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Sleepless Nights Redux

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Sleepless Nights Redux

by **Karen Hunter** (Senior Vice President, Elsevier Science)

I made a presentation at the **1996 Charleston Conference** called Things That Keep Me Awake at Night, which was published in *Against the Grain* in February, 1997 (vol. 9, no. 1, pp. 40). Apparently, the causes of my sleeplessness hit home with listeners and readers. Now, in wrapping up 1997, I have agreed to review the worries, see if they are still relevant, and consider what else might be an excuse for the bags under my eyes. My 1996 concerns were largely connected to the process making the transition from paper to electronic. Let me reconsider those first, using the headings from my 1996 paper.

Building the infrastructure

By mid-1997, my quip was that we were in the sixth year of a five-year plan to put all of our journals in SGML. This was the right item to head the list, for it was probably the single biggest source of frustration in electronic developments last year. SGML is hard

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"The viability of a market for sophisticated products targeted at narrow disciplines still has to be proven."

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under the best of circumstances. SGML on a large scale, when there are as many different suppliers and locations as we have, is very hard. We're getting there, but this truly did cause sleepless nights.

By contrast, the other parts of the infrastructure needed to support electronic publishing and distribution, most notably more sophisticated sales efforts and product development and support tools, developed for us as planned in 1997 and now can be said to be an asset, not a worry. When I look around the industry, I'm not certain our experience has been mirrored by others, but I think this part of the process is better for most publishers and their library customers.

Virtual kiosks vs. digital libraries

One might call 1997 the Year of Metadata — or at least talk of metadata. A lot of that, and of developments such as the **Digital Object Identifier (DOI)**, is intended to provide more coherence to the array of individual Web sites and millions of digital objects that are part of the distributed set of information resources available to library patrons. As the **Digital Libraries Foundation** and **CLIR** describe on their Web site, the need is to organize these virtual collections and resources into a digital library. So, perhaps it is no longer the need to make a choice between isolated sites (my 1996 "virtual kiosks") or aggregators' collections, but rather the development of tools to make a

uniform offering out of the disparate parts.

Creating links

In 1996 I said: "One of the key roles a publisher should play in the future is creating links — adding value by integrating information, letting people maneuver through the space and get a full range of information." Amen. My current motto is "the publisher with the best links wins." I don't lose sleep over this, but it's a mantra that I keep repeating to all who will listen. No publisher is an island, no information cannot be improved by enriching its context. (Pardon the double negative.)

User vs. buyer

The concern was do you design for the end user (who will not be paying) or for the library (who makes the buying decision and writes the checks)? I think the balance has shifted to the library. More emphasis this year has come — from all sides — on broad, horizontal offerings intended for library purchase. For all of the talk of tailored or customized subject-based services, very few have emerged. Even those that have been marketed, such as **Chem Web** and **Chem Port**, are on a broad disciplinary basis, not a narrow specialization. The viability of a market for sophisticated products targeted at narrow disciplines still has to be proven.

Role of consortia

No contest. Consortia have grown in importance and are not just a flavor of the month. What is not clear is how consortia will play out as buyers' clubs for Web-based services. The win-win economies that are obvious when resources are licensed to mount locally are not so clear when the consortial aspect is largely limited to bringing together individual entities to do collective price bargaining.

Interlibrary loan

Some things seem never to go away. I know, you will say that's because publishers remain "distrustful" of libraries when it comes to ILL. This year saw some interesting discussion on the Net on this topic, but no substantive movement toward a consensus between publishers and libraries. At **Elsevier Science** we have agreed to do some limited ILL experimentation with a group of libraries and are searching for a more per-

manent (i.e., good for 2-3 years) approach. This subject may not keep me awake, but it can ruin a good meal if brought up over dinner.

