



The CHARLESTON REPORT

Business Insights into the Library Market

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Mark Your Calendars

January 7-11, 2011 American Library Association Midwinter Meeting & Exhibits in San Diego, California. For information go to <http://www.ala.org/ala/conferencesevents/upcoming/midwinter/index.cfm>.

January 13, 2011 The SOAP Symposium in Berlin, Germany. The Study of Open Access Publishing (SOAP) will be holding a discussion about the final results and groundbreaking findings of its project. Visit <http://project-soap.eu/soap-symposium/> for more information on the project and the free symposium.

February 1, 2011 The 7th Annual Society for Scholarly Publishing's Librarian Focus Group. Visit: http://www.resourcenter.net/Scripts/4Disapi2.dll/4DCGI/events/294.html?Action=Conference_Detail&ConfID_W=294 for a complete description and registration information.

February 21-22, 2011 Association of Subscription Agents Annual Conference in London, England. The theme for the 6th annual conference is "Recession is the Mother of Invention." For details on speakers and sessions see <http://www.subscription-agents.org/conferences2011>.

March 13-14, 2011 Understanding E-Journal Technology in Abingdon, England. This one day course is targeted for new technical staff in journal publishing or experienced staff who want a refresher course. See <http://www.renewtraining.com/uejt/uejt.htm> for a full description.

March 21-23, 2011 Computers in Libraries 26th Annual Conference sponsored by Information Today, Inc. in Washington, D.C. The 2011 theme is *Strategic Focus & Value for Library Communities*. Program and exhibitor details are at <http://www.infotoday.com/cil2011/>.

March 30-April 2, 2011 Association of College & Research Libraries Annual Conference in Philadelphia, Pennsylvania. Log on to <http://www.ala.org/ala/mgrps/divs/acrl/events/national/2011/> for the schedule and speakers.

May 11-13, 2011 Fiesole Collection Development Retreat in St. Petersburg, Russia. This year's theme is "Collections Across Frontiers: Technology & Globalization." For more information go to http://digital.casalini.it/retreat/retreat_2011.html.

Observations at the Frankfurt Book Fair, October 6-10, 2010

*... Reported by Anthony Watkinson,
University College London*

The Frankfurt Book Fair is still where publishers from all countries and from all sectors meet up with their agents and representatives and especially with one another — the networking is ferocious. The stats tell it all. This year there were 7,539 exhibitors from 111 countries *and* there were around 3,000 associated events *and* 279,325 visitors. Some of these visitors are librarians but not many. The big noise is usually made by the trade/consumer publishers, but scholarly and educational publishers, such as Elsevier, Wiley and Pearson have some mammoth booths which are very visible. STM publishers have their annual meeting the day before the Fair starts. However, I am sorry to say, and everyone agreed, that there was no big news this year — no Google initiative and no big takeovers and not even any big rumours. Here is a personal take on some of the trends:

- Everyone agreed that e-books are the future. Consumer publishers have discovered digital in the last year, but they are making up for the late start with serious investment.
- E-books will include enhancements for devices and in particular new apps.
- In many sectors the iPad is seen as the forerunner of the new range of tablets which provide a new user experience and may lead not just to enhancements of existing products but transform creative works. Here trade publishers may well be in the lead at least as far as recognition of the issues.
- Consumer publishers are, however, only just beginning to appreciate how expensive this is all going to be for them and how difficult it will be to change their workflows. Intense activity is preceding business model adjustments which include working with aggregators to sell to public libraries.
- Educational publishers, as many join already globalised competitors in looking to the bigger world, are finding Frankfurt the place for business.
- Thomson Reuters announced their new Book Citation Index as part of the Web of Science which will be available in 2nd quarter next year. Impact factors will not be included.
- The STM Annual Conference may not have offered anything totally new, but the presentation by Bill Park of DeepDyve, the rental service for articles, demonstrated a more attractive model (at least to publishers) than some had previously perceived: a break-through perhaps? It could be the answer to the problems of all those disenfranchised knowledge workers outside the academy.
- Copyright committee meetings by top representative publishing bodies showed a new openness to an adjustment for legally allowed exceptions.

Short Takes

The Registry of Open Access Repositories (ROAR) has released a new map of repositories around the world. The ROAR Website allows users to search for repositories by country, repository software, and repository type; the new animated map <http://roar.eprints.org/oaweek.html> features recent deposits one-by-one. The map allows the user to travel around the world's repositories by viewing a description of the deposit and a thumbnail of the repository's home page. The display also features the URL to the repository which allows the viewer to link instantaneously to that open access research. ROAR's mission is to "promote the development of open access by providing timely information about the growth and status of repositories throughout the world. Open access to research maximizes research access and thereby also research impact, making research more productive and effective."

A disposable e-reader? Through a grant from the National Science Foundation, a University of Cincinnati engineering professor, Andrew Steckl, has been conducting research with e-paper that could be both advanced enough to display video and affordable enough to be disposable. "It is pretty exciting," said Steckl. "With the right paper, the right process and the right device fabrication technique, you can get results that are as good as you would get on glass, and our results are good enough for a video-style e-reader." Through a process known as "electrowetting," the researchers' (Steckl along with doctoral student Duk Young Kim) goal is to simulate the look of ink on paper; in the next three to five years, they hope to gain commercial interest which will help to fund the next stages of their research. To see the University's news release, visit <http://www.uc.edu/news/NR.aspx?id=12779>.

