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The Shifting Sands of Cyberpublishing: Markets, Pricing and other Dilemmas.

by **Tom Gilson** (Head, Reference Services, College of Charleston Libraries)
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Like hope, change springs eternal. But change can be laden with either uncertainty or excitement, and depending on your perspective, can be a threat or a godsend. Regardless, change is necessary and unstoppable. **Robert Kennedy** once alluded to change as the "essential journey," one that must be taken even if "we cannot see clearly the end of the road." And then, he cautioned, "unless we move with change we will become its victims." Librarians and publishers are on this "essential journey," over an evolving landscape of shifting markets, new pricing models and creative product development. Hopefully, there will be far more movers than victims.

Markets and Marketing

Expensive reference sources and research databases were once affordable to only libraries, corporations and other larger institutions. In short, it was these institutions that comprised the market for such products. But taking these resources online, and making them available over the World Wide Web creates other options. It offers the publisher an opportunity to reach whole new audiences. **Richard Charkin** said as much in a revealing article in the June 4, 1999 issue of the *Guardian* (London) newspaper. (Mr. Charkin is the chief executive of Macmillan Publishing (UK) who publishes the *Grove Dictionary of Art*.) In Great Britain, Macmillan is not only marketing to schools and libraries, but to individuals. Individual subscriptions are priced at 250 British pounds. In fact, according to their Web site, "you can use any major credit card to subscribe to the *Grove Dictionary of Art* for a fixed period of time—whether it's by the year, by the month or by convenient 10-day 'carnets' (ten 24-hour sessions)." In addition, Charkin says there are plans to introduce a service that would allow users to purchase individual articles. He also sees a possible market for sponsorship deals where businesses and organizations subscribe on behalf of local schools.

Northern Light is another case in point. According to **Michelle Mach's** in-depth review in the July 1999 issue of *The Charleston Advisor*, **Northern Light** "offers a unique combination of Web search engine and proprietary database." It provides not only free access to millions of Web pages, but through **Northern Light Special Collection**, access to a wide range of magazine and journal articles for a fee. Individuals can use their credit cards to purchase articles at a cost ranging from \$1 to \$4 "in a pay as you go system, or set up an account for higher volume discounts." **Northern Light** is also reaching out to the business

community by providing access to documents in the **Wharton Econometric Forecasting Associates** and **Investext** collections. Of course, the prices for these documents are much higher, and range "from \$12 to \$350 with most documents in sample searches priced in the \$30-50 range."

The *Dictionary of Art* and **Northern Light** are not alone. A number of others are joining them in reaching out to the individual user. **Judy Luther**, in the same issue of *The Charleston Advisor* quoted above, discusses **Skyminder.com**, a service that aggregates business information from international sources such as **Hoover's Responsive Database Services**, **Dun and Bradstreet**, **Transdata**, and **Graham and Whiteside**. Again, individuals have the option to pay as they go with a credit card or establish their own personal deposit accounts. Prices range from \$2 for a simple news article to \$200 for a full industry report. In addition, **Standard and Poor's** is advertising that "students and faculty who want the convenience of accessing **Research Insight** [their business research database] on their own computer, now have the opportunity to subscribe for only \$79 per semester or \$129 per school year."

From this evidence, it seems that Ms. Luther's analysis is on target when she identifies "end user pricing to reach unserved markets" as a trend "emerging with the evolution of Web-based products." All of these

companies offer information as a commodity and are banking on individuals being willing to pay for it.

Profits and Profit Streams

Expanding markets are not the only advantage. Electronic publishing of these reference and research databases offers attractive financial benefits too. Again back to the *Dictionary of Art*. Approximately 20 million British pounds were spent in the editorial preparation of the *Dictionary* according to Mr. Charkin. And, in a somewhat colorful description of the current process, he continues: "You spend the money during this period and keep your fingers crossed. Then comes the 'orgasmic moment' when the book is finally published, printed and distributed. At this point, the publisher hopes for a profit. Then, 10 years later, someone proposes the next edition." But electronic publishing offers a new dynamic, says Charkin. It provides "an altogether steadier relationship with the reader" and the potential for a steadier profit stream.