Pricing and Subscription or transaction

These are continuing and major concerns, not only for new electronic paradigms but for the paper product as well. During 1997 we supported the **University of Michigan** in their development of a pricing experiment called **PEAK** (<http://www.lib.umich.edu/libhome/peak>), which will run through 1998. One of the key features of this experiment is the option for some participants to buy subscription access (that is, prepaid at the start of the year) to a fixed number of articles to be drawn as needed from across the entire Elsevier Science journal database. This has been described as a user-selected (versus publisher-selected) subscription and varies from pure pay-per-view in having a lower per-article cost. There are other aspects to the pricing, notably that the intellectual content is separated from the media in pricing more traditional electronic subscriptions. It has not been an easy project for Michigan to put together, but we hope that we will all learn from the work being done.

Parallel publishing

For the moment I see no decrease in the need to publish in both paper and electronic form. Regrettably, that means the total costs continue to be greater than paper alone. A worry for all of us.

Short and long-term archives

Yep, still a worry. If I saw any movement in 1997 at all (and I saw little), it was a tightening of the library view that publishers are not likely to be considered trusted archives.

Frankly, I agree. Now let's work out the alternatives.

Where is the money going to come from

This was my last point in 1996 and is a good transition to the issues that having me watching the clock at 3 in the morning in

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"For the moment I see no decrease in the need to publish in both paper and electronic form."

A Year of Consolidations, Mergers, and New Entrants to the Market

by **Judy Luther** (Market Development Services, 102 W. Montgomery Ave. #B, Ardmore PA 19003; phone: 610-645-7546; fax: 610-645-5251) <jluther@earthlink.net>

As 1998 begins, there continue to be dynamic changes in the ownership of companies throughout the information industry. We are seeing consolidation among the existing primary and secondary content providers, aggregators and distributors, while new entrants bring new ideas.

Innovators such as **PointCast** entered the market for electronic news by introducing the use of screen savers to deliver content. A subsequent shakeout in this portion of the market has resulted in a new roster of players. (see prior article in *ATG*, vol. 9 #2, April 1997, p.79) Thirteen year old, **America Online** (AOL) acquired both **CompuServe** and more recently, **Personal Library Software** (PLS), a leading developer of information indexing and search technologies whose products they use.

For publishers selling to the library market, the impact of technology on internal operations and the increased demand for Web based products is prompting conversion of their legacy systems. They have developed partnerships with new entrants and bought out competitors to achieve economies of scale and gain market share. Established publishers are challenged by the need to invest in producing electronic publications without jeopardizing the revenue base from their print products, realizing that libraries will cancel the print to

subscribe to the electronic version.

Libraries can benefit from mergers which offer one-stop shopping, consolidated publication offerings, standardization, or greater innovation through product development. Occasionally libraries report more limited product choices, fewer customized solutions, and less opportunity for customer feedback to the new management.

ELSEVIER buys ...

Reed-Elsevier has been in the news frequently with announcements of their acquisitions as they build a critical mass of primary and secondary content for the online environment. The most recent announcement before going to press was that Elsevier Science had acquired **Engineering Information** (Ei) creator of *Compendex*, the engineering index and the popular Ei village which serves the community of engineers on the Internet. The index tools can be linked to the full image engineering journals published by Elsevier, providing greater access and increased demand for articles.

Just prior to this announcement is the major news that Elsevier will buy their competitor **Wolters Kluwer** which will make Reed-Elsevier the world's largest scientific publishing and information group,

pushing revenue to \$8 billion and market capitalization to \$30 billion. **Kluwer** owns **Lippincott-Raven** which produces health science titles and **Commerce Clearinghouse** which produces US tax law information.

Late in 1997 Elsevier Science acquired **Bielstein Information System** G.M.B.H., a chemical database and handbook which will complement their acquisition of **MDL Information Systems**, a California company that sells software and databases to scientists in the pharmaceutical and chemical fields. The acquisition of **BioMedNet** enables them to offer service to the biological and medical community, including their electronic journal "hmsbeagle".