DTP (Digital Text Publishing), Amazon Inc.'s service that allows users to self-publish to the Kindle e-bookstore, is receiving criticism for allowing a self-published book entitled *WikiLeaks Documents Expose US Foreign Policy Conspiracies: All Cables with Tags From 1-5000*, http://www.amazon.co.uk/WikiLeaks-documents-expose-foreign-conspiracies/dp/B004EEOLIU/ref=cm_cr_pr_product_top to be sold on its site. Critics are focusing on a few issues: Amazon removed WikiLeaks from its servers then allowed book to be sold through its service; Amazon is profiting from the sale of this book when the content is available free; and, users can purchase the e-book with Mastercard and Visa when both suspended payments to WikiLeaks <http://www.bbc.co.uk/news/business-11938320> recently. To the Amazon controversy, WikiLeaks responded via Twitter "If Amazon are so uncomfortable with the first amendment, they should get out of the business of selling books." <http://twitter.com/wikileaks>

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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 Elaine Robbins, <robbinse1@citadel.edu>, Editorial Offices, 6180 East Warren Avenue, Denver, CO 80222. 303-282-9706, FAX: 303-282-9743, (c) Copyright 2010, The Charleston Co. All rights reserved. ISSN 1091-1863.

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By the Numbers

\$440... Hanvon Technology, based in Beijing, is selling an e-reader with color display using technology from the company E Ink. The reader will start at \$440 in China, and Hanvon's founder expects that the reader could later be available in the U.S. See more about the technology at <http://www.nytimes.com/2010/11/08/technology/08ink.html>.

15 million... Forrester Research predicts that 15 million e-readers and tablets will be sold by the end of 2010 compared to 2.8 million in 2009. See more about happenings in the e-book world here <http://online.wsj.com/article/SB10001424052748704369304575632602305759466.html>.

80%... The University of Missouri's Reynolds Journalism Institute recently found that out of 1,600 iPad users, 80% were male and 80% used the iPad to read news and current events items. See more of the study's findings at <http://www.bizjournals.com/sanjose/news/2010/12/10/early-ipad-users-mostly-men-reading-news.html#ixzz17jpEIWAG>.

4,000... Google's e-bookstore opened early December featuring books from more than 4,000 publishers. Read the entire *New York Times* article here <http://www.nytimes.com/2010/12/07/business/media/07ebookstore.html?pagewanted=1&r=1&ref=technology>.

25%... Harvard library's purchase of e-resources increased by 25% last year. Read more in Robert Darnton's article discussed in "Must Reads."

370 million... The number of people each month who access Wikipedia. Phoebe Ayers, Wikimedia Foundation, 30th Charleston Conference.

Digital Projects

The University of Chicago Library's Special Collections Research Center has begun a large-scale digitization project that will allow researchers to view high-resolution images of special collections material right from the online finding aids. This allows the user to perform the same research as if they were in the Center but with the convenience of online availability. See the library's highlighted collections here <http://www.lib.uchicago.edu/e/spcl/>.

Europeana has recently passed the 10 million object goal with its collection of 14 million digitized books, maps, photographs, paintings, film, and music clips from libraries, archives, museums, and other cultural institutions throughout Europe. The European digital library began in 2008 with two million objects; the 1500 contributing institutions' collections can be seen at <http://www.europeana.eu/portal/>.

The Mexican Digital Library presented its collection of nearly 20 historical documents from the pre-Hispanic, Colonial, Independent and Revolutionary periods in November. The digital library's president, Andrea Martinez Baracs, says that all libraries and archives that guard Mexican material will be invited to be part of the library. Visit <http://bdmx.mx/> to see the entire library.

Hot Topics from the 30th Annual Charleston Conference, November 3-6, 2010

Contributors: Katina Strauch, College of Charleston; Douglas LaFrenier, American Institute of Physics; Stephen Clark, College of William & Mary; John Riley, BUSCA, Inc.; Eleanor Cook, East Carolina University; and Corrie Marsh, University of Texas Pan American.

The 30th Charleston Conference Issues in Book and Serial Acquisition welcomed a record high 1,307 attendees this year. The breakdown included 55% librarians, 18% vendors, and 18% publishers. The majority of the attendees were from the U.S. (almost every state) and there were over a hundred international registrants from Canada, the United Kingdom, Scotland, Hong Kong, Italy, Germany, Switzerland, and other countries.

The theme was “Anything Goes” from the famous Cole Porter musical. Among the emerging key issues it was clear that libraries, publishers and vendors are all innovating new ways to maintain their trusted place in the information chain.

“PDA” no longer refers to a device, but is now part of general “library-speak” meaning “patron driven acquisitions.” Douglas LaFrenier, Director of Publication Sales & Market Development at the American Institute of Physics observed: “patron-driven acquisitions must have been mentioned 45 times in the conference program; it was the most pervasive new topic.” Eleanor Cook, Assistant Director for Collections & Technical Services at East Carolina University commented “[PDA is the] end of collection development as we know it.”

It seemed that Open Access has moved from “hot” to “ordinary” and although there was discussion about social media, it was not as popular as expected. Other topics included: budgets, big deals, business models and sustainability, usage data and metrics, and the archiving of data in repositories.

In his keynote address, Rick Anderson, Associate Director at the University of Utah, questioned the continuing need for many standard practices in libraries. He believes that inter-library loan, reference instruction, and distributed cataloging, for example, are no longer needed in the 21st century library. Anderson stressed that with patron-driven acquisitions and print-on-demand services now available to library users, libraries need to realign their expectations and develop new service models.

In a similar vein, during his address, Joseph Esposito, CