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ATG Special Report: Part III -- Libraries In The Cyberage -- Electronic Publishing and the Future of Scholarship

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to use libraries, are not flocking wholesale to the Web. *Use of the Library* is a for-credit, required course in which students learn the value of various forms of scholarly communication. I can't help but think that the infatuation with the Web that we see among U.S. college students is a direct result of the dumbing down of the whole educational system and the failure of colleges and universities to properly teach the uses and misuses of the multitude of ways in which information is provided. Unfortunately, librarians have been complicit in this.

The **Library of Congress** classification system was roundly criticized, even ridiculed, for its North American biases and penchant for organizing information in ways not relevant to the scholars who use it. But there was love of libraries present and great enthusiasm for the value of browsing shelves, seen as an entirely different exercise than browsing online. Those faced with closed stacks severely felt the loss.

Lest one think that these people were all work and no play, let it be recorded that two

tourist type outings were built into the schedule and an occasional brief stop at a grocery store was allowed so that participants could stock up on whatever they felt was missing from their diet. One outing took us to a Swedish "summer farm" where dairy cattle are taken for summer pasturing. The second was an evening boat trip from Fr̄ya to two nearby islands with a stop at a salmon farm. Here we were among the many islands and skerries off the coast of **Norway**, north beyond the tip of Scotland, beyond the **Faroes**, gazing west where the next landfall is **Iceland**, then **Greenland**, then **Labrador**. It was truly awe-inspiring to think of where we were and what has taken place there in centuries past. Moreover, impromptu sessions of Swedish folk fiddle music erupted on more than one occasion and a midnight beach party was held at which the **Northern Lights**, normally a winter phenomenon, were seen.

High tech information was all around us in what sometimes seemed to be the remotest of places, landscapes sculpted during the last Ice Age, the homeland of the Vikings, the shores of the North Sea where so much history, much of it unhappy, had taken place. Cell phone conversations took place in mid-bog.

Several participants used global positioning systems (GPS) to record the location of their finds. Every public form of transportation that we used — the grand SAS Air Bus, the coach in which we rode from locale to locale, and the hydrofoil ferry that took us from the island of Hitra to its neighbor, Fr̄ya — all had GPS. Monitors displayed maps on which a small moving target represented the vehicle's position. Outside temperature was also displayed inside the plane and the bus. Never had a traveler known so acutely where he was in relation to the planet or what temperature he was experiencing. I thought of the Vikings setting sail from Fr̄ya with only their knowledge of the heavens and currents, a few pieces of equipment for determining location, and accumulated experience to guide them.

Librarians seldom immerse themselves in the work of scholars or accompany field biologists into the field. It is enlightening to do so! The people I was with spend their lives studying Sphagnum (as others spend theirs studying other seemingly esoteric topics) for the same reason that an artist paints — to get at the essence of things. Ultimately they are a testament to the power of scholarly communication — in any format. 🍄

ATG Special Report: Part III — Libraries In The Cyberage — Electronic Publishing and the Future of Scholarship

by **Mark Y. Herring** (Dean of Library Services, Dacus Library, Winthrop University)
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*Please Note: This is part three in a four part series. See **Against the Grain**, Sept. 2002, v.14#4, pp.42-59 for part one. See **Against the Grain**, Nov. 2002, v.14#5, pp.32-59 for part two. — ATG*

Electronic access has shaken (but not entirely dislodged) the roots of library services. For more than a decade, libraries have made materials available electronically. Major vendors have emerged to make access easier and seamless to the user. Libraries, eager to make materials available to users, have quickly and enthusiastically made this access a primary part of their document delivery. Unfortunately, it has given space to a spate of nonsense about how libraries are becoming obsolete, but we'll save that for another discussion.

Electronic access is often costly. With limited budgets, libraries have to make either/or decisions: either make materials available in print, or offer them electronically. Many, if not most, have chosen to deliver the bulk of their serial materials electronically. Because the presentation of subject matter in, for example, the Humanities (often text-base only) made digitization easy and quick, materials in these areas were often chosen first. Although the total number of full-text electronically accessible materials is small, those materials chosen are often frequently consulted.