The **Chilton Business Group** was sold during the summer to Reed-Elsevier by **Walt Disney's** ABC Division and will be-

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early 1998. As a colleague of mine observed recently, librarians are increasingly saying, "This is it, there is no more." Most of these declarations come from simple reality: there are few or no more special funds to tap. Sometimes it is also (or instead) a question of principle, or as the old Network line went, "I'm mad as hell and I'm not going to take it anymore." Or: "You can't get what I don't have (and if I had it, I wouldn't give it to YOU)." The message is clear: the money isn't going to come from anywhere — it just isn't there.

Which, as I said, is something of a transition point to the things that keep me awake now. I think I would characterize 1997 as stacking up as a year of extraordinary librarian distrust of publishers, which is sad. Certainly, Elsevier specifically felt this repeatedly, whether in pricing and negotiat-

ing, or in our advocacy of database protection legislation, or the proposed merger of **Reed Elsevier** and **Wolters Kluwer**. We were publicly accused of having policies we don't have (e.g., requiring libraries to purchase entire packages of journals), criticized for responding to customers' express requirements (capping prices for future years or setting firm prices), reviled for favoring passage of legislation which is supported by neutral parties such as the Registrar of Copyrights, and labeled a monopolist in a merger

"... publishers are not likely to be considered trusted archives."

in which our autonomy may be less and the other publisher is slated to take the Chairman's chair. You feel a bit black and blue after a while.

But the sleeplessness is not just over what are often misunderstandings or misperceptions of Elsevier. It goes much

deeper. Take the DOI. This is a numbering system intended to provide a better way of ensuring that when you click on something intended to lead you to a digital object (whatever that object might be) you actually get where you want to go. It will set up a directory system that will permit persistent locators. It is just that — a numbering system. Yes, there can be different applications or uses of that system, just as a Social Security number can be used with your government pension, but also as an insurance ID or student ID. But the market will decide which, if any, of these applications it is willing to support. The DOI itself is just a number that can serve many linking purposes.

But, so deep does the distrust of publishers run, the fact that the DOI was developed by the **Association of American Publishers** seems to have made it, *prima facie*, something to fear. I admit, some publishers (in this case, not Elsevier Science) may have created part of the problem by talking about poten-

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PointCast made push technology popular by using screen savers to deliver customized news that was advertising based at no cost to the subscriber. This broad-based innovative approach attracted many administrators who were not included in the profiled contract information service provided to selected staff in their organizations.

As corporate Intranets expanded to include information from outside the company for internal distribution, new opportunities appeared along with additional competitors such as **Reuters**. By summer **NewsNet** succumbed to increased competition and closed their doors.

About this time, **WavePhore Inc.**, whose specialty is data broadcasting, acquired **Paracel Online Systems**, which provides Internet-based corporate business intelligence services. The combined operation strengthens WavePhore's position in the desktop information market and the combined operation will provide customized, real-time information to more than 125 corporate customers including **IBM**, **3M**, **Lucent**, **Toyota**, **U.S. Robotics**.

DataTimes, acquired by **University Microfilms Inc. (UMI)** in 1996, fell victim to a shift in the corporate strategy of its new parent when UMI decided to close their corporate division during 1997 and transferred their accounts to **Dow Jones** with whom they have a new partnership.

Finally at the end of 1997, **Desktop Data, Inc.** and **Individual, Inc.** both located in Massachusetts announced a merger to form a new company called **NewsEDGE**. Desktop Data has a strong reputation for delivering real-time news over company intranets to corporations, financial institutions, government agencies and publishers. Individual has developed highly personalized news packages for both individual and enterprise settings.

OTHER NEWS

During 1997, **John Wiley and Sons**

bought **Van Nostrand Reinhold** from the **Thomson Corporation**, expanding their offerings in architecture and design, environmental and industrial science, culinary arts and hospitality, and business technology.

Carfax was sold to **Routledge Publishing Holdings** and aim to be the world's premier journal specialist in the humanities, social sciences, education and healthcare.

Harry Abrams, the largest and most eminent art book publisher was sold off by parent **Times Mirror** to a young French company, the **Latigny Group**.

