

The relationship between university presses, e-book vendors, and academic libraries: A platform theory analysis

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Abstract

University presses, as one of the major content providers in the scholarly e-book market, especially in humanities and social sciences (HSS), play a critical role in the production and distribution of new knowledge and culture. We investigate the relations among university presses, academic libraries, and e-book vendors, by examining university presses' perceptions of academic libraries and e-book vendors, and presses' perceptions of themselves and the university press community. Findings are drawn from one-on-one interviews with 19 participants from 18 different university presses in the United States during 2020–2021. We observe a market structure for HSS e-books where most presses were satisfied with Big Four e-book vendors, including Project MUSE, EBSCO, ProQuest, and JSTOR, and lacked strong incentives to search for new e-book vendors. We find that most presses often treat libraries, including the one from the same institution, as their customers with limited interactions; findings also show university presses' varied self-imaging, along with a shared perception about the collegiality of the university press community. We then explore the question of why the market is dominated by the Big Four through the theoretical lens developed in platform literature, and further examine the factors contributing to the low communication between university presses and academic libraries related to e-book distribution.

Keywords

Academic libraries, digital platform, e-books, market consolidation, university presses, vendors

Introduction

University presses (UPs) play a key role in generating and disseminating knowledge through publishing academic books, particularly in the areas of humanities and social sciences (HSS). In 2022, the Association of University Presses (AUP) reported 100 US-based member presses located at a university or college, and publication of 12,000 book titles annually from all its 158 members (Association of University Presses, 2022). Meanwhile, e-books have gained popularity among academic library users, surging in popularity during the COVID pandemic as libraries sought to support remote access (Frederick and Wolff-Eisenberg, 2020). Many UPs now provide many titles as e-books, and academic libraries are among the major consumers of the e-books published by UPs. Based on a survey of AUP members, 46 out of 49 participating UPs provided e-books to libraries (Association of University Presses, 2019).

Many have expressed concern that consolidations in the publishing industry in general, or amongst e-book vendors in particular, could have negative consequences for the production and distribution of knowledge (Jubb, 2017; Lynch, 2010; Watkinson, 2016a, 2018). Importantly, UPs heavily rely on e-book vendors, like EBSCO or Project MUSE, to deliver their e-books to libraries because many UPs do not have the service or technical infrastructure to sell directly to libraries.¹ E-book vendors provide important sales-related services for both UPs and libraries, and e-book vendor platforms provide publishers an easy means to distribute their e-books. The platforms often aggregate

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content from many UPs, and through that aggregation provide academic libraries a convenient means to offer a variety of titles through one service agreement.² But, consolidation has occurred among commercial e-book vendors, reducing choices and arguably increasing barriers to entry to the HSS e-book vendor field.

Due to the important roles of e-book vendors in the HSS e-book market, exploring the relationships among UPs, libraries and e-book vendors, and any potential asymmetries in power, is critical to helping practitioners and researchers build a better understanding of the HSS e-book publishing industry. This paper explores the relationships that have developed between UPs, libraries and e-book vendors, and the role of e-book vendors' services and distribution platforms in encouraging or discouraging competition in the e-book vendor marketplace. We draw on data from interviews with HSS UPs staff about their relationships with the e-book vendors that carry their books, and the academic libraries that purchase access to their books. We also report on UPs' perceptions of the larger UP community in the United States. We use concepts developed in platform literatures to help us better understand the way e-book vendor services and platforms encourage or discourage competition among e-book vendors.

Through our analysis, we point to how e-book vendor management efficiencies, and their technical distribution platforms' aggregation and matching features, may discourage the growth of smaller e-book vendors, or the entrance of new e-book vendors into the marketplace. Our results show a high level of satisfaction amongst UPs for their current relationship with e-book vendors, especially "the Big 4"—Project MUSE, EBSCO, ProQuest, and JSTOR, and only a modest interest among presses in exploring relationships with new e-book vendors. Our findings also show how co-location of UPs within academic libraries does little to change the structure of the relationship between UPs, libraries, and e-book vendors.

Background

Platforms concepts

The platform literature (including studies from economics, political sciences, management, and marketing) examines relationships as two-sided markets consisting of sellers and buyers connected through platform(s). Platforms act as "matching devices" by providing "autonomy for agents on both sides of the market to meet and define trade" (Jullien and Sand-Zantman, 2021: 2).

Scholars use the term "platform" to not only refer to the technical infrastructure of the matching devices, but also to the companies, and their services, that facilitate interactions between both sides of the market through technical infrastructure. Other scholars tend to use different terms like "the hub of platform" to distinguish the company that

sponsors a platform from the technical infrastructure itself. The company, or platform hub, is a key player in the overall ecosystem of the technical platform, as the platform hub, "has both incentive and ability to exert considerable influence to increase both the overall value created by the ecosystem and its own value capture" (Rietveld and Schilling, 2021: 1545). In this paper, we use the term "platform" more broadly to include both e-book vendor companies and their services, and the technical infrastructure of the e-book platform that distributes e-books. Further, some literature use the term "complementor" referring to the sellers while "consumer" refers to the buyers. In our case the complementors are the UPs and the consumers are academic library customers.