Only recently, however, has it come to the attention of librarians that almost no vendor is archiving electronically accessible materials for more than five years. Every time a year is added, another, earlier year is dropped. Thus, what scholars and the public were able to access in the early nineties will most likely *not* be available early in the new millennium-and it will not be a "computer" problem but a "management" decision! With the exception of **JSTOR**, no other vendor is offering a full retrospective back file (Volume 1, Number 1) online. Various *individual* titles may be available, but the price is often formidable and, for many libraries, prohibitive. Electronic archive access is generally out of reach for all but the largest of libraries.

Meanwhile, vendors making electronic access to magazines available are also dropping titles annually, and *often without any warning to the libraries under subscription*. Thus, if a given title is not being accessed as frequently as the vendor wishes, it will be replaced by a title that the vendor thinks may be more popular. The library subscribing to this service is generally never made aware the title has been

dropped unless and until a patron using the title inquires of its whereabouts. The electronic access is often so unstable that titles come and go from the database almost as frequently as patrons to library buildings. More recently it now comes to our attention that the nocent effects of the **Tasini** decision are proving true. **Sage** publications has recently yanked its materials from **ProQuest** owing to its inability to continue its profits while paying its freelancers. Other companies will, if they haven't already, follow suit. How will scholars access electronically defunct materials? What are the coming changes for scholars and authors? What will be the impact of eBooks? Or other electronic configurations? If many companies pull their materials, then what? Are we back to print alone?

Three very capable speakers (one did not submit a paper for publication) enlightened us on this matter. **Ron Chepesiuk** stepped to the dais first and delivered an overall discussion of eBooks and libraries. **Mr. Chepesiuk** made the case that librarians may not be as fully ready as they ought to be. He further warns that if librarians believe the eBook revolution will have the same impact on libraries as microforms have, they'd better think again: it will be far greater. **Mr. Chepesiuk** is professor and a librarian at

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Winthrop University in Rock Hill, S.C., and a contributing editor to *American Libraries* magazine. As a freelance writer and content provider, his articles have appeared on numerous Websites, including YAPA, Neighborhood America, Logisticsexpo.com, ASPstreet.com and Worthinteractive.com. His fourteenth book, *The Scotch-Irish: From Ireland to the Making of America* (McFarland, 2000) will be published by netLibrary. Ron has also published more than 2,000 articles in magazines as wide-ranging as *Nation* and *National Review*. Mr. Chepesiuk served as the co-director of this conference.

The next speaker, John Muchniki, shocked the audience with the audacious work of **Questia Media**. By now, almost everyone has heard of **Questia**. In October of 2000, only a handful of us had and Mr. Muchniki proceeded to tell us that **Questia** would soon be making 50,000 titles available to researchers, but *not* to libraries. Students could connect by the minute, hour, day, week, month or year. While libraries could access the search engine of titles, they would not be allowed to subscribe. (Unfortunately, just before publication, **Questia Media** laid off more than half of its staff. Meanwhile **netLibrary**, the other major eBooks distributor just announced that it *hopes* to survive long enough for a buy-out!)

John has twenty years of publishing experience across a range of professional, scholarly, technical, medical, and trade publishing. He has worked for such companies as **Academic Press**, **John Wiley & Sons**, **Macmillan Library Reference**, and most recently, **Routledge/Taylor & Francis** as Senior Vice President, Marketing and Sales. He is currently the Executive Director of Business Development for Scholarly and Professional Publishing at **Questia Media**, a start-up Internet company with the mission of becoming the source for Humanities and Social Science research on the Internet.

