February 2007

As I See It! -- Even Fewer And Larger

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Recommended Citation

Cox, John (2007) 'As I See It! -- Even Fewer And Larger,' Against the Grain: Vol. 19: Iss. 1, Article 35.
DOI: https://doi.org/10.7771/2380-176X.5256

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Bet You Missed It

Press Clippings — In the News — Carefully Selected by Your Crack Staff of News Sleuths

Column Editor: Bruce Strauch (The Citadel)

Editor’s Note: Hey, are y’all reading this? If you know of an article that should be called to Against the Grain’s attention ... send an email to <kstrauch@comcast.net>. We’re listening! — KS

VIVE KING CONTENT
by Bruce Strauch (The Citadel)

Viacom is demanding Google take down 100,000 clips on YouTube that violate copyright. Some are laughing; others call it a negotiating tactic.

All the same, the Internet won’t stomp TV networks the way it did the music moguls. YouTube carries snappy clips of cats flushing toilets, but most are viewed solely by the poster. And it has no proven revenue model. Which is to say YouTube is virtually worthless.

TV still has hugely popular shows that gather millions of viewers and advertisers need the platform so badly they will pay big bucks to keep it around.


EMBRACING BOILED PEANUTS
by Bruce Strauch (The Citadel)

For Charleston Conference loyalists, be sure to read the entire “Eat, Drink & Be Local” issue of Charleston magazine. But especially follow the soaring career path of celebrity food geeks, the Lee brothers. They enthuse over boiled peanuts, the official state snack food for S.C., and have developed a boiled peanut and sorghum swirl ice cream. And they have their own cookbook which our daughter uses religiously.


As I See It! — Even Fewer And Larger

Column Editor: John Cox (Managing Director, John Cox Associates Ltd, United Kingdom; Phone: +44 (0) 1327 861184; Fax: +44 (0) 20 8043 1053) <John.E.Cox@btinternet.com>

The pace of consolidation in the scholarly publishing space is moving even faster. Most of us have paid attention only to publishers and vendors. There has been a lot to watch in the last ten years! And now aggregators and indexing services have hit the radar screen.

During 2006, two major players suddenly appeared in the news. ProQuest ran into regulatory and financial trouble, and then changed hands. And Thomson announced that it was going to exit the education market, and put Thomson Learning up for sale; Gale is part of Thomson Learning. Are these events connected? Do they say anything about the changing ecology of aggregators?

On the face of it, the two are not connected. Thomson Learning is the second largest textbook publisher — the biggest is Pearson. Its operating performance in recent years has not matched other divisions of Thomson. Like most textbook publishers, Thomson Learning has found the migration of its business from print to electronic to be a formidable challenge. It has, in its parent company’s eyes, made slow progress in doing so. The Gale operation itself, thought of as an aggregator and electronic re-publisher, still has considerable print activity in its reference publishing. Its aggregated databases are caught up in this larger corporate decision.

There are a number of unanswered questions. Will Thomson succeed in selling Thomson Learning as a whole, or will it have to break it up to find buyers? If a buyer is found for the whole, who will it be? If one of the other major textbook publishers makes an offer, there may be difficult anti-trust and competition issues to contend with. Will a private equity group move in to buy it with the existing management? At least that would not raise any anti-trust or competition issues. It is too early to tell.

ProQuest is a different story. In December ProQuest Information and Learning was acquired by the Cambridge Information Group (CIG), which includes the CSA, RefWorks, Bowker and Ulrich brands. But the story started some time ago. ProQuest is a public company. It has spent most of 2006 grappling with accounting irregularities, most of which appeared to reside in its Information and Learning unit. It has had to restate its accounts since 2001, and file restated accounts with the SEC.

It had already sold its Business Solutions unit which provided services to car dealers. When the sale of Information and Learning to CIG took place, between Thanksgiving and Christmas, we had our minds on festive things.

CIG has announced that it will merge ProQuest Information and Learning with CSA. The CSA business comprises over 100 databases — mostly bibliographic — in the humanities, social sciences and science. ProQuest has a lot of full text products in news, business, economics, social sciences and the humanities. Its products encompass Chadwyck-Healey, SIRS, Serial Solutions, and full text products containing newspapers.