Another key concept used in the platform literature is network effect. This refers to the idea that a platform generates more value when it has more participants using it (Blackman and Bosc, 2015; Evans and Schmalensee, 2014). Within our context, the more UPs that use a particular platform, the more valuable that platform might be for libraries. Conversely, the more libraries subscribe to a platform, the more valuable the platform is for UPs.

Jullien and Sand-Zantman (2021) explain that platform concentration/monopolization is caused by platform network effects. Concerned about monopolization, they identify three elements that would prevent a market from "tipping" into a monopoly: multi-homing, platform differentiation, and interoperability among platforms. In a two-sided market, users' multi-homing refers to the situation where users on one side of the platform choose to connect with more than one platform in order to interact with users on the other side of the platform. Platform differentiation refers to how differentiation in services among platforms enables the survival of multiple platforms. Finally, interoperability amongst platforms is generally seen as intensifying competition.

HSS E-book marketplace

E-book vendors work with both UPs and libraries as clients and facilitate the circulation of e-books between UPs and libraries. E-book vendors negotiate a discounted price with UPs to acquire e-book content, and then license access to that content to libraries. Important for this paper, e-book vendors' distribution platforms provide the technological infrastructure to sell and distribute access to e-books. E-book distribution platforms are expensive to create and maintain, and accordingly, many UPs instead rely on e-book vendors' sales services and their platforms to distribute e-books to library clients (Jubb, 2017). As Jubb (2017) describes, while larger UPs may have 30 or more agents to sell their books, UPs with smaller staff may rely on e-book vendors for advertising and distribution. E-book vendors may also provide metadata assistance to UPs clients (Fisher and Jubb, 2016). The move to e-books

has increased the importance of metadata, but production of quality metadata, and the distinct types of metadata requested by e-book vendors (ONIX) and libraries (MARC), may be difficult for smaller UPs (Charlip, 2016; Fisher and Jubb, 2016; Vassallo, 2016). E-book vendors also provide a value add for libraries aggregating content from multiple UPs onto one distribution platform, thereby providing an easy means for libraries to acquire diverse content without having to negotiate with each publisher individually (Brooks, 2013).

Academic e-book titles are published by both UPs and some commercial presses. Some commercial presses received a surge of investment in the early 2000s that supported development of more sophisticated e-book platforms, and which allowed them to more aggressively court academic authors. This reduced UPs' prior dominance of scholarly book publishing (Greco and Wharton, 2010). In contrast, UPs have faced reductions in financial support from universities (Phillips, 2010).

The move to e-books has been financially challenging for UPs. Sales of e-books tend to reduce print sales. Further, because e-book vendors purchase at a discounted rate, sales to e-book vendors return less profit for UPs. As Watkinson (2016a) reported, even under Project MUSE, which provided one of the best returns, UPs only get 1/5 of retail price of front list for each sale to e-book vendors. As noted earlier, few university presses sell directly to libraries: Greco (2020: 100) found that direct-to-library sales of e-books was small, with the largest (Cambridge) at only \$217,904 annually. Further, e-book sales, especially sales to e-book vendors, are not as stable as print sales (Jubb, 2017). Another report describes that while e-book revenues are projected to rise, they might not make up for concurrent declines in print revenues (Greco and Wharton, 2010).

The need for more investment in IT platforms, combined with the smaller profits generated from e-books, have encouraged consolidation within publishing and among commercial e-book vendors (Jubb, 2017). Specifically, ProQuest (with its e-book platform Ebook Central), acquired ebrary in 2011, EBL in 2013, and MyiLibrary in 2015. Similarly, EBSCO (with its platform EBSCO e-books) acquired NetLibrary in 2010. E-book vendor platforms our participants used are listed in the findings. The consolidation among commercial e-book vendors has arguably raised barriers to entry as it is more difficult for new entrants to provide the same toolset and level of data and product integrations that the better resourced commercial e-book vendors can support (SPARC, 2021). For example, libraries expect that an e-book vendor platform should link well with library search systems, provide acquisition and collection management tools, facilitate billing, support easy transfer of bibliographic data, provide usage data, and support user driven acquisition models (Jubb, 2017). Importantly, some UPs also serve as e-book vendors, providing access to their own titles, and the titles of other UPs, to libraries (Jubb, 2017).

Academic libraries vary in terms of their capacity to work with UPs. Smaller libraries with limited ability to manage many different relationships may prioritize working with e-book vendors that aggregate e-books from many publishers. Libraries also vary in degree to which they require specific book titles. Some libraries have a need for specific titles or book series, but other libraries may be satisfied with packages of titles that cover general topical areas. Because of this, e-book vendors give libraries the option to make selections at the bundle level rather than the title level, and selection now considers the attributes at the book bundle level as well as attributes of the e-book vendor's platform such as patron driven acquisition, or DRM options (Greco, 2020).

E-books grew in popularity among academic libraries throughout the 2000s, but surged in popularity during the COVID pandemic as libraries sought to support remote access (Frederick and Wolff-Eisenberg, 2020). Many UPs and e-book vendors provided free access during the early COVID periods, further encouraging use (Brown, 2020; Watkinson, 2021).