The forum occurred in October of 2000 in Greenville, South Carolina.

eBooks and the Future of Libraries

by Ron Chepesiuk (Archivist, Professor, Winthrop University)

It took the contemporary master of the horror genre to awaken the world to the advent of the electronic book or eBook. This past spring **Simon and Schuster** published **Stephen King's** 66-page novella, *Riding the Bullet*, the first work by a best-selling author to be released exclusively for electronic publication. It may have been a publicity stunt, but its effect was momentous: the demand for downloads of the eBook crashed the Website, while shaking to the core traditional publishing's assumptions.

Then a few months later, the master of the macabre thriller went one step better and published on his Website the first chapter of a story about a vine that ate a small publisher. Many writers saw the humor, but publishers were not laughing. **King** said he would continue to publish his novel, chapter by chapter, if a minimum of 75 percent of those downloading the chapters from his Website opted to pay \$1.50 each. To make **King's** short tale even shorter, some 78 percent of the first 40,000 readers did so. In all, 150,000 Net surfers sent old **Steve** their **George Washington**. Some perhaps were egged on by the author's gleeful comment: my friends, we have a chance to become big publishing's worst nightmare.

King's stunts, of course, were in no way a threat to the publishing industry; at least, at the moment, that is. But it seemed to confirm what many were predicting: the future of publishing may lie in files you can download, view and print out from your personal computer. With all the hoopla surrounding eBooks, it's easy to forget that electronic publishing has been around since the 1980's. CD-ROMs are the most obvious example.

While the Internet has accelerated the trend, no one can really predict if and how it will transform the book industry.

The naysayers of e-publishing point to the failure of CD-ROMs to catch on a few years ago as predicted. The eBook enthusiasts, on the other hand, say there are many indicators, showing that this trend is here to stay. For example, there are currently more than 300 electronic book publishers, and the total has nearly doubled every quarter since 1999. Several pub-

lishers, including the august **Random House** and **Simon and Schuster**, have announced plans to convert their book back lists into digital files, the first step towards making books available through eBook distributors like **netLibrary**. *Publisher's Weekly*, the bible of the book industry, now has a column that reviews eBooks.

Then consider the news item that may have passed many of us by. The acceptance of eBooks took a small but historic step forward last summer when literary agent **Sober Weber** conducted the first auction for the rights to publish an eBook. **Steve Brill's** *Contentville*, which sells editorial works on the Internet, won the right to republish a collection of stories written by **Steve Elroy** in *GQ* magazine. While auctioning the rights to a book is not new, the sale, I think, signals that eBooks are increasingly being taken more seriously in publishing.

Yes, of course, many of us may be uncomfortable with the thought of reading our favorite books on a computer screen. Indeed, I've heard and read about many arguments for the case that eBooks should not or will not be adopted. One common complaint or reservation: we can't read eBooks in bed, the bathroom or the beach. Some people have complained that they'd rather turn pages than push a button to get to the next page. Some book aficionados have even voiced the argument that eBooks don't really smell like books.

Some of these arguments, of course, do have merit and could pose challenges to eBook adoption; others can be quickly dismissed. For instance, how many of us really read in the bathtub, or even have time to do so nowadays? Moreover, how many of today's computer-savvy young generation have experienced the smell of a new book?

But the point I wish to make is it's imperative that librarians start paying attention to the eBook trend, given that some pundits are predicting that the eBook will make libraries irrelevant, or even unnecessary. Yet libraries, like many of their publishing and literary associates, have been slow to react to the coming of the eBook.

After **Stephen King** made his novella, *Riding the Bullet*, available last year, library di-

rectors were interviewed at the **Public Library Association** conference in Charlotte, North Carolina, and asked what they made of it. According to the school library journal, a librarian from the **Lake Oswego Oregon Public Library** responded: Nobody asked us for it. I think they got it off the Web themselves if they wanted to.

This indifference seems to be common in the library profession. Indeed, few public libraries have attempted to catalog and circulate electronic books. But some libraries have been catering to strong public demand. Patrons at the **Algonquin Area Public Library** in Illinois, for example, have lined up for eBooks.