The bottom line is that with electronic publishing, reference publishers not only have an opportunity to expand their market, they become less dependent on the sporadic "big

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profit" orgasm that publishing a major print set gives, and can take advantage of the steady profit stream that a cadre of electronic subscribers provides. (In fact, they may be able to get both. Print still has advantages in terms of page layout, readability and a shortened learning curve for users.) It does not take a rocket scientist to figure this out, so I suspect that Charkin is not alone in his thinking. Other reference publishers must be considering the pluses of electronic publishing. Placing a product like the *Dictionary of Art* on the Web grows a one-time profit from the sale of an expensive set of print volumes to the steady profit stream provided by a subscription to a "serial" database.

Another, possibly even more lucrative, trend is the aggregation of complementary reference sources, periodicals, etc. into one database product. **Skyminder.com** is only one example. Others are springing up everywhere. **The Gale Group** is effectively merging multiple resources in creative database products like the **Literary Resource Center** and **Biography Resource Center** while **Chadwyck-Healey** is following a similar logic in products like **KnowUK** and **Literature Online**. (More on this later.) In scenarios like this, publishers are creating new products from old by clever combinations of related resources united by a common delivery system. The full ramifications of this type of aggregation are unclear. How this will affect sales of the other versions (print or CD-ROM) of these aggregated resources is up for debate, but it is obvious that the publisher's objective is to make more money, not less.

Libraries and the Marketplace

Does the expanding market referred to earlier threaten libraries and librarians? Will we be left out in the cold while publishers bypass us and reach individual users directly? Personally, I doubt it. That is, if we play our cards right. There will certainly be more competition, or should I say options for the user. Publishers will reach out directly to users with their own product offerings as well as vend them via **Northern Light**, **Skyminder.com** and other information providers like the **Electric Library**, **America Online**, etc. But expanding a market does not necessarily mean the death of an existing one. The library market can remain vibrant if librarians are proactive and tailor their services to their respective communities. Purchasing relevant databases and providing convenient access from home, and of course, within the library, is a must. Creative marketing of these databases to our patrons, whether in a brochure, individually at the library reference desk or online via our Web pages, is also part of the equation.

In addition, we have to take advantage of our capability of adding value to the user in terms of services like database advisory and personal instruction. As availability of online

resources grows so does patron confusion. Using our Web catalogs, librarians can, and do, provide online "research guides" that cluster related databases and resources to specific interests and topics guiding patrons to the most useful sources. And, of course, we offer expert guidance at our reference desks to patrons lost in the information whirlwind. This advisory function is one which has a long and respected tradition in libraries. The exponential growth of electronic resources heightens this need, rather than reducing it. Most users do not know **Infotrac** from **Infoseek**. Librarians can help them sort the options and advise on which resources are most relevant.

Another factor: all database search engines are not intuitive and easy to use, not to mention different. While there has been some standardization of search syntax, there is no one way to search all databases. Screen layout and database features are even more haphazard. Take a look at the *Dictionary of Art*, then look at the *Encyclopedia Britannica Online*; one uses frames in its presentation (*Dictionary of Art*), the other does not (*Britannica*). One offers features like "Spotlights" which focus on topics of current interest (*Britannica*); the other allows you to search all the bibliographies of each article (*Dictionary of Art*). Discovering and learning how to use these "bells and whistles" takes time and the learning curve can sometimes be steep. Patrons often need help and librarians provide it, both individually and in the form of organized classes and presentations. Librarians provide the answers to questions on how to search a database and assist patrons to discover a database's unique features and foibles. Not only do we do this in-person but we can also use the Web to our advantage and provide online tutorials that assist patrons in navigating these electronic resources by themselves.

In the final analysis, the availability of these information sources directly from the publisher or through an online vendor may be to our advantage. The accompanying marketing serves to make these resources much better known to potential users and many of them may turn to the library to provide access. In fact, it may help lead those unfamiliar with the library's potential to grace our doorstep. From this perspective, the more markets there are, the better. It only exposes more people to the wealth of information available and may actually enhance the role of libraries and librarians in information delivery. In short, libraries and librarians can compete and play an important part in this continually changing environment.