The Learning Co. (TLC) agreed to buy **SkillsBank Corp.** for \$15.4 million in stock. It has also bought **Learning Services**, an educational catalog company, for \$9.8 million in stock. This will put TLC's School Division into the top five K-12 electronic instructional materials publishers in the U.S. The acquisitions will expand TLC's products and move the school division into new markets, according to **Paul Gullickson**, president of **TLC School**. **SkillsBank** and **TLC School** are planning to launch a subscription-based curriculum Web site similar to the **Scholastic Network** by fall of 1998. **Quality Education Data** claims that 84.7% of schools use TLC products, making TLC the leading educational software company in the nation.

NEW VENTURES

It seems as though large companies (**Thomson**, **Reed-Elsevier**) are managing by incorporating new technology, buying competitors and aligning with partners to adapt to the changing market. Part of their challenge is that their size makes it difficult to move quickly and they are economically vested in a print-based subscription model.

New companies can introduce innovative ideas and begin with current technology and workflow without having to reinvent themselves by dealing with legacy systems. Some examples of new entrants include those born as related but separate identities from their parent institutions.

KnowledgeCite, created by **Silver**

Platter, offers Web-based collective access to a range of scholarly bibliographic and fulltext databases which can be searched by database or by discipline across databases. Natural language and advanced Boolean searches produce results which are ranked by relevance. Similar in concept to **Nightn**, this product has a logical market with **SilverPlatter's** existing customer base.

The **Community of Science** was created ten years ago as a spinoff of **Johns Hopkins University** and was focused on linking researchers and serving their grant information needs. They just introduced their journal and Web site publishing services which offer societies a flexible, affordable and current approach to putting their journals online and linking them to bibliographic databases.

Yankee Rights Management, whose parent company is **Yankee Book Peddler**, offers online copyright transactions from within online documents. **Copyright Direct** supports compliance by making it easy for users to obtain permission and pay for legitimate use of copyrighted works.

As the economic model shifts from supply (offering what is available) to demand (transactional sales, buying as needed), the entire market will become more customer oriented. The Web technology provides the ability to offer customized services to end users and publishers, third party vendors and intermediaries will find new roles to meet the specific information needs of their customers. 🐾

NB: I would like to acknowledge the support I received in writing this article from — **Corrie Marsh**, *Gale Research*; **Glen Secor**, *Yankee Book Peddler*; **Phil Wallas**, *EBSCO Publishing*. — JL

Rumors from page 23

This issue contains the results to the **ATG Annual Report Survey**, see page 42. The two winners are **Julia E. Ben-Simon** (Head of Acquisitions, King County Library System, Seattle, Washington) and **Chuck Longfellow** (Delaware State University, Dover, DE). These people were chosen at random from the group of people who took the time to fill out the survey. They will be given a complimentary subscription to **ATG** as well as free registration to the next **Charleston Conference** (November 5-7, 1998). Hooray!

CORRECTION. ATG, v. 9#6, Dec. '97-Jan. '98, page 82, Paragraph 3, line 1, the word "not" should be inserted before the word "cook". The point is that **Papa Lyman Remembers** that he is not going to cook his lunch and must, therefore, outsource it. 🐾

Sleepless Nights from page 30

tial applications of the DOI in e-commerce, which gave rise to a library worry that somehow everything will become pay-per-view. In fact, as unique numbers with persistent ways of being found, DOIs can be powerful tools for links between different publishers' materials, which in turn will permit the type of seamless movement from one database to another that librarians and researchers are asking for. In that same way, they can be used to link from a listing of a journal in an OPAC to the journal itself on a publisher's Web site.

But for this to be successful, it is essential that the initial negative library reaction be replaced by a thorough and careful understanding of what is actually being proposed. Publishers have an educational mission to perform here.

Which leads to my last remark. As a community we are going to get nowhere if we continue to encourage a bunker mentality. Therefore, I have made a New Year's resolution to try to get out and talk with as many people as possible, to listen and to respond as objectively and openly as possible. I would encourage all readers to do the same. What have we got to lose but our prejudices? 🐾