In the last April issue of the *Library Journal*, **Roberta Burke**, readers' advisor coordinator of the **Algonquin Area Public Library**, noted that at her library, the four **Rocket eBook Readers** purchased (in May of 1999) have been in constant circulation since August (1999), each with long waiting lists. **Ms. Burke** added that "the library had to feel its way through staff training and new policies, but that's what makes this new adventure intriguing and satisfying."

At the university level, **North Carolina State University** libraries have been experimenting with eBooks, and the library has bought seven **Rocket eBooks** and five **Softbooks**. The library has loaded a number of titles onto reading devices and has been lending them out to users since the Fall of 1999. In a recent report that appeared in the January 2000 issue of *Against the Grain*, **Nancy Gibbs**, Head of Acquisitions at **North Carolina State** libraries, revealed that the surveys the university has taken indicated that users enjoy the devices, although likes and dislikes vary.

Yet a survey conducted at the **Tri Conference 2000** meeting, which was held in Kansas City and had as its theme — "Can eBooks Improve Libraries?" — revealed that only a smattering of libraries had viable eBook programs. Some of the surveyed libraries had a few eBook readers available to the public; some were conducting patron surveys to gauge interest, while others were circulating **Rocket eBook** and **Softbook** readers.

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This type of activity is a move in the right direction for libraries, I think. As **Dave Dorman** explained in *American Libraries* magazine last November, libraries would do well to begin experimenting with eBook systems that exist in the marketplace, because the market is not going to go away.

It's not only a market that won't go away, it's also a market that is bringing, and will continue to bring, difficult challenges well into the future for libraries as they grapple with this dynamic new technology and media, both to serve users and to identify the services, formats and property-rights arrangements that will meet the needs of libraries, and communicate those needs to the emerging eBook vendor community.

At the moment, the myriad of eBook formats can be confusing, at least, to the untrained eye. There is really no one medium called the eBook, just as there is no one medium called the DVD or audio-CDs.

Even the term can be confusing. The industry's technical standards group, the **Open eBook Initiative**, answered the question, well, sort of, by noting that different people define the term differently. For some an eBook is the content you read, a paperless digital version of the book, article or document, but for others, the initiative went on, an eBook is what you read on, such as a personal computer, either desktop or portable, a palm-size reader or a dedicated eBook reader designed for viewing and reading electronic documents.

In this past month's issue of *American Libraries*, **Walt Crawford** identified nine models of eBooks, ranging from portable proprietary eBooks, such as the **Rocket Book** and **Soft Book Reader**, public domain eBooks, as represented by the **Internet Public Library** and its 12,000 eBooks offerings, and what **Crawford** labeled as "Insta Books" or books on demand, such as those handled by **Lightning Source**, which offers more than 8,000 titles delivered 48 hours after they are ordered.

These type of eBooks are beginning to provide new resources for libraries. But, as **Crawford** noted, don't bet on them (that is, the eBook devices) converging into a single eBook model. That's not the way the world usually works.

Roberta Burke, in her library journal article, noted the **Algonquin** library staff must catalog both the individual eBook title, as well as the reader in which it is loaded. All titles on a particular reader must be checked out when a user checks out a particular eBook. That means the library staff has to consider carefully what books to load on the reader.

Librarians must also decide which eBook reader they want to purchase. Because **Rocket eBook** and **Softbook** both carry the same titles in slightly different formats, at this point in time, a library cannot load **Rocket eBook** titles onto **Softbook** or vice versa. Each title has to be provided for the specific reading device.

It's true **Gemstar International Group** now owns both the **Softbook** and **Rocket eBook**

readers, but the company has indicated that it plans to keep both in circulation and target each one to a different market.

As North Carolina's survey of eBook readers showed, readers want the freedom to pick and choose from an array of titles to download and read on a particular device. **Gibbs of North Carolina State** concluded this will be an issue for future negotiations (between libraries and vendors), as more libraries use those readers and more alliances are formed between publishers and device manufacturers.

