



The CHARLESTON REPORT

Business Insights into the Library Market

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Libraries on the Move

The World Digital Library (WDL) is now available on the Internet and provides free, significant primary materials, including manuscripts, maps, rare books, recordings, films, prints, photographs, and architectural drawings. One of the WDL's content objectives will be to work closely with UNESCO's Memory of the World program to make digital versions of these collections from countries around the world publicly accessible. The primary materials appear in their original language, but the metadata is translated to make it possible to search and browse the site in seven languages. The World Digital Library is a collaborative project of the U.S. Library of Congress, UNESCO, and worldwide partners. Go to <http://www.wdl.org/en/>.

The faculty of Steely Library at Northern Kentucky University is collaborating with Bluegrass Community and Technical College to offer three academic programs in library studies: A 21-credit library staff certification program, an Associate Degree in Library Information Technology, and a Bachelor's Degree in Library Informatics. Courses taken in either the certification or the Associate Degree track can be seamlessly transferred into the Bachelor's Degree program. All courses are offered online and the programs are open to individuals in all geographic areas. For information, please contact Threasa Wesley, wesley@nku.edu. Press Release, May 2009, http://library.nku.edu/news/news_item.php?key_number=168.

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Report from SSP's 31st Annual Meeting

... Reported by Dan Tonkery, Vice President, Business Development, EBSCO Information Services <dtonkery@ebSCO.com>

Baltimore, Maryland and its famous Inner Harbor was the back-drop for the 31st annual meeting of the Society for Scholarly Publishing where over 500 of the publishing industry's brightest and finest came together to learn, share, and commiserate about the current market conditions. There was a strong and informative program that was well balanced as the program committee worked hard to cover a wide range of topics from Managing and leveraging content, updates on Open Access, Rearchitecting Science, as well as sessions on E-Books. There was plenty of content for all levels of publishing executives from those that are just starting out in their careers to many of us old timers.

My favorite speaker was Charles Lowry, the Executive Director of the Association of Research Libraries. He came to a publisher meeting to deliver the message that it is no longer business as usual and that publishers really need to develop new models and pricing strategies for the new economy. He delivered a very clear and compelling message that libraries--many libraries-- are suffering and that both staff reductions and acquisitions budgets are significantly down.

His presentation of the results of a recent ARL survey was an eye opener to many publishers (see below for more details). Some of his comments about pending US legislation that the library community is fighting struck a nerve and a number of publishers jumped at the chance to attack.

In the end the real subject of the meeting was the economic crisis and what the various societies were doing in the short term to deal with declining sales and reduced marketing budgets. While most publishers saw little effect to their 2009 subscriptions base, many are hearing the rumors and anticipating that 2010 will be a difficult sales year. Many societies are reducing staff and marketing budgets and just planning to hold on for 2010. Many publishers are maintaining last year's prices and renegotiating their consortium deals.

The 32nd SSP meeting will be held in San Francisco next year and we'll see then how budgets, libraries and publishers are all faring.

Ed Note: This report first appeared in UKSG's Serials eNews and is reprinted here with permission.

Further notes from Charles Lowry, Executive Director, ARL

The basic themes I struck at SSP were:

- A survey of our membership shows deep cuts this year in nearly half and predictions of far worse to come next year;
- The emphasis for ARL Members on finding new ways to collaborate that will allow us to continue to be effective in spite of the difficult times;
- The strong desire to meet the challenge of new forms of emerging scholarly communication through close cooperation with our faculty, our university presses, and scholarly associations.

Our survey of members revealed that the propensity to protect acquisitions, where possible, was strong. However, even when acquisitions were fully protected, this year, 27% said that they had to reduce levels of collection acquisitions anyway due to the inflation in publisher prices. We look for this phenomenon to be even more chronic next fiscal year.

Libraries on the Move *from page 1*

At Florida State University, the College of Information will merge with the College of Communication on July 1 to form the College of Communication and Information. The new College will consist of a school of communication, school of library and information studies, and a school of communication and disorders. It will have programs in information, communication, and technology. *fsunews.com*, April 30, 2009, <http://www.fsunews.com/apps/pbcs.dll/article?AID=/20090430/FVIEW/90429026>.

OCLC and the Bibliothèque nationale de France have signed an agreement to work cooperatively to add records from the French national library to OCLC WorldCat. Plans are for OCLC to process an estimated 13.2 million bibliographic records from the Bibliothèque nationale de France. OCLC and the Bibliothèque nationale de France have worked together on other projects, such as the cooperative effort to create the Virtual International Authority File (Fichier d'Autorité International Virtuel), which combines multiple name authority files into a single name authority service, and French translations of the Dewey Decimal Classification system. To learn more, go to www.oclc.org/us/en/worldcat/catalog/national or www.bnf.fr.