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I knew it was time to leave when I read an email from a librarian I didn’t know personally that said something like, “Bob Nardini, Mr. Yankee Book.” That was ten or twelve years ago, I would guess. So I stayed for ten or twelve more before finally taking my leave from the company a few weeks ago, after 21 years. I am now all of three days into a new job.

Academic librarians change positions all the time, of course, in a job market that’s publicly reported in places like the Chronicle of Higher Education, College & Research Libraries, Library Journal, and so on. Usually there are search committees, campus visits, onsite presentations, lunches and dinners, tenure considerations, and all sorts of other formal structures that make job-watching among librarians a spectator sport. “Do you know who’s applied for the AUL job at such-and-such university?” is a question all of us hear regularly.

For vendors, though, the job market is more of an underground economy, one far less visible to all the potential spectators. And spectators there would be. When a librarian leaves a library, the assumption is always that it’s a good career move, not some form of repudiation of “Library A” in favor of “Library B,” not a story with the subplots and intrigues of a John le Carré novel. When a vendor moves, though, often the assumption is that there has to be more to the story. Partly it’s the surprise element that causes this, since the formalities to academia largely don’t exist in the private sector. Who knows what job would come open? There might not even have been a job in the first place, before someone is hired to do it.

Of course there’s more to the story. There always is, and not just for vendors. For librarians too, in their leavings, there’s always more to the story. There’s always more because a job is never just a job. More, that is, than a job description, a desk, computer, office or a cubicle, and the particular work you do. A job, instead, is a constellation of people within the organization. The group is privately owned, but it’s a public business like Google, Microsoft and other continue

The imperative behind the ProQuest sale is clear, and has more to do with accounting management than anything else. CIG’s motivation is more interesting, and reveals a concern about the future of the index.

Abstracting and indexing databases are under threat from Google and the other major search engines. Most searches, even by researchers, start with a general search engine such as Google. Most A&I publishers have sat on their hands and watched this happen. As Google, Microsoft and other continue to interest themselves in the scholarly and scientific communities, A&I publishers that want to survive have to distinguish themselves from these giants. What CIG has done is to put itself in a position where new products can combine indexes and full text. It is a logical extension of the announcement CSA and ProQuest made in June 2006 that collections of full text ProQuest material would be made available as an upgrade to CSA’s bibliographic databases in sociology and political science. The first product is to be launched this Spring. CSA wants to continue to be a “must have” destination for library purchasing.

Does this put aggregators in a stronger position? Or will publishers take fright and start to withdraw their journals and other content from aggregators? Will libraries — and their users — find aggregated databases an acceptable substitute for the primary journal, or is the researcher’s need for immediate access to the primary journal literature still an over-riding imperative? All the evidence to date is that journals and aggregated databases serve different constituencies in the university library: faculty and researchers, and undergraduates, respectively.

U.S. academic libraries constitute 40% of the world academic library market. The majority of scholarly and scientific journals originate outside the USA. Given the U.S. dollar’s weakness, and library budgets that are not even inflation-proofed, many publishers are worried that the evidence may change in the next few years.

So why are private investors, from family businesses like CIG and EBSCO, to private equity houses like Cinven and Candover, so interested in mergers and acquisitions in scholarly and scientific publishing?

First, the market is mature, and is not a significant growth sector. That means expanding publishers have to capture market share, largely by acquisition. A lot of acquisition activity means that there is a market in which competitive bids lead to high prices paid for good publishing properties. This works at

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about your lines, your delivery, your entrances and exits. You try to define your role, while studying theirs.

Of course any job is always something of a performance, no matter how long you’ve been at it. And at some point, “Opening Night” was a long time ago. You have your lines down so well you can deliver them without thinking. When other cast members speak theirs, there’s hardly a need to listen. Members of the cast come and go, of course … but can’t somebody do something about this script? If not, if the script isn’t rewritten once in awhile, to longtime workers each day begins to feel like veteran cast members of Les Misérables must have felt somewhere about fifteen years into the run.

Even Les Misérables didn’t last forever, though. It ran for 6,680 performances on Broadway. Eventually, enough is enough. Everyone from the hinterland had seen it. New Yorkers long ago were no more conscious of Les Mis than they were of the Triborough Bridge. It’s easy for a production to rest on past plaudits, and for a long time. So too for a library vendor rep. It works.

Until it doesn’t. What anyone who speaks on behalf of a vendor really represents is themselves. That is, their own ability to deliver on promises, things that will happen in the future. There’s the short-term future, as in a jaunty, “Sure, I can take care of that.” Then there’s the middle-term future, “Of course we’ll be ready for that by then.” And finally the longer-term future, “We know where things are going.” That last future may not have much to do with the other two. In fact, the short-term future is really the past, “We know how to do a known thing that we’ve done many times before.”

One day, after a long time working with one set of futures, you may find it’s time to try out another. And there’s nothing to say it will have much to do with your own past.

Standards Column — Restructuring NISO’s Standards Committees

by Todd Carpenter (Managing Director, NISO) <tcarpenter@niso.org>

During the recent American Library Association Midwinter meeting in Seattle, I had the opportunity to meet with more than sixty members of our community to discuss the new directions that NISO is taking in the leadership of the development of standards. Certainly, this column would hardly be compelling reading if it constantly focused only on the internal structure and developments within our organization. Indeed, there are important standards developments and ongoing work that you all need to be aware of and these concerns will be the focus of future columns.

However, as NISO is at an important crossroads and the changes we are putting in place will have a significant, profound, and, I believe, positive impact on the way we coordinate standards development and promotion as well as the types of standards we develop, it is important that we explain in some detail how the new structure will work and what we hope to achieve. We hope that those interested in standards work and NISO’s directions will provide valuable input on our activities in order to further improve and smooth the process.

As background, since many of you might not be familiar with NISO’s structure, let me explain the oversight process that has been in place. Reporting to the Board of Directors is a Standards Development Committee (SDC), whose responsibility is to both provide advice on the organization’s strategic direction in areas of standards and to monitor the activities of the various working groups that generate and update NISO’s standards portfolio. This committee has performed a difficult job commendably, despite its small size and broad responsibilities. However, it is unrealistic to expect that a small number of people will have the breadth of knowledge, or the time to commit, to managing the work of nearly thirty active and diverse standards-setting technical groups. With a diverse portfolio of standards ranging from bibliographic formats to Web services and from metasearch to binding, no group comprised of fewer than ten people could realistically hope to keep pace with all of the underlying issues and ramifications to effectively direct it all. Those who have served on and lead the SDC deserve our great thanks for their energy and commitment to NISO’s governance and for the work that they have done in stewarding the standards process.

Among the many recommendations that were offered during the strategic planning process over the past two years, the restructuring of the SDC was among the top priorities. The two key responsibilities, of setting strategic direction and of managing the working groups, would need to be split up and addressed separately in order to focus the efforts in these areas, albeit with significant communication back and forth between the groups managing these responsibilities. Furthermore, to expand the breadth of expertise and ease the management burden of diverse community needs, separate topic areas that will provide arenas for more concentrated attention on standards in those areas would need to be organized to provide a more cohesive and efficient oversight of the work underway.

To begin, we have created four separate committees to lead our standards process. The Architecture Committee will review NISO’s strategic vision and convene Topic Committees to manage a portfolio of standards activities. These Topic Committees will coordinate and monitor the work of the Working Groups, which will continue to explore issues and come to consensus on standards. We are currently organizing three Topic Committees: Discovery to Delivery, Content and Collection Management, and Business Information. Although these three areas comprise the majority of NISO’s activities, it is not expected that all of NISO’s standards will fit neatly into these three groups or that its work will be limited to these three topic areas. Realistically, there are limited resources to organize these groups and developing too many committees simultaneously risks not organizing any well enough to succeed. Over time, additional Topic Committees may form or be divided into more specific areas of focus.

The Architecture Committee will play a key role in the oversight and direction of NISO and in concentrating NISO’s limited resources on those key areas where they can be most effective. Bringing together a diverse group of experienced leadership will ensure that NISO is addressing issues affecting our constituency. The expectation is that this group will provide a vision of where standards need to be developed, point out areas of overlap with other standards bodies, and identify forces outside our current environment that will impact our future standards development activities. Led by Chuck Koscher, Technology Director at CrossRef and a member of NISO’s Board of Directors, the Committee will include representatives from each of our communities: in the library and publishing communities, from automation and other vendors, from the academy, and from other standards-setting organizations. The Architecture Committee’s primary short-term goal will be the expansion of the NISO Strategic

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