So will libraries feel compelled to buy both in order to accommodate all patrons? Unfortunately, that may be the case, until eBook companies adopt a common content format such as **Open eBook Standard**.

From the library profession's point of view, standards are desirable for eBook's development. Even though it may be a little early in the growth of the eBook industry for a single standard to be in place, the library profession needs to monitor the situation and provide its input so they can live with whatever evolves.

The technology of eBooks is also going to impact libraries in another important way. The technology has made it easy for anyone to be his own **Simon and Schuster** or **Walden Books**. The ease of creating text on the Internet and creating Websites to advertise those books is making it possible for anyone to self publish and to sell their writing. In e-publishing, the expense of physically producing a book and distributing it is minimized, and there are no printing, shipping or warehousing costs. So, in theory at least, many more books by many more authors will be published.

Consider, too, that many electronic book publishers, including the division of one of the best known, **IST Books Library**, are really subsidy publishers, that is, cyber versions of the familiar brick and mortar vanity presses. These vanity presses publish almost any book submitted to them and provide few editorial services, including the *sin qua non* of good writing, proof-reading. Many of the books of these vanity publishers end up in online book stores indistinguishable from quality eBook products.

Given this trend, a big problem may arise for libraries. There may be too much out there in cyberspace for librarians to apply the critical methods they have traditionally used to select books for their collection. That, of course, can change once the dust settles, so to speak, and e-publishing evolves into a viable form of publishing. Fortunately, many e-publishers realize that standards are important for their medium, and they are taking steps to insure that they produce imprints associated with quality writing rather than simply serving as a platform for anyone with a manuscript.

In dealing with the emerging and evolving world of eBook publishing, there are many other challenges facing libraries. I can't list all of them or get into them in much detail, but I would like to summarize some of the major ones that libraries will need to address. These issues impact on all types of libraries, by the way. The **Dacus Library** at **Winthrop University**, where I work, is just beginning to tackle these issues and what decisions it

makes over the next three to five years will be critical to its future.

Here are some of the major issues: How much will it cost to start up an eBook acquisition and cataloging program? How will e-publishing impact on the ability of libraries to serve the public? What kind of training and re-training will librarians need to have to function competently in an electronic environment? What kind of infrastructure will libraries need to accommodate both the traditional and electronic library environments? Most importantly, and this is one of the reasons why we are here, what can we do to encourage the participation of the library's constituencies, consisting of people like you, in the decision making process?

In closing, I would like to summarize my feelings about eBooks, libraries and the future of scholarship. Yes, electronic texts and devices are moving into the library environment and they will be here to stay. What role will they play? The answer is still years away. (Meantime, we are nowhere near to having the new electronic technology to zapping the traditional library we all love and feel comfortable with.) In a recent report, the **Anderson Consulting Company** projected that only 10 percent of the books sold by 2005 will be eBooks. That's not really a high percentage.

Just consider how many of us here tonight have seen an eBook reader or even held one? Then just think about the job and cost of trying to digitize all the traditional library materials scholars have relied on in conducting research. How can we think about a totally electronic library environment when it would take decades, if not centuries, to do that? Besides, where will we get the money for this costly endeavor?

Remember, that as the 20th century advanced, radio, television, the VCR, and the Internet—some of the major technological advances of the century—have had little impact on the traditional library; indeed, today, libraries are thriving. I think for the foreseeable future, e-publishing will change libraries about as much as the radio, VCR and television have.

Even the public has reservations about the big bang theory of e-publishing. A poll taken about two weeks ago indicated that those using the Internet don't believe that eBooks will replace the paper book. The survey titled, "The Consumer Book Buying Study 2000," included 1,140 responses, mainly from those who had purchased an electronic book since July 1999. Only four thought electronic books would replace traditional books. What was revealing about the survey: 80 percent of the respondents want to buy books online. Libraries, therefore, must be aware of the eBook trend but it should be put in perspective.