In summary, e-book vendors can smooth the distribution path between UPs and libraries and encourage more e-book transactions and use (Li, 2022). E-book vendor services and platforms can reduce acquisition and management costs for libraries (Fisher and Jubb, 2016; Fulkerson, 2022). But the consolidation of e-books onto a limited number of e-book vendor platforms, and the further consolidation of e-book vendors, raises concerns. Reduction in the number of e-book vendors reduces UPs' choices in how to distribute books and reduces library choices for how they might acquire e-books.

Research methods

This paper focuses on examining the relationships among the key stakeholders in the HSS e-book publishing industry, including UPs as sellers, libraries as consumers, and e-book vendors as the providers of platforms, which will help us better understand the two-sided market characteristics of e-book platforms. Our research design allowed us to investigate the relationships from the perspectives of UPs. Particularly, this paper addresses the following questions with data from interviews with university press staff:

- (1) What are the university presses' perceptions about e-book vendors?
- (2) What are the university presses' perceptions about libraries?
- (3) What are the university presses' perceptions about themselves and the university press community?

The first author conducted one-on-one interviews with 19 directors/managers from 18 different university presses

Table 1. E-book vendors worked with participating university presses.

E-book vendor	Number of participating university presses using the vendor
Project muse (non-for-profit, Big Four)	18
EBSCO (commercial, Big Four)	17
ProQuest (commercial, Big Four)	17
JSTOR (non-for-profit, Big Four)	14
Press hosted books through own ebook platform	3
American council of learned societies humanities Ebook collection (ACLS HEB) (non-for-profit)	3
De Gruyter (commercial)	3
University press scholarship online (UPSO) (non-for-profit)	3
Gale (formerly Questia) (commercial)	2

from the AUP list from February 2020 to June 2021. Participants were recruited via snowball sampling and purposive sampling with the intent to cover presses with different sized portfolios. All participants held management positions such as marketing or sales manager, or director of the press. Most participants had extensive publishing industry experience, and 16 of them (84.2%) had over 15 years of experience in publishing. More than half of our presses (55.6%) were in medium size, 4 presses (22.2%) in small size, 2 presses (11.1%) as very small, while 2 (11.1%) as large presses. We followed the categories used in the ALPSP survey of book/e-book publishing (Cox, 2010), which includes four categories: (1) very small: publishing under 20 titles; (2) small: 20–49 titles; (3) medium: 50–200 titles; and (4) large: over 200 titles. We used the average number of titles published annually in the most recent 3 years to determine size. Interviews were conducted by phone or videoconference, but one was exclusively via email. All but one interview was transcribed using the NVivo Transcription service and all transcripts were later corrected by the first author.

We employed a mixed approach to data analysis. Analysis was driven by the research questions about participants' perceptions of the e-book industry. First, the first author grouped the transcripts based on different types of stakeholders (e-book vendor, libraries, and presses), which provided a systematic way to organize and identify participants' opinions. Within each group, the first author used inductive coding to capture participants' perceptions naturally merged from their transcripts by using NVivo12 to aid in organizing the transcripts and the coding. After the initial coding, the first author conducted several rounds of further coding, focusing on grouping the codes into topics. Along with their growing understanding of the data, the first author used memos provided in NVivo to keep track of the interpretation of the data, the interrelationships among different codes, and new ideas for further analysis, which provided a solid foundation for developing themes of the transcripts.

Findings

Perceptions about relationships with current e-book vendors

Most university presses reported using a core group of e-book vendors identified as the “Big Four,” while a much smaller number of presses hosted their own e-book platforms, or worked with other e-book vendors (Zhang, 2022), as shown in Table 1.

This data show that the “Big Four” e-book vendors are dominant within this study's sample of university presses. Of the Big Four, two are commercial (EBSCO, ProQuest) and two are non-for-profit (Project Muse, JSTOR). The less common e-book vendors also include both non-for-profit and commercial vendors. The ACLS HEB is a foundation supported collaboration between learned societies and a university library started in 2002. UPSO is affiliated with the longstanding Oxford University Press. Both De Gruyter and Gale/Cengage are commercial e-book vendors. Recent decades have seen numerous consolidations among e-book vendors, and in 2020 the e-book vendor Questia, mentioned by two participants, was purchased by Gale, which is a branch of Cengage.

Many participants defined their relationship with e-book vendors using the word “contractual.” This was often paired with positive words, like “smooth” and “good experience.” Participants described positive characteristics of relationships with e-book vendors including (1) effective and transparent communication, especially a willingness to explain why specific access models are available or not; (2) willingness to work with presses to meet their needs; and (3) ability to deliver consistent revenue streams.