Other Issues and Concerns

Many librarians lose sleep worrying if online sources are the death knell of print. That is not happening in my crystal ball. At least, not in the immediate future. As mentioned above, print has some advantages. I would gladly turn to the online version of the *Dictionary of Art* in order to answer a specific question, or get a brief background. But if I want to sit down and read the eight pages on the **Cathedral at Chartres**, I am going to volume six of the print set. The printed page is still easier on the eye, physically more comfortable, and aesthetically more pleasing than computer terminals. One day there may be affordable handheld e-book terminals that most people carry around like paperbacks which can wirelessly link to a network providing the fulltext of the *Dictionary of Art*. But that day is not today, and whether it ever becomes the dominant mode of reading is

anyone's guess. Right now, print volumes still hold the upper hand when it comes to comfort and readability. The print set also allows the reader to get the full impact of the two hundred and twenty seven pages devoted to **African Art**. The page layout of the detailed table of contents and text itself

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"We have tried in our imperfect way to act as the record keepers for the written word. As uncertain as the future looks, it will be one of our greatest challenges to maintain that commitment."

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invites the reader to browse and explore without losing sight of the whole section. Exploration of an extensive series of articles like this can be awkward and confusing in a frames environment, and maintaining a sense of the whole section is almost impossible.

Admittedly, the case for electronic journal and magazine articles is stronger, especially given the quick and easy access afforded by many databases, the brevity of most articles and the ability to print those you need. Still, I like receiving my *National Geographic* in the mail, thumbing through it, casually taking in the glossy photos and illustrations, and then settling on an article that sparks my interest. I also know of faculty members that take advantage of printing articles from **JSTOR** or **Academic Press' Ideal** and keep subscriptions to their favorite journals because they like getting the entire issue delivered directly to them as well as wanting to keep their own back files. In fact, I do the same thing with a few library journals.

Prices.

Rather than wasting energy fretting over the future, librarians should be asking questions that will help define it. The first question librarians should pose to publishers is whether a change in publishing dynamics that insures more markets and a steady income

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stream for the publisher, will affect prices to libraries. In short, will added sales volume due to new markets and the steady income resulting from a new subscriber base result in price reductions? And by how much? We also need to ask ourselves: how can we leverage consortium arrangements to reduce prices further? If print products are still necessary and in demand, is it necessary to price them at today's levels or are opportunities for more combination pricing realistic? While the original print set of the *Dictionary of Art* was priced at \$8,800, **Grove** is now offering the print and electronic versions for \$5,000. Is this a pricing model we can expect for similar products? Will future combined pricing of the print and electronic version be less than the current price of the print alone, providing a library makes the longer term commitment to a subscription?

Customization

As noted earlier, publishers are taking advantage of another technological capability, the bundling of complementary products into one overall searchable database. In our interview with **Sir Charles Chadwyck-Healey**, in this issue of *ATG*, (see p. 36) Sir Charles describes a new product his company is offering entitled **KnowUK**. Starting out as a guide to people and organizations in the UK, **KnowUK** has expanded into a database that also contains "information on heritage, amenities, consumer information ...". In order to create this product, Chadwyck-Healey has bundled standard British government-related references like the *Civil Service Yearbook* and the *Municipal Yearbook* along with general sources like the *Hutchinson Encyclopedia of Britain* and *The Hutchinson Gazetteer of the UK*. In addition, the package includes access to the last ten years of the *Guardian* newspaper and the *Blue Guides* (a series of travel books).

Closer to home, **The Gale Group** is marketing the **Literature Resource Center**. This is a database that includes fulltext entries from an impressive list of Gale standards including *Contemporary Authors*, the *Dictionary of Literary Biography*, and the various literature criticism sets like *Contemporary Literary Criticism*, *Nineteenth-Century Literature Criticism*, *Shakespearean Criticism*, *Poetry Criticism* and *Literature Criticism 1400-1800*. With the recent acquisition of **Macmillan Library Reference**, The Gale Group is shrewdly including standard Macmillan references like the various titles in the *Scribner Writers Series*, as well as those in the *Twayne Authors Series*. And even more shrewdly, they are including access to fulltext articles from select journals indexed in their **Infotrac Expanded Academic database**.