So what will the future of the library-e-publishing-scholar nexus be? In speculating about the future, **Nancy Gibb** put it succinctly. She was talking about the university library but her comments could apply to the public library as well. **Ms. Gibbs** said: the traditional book will always have a place in

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the university, the library will continue to be the point of socialization on the campus, and

the user will still need assistance in mediating all of the information the user encounters in this information age.

I think that's the way it's going to be for some years to come.

Cyberage: Its Future and Its Fortunes

by John Muchnicki (Questia Media)

Good evening. It's a pleasure to be standing here this evening discussing one of my favorite subjects — the Cyberage — with all of you. I would like to accomplish three things this evening.

- 1) In **Part 1** of this discussion, I'd like to tell you why the cyberage is upon us, and will continue to develop at a robust pace. I want to get you as excited about it as I am and get you to embrace it for the wonderful, new possibilities it might bring.
- 2) In **Part 2**, I'd like to give you a general background of the types of players out there, what they bring to the table, and what their issues are. Here, we will talk about not only e-vendors, but traditional publishers as well.
- 3) And, finally, in **Part 3**, I hope to convince you, by way of example, that it is vitally necessary that you support this change.

Also, for those in the audience who love a good prognostication, I promise not to disappoint. Yes, I'm also going to go way out on a limb this evening and make three of them — one in each of the three parts of this discussion.

Part 1: Why the Cyberage is Upon Us

I have worked in publishing for twenty years, am currently working for an Internet start-up company, and am a deep, and passionate believer in both worlds — in their continued health and future. How can this be, you might ask? Isn't the Internet going to do away with publishing and books as we've come to know them?

This brings me to prediction one: for all of you book lovers in the audience, and I number myself among you, don't worry about the health of the traditional book. It will continue to enjoy a healthy life for the foreseeable future.

You see, on one hand, I believe that the book is not dead as a medium for learning and entertainment. On the other hand, I also believe that computers, and more specifically, the Internet, bring an opportunity to use the information contained in traditional media types in a whole new and beneficial way. And I have a classical example that will demonstrate this in Part 3 of this discussion.

I've been an active participant in the "publishing" electronic world for over ten years now. And while ten years is not normally considered to be a long time, in the cyberage it is probably equivalent to being a great grandfather.

In fact, I believe the company I was with ten years ago, **Scientific American Medicine**, was one of the first professional publishers to mar-

ket and sell a CD-ROM product. We were so early into the market, in fact, that we had to purchase the CD-ROM drives from two manufacturers in Japan to resell with our product because you couldn't easily find the drives in the U.S.

I guess you could say that we helped create a market, because indeed, that product turned out to be wildly successfully for **Scientific American Medicine** and a host of medical publishers soon followed suit. We created a market back then without the advantage of customer input, which is a unique way of creating a product and largely confined to the publishing world.

Today, the market is different. Today, for at least the part of a publisher's business that relates to electronic publishing, someone else is driving the market — the customer. Today, publishers must respond to the demand of customers who want their information electronically. Again, this is not the norm for the publishing community and it is a very uncomfortable position for some of them. They feel like they are losing control over their intellectual property. They feel like they are being pushed to make decisions much faster than they feel comfortable doing.

It is certainly not an easy issue for publishers to tackle. Their business is changing. It's happening so rapidly that one can hardly catch a breath. It's being driven by something publishers have not had to react to in the past — customer demand.

So, why is the cyberage upon us? Because there is a customer base out there that is demanding these new products be created. And why will it continue to develop at a robust pace? Because these customers will demand that it does, and because this customer base will continue to grow.

At least **Andersen Consulting** certainly thinks so. At the annual meeting of the **American Association of Publishers** this past March, **Andersen Consulting** delivered a report that was the culmination of six months of consumer research. They stated that eBook publishing would be worth between \$2.3 to \$3.4 billion dollars within five years.