Several participants used the idea of interdependence to describe the relations between presses and e-book vendors. One interviewee defined the press-vendor relationship as “cooperation,” where their press competed with e-book vendors while it also relied on e-book vendors in delivering e-books to libraries. E-book vendors “needed” content

from presses for their business operations. As one interviewee explained: “because it is our content. . . it’s our choice to send our content.” Meanwhile, presses needed e-book vendors to distribute their e-books to the library market. Even presses that had their own distribution platforms still “needed” the e-book vendors to distribute to libraries their platforms did not reach. One interviewee described how although presses had previously had more power in the relationship and could get better contract terms because e-book vendors “desperately wanted to break into the [academic library] e-book market, so they needed content to offer.” Later, as several e-book vendors gradually established their dominance in the market, e-book vendors were “all trying to wring as much as they can out of our content and not pay us as much as we would like.”

Relationships with non-for-profit and commercial e-book vendors differed. Some participants used words like “friend” or “partner” to depict their relationship with the non-for-profit e-book vendors JSTOR and Project MUSE. In comparison, they described their relations with commercial e-book vendors EBSCO and ProQuest as “just like doing business.” These participants believed Project MUSE and JSTOR listened more because of their histories with the university press community, as Project MUSE grew out of John Hopkins University Press, and JSTOR began as a project to digitize scholarly journals. Further, one participant pointed out that Project MUSE has hosted annual symposiums in the past a few years with all its publishers, mainly university presses, to update them on the academic library market and any developments in its programs, which made that participant feel Project MUSE “listen much more to what university presses have to say”.

Perceptions about potential new e-book vendors

Given the ongoing consolidations among e-book vendors, we examined university presses’ perceptions about potential new e-book vendors, consolidation among e-book vendors, and their current e-book vendors. We first asked our participants a hypothetical question to understand their attitudes toward potential new vendors. Some answered that they were not interested in exploring new e-book vendors, some were open to new e-book vendors, and a few were actively seeking out new e-book vendors.

Five participants claimed that their presses did not plan to work with any new e-book vendors in the near future. They explained that they would only consider a new e-book vendor if the relationship could bring more revenues to the press with minimum extra work; however, they believed the cost entailed in forming such a new partnership would be higher than any possible additional revenue. They believed the comprehensive coverage of the

academic library market by current e-book vendors would limit the ability of a new vendor to make a profit and be viable. As one participant put, “we don’t have a sense that we are missing any of the libraries.” The presses have already established “really good market representation” through current e-book vendors, so a new e-book vendor could only bring a “very tiny” new revenue stream to the presses. One participant described how new “vendors were showing up and disappearing” and concerns about lack of viability would discourage presses to work with new e-book vendors.

Second, participants emphasized the amount of work and resources required to develop a relationship with a new e-book vendor. One participant explained “is not just a matter of saying: ‘ok, here are the files, send us some money’. There is a lot more to it in terms of cost.” This would include creating metadata in appropriate format, transferring book files, tracking payment, or even considering the exchange rate when dealing with the international market (Zhang, 2022). This could be a real burden for a press lacking resources to use field standard systems. For instance, a smaller press participant explained how they were still using Excel rather than ONIX as “the old-fashioned method” to provide book information to e-book vendors, where ONIX is standard format for publishers to share information about their books with vendors/distributors/other publishers. Because they did not use ONIX, it would be even more time-consuming for this press to add an e-book vendor.

Only two participants claimed that their presses were actively seeking new e-book vendors in the academic library market. They specified that they were looking for additional e-book vendor(s) for their course adoption books because their current e-book vendors did not have good course adoption book models. They explained that the usage pattern for course adoption books is different from regular academic books. A course adoption book would be purchased by multiple students in the same class, while a regular academic book is purchased based on individual interests. Therefore, once the press realized a book has been adopted by a course, the press has a strong incentive to pull it back from the rest of regular academic books and “sell it in a different way.” The current e-book vendors, according to the two participants, had thus far failed to develop a different business/access model for course books that the presses felt “comfortable” with. Therefore, these presses were actively searching for new e-book vendors that could provide a solution.

About half the participants fell between the two ends of the spectrum: they were not disinterested, but they were not actively looking for new e-book vendors. Instead, those participants took a passive attitude by claiming that their presses were “open to” or “love to learn about” new

e-book vendors. They assumed a new e-book vendor should reach out to them, and then they would then consider whether or not to work with this new vendor. As one participant explained, their presses did “not tend to rush in” with new e-book vendors. The factors that might affect their willingness to work with a new e-book vendor are similar to the factors participants used to evaluate a current e-book vendor reported in a previous paper (Zhang, 2022), including (1) whether the new e-book vendors could bring the press’s books to a new geographic market, like Asia or Australia; (2) their peer presses’ comments and feedback about this new e-book vendor; and (3) whether the new e-book vendor could follow the press’s established procedures or protocols for doing business, especially whether this new vendors could work with the press’s current digital distribution service provider, like Ingram’s CoreSource Plus.

Perceptions about e-book vendor consolidations

All participants were aware of consolidations among e-book vendors, but participants held different attitudes toward consolidation. Some explained that consolidation would not affect their work because they were already working with the dominant e-book vendor(s), their e-books had solid coverage in the academic library market and thus, it would not make any significant difference if more consolidation occurred. Other participants stated the belief that consolidation was an unavoidable trend in the scholarly publishing industry. As one participant described,

First of all, this M&A activity is inevitable. There’s no question about it. It will continue. I think I feel neutral about this because I understand that this is business and you can’t get scale economies when you’re with content and technology unless you have a significant amount of it so that you can create network effects. So it’s entirely understandable that large commercial players need to buy up smaller commercial players acquisitions or merge with pure commercial entities. And that will continue to happen.