In the case of both **Know UK** and the **Lit-**

erature Resource Center, the bundling of different but complementary resources has been used to create very attractive and useful products. But can they be unbundled and purchased in parts according to the individual library's needs? Suppose a library is interested in the information provided in **KnowUK** resources like *Civil Service Yearbook* and the *Municipal Yearbook*, but does not care about the travel information in the *Blue Guides*. Or maybe a library already has access to the **Infotrac Expanded Academic database** and is happy with the print versions of the *Scribner Writers Series* but wants electronic access to the Gale reference sets. How much flexibility is there in purchasing these databases? Is it all or nothing? Can these databases be customized to individual library needs? And if not, why not? Other forms of customization are already being pursued. In another interview in this issue of *ATG*, (see p. 40) **David Tychoson** describes what they are doing in the California State system with electronic journals. "We are currently in the process of establishing a system-wide set of core journals that will be available electronically ... The idea behind this **Journal Access Core Collection (JACC)** is that we are telling the vendors which titles we want in electronic form rather than purchasing the package that they have put together." Placed in this context, it becomes obvious that customization is really another word for selection, an essential for what is surely a library's prerogative, collection development.

Duplication

A corollary concern to this issue of customization is that of libraries paying for the same information, over and over. However, that is not the fault of the publisher. They

will sell what we will buy. **Dr. Pieter Bolman** of **Academic Press** in his interview in this issue of *ATG* (see p.32) refers to scientific/medical journals and confirms that "we publish them in more than one format as long as that is needed by the user community and as long as it is economically viable." Of course, librarians have a great deal to say about that need and, by and large, it is our purchasing that makes this type of publishing "economically viable." Library selection decisions regarding multiple formats of the same information require a great deal of thought and analysis. But given budget restrictions and use patterns, multiple formats of journals like *Bioorganic Chemistry* and reference titles like *Contemporary Authors* may be luxuries some libraries can no longer afford. Still, the choice is ours and we will have to negotiate with publishers to provide what we need.

Tangible Assets and Archiving

Further complicating matters in this electronic environment are concerns over what it is that libraries are buying, as well as how they will preserve it. Again, in this issue of *ATG*, our **Group Therapy** column (see p. 84) contains a response from **Robin Lent**, Collection Development librarian at the **University of New Hampshire** that voices a common concern. "If the online subscription is canceled or the vendor goes out of business, will the library lose access to the fulltext?" **David Tychoson** is even more emphatic in his comments on this topic. (see p. 40) "The other issue that comes up when buying these services is what are we buying? If I get **IAC** for ten years and then switch to **EBSCO**, what do I have for my ten years' investment with **IAC**? I am left with nothing tangible, or even intangible, for that matter." Vendors like

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A Balmy Time for CD-ROM

by **Cheryl LaGuardia** (Coordinator of the Electronic Learning Facility, Harvard College Library, Cambridge, MA 02138), ph.: 617-496-4226; fax: 617-496-9802 <claguard@fas.harvard.edu>

*Not mine own fears, nor the prophetic soul
Of the wide world dreaming on things to come,
Can yet the lease of my true love control,
Supposed as forfeit to a confined doom
The mortal moon hath her eclipse endured,
And the sad augurs mock their own presage;
Incertainties now crown themselves assured,
And peace proclaims olives of endless age.
Now with the drops of this most balmy time
My love looks fresh....*

William Shakespeare, Sonnet 107

Reading Sonnet 107, I have to shake my head in wonder at Shakespeare's overwhelming prescience and perspicacity: how did the man anticipate and appreciate the invention of CD-ROMs by nearly 400 years? Because it's obvious he's talking about this medium, whose demise has been predicted almost since it first became available. I tried out early CD-ROMs in 1985, and it was later that year I first heard industry pundits utter "sad augurs" of its doom, characterizing the format as an interim technology. And yet CD-ROMs are still among us, a mortal moon doggedly enduring its eclipse (Shakespeare even nailed the disc imagery, for heaven's sake!).