Vendor Agreements and Nondisclosure Clauses

The Association of Research Libraries (ARL) Board of Directors voted in support of a resolution introduced by its Scholarly Communication Steering Committee to strongly encourage ARL member libraries to refrain from signing agreements with publishers or vendors, either individually or through consortia that include nondisclosure or confidentiality clauses. In addition, the Board encourages ARL members to share upon request from other libraries information contained in these agreements (save for trade secrets or proprietary technical details) for licensing content, licensing software or other tools, and for digitization contracts with third-party vendors. The resolution was prepared in response to the concerns of membership that, as the amount of licensed content has increased especially through packages of publications, nondisclosure or confidentiality clauses have had a negative impact on effective negotiations. *Press Release*, June 5, 2009, <http://www.arl.org/news/pr/nondisclosure-5june09.shtml>.

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The Charleston Report is written for publishers, vendors, product developers, merchandisers, and wholesalers who are interested in expanding their library market. Readers will gain insights in effective marketing to libraries, early alerts to library trends, access to library leaders' future plans, library budget projections, library strategic plans, technology directions, and publications needs.

For comments and contributions, contact Laura Barfield, <barfieldlaura@gmail.com>, Editorial Offices, 6180 East Warren Avenue, Denver, CO 80222. 303-282-9706, FAX 303-282-9743, (c) Copyright 2009, The Charleston Co. All rights reserved. ISSN 1091-1863.

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By the Numbers

83%...The increase in minutes on social networks from one year ago. *Reuters*, June 3, 2009, <http://www.reuters.com/article/technologyNews/idUSTRE5520OC20090603>.

>60%...The number of users who stop using Twitter after one month of joining the site. *Reuters*, June 3, 2009, <http://www.reuters.com/article/technologyNews/idUSTRE5520OC20090603>.

13.9 billion...The number of minutes on Facebook in April 2009, up 700% from one year ago. *Reuters*, June 3, 2009, <http://www.reuters.com/article/technologyNews/idUSTRE5520OC20090603>.

154.8%...The increase in e-book sales for the year as of April 2009. *Press Release*, June 10, 2009, <http://www.publishers.org/April2009Stats.htm>.

3,892,179,868,480,350,000,000...The number of new digital information bits created in 2008. *Press Release*, May 18, 2009, <http://www.emc.com/about/news/press/2009/20090518-01.htm>.

Mark Your Calendars

American Library Association (ALA) Annual Conference, July 9-15, 2009, Chicago, IL, <http://www.ala.org>.

International PKP Scholarly Publishing Conference, July 8-10, 2009, Vancouver BC, <http://pkp.sfu.ca/ocs/pkp/index.php/pkp2009/pkp2009>.

11th Fiesole Collection Development Retreat, July 23-25, 2009, University of Strathclyde, Glasgow, Scotland, http://digital.casalini.it/retreat/retreat_2009.html.

102nd American Association of Law Libraries (AALL) Annual Meeting & Conference, July 25-28, 2009, Washington, DC, <http://www.aallnet.org/events/>.

ACRL/Harvard Leadership Institute for Academic Librarians, August 2-7, 2009, Cambridge, Massachusetts, <http://www.gse.harvard.edu/ppe/highered/programs/lial.html>.

75th International Federation of Library Associations (IFLA) General Conference and Council: Libraries create futures: building on cultural heritage, Milan, Italy, August 23-27, 2009, <http://www.ifla.org/IV/ifla75/index.htm>.

Did You Know?

The U.S. Federal Government has created a Website *Data.gov* that provides free public access to raw data sets. The purpose of *Data.gov* is to increase public access to high value, machine-readable datasets generated by the Executive Branch of the Federal Government. Users can download the data in several formats to perform research, conduct analysis, or build applications. Go to www.data.gov.

Short Takes

ALA is offering a virtual conference option this year, featuring 10 interactive Web sessions on Monday, July 13, and Tuesday, July 14, at the closing of the 2009 Annual Conference in Chicago. All full registrants for the ALA Conference will have access to these sessions after the conference. Those not attending the Conference in-person can register for the Virtual Conference online through the ALA Website. The cost is \$215 for ALA members, \$210 for division members, \$120 for student members, \$145 for retired members, \$298 for non-members and \$215 for institutional members. To register, go to <http://ala.org/ala/conferencesevents/reg/index.cfm>.

New York Law School is launching a Website dedicated to the Google Book Search settlement. The project will be staffed by NYLS students and underwritten by Microsoft. A major part of the project's goal is to solicit and display public feedback. The law school will host a conference on "the law and policy of book scanning," from Thursday, October 8, to Saturday, October 10, 2009, which coincides with the rescheduled fairness hearing in the Google Book Search case, now set for Wednesday, October 7, in New York City. The *New York Law School Law Review* will also publish a volume of essays from the panelists at the conference. *Publishers Weekly*, May 6, 2009, <http://www.publishersweekly.com/article/CA6656797.html?nid=2286&source=title&rid=>.

The six-branch Rangeview Library District, Adams County, CO, will be the first library system in the country to fully drop the Dewey Decimal Classification in favor of a system adapted from the book industry. Rangeview's WordThink system draws on BISAC (Book Industry Standards and Communications). The library has narrowed and adjusted some of the categories to fit their needs and feels that the current approach will better serve their patrons. *LibraryJournal.com*, June 5, 2009, <http://www.libraryjournal.com/article/CA6663145.html>.

At the annual BookExpo convention in May, Google signaled its intent to introduce a program that would enable publishers to sell digital versions of their books through Google. Google has said it would allow publishers to set a suggested retail price, but that it would set the ultimate consumer price. Google's program would allow consumers to read books on any device with Internet access, including mobile phones. *The New York Times*, May 31, 2009, <http://www.nytimes.com/2009/06/01/technology/internet/01google.html?partner=rss&emc=rss>.

Must Reads

Bibliometrics and Citation Analysis: From the Science Citation Index to Cybermetrics, Nicola De Bellis, Scarecrow Press, 2009.

"In from the Cold: An assessment of the scope of 'Orphan Works' and its impact on the delivery of services to the public," JISC, April 2009, <http://www.jisc.ac.uk/media/documents/publications/infromthecoldv1.pdf>.

"Semantic Publishing: the coming revolution in scientific journal publishing," David Shotton, *Learned Publishing*, Vol. 22, No. 2, 85–94, April 2009, http://imageweb.zoo.ox.ac.uk/pub/2008/publications/Shotton_Semantic_publishing_evaluation.pdf.

"A challenge to Goliath," Mike Rossner, *The Journal of Experimental Medicine*, April 27, 2009, <http://jem.rupress.org/cgi/content/full/jem.20090836v1>.

"OPACs and the Mobile Revolution," Samuel Liston, *Computers in Libraries*, Vol. 29, No. 5, May 2009.

"Evaluation of Digital Repository Software at the National Library of Medicine," Jennifer L. Marill and Edward C. Luczak, *D-Lib*, Vol. 15, No. 5/6, May/June 2009, <http://www.dlib.org/dlib/may09/marill/05marill.html>.

"Creating catalogues: bibliographic records in a networked world," Research Information Network, June 2009, http://www.rin.ac.uk/files/Creating_catalogues_REPORT_June09.pdf.

Check These Out!

Stanford, Duke, UC Berkeley, UCLA, and UCTV have partnered with YouTube to share lectures and research through free downloads of YouTube videos. The videos are created under Creative Commons licenses and are shareable. For more information, go to: www.youtube.com/stanford, www.youtube.com/duke, www.youtube.com/ucberkeley, www.youtube.com/ucla, www.youtube.com/uctv.

The National Library of Australia is using a next-generation catalog, the SBDS prototype. SBDS will be a new discovery service focusing on Australia, Australians, and items found in Australian collecting institutions. It will provide a single point of access to resources currently discoverable via the Library's multiple discovery services and to digitized material freely available online anywhere in the world. The prototype will be constantly updated as it evolves into a system planned for release into production in the third quarter of this year. To learn more, go to <http://sbdsproto.nla.gov.au/>.

Two New Search Services

Wolfram|Alpha, a new search service, was launched in May. Wolfram|Alpha is not a search engine and does not search Web pages; rather it is a computational knowledge engine that answers questions that require computations. Topics range from the hard sciences to culture, linguistics, and music. Wolfram|Alpha's goal is to make all systematic knowledge immediately computable and accessible to everyone, so that it is possible to compute whatever can be computed about anything. It contains 10+ trillion pieces of data, 50,000+ types of algorithms and models, and linguistic capabilities for 1000+ domains. Learn more at <http://www.wolframalpha.com/>.

Microsoft has launched Bing, a new search decision experience. Bing aims to help customers improve searching to make better decisions. Bing's initial focus is on four key user tasks: making a purchase, planning a trip, researching a health condition, or finding a local business. Go to www.bing.com. Press Release, May 28, 2009, <http://www.microsoft.com/presspass/press/2009/may09/05-28NewSearchPR.mspx>.