Three participants expressed concerns about the mergers among e-book vendors, with one using the phrase “not healthy” to describe mergers. Participants’ main concerns were that mergers would negatively impact their distribution capacities: fewer e-book vendors means fewer options for presses to distribute their books to libraries. As one participant pointed out, presses might lose access to some libraries, especially smaller ones that cannot afford to work with big e-book vendors. Another concern, expressed by only one participant, was the e-book vendors’ consolidation could also “tamp down diversity in publishing in terms of the types of books that are published.”

Two participants emphasized the benefits their presses obtained from mergers. As they explained, fewer e-book vendors reduced the challenges and workload when

dealing with different e-book vendors. Thus, consolidation among e-book vendors could “streamline” presses’ activities, and eventually reduce the amount of work for presses to distribute their books.

Additionally, one participant expressed “uncertainty” about the effects of mergers among e-book vendors. This interviewee acknowledged that mergers would continue to occur, and questioned how long the current Big Four vendors could maintain their dominance in the market. Particularly, this interviewee mentioned Clarivate’s acquisition of ProQuest, and concluded it as “I don’t know whether this is a good thing or a bad thing.”

Perceptions of academic libraries

Most university press participants used “customer” to describe their relations with libraries. They further discussed libraries’ e-book purchasing patterns, the difference between direct and mediated relations with libraries, and the unique situation of presses located in academic libraries. Press participants acknowledged that different libraries choose different e-book vendors because of varying needs, and it would be difficult for any single e-book vendor to successfully serve all libraries. Two participants used Project MUSE as an example to demonstrate the difficulty for one e-book vendor to serve all libraries’ needs. The Project MUSE e-book collection was developed by a group of university presses who perceived that libraries wanted one source for e-books. As one participant described, “what we’re hearing from libraries is libraries want one place to go to get our books. So we should build that one place.” But they found that even Project MUSE had difficulty satisfying all different libraries’ needs. The participant explained “But Library X wants it to be in place A; Library Y wants it to be in place B.”

Participants pointed out two factors that would affect libraries’ selection of e-book vendors, including a library’s budget and the desire to optimize workflow. First, libraries with limited budgets might only have resources to work with one e-book vendor while other libraries might have the budget to work with multiple e-book vendors. Second, according to one participant, some libraries tended to only work with certain e-book vendors in order to maximize efficiency of the libraries’ workflow. Other libraries who were more willing to support multiple acquisition approaches would be more likely to work with multiple e-book vendors.

Three of the 18 presses participating in this study had their own e-book distribution platforms, acted as e-book vendors, and provided e-books directly to libraries. The remaining 15 presses worked with e-book vendors to deliver their e-books to libraries. We refer to the former as having a direct customer relation and the later as having a mediated customer relation. Participants described several differences between direct and mediated relationships.

As three participants described, direct customer relations with libraries required more work because the presses had to negotiate with every library customer. On the other hand, the direct customer relationship provided a channel to “learn a lot about what [libraries] like and what they don’t like,” which was impossible before they launched their own e-book platforms.

Presses using vendor-mediated customer relations often did not interact with libraries. As one participant described, “we’re a step back in the supply chain. We’re not really interfacing with customers directly in the same way that we kind of are with our print books.” Some participants discussed the limitations in mutual understanding inherent in this mediated relation. Press participants felt they did not really know their library customers, their processes, and their needs. They also believed that libraries similarly did not really understand university presses. Multiple participants described libraries as not understanding the cost of e-book production. This lack of understanding led libraries to question the e-book pricing. They also believed libraries did not understand the realities of press business models, and this led libraries to ask for things like open access or multi-user access, that presses could not offer, or felt “a little leery about.” As one participant described:

I think institutional libraries can be a little starry-eyed about open access. I wish they were a little more aware of the costs that we put into a book. [. . .] The costs of producing a book are not insignificant. We produce books often at a loss. Or if they make back, it’s over the long term, over three years or more. So we just hope that libraries are sympathetic to that.

Another interviewee talked about how libraries tended to treat university presses as the same as commercial publishers, and unfairly blame them for the increasing price of e-resources. This interviewee explained:

It’s a little bit sensitive whenever librarians lump all publishers together in terms of, you know, the rising cost of subscriptions. But it’s really the giant global commercial publishers who are driving that increase, like, of course, Elsevier and Taylor & Francis and others. So I’m very quick to always say: “you mean commercial academic publishers.” And absolutely, there’s a distinction to be made.

The co-location of university presses and academic libraries at the same institution did not necessarily mean that they worked closely together, and participants described different types of press-library relationships within their institution. Five participants referred to joint projects between a co-located press and the library, including projects in the areas of institutional repositories, open access e-books, creating e-book MARC records, and open educational resources (OER). Two participants, both from presses that had their own e-book platforms, talked about how their libraries helped promote the press e-book

platforms in the academic library community, providing the press with “the access to the network of libraries.” One of them further explained that the library could help the press to obtain “competitive intelligence” in the e-book academic library market. “We have an opportunity to understand what other publishers are doing with their e-book collections because the library [within the same university] buys those collections. So we get quite a lot of information about what other platforms and collections are doing right and not doing right.” In contrast, two press participants claimed they did not establish any special partnerships with their co-located libraries, and that these libraries were just “a customer of ours.”