Librarians and publishers alike are struggling through this age rampant with fears and "incertainties" about the right format to use. As we work increasingly with the World Wide Web, it seems that

perhaps CD-ROMs' applicability is waning—isn't it always better, faster, easier, and possibly even cheaper to put something on the Web rather than CD-ROM? Well, no, frankly, it isn't.

The Mythic Proportions of the Web

If the Web could deliver all reference materials better, faster, easier, and cheaper than any other mode of publication, both publishers' and librarians' lives would be simplified: we'd simply convert everything into Web formats as soon as possible and be done with it. Although I have been an avowed CD-ROM enthusiast, I, like most other librarians, have only one vested interest concerning reference products: to encourage the development of the best possible research tools in the most appropriate format available. If the Web answers every need well, then it should be the format of choice.

When Web-based products were first introduced, some of them offered numerous advantages over both printed and CD-ROM resources, most notably in terms of timeliness and immediacy. I'll never forget a demonstration by an *Encyclopedia Britannica Online* rep showing **P.L. Travers'** full obituary the day she died. For current news sources it is hard to beat Web-based products.

But current news sources are only one small slice of the juicy pie that constitutes a good reference collection, whether physical or virtual. Dictionaries and encyclopedias, handbooks and guides, bibliographies, indexes and abstracts, government documents and data—all of these, plus other publications, make up effective reference collec-

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JSTOR promise that libraries dropping subscriptions will have access to what they have already purchased. But promises like that are few. Other suggested solutions are to charge maintenance fees for limited access or provide the "paid for information" on CD-ROM. But clearly, this is an issue that has no easy solution.

There is also the issue of content. A revealing article entitled "What does Electronic Full-Text Really Mean? A Comparison of Database Vendors and What They Deliver," was just published in *Reference Services Review*, volume 27, no. 2 1999. In it, the authors note that "none of the four databases in this study gave cover-to-cover full-text for all the journals in the sample test." They found that letters to the editor, short columns, book reviews, etc., were omitted. This is something libraries that hope to cancel paper subscriptions need to be aware of.

The issue of archiving for preservation may be even more difficult. The very integrity of electronic format is in question. Many are skeptical of its staying power. **Sir Charles Chadwyck-Healey** does "not think that electronic storage is a satisfactory archival medium at the present time as it has not been properly tested." (see p. 36) He points to short

term solutions like keeping "multiple copies of all our CD-ROMs, refresh tapes and properly maintain Web sites in more than one location." But long term, with the constant change in technology, no one knows. Will you be able to find a CD-ROM player in 100 years? Will the Web exist in 2050 or will it have been replaced by something else? Regardless of the answers to questions like these, librarians and publishers struggle with this issue. Sir Charles feels that, "at the end of the day the publisher must remain responsible for the maintenance of his own data." (see p. 36) But libraries have a bigger responsibility than that. We have tried in our imperfect way to act as the record keepers for the written word. As uncertain as the future looks, it will be one of our greatest challenges to maintain that commitment.

Wrap up

The world of information is in constant flux. Naturally, publishers are scanning the horizon in search of markets and profits, but they should not be making their decisions unchallenged or in a vacuum. A creative tension exists between publisher and librarian that if used productively, offers both fair profit margins and quality products at affordable prices. For our part, librarians need to question, cajole, and sometimes fight for the best possible product at the best possible price, whether in print or online. Librarians cannot

be content to sit back and merely observe. We also have to adhere to our tradition of public service, providing our patrons with timely information in the most accessible and useful formats. And, of course we will have to continue our tradition of collecting and preserving for future generations. Remember if we don't, who will?

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for the next ten years or so (or at least for paper). In our situation CD-ROMs running on a single station are fairly routine; however, networked CD-ROM databases are problems for us. We rely on the computing center to operate that network and the reliability has been poor. We are moving more and more CD-ROM based databases to Web versions. I think we will continue to be pressured to provide greater remote access to our reference resources, which means more Web-based databases and, concurrently, more reference and instruction services provided online. That riptide we're riding just keeps rolling. I hope that when we get free from it, we'll still be able to say that we are in the business of providing access to information and knowledge and preserving it for future generations."