questions in this section, just write "NA" in the blanks.)

13. Are you familiar with Patron-Driven Acquisitions (also known as Demand-driven Acquisitions)?
14. If your press's titles are involved with PDA programs, which vendors are you working with?
15. Have you made any changes to your procedures to accommodate PDA? If so, please provide specific examples.
16. What impact, if any, has PDA had on your sales?
17. Do you anticipate that PDA will have an impact on sales in the future?
18. Do you plan to take any steps in order to increase your sales to libraries? If so, how will PDA programs fit into this?
19. Do you or any of your colleagues routinely look at library catalogues to see how your books are listed there?

D. Thinking about the future

20. How would you like to see PDA evolve in the future?
21. Do you see library sales becoming a bigger or smaller portion of your overall sales in the years ahead?
22. If you could change one thing about your press's relationship with libraries, what would that be?

E. Finally . . .

23. What questions did we fail to ask? What would you most like us to know about PDA, ebooks, and library sales? You may write as much as you like.

Appendix C: Library Questionnaire

PDA Questionnaire for Libraries

This questionnaire is designed to solicit information from librarians on patron-driven acquisition (PDA) of books by libraries. The PDA project is described at the Scholarly Kitchen: <http://j.mp/qQdaDU>. The primary focus of the project is to help academic publishers, university presses in particular, develop their programs with PDA in mind. In some cases I will ask to follow up with respondents by phone or email for additional information.

To keep this simple, the questionnaire was written using Microsoft Word (.doc). [Most respondents filled out a form online in Google Docs.] You can write your information and comments directly on this document. This will make the document longer, and that's okay. After you write your comments, save the document before emailing it to me. *Please rename the document, even if you just add your initials to the file name, so that the many copies of this document don't get mixed up.* Use the project email address: hopkinspdaproject@gmail.com. My primary contact information is esposito@gmail.com; _____)

The information in these questionnaires will be shared only with my colleagues on the project team (Terry Ehling and Kizer Walker). The responses will be aggregated and synthesized and discussed analytically in the body of the report we will be creating. The names of your institution and yourself will not be linked to the information without your permission.

Thank you for your help. I look forward to hearing from you.

Joseph J. Esposito
esposito@gmail.com

A. Contact information

1. Your name:
2. Your title:
3. The name of your institution:
4. Your email address:
5. Your phone number:

B. Status of PDA at your institution

6. Do you already have a PDA program in place? If so, how long has the program existed?
7. If you do not have a PDA program in place, are you actively planning to add one?
8. What was your total budget for library collections in the last full year? What percentage of the budget was spent on print monographs? What percentage was spent on ebooks (including aggregations, PDA, etc.)
9. If you have a PDA program, what percentage of the total expenditure on print and electronic monographs went to PDA in the last full fiscal year?
10. Is your current or planned PDA program for ebooks only, print only, or for both?
11. How do you determine which books are eligible for PDA and which are outside the library's proper purview? You may write as long a response as you wish.
12. If you have a PDA project in progress, have you consulted with faculty to get their view of what they expect from such a program? Once again, you may write as much as you wish.

C. Vendor Issues

13. List all vendors you work with for PDA.
14. Do you have any direct relationships with publishers for PDA? If so, which publishers?
15. What is the source of your OPAC metadata for titles that are eligible for PDA? Do you handle PDA metadata any differently from other metadata?
16. Do you purchase titles for PDA from one source and then place the order from another entity? For example, do you purchase a title from Ebrary, but place the order through YBP?
17. Are there any particular programs from vendors for PDA that you particularly like?

D. Future and Strategic Issues (Some of these items are open-ended. Write as much or as little as you like.)

18. Do you believe you are likely to increase or decrease the size of your PDA book budget over the next 3-5 years?
19. Are you confident that titles listed for PDA will still be commercially available at some future point when a patron requests them? If you are not confident, what should a publisher do to make you so?
20. Are you now or are you planning to make it possible for patrons to purchase books on their own account through your catalogue? For example, if a book is not in your collection and is not available for PDA, would you create a link to a commercial site where the patron can purchase the book using his or her own funds?
21. What should university presses know about PDA? What would you like them to do to assist you with your program?

E. Open Question

22. Please let me know what other questions I should have asked. Also, any comments on PDA, its practice and prospects, will be appreciated.

Appendix D: Participating Institutions

Institution	Library Participation	Press Participation	Vendors
1 Agnes Scott College	✓		
2 Akron, University of		✓	
3 Alberta, University of		✓	
4 American Psychiatric Association		✓	
5 American University of Cairo, Egypt	✓		
6 Amsterdam University		✓	
7 Baker College	✓		
8 Benedictine University	✓		
9 British Columbia, University of		✓	
10 Central Florida, University of	✓		
11 Colorado, University of		✓	
12 Columbia University	✓	✓	
13 Concordia University Texas	✓		
14 Cornell University	✓	✓	
15 Denver, University of	✓		
16 Duke University	✓		
17 EBL			✓
18 Ebrary			✓
19 EBSCO			✓
20 Elizabethtown College	✓		
21 Ferris State University	✓		
22 Florida, University of		✓	
23 Grand Valley State University	✓		
24 Harvard University		✓	
25 Haverford College	✓		
26 Illinois, University of	✓	✓	
27 Ingram			✓
28 Johns Hopkins University	✓	✓	
29 JSTOR			✓
30 Lake Forest College	✓		
31 Lenoir-Rhyne University	✓		
32 Liberty University	✓		
33 Manitoba, University of	✓	✓	
34 Minnesota, University of		✓	
35 Mississippi, University of		✓	
36 MIT		✓	

37	Mount Holyoke College	✓	
	MRC National Institute for Medical		
38	Research	✓	
39	NCSU Libraries	✓	
40	Nebraska, University of		✓
41	New York University	✓	✓
	North Carolina, University of		
42	(Asheville)	✓	
	North Carolina, University of (Chapel		
43	Hill)		✓
44	North Texas, University of		✓
45	Northwest Christian University	✓	
46	Northwestern College	✓	
47	Oberlin College	✓	
48	Occidental College	✓	
49	Pennsylvania State University	✓	✓
50	Pennsylvania, University of		✓
51	Pfeiffer University	✓	
52	Princeton University		✓
53	Rutgers University		✓
54	Southern California, University of	✓	
55	St. Cloud State University	✓	
56	St. Olaf College	✓	
57	SUNY at Geneseo	✓	
58	Temple University	✓	✓
59	The Ohio State University	✓	
60	The University of Chicago	✓	✓
61	Trinity University	✓	
62	Washington University in St. Louis	✓	
63	Washington, University of		✓
64	Wayne State University		✓
65	Wellesley College	✓	