University presses’ self-perceptions

Six participants identified their own presses as innovators in the e-book academic library market. They believed their presses were either among the first few presses that provided e-books to libraries, or that their presses were open to experimenting with different business models. Participants used words like “pioneer,” “innovator,” “fore-runner,” “trendsetter,” or “vanguard” to describe themselves. One participant described their press with, “I think there’s always been a culture of wanting to try out new things.” These participants were not necessarily from large presses: two of them worked for a small or medium sized press. In contrast, other participants did not see their presses as being highly influential or making decisions that affected e-book vendors’ businesses. As one explained, “there really aren’t people at EBSCO or ProQuest, who are going to bed at night anxious about [us].” This participant explained that their press took a wait-and-see approach to figure out the business models that worked for other presses, rather than being the first to try new things.

More than half of the participants emphasized the mission-driven characteristics of their presses and how the university presses’ mission to disseminate and preserve scholarly works distinguishes the university presses from commercial publishers. For instance, one participant claimed that the mission pushed their press to provide certain e-book features desired by academic libraries such as DRM-free books, multi-use access, and interlibrary loan. Another participant explained the major difference between university presses and commercial publishers as “we will publish books we know we will lose money on, and a commercial publisher would never do that.”

Another participant distinguished between presses supported by endowments and those without endowments. “Some university presses have a large endowment that they get every year from their parent institutions. That takes the pressure off. We, unfortunately, are a self-sustaining press. So in order to kind of continue to support all of our publishing output, we need to basically break even every year. And so the reality is that as our markets change

and the library market, I think is a great example of that, we need to find ways to keep our revenues at a steady, if not growing pace.”

Almost all participants described a sense of community when talking about the relationship with other university presses. They often used words like “collegial,” “sharing,” “collaborative,” “supportive,” or “very close-knit” to describe the university press community. This community, according to our participants, allowed them to freely share information, especially about e-book vendors or platforms, and to learn from each other’s experiences. Many participants explained the sense of “camaraderie and support” among university presses stemmed from the non-profit nature of these presses, which allowed them to treat each other as members of a community rather than competitors. As one participant described, the shared mission among university presses made them “more like an academic society where academics from all sorts of colleges will come together and talk about their projects.” Further, more than half of our participants mentioned the important role of Association of University Presses (AUPresses) in facilitating the sharing community, AUPresses provided communications channels and events to facilitate sharing knowledge and relationship building. About a third of participants identified areas of competition among university presses, like competing for authors or for library acquisition dollars if presses publish books in similar fields. But, they emphasized that such competition would not change the collegial nature of the university press community. As one participant put, “We are competing with [X] and [Y] presses all the time. But that doesn’t make us any less collegial towards them.”

In contrast, several participants who had previously worked for commercial publishers, described the relationships among commercial publishers as “totally different,” where commercial publishers did not share any “pooled resources,” and they did not “tell their competitors anything.” Like one participant claimed, “there isn’t a space for like Routledge and Elsevier and Wiley to go sit down and have a panel, where three of them say like here’s the problems with e-books that we’re facing.”

Discussion

The interviews with UPs staff summarized above describe the UPs’ staff perceptions of the e-book vendor and academic library stakeholders, and the structure of the market—including power differentials and communications flows amongst the stakeholders. Their perceptions illuminate how the e-book vendors (platform hub) and their technical infrastructures’ aggregation and matching features, make use of the e-book vendor platform very attractive; how their close relationships might discourage new entrants. The next sections further explore the dominance of the “Big Four” e-book vendors and the low communications between UPs and libraries.

Dominance of the Big Four

The findings on UPs’ staff attitudes suggest that growth for the less dominant e-book vendors, or the entrance of entirely new e-book vendors, will face many challenges. Interviews showed that UPs were largely satisfied in their relationship with current e-book vendors (mostly the Big Four). While they were passively open to a proposal from a new e-book vendor, it was unclear that the costs of developing and maintaining a new relationship would be worth the potential increased sales. Moreover, only a few UPs in this study expressed concerns about consolidation among e-book vendors, despite critiques of this consolidation in the professional literature (Jubb, 2017; Lynch, 2010; Watkinson, 2016a).

Platform theory concepts help explain the factors that may encourage UPs’ satisfaction with the current dominant e-book vendors, and also explain factors that might promote growth of the less dominant e-book vendors. In the following section, we link Jullien and Sand-Zantman’s (2021) concepts on platform monopolization to our findings. We discuss how the presence and absence of these three elements—multi-homing, platform differentiation, and interoperability among platforms—may affect consolidations in the e-book vendor market.

Multi-homing. In a two-sided market, users’ multi-homing refers to the situation where users on one side of the platform choose to connect with more than one platform in order to interact with users on the other side of the platform. In our case, UPs interact with academic libraries through e-book vendor platforms. Multi-homing could allow UPs to contract with multiple e-book vendors to serve their books, and it could allow libraries to contract with multiple e-book vendors to obtain e-books. UPs do sometimes adopt a multi-homing strategy by providing their e-books to multiple, rather than just one e-book vendor. This discourages the e-book market from concentrating to only one e-book vendor. Jullien and Sand-Zantman (2021) point out that multi-homing allows users to “benefit from large network effects,” which then “can mitigate tipping” (p. 3). On the other hand, UPs also perceive that working with multiple e-book vendors raises costs. Working with multiple e-book vendors is especially a burden for smaller presses with limited resources (Jubb, 2017; Wiersma and Tovstiadi, 2017). Presses often need to evaluate whether the revenues they might receive from an additional e-book vendor could compensate for the extra work they put to establish and maintain that relationship. Different e-book vendors may have different workflow requirements and need different metadata formats.

On the other side of the relationship, multi-homing also refers to libraries contracting with multiple e-book vendors to obtain e-books. UPs participants recognized that libraries generally use a mix of acquisition methods to

acquire e-books from multiple e-book vendors under different access models (albeit with frustrations brought by managing multiple e-book vendors). Libraries have heterogeneous selection criteria to make their e-book selection; and the fact that different libraries have different sets of criteria with varied priorities allows differentiation among e-book vendors (Novak et al., 2020; Zhang, 2019). For instance, one library purchases e-books from Project MUSE as it provides a multi-user access model; meanwhile, this library also purchases e-books from ProQuest, as it has the latest titles published by a core press. On the other hand, the factors that discourage library multi-homing include flat library budgets that limit libraries' ability to contract with more vendors, and the simplicity of workflows associated with working with fewer e-book vendors. In summary, multi-homing occurs among UPs and libraries, but there are costs to multi-homing for both, and this limits the number of relationships that UPs and libraries may want to develop and maintain.

Differentiation among e-book vendors. Jullien and Sand-Zantman (2021) point out that platforms (both the company and the technical infrastructure) provide services to either one side or both sides of the platform, and differentiation in services among platforms enables the survival of multiple platforms. In the e-book market, e-book vendors differentiate themselves to UPs through services. For example, e-book vendors may vary in what percentage of their revenues they provide back to the press. Further, e-book vendors may offer to pay a larger or smaller percent of the list price of the e-book in order to include it in their package. And, as noted above, e-book vendors vary in the access models they can provide for an e-book (i.e., single vs multi-user, DRM free). We found that UPs' dissatisfaction with e-book vendors' pricing and access terms are the two main reasons for UPs not choosing an e-book vendor (Zhang, 2022). Another subtle differentiation among e-book vendors is their relationship with UPs. As described in the findings, UPs participants perceived some e-book vendors as "friends" or "partners" while other relationships were strictly contractual. These differentiations encourage UPs' multi-homing, which in turn, could encourage the growth of less dominant e-book vendors.

E-book vendors provide differentiated services to libraries in terms of titles in their packages, pricing, access model, DRMs, other license terms, and acquisition models such as PDA. Differentiation among services allows e-book vendors to attract different groups of libraries with unique demands and price points. E-book vendors also allow for different access models to e-books, like unlimited multi-user access or single-use access, which not only affects libraries' selection of e-book vendors, but also affects UPs' willingness to supply their titles to e-book vendors. For instance, JSTOR or Project MUSE are especially attractive to libraries that place higher priority to

DRM-free titles, while EBSCO or ProQuest are important for libraries that prefer more comprehensive coverage of multiple disciplines. Thus, the differentiated services provided to libraries enhance the multi-homing on the library side, and could also encourage the growth of less dominant e-book vendors or the entrance of new e-book vendors.

Lack of Interoperability among e-book vendors. Jullien and Sand-Zantman (2021) contend that interoperability among the technical infrastructures of platforms, or a situation in which e-book platforms would share access to packages of titles and library customers, would intensify competition because different e-book technical platforms could then have the same level of network effects. But, e-book technical platforms do not have interoperability with other e-book technical platforms. Rather, UPs and libraries have relationships with particular e-book vendors, their services and their technical platforms. On the one hand, the absence of interoperability offers opportunities for a new vendor to differentiate itself from other e-books vendors: Our findings suggest that a new vendor would be very attractive to UPs if it could develop a new market for UPs e-books. Similarly, new e-book vendors could also attract library customers if they could provide titles published by new and ideally core UPs. On the other hand, the lack of e-book vendor interoperability creates a chicken and egg barrier for new vendors to enter the market: It is difficult for a new e-book vendor to persuade libraries to become customers before it has an attractive package of e-book titles. The challenge of attracting libraries makes it difficult to attract UPs into contracts. Further, as our findings show, many of our UPs participants felt that the current e-book vendors had already provided a relatively comprehensive coverage of potential library customers (at least in the United States).

