My main interest is in scholarly communication and respective roles of publishers and librarians in relation to scholarly communication. In this report on the scene outside North America, I am not going to cover the very interesting changes in ownership at the heart of STM publishing. This is mainly because the Kluwer Academic story is ongoing. No one believes that the investment houses who have bought this publishing unit from Wolters Kluwer are going to leave it as a standalone. To the outsider it looks as if the owners are putting the Dutch management in charge, while they try to buy another company that will make for a large enough entity to do something serious with. The candidate is Springer. At the present time it would seem that the family is holding firm in its decision not to sell Blackwell Publishing, but, as I have said, this is an ongoing story.

For scholarly publishers, the big event in December is Information Online, which occupies most of the first week of the month. The site is http://www.online-information.co.uk. Until I checked the catalog I thought the conference was called International Online and it certainly used to be called London Online; at any rate it is still held in the inconvenient and depressing conference centre at Olympia. For publishers it is now more important than any meeting in North America as a gathering place. Oddly enough, before Online became the serious way in which digital information was made available, the big meeting was also in Europe. It is called (because it still continues) MILIA and takes place in Cannes, a seaside resort in France better known for topless models. It is where the CD-ROM is still king or queen. I suspect that for the technologists it may not be where cutting edge innovations are to be found. Alas too, although this is billed as “the world’s No. 1 event for everyone who uses, manages or sources electronic information” I would guess that librarians do not make up a large proportion of delegates. Librarians are certainly present at the exhibition and publishers are geared to present, display and sell but they are quiet librarians. There is both an extensive free educational program and a conference organized by Martin White of Intranet Focus, well-known to readers of ATG. With due respect to Martin, whose program looked interesting, I have met very few people who actually register for the conference, unless they are asked to present. This whole enterprise should be a great opportunity for publishers, librarians and intermediaries to get together and discuss all the problems of the digital environment — but it does not work like that.

What was to be found at the Exhibition? In the first place there were certainly fewer exhibitors than in 2001. In 2001 there were exhibitors all round the gallery. In 2002 the gallery was empty. In addition, the big people seemed to be taking up more space but this might have been mainly because of a surprisingly heavy corporate presence of Thomson in the center of the hall. For years, to my personal knowledge, Thomson hierarches have been trying to get divisions and companies to present in the same livery. This year they have finally and absolutely won and huge identical booths for ISI, Dialog, Derwent and “Legal and Regulatory” faced each other across a sort of crossroads, which visitors approached to be intimidated. Thomson now offers itself as “a global leader in providing integrated information solutions to business and professional companies.” This is an odd catalog for an event aimed at information professional and why the stress in “integrated”? In contrast Elsevier Science, presenting under that name and not subsumed into Reed Elsevier, looked positively small and homely — though of course they are not.

What does this sort of display mean for the end-user, or, one might say, the user in the end? Were there any obvious trends? I did not spot them on the ground but there is one quantitative measurement that can be applied. The event guide, kindly supplied by Online Information even to those who got in free, contains a series of navigational lists called Exhibition Trails, which list exhibitors under different headings. Presumably exhibitors decide into which categories they are assigned and they can designate a number of categories as relevant. Comparing the lists for 2002 with those of 2001, some conclusions can be drawn. Those big categories are “those exhibitors (who) provide scientific, technical and medical information in a variety of formats” and “those exhibitors (who) provide technology, solutions and services for all your library needs.” The former group totals 94 in 2002 and the latter 67, down from 2001 by 17% and 13% respectively. The more specialized groupings show bigger drops. For example, “intranets, extranets and portal solutions” is 21% down, “ecentric and establishing technologies & solutions” is 32% down, “search and retrieval solutions” is 26% down and knowledge management is 32% down. Are these buzz-words on the wane if not on the way out. In 2002 the mysterious organizers behind Online Information brought in a new category — “complete information solutions.” This up-and-coming concept is applicable to “those exhibitors (who) provide the content, technology and professional services to create an enterprise-wide solution for the organization.” 50 exhibitors saw themselves as part of this scene and librarians will be glad to learn that, judging by the list, libraries are among those “organizations” which can benefit from the treatments on offer.

From what I have said above, it is obvious that there are a lot of STM publishers around. This meeting is one of the places where the great and good gather, falling as it does between the Frankfurt Book Fair and the PSP meeting in Washington in early February.

continued on page 92

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We develop a deep understanding of each customer’s library and its unique requirements. Our customers choose from a full range of library services and enjoy services tailored to their individual needs.
The other important item on the calendar is the so-called “Amsterdam” meeting of STM in the late spring. In 2003 it is back in Amsterdam.

In London in December the International STM Association held two seminars (information-sharing) at the end of the Online week. The first of the seminars, on the Thursday, is mainly for those involved in the internal processes of the publishing houses and is entitled Strategies of Journal Production in the Electronic Environment. Librarians will be pleased to learn that publishers really are trying to get digital versions of journals articles online, in correct form and before the print version is available. It is a very difficult task, however.

The seminar on the Friday is the Innovations Seminar. This year there were over 90 present, mainly publishers, and the theme was web services—the third wave of online publishing. What is this third wave? The definition provided is that “publishers begin to develop innovative web services that add significant value to their content” and goes on to predict that “with the advent of the third wave, the journal itself may begin to be transformed from the model that has served the scientific community for hundreds of years.” In library circles, a prediction like this would refer to so-called “alternative publishing,” the cluster of ideas and initiatives based around COUNTER, XML, and Online Serials Measurement.

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by Robert Molyneux (Director, Statistics and Surveys, U. S. National Commission on Libraries and Information Science; Phone: 202-606-9181) <bmolyneux@nclis.gov>

The purpose of this article is to elaborate on the major points of my talk at the last Charleston Conference and to discuss recent developments.

**BACKGROUND**

There was much discussion about the Conference of American Libraries (CAL) and the American Libraries Journal. No one denied the adequacy of the current reporting of data on the use of these expensive materials. Ann Okerson ably summarized these problems so I defer to her discussion of the many issues involved.

Given that there is data for the collection and distribution of “good” data on the use of online materials, the question now is: how to do it?

1. Expenditures for automation

At the time, the large academic libraries that were members of ARL were committing enormous sums to automation. It was important to find out how much was being spent but there was no category in the ARL data to collect this number. ARL had not collected data on automation expenditures because it was a new and rapidly developing area. Like the matter of the use of online journals and databases, it was an expensive and fast-growing target.

Two committees of ARL each independently decided to find out the answer to the question of how much was being spent by the ARL. It continued on page 93

<http://www.against-the-grain.com>