Here we are, seven months after **Andersen's** report, and we read the headlines in yesterday's *Wall Street Journal* that stated: "eBooks Have A Big Future But It's Unlikely to Come Anytime Soon." In this article **John Feldcamp**, the founder of **Xlibris**, has the following quotes: "No one has figured out a good way to distribute eBooks or even what to charge." "Let's be frank: With the exception of phenomena related to **Stephen King**,

nothing is selling." He finishes by saying, "Do eBooks ultimately win? Yes, absolutely. Do they win this year or next year? No. This isn't even slightly cooked yet."

Okay, you have heard a quote from an e-vendor, now let's move into Part 2 of this discussion and have a look at who these e-vendors are and what they bring to the table.

Part 2: The Players and Their Issues

Since it's impossible to discuss all the vendors currently out there, I have chosen to first break the various e-business types down for you, give you a few examples of vendors working in these areas, and then discuss what they bring to the table.

There are really three major e-business types in existence. These are eBook Vendors — those companies that sell an electronic version of a book; Information Databases — vendors who compile large quantities of books and sometimes other media for the purpose of searching and research; and Content Managers — companies that digitize publishers' information for resale to other e-vendors. Within each of these categories there are also subsets. Also, often times you will find hybrids within categories, those companies that don't quite fit neatly into a category. Let's take a quick look at the current types of businesses out there.

eBook Vendors: have a digital version of a print title and deliver it electronically

Online delivery models:

netLibrary: primarily delivers books to institutions, general in nature.

Ibooks: subject-specific, STM titles to individual consumers

Handheld delivery models:

Rocketbook: primarily trade titles to consumers

Value add:

1. They bring a central ordering point for the consumer
2. They bring the means for delivery
3. They often subsidize the digitization of the original work

Notes:

1. While revenue models vary slightly among them, they are largely modeled after traditional, print copy booksellers — like a **Barnes & Noble**, like a **Baker & Taylor**
2. Most are going after front list titles — because they are in the business of selling single copies of these titles, and the publishing business has always been a front-list driven industry.

Searchable Databases:

1. Subject-specific databases
Questia: Humanities and Social Science specific, for college students
2. General databases

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Ebrary: a mix of general titles, to the individual consumer

Value add:

1. They bring a central ordering point for the consumer
2. They bring the means for delivery
3. They often subsidize the digitization of the original work
4. In some cases, they bring new software that can enhance an end-user's experience of the database material. Use **Questia** example here.
5. And finally, with these companies, a title will never go out of print.

Notes:

1. Revenue models between vendors in this category can differ significantly, and are quite different from anything that publishers have experienced. Some plan to generate revenue from advertising, some from customer copying of pages of the digitized material, and some through customer subscriptions.
2. In some cases, revenue achieved from this category will have the least cannibalization effect on publishers' current revenue streams. The anticipation here is that customers using these databases are not there to read a book. Rather they are looking for information across thousands of books. This being the case, a database should not deter a potential customer from purchasing a book.
3. The digitization process used by the vendors in this category can vary greatly. Some use PDF that has a minimum of search capabilities, while others like **Questia**, use XML that offers the most powerful searching capabilities available today.

Content Managers: This group of companies will digitize and store publishers' materials/efiles. Some will make additional revenue by selling the content they digitize.

1. **Catchword:** primarily a digitizer and storage facility for journals
2. **Versaware:** primarily a digitizer of books. They are also one of the hybrids that I mentioned earlier as they also sell books
3. **Lightening Source:** a digitizer, storage facility that also sells out-of-print titles via its print-on-demand capabilities

Value add:

1. They provide a technology to the publisher, not unlike a printer does, which publishers might find is uneconomical to develop themselves.

2. In the case of print-on-demand companies, they offer the publisher a new revenue stream, and the ability to keep a title in print indefinitely, without incurring warehouse costs.

Okay, let's quickly turn our attention to the publisher side of the business and their issues. The first question you might ask me tonight is: Why do publishers need e-vendors? Why can't they just do this themselves? And indeed, many publishers have voiced the same thing to me. To answer this question I will turn to the software industry as an example.

Fifteen years ago, the software industry was fragmented with different companies producing single applications. Then along comes **Microsoft**, who not only combined several applications into a single package, but also made them all look the same and operate the same. It brought a whole new level of ease-of-use to consumers. And consumers responded by making **Microsoft** one of the most successful companies of all time.

Using this precedent in today's publishing/e-vendor world, I would ask you the following: Let's say you were looking for information on history. Would you be happier having to go to every publishers' site who published in history, and then accustom yourself to their own, individual ways of navigating the site, or, might you be happier going to one place that had the complete information for all publishers in history?

Might you even be willing to pay a premium for this service? After all, it could save you hours upon hours of searching time. I think you would, and I know that I certainly would. Customers are a demanding lot. And today's customers want complete access to the subject area they are interested in, and they want it fast. The Internet is training them to be like this. No one publisher could ever fill this demand. Only an aggregator can. And that's exactly what e-vendors are. We are aggregators. We take everybody's information and make it easily and quickly available to consumers in one place.

The next question you might ask is "Given the new dynamics in the cyberage, will the publisher's role change? Will it become less than it currently is?" And this leads us to my second prediction: The publishers' traditional role as an evaluator and selector of what's worthy to publish is absolutely secure. They will continue to retain that formidable power. The only alternative would look much like the Internet does now — a wonderland of information with scant means of telling whether it's worth anything because of doubts about the source. In fact, I would go so far as to say that I don't believe the current publishing model will change much at all. E-vendors are simply that—a vendor, a new form of distributor. The twist that we bring is that we modify the original content into a different form.

Part 3: Why You Need to Support This Effort

We're now on the eve of an age where we can provide individuals anywhere in the world, as long as they have an Internet connection, with the ability to have access to complete collec-

tions of human knowledge in subject-specific areas of their choosing.

When you really think through what this means, *really think it through*, there can be only one answer — and herewith my third and final prediction:

The technology that is being developed today, and that will be implemented within the next six months, will profoundly change the way we interact with knowledge.

Finally, I promised that I would demonstrate this by example. So here it is.

Back in my **Scientific American Medicine** days we were beta testing an online version of our database that would be made available through two medical software providers who created software systems to run hospitals. One of the beta tests was with a 63-year-old physician who was treating a mid-30-year-old female patient who came to him complaining of hair loss. He spent some time with her, asking if she had been doing anything different lately — traveling to exotic locations, eating different foods, taking new medications. She could think of nothing.

He then, over a course of two weeks, ran her through a battery of tests. All of them came up negative and she once again found herself in the doctor's office. The physician was now talking about some drug therapy, but before writing the prescription, asked the patient once again if she had been doing anything different in the last several months. This time she remembered that she started using an over-the-counter product on a daily basis.

The physician said he knew of no examples where this product caused hair loss but decided to check the newly installed medical database next door where, after a few moments, he found that this product does indeed, in a very small handful of women, cause hair loss. The remedy? Stop using the product and the hair returns. Thousands of dollars of tests were wasted. Unnecessary drug therapy was almost used.

This example absolutely begs the question: Why wouldn't any professional, who had access to a database of complete information in their specialty subject area, check their thinking against this database? This type of database is now a reality and will truly fulfill the promise of the Internet.

I will finish tonight by leaving you with one more question. Do we, as intelligent human beings who have the power to affect the outcome of this burgeoning technology that can so dramatically affect the spread and use of knowledge, have an obligation to insure that it is developed and made available to anyone who would choose to use it?

I think we do, and I sincerely hope that I have convinced you, even just a little bit, to step together into the future as a partner with those of us who are trying make it happen.

*Please Note: The fourth and final forum in this series, will appear in the next issue of **Against the Grain**. The entire proceedings will also be available online at www.charlestonco.com. — MYH*