Low communication between presses and libraries

Another interesting finding is the lack of communication between UPs and libraries in the context of e-book distribution/purchasing. Several have pointed to a possible trend of collaboration between presses and libraries in the same institution (Watkinson, 2016b; Zhang & Wei, 2021). Given this, one might assume that presses and libraries, especially the ones from the same institution, should have good communications and collaborations. These two parties are both non-for-profit organizations, and they share the mission of distributing and preserving scholarly works. Nevertheless, our findings described barriers to communication as well as misperceptions and a lack of shared understanding between the two. For example, some UPs felt uncertain about libraries' e-book purchase decision processes. Similar to some previous studies (Charlip, 2016), our UPs complained about their limited knowledge on libraries' purchasing patterns. UPs staff also described

libraries' misperceptions about costs of the e-book production process. Below we discuss factors that dampen UPs-library collaboration in the e-book market: indirect relationships, information exclusivity, and limited utility.

First and foremost, the existence of e-book vendors as intermediaries creates an indirect relationship between UPs and libraries, reducing the need for more direct UPs-library communication. The transactions involved in e-book distribution do not involve direct UPs and library communications. UPs' and libraries' dependence on e-book vendors benefits both parties through reduction in some costs; however, this reduces the incentive for direct communication with each other.

Secondly, e-book vendors collect and use information to maintain their intermediary positions. In the process of connecting UPs to libraries, e-book vendors collect detailed information that gives them an advantage in communication and relationship management. This includes UPs' information such as e-book production workflows and pricing strategies. It includes library e-book purchase and usage data such as search terms, popular features, etc. Keeping this information private allows e-book vendors to maintain their negotiating position and importance as intermediaries.

Third, even within the same institution, arguably the utility of UPs-library communication and collaboration is limited. For UPs, their scholarly titles aim for a much wider audience beyond their home library. Talking to librarians in the same institution can only allow the UPs to learn about a very small portion of their potential customers because of the variances among different libraries in terms of e-book purchasing. Likewise, for libraries, their e-book collections are not limited to the titles published by their home UPs; conversation with UPs staff in the same institution provides librarians limited knowledge about other UPs. Therefore, both UPs and libraries lack a strong incentive to communicate with each other in the context of e-book dissemination/purchasing, particularly when the UPs do not have their own technical distribution platform in place.

Conclusion and implications

UPs, as one of the major content providers in the scholarly e-book market, especially in HSS, play a critical role in shaping how consumers, including academic libraries and end users, access scholarly works. In this paper, we explored the role that e-book vendor services and technical distribution platforms play in encouraging or discouraging competition in the e-book vendor marketplace. We defined a platform in terms of both the companies, and their services (platform hub) and the technical infrastructures between both sides of the market through technical infrastructure. We used the concept of network effect, which points to how platform becomes more valuable when it

attracts involvement from more groups. We drew on data from interviews with HSS UP staff about their relationships with the e-book vendors whose service and technical platforms distribute their books, and the academic libraries that purchase access to their books. We observed a market structure for HSS e-books where most UPs were satisfied with Big Four e-book vendors and lacked strong incentives to switch to newer vendors because of the network effects of the existing platforms, specifically the disincentives of multihoming for both UPs and libraries, and the lack of interoperability amongst e-book platforms. On the other hand, variation in UPs and library needs, differentiation amongst e-book vendor services, or some potential future interoperability, could support new entrants. Moreover, while some had suggested that libraries and UPs could have more direct collaboration, we observed a lack of communication and collaboration between UPs and academic libraries related to e-book distribution. Factors discouraging more UPs-library interaction include the current successful mediation services provided by e-book vendors, the information exclusivity advantage held by e-book vendors, and limited learning opportunities available from communications with a UPs or library at the same institution.

Practically, this study helps stakeholders in the scholarly publishing industry develop a deeper understanding of the relationships among three key members- UPs as content providers, academic libraries as institutional consumers, and e-book vendors as intermediary platforms. It also encourages libraries and UPs to reflect their relationship within this HSS e-book market, and what they could do to further improve the flows of e-books from UPs to libraries with a shared mission of promoting the dissemination of scholarly works. Theoretically, by examining the factors affecting the number of dominant e-book vendors, this study complexes practitioners and researchers' understanding of consolidation in scholarly publishing, where such consolidation is not simply an inevitable outcome of a mature market, but also a dynamic process involved and shaped by both sides of the platform. This deeper understanding of e-book vendor consolidation can be further extended to other distribution companies and technical platform contexts like platforms for e-journals or research data, or platforms beyond the scholarly publishing industry.

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Supplemental material

Supplemental material for this article is available online.

Notes

1. For instance, in the same AUP survey in 2019, 30 presses reported an average of 47% of their overall e-book revenue generating from e-book vendors, and only 5 presses reported an average of 18% revenue from the direct sale to libraries.
2. We did not include university publisher relationships with other types intermediaries in our analysis. Other important intermediaries include (1) e-book wholesaler or distributor, like CoreSource Plus, Gardners and r; (2) e-textbook vendors, like Kortext or VitalSource; (3) e-book vendors that sell to individuals (e.g., Amazon); (4) e-book vendors that sell primarily to school/public libraries, like OverDrive, Axis 360, or Follett; and (5) platform software services, like Fulcrum.

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