Position Statement from University Press Directors on Free Access to Scholarly Journal Articles

1. The undersigned university press directors support the dissemination of scholarly research as broadly as possible.
2. We support the free access to scientific, technical, and medical journal articles no later than 12 months after publication. We understand that the length of time before free release of journal articles will by necessity vary for other disciplines.
3. We support the principle that scholarly research fully funded by governmental entities is a public good and should be treated as such. We support legislation that strengthens this principle and oppose legislation designed to weaken it.
4. We support the archiving and free release of the final, published version of scholarly journal articles to ensure accuracy and citation reliability.

5. We will work directly with academic libraries, governmental entities, scholarly societies, and faculty to determine appropriate strategies concerning dissemination options, including institutional repositories and national scholarly archives.

Meredith Babb, University Press of Florida; Thomas Bacher, University of Akron Press; Michael Burton, University Press of New England; Walter Hildebrandt, Athabasca University Press; Jane Hoehner, Wayne State University Press; Donna Livingstone, University of Calgary Press; Phil Pochoda, The University of Michigan Press; Mike Rossner, The Rockefeller University Press; Sandy Thatcher, Penn State University; Bruce Wilcox, University of Massachusetts Press. *SPARC-OAForum@arl.org*, June 3, 2009, <https://mx2.arl.org/Lists/SPARC-OAForum/Message/4978.html>.

Open Access News

A joint statement released by the International Publishers Association, the International Association of Scientific Technical and Medical (STM) Publishers, and the International Federation of Library Associations and Institutions (IFLA) calls for a more rational, evidence-based debate on Open Access. It encourages experimentation and piloting of new concepts and ideas, while acknowledging that the differences in the different academic disciplines and publishing traditions may lead to differentiated approaches and business models in support of authors. The joint statement is intended to move the oftentimes heated and polarized debate about Open Access as a model for scholarly communication towards a more measured and nuanced discourse. *Press Release*, May 20, 2009, <http://www.ifla.org/en/news/joint-iflaipa-statement-enhancing-the-debate-on-open-access>.

E-textbook News

There is a growing demand for e-textbooks, according to a study by John Smith & Son, a UK academic and professional bookselling chain. E-textbooks were sold using various sales models. Bundled print and e-textbooks were more successful than either e-textbooks sold as a discounted point-of-sale add-on or e-textbooks sold as a single full-price product. E-textbook sales increased over 20 times from last year's units. *Research Information*, May 12, 2009, http://www.researchinformation.info/news/news_story.php?news_id=476.

Kindle has launched the Kindle DX in anticipation of e-textbook reader wars. Apple will launch an e-textbook reader next year, while Sharp is developing a new technology for e-textbook reader screens. *theBookseller.com*, May 19, 2009, <http://www.thebookseller.com/news/85859-amazon-prepares-for-textbook-e-reader-wars.html.rss>.

Signs of the Times

In their "Revised Revenue and Budget Outlook" for 2009-11, the Fiscal Research Division of the North Carolina General Assembly predicts that if normal long-term growth resumes in 2011-12, then it will be 2013-14 before revenues equal the North Carolina budget numbers of 2008-09. *Post to liblicense-l listserv*, June 4, 2009, Chuck Hamaker. For the full report, see http://www.ncleg.net/fiscalresearch/generalfund_outlook/generalfund_outlook_pdfs/Revised%20Revenue%20and%20Budget%20Outlook%20FER%20090505v2.pdf.

ABC News will convert its existing research library on the second floor of its 47th street building into a smaller, more cyber-focused "Digital Research Facility." David Westin, president of ABC News, believes that an "extensive, hard copy library filled with periodicals and other materials is no longer necessary in the digital age." The new, revamped digital facility, according to Westin, will reflect "today's world." This move is thought to be related to cost-saving measures instituted in the corporation in October 2008. *The New York Observer*, June 4, 2009, <http://www.observer.com/2009/media/abc-news-shuttering-house-library-favor-digital-research-facility-looking-donate-print-ma>.

In the UK, the growth of "virtual learning platforms" in secondary schools is putting school libraries under renewed threat. School library closures and downgrading of library staff occurred in several schools, while other schools replaced their library with an IT suite. The government is encouraging all secondary and primary schools to introduce a "Virtual Learning Environment" (VLE) to support their teaching resources and pupil assessment. This is adding to pressure on space and budgets. *theBookseller.com*, May 20, 2009, <http://www.thebookseller.com/news/86216-gibbons-school-libraries-under-threat.html.rss>.

The Bellevue (WA) School District reassigned all secondary librarians to classroom positions for the 09/10 school year because of a districtwide reduction of 60 FTE positions. The librarians will be reassigned to classroom positions, primarily in English where they are certificated. The reassigned librarian positions will be filled by aides to oversee the management of the middle and high school libraries. *BellevueReporter.com*, May 19, 2009, http://www.pnwlocalnews.com/east_king/bellevue-news/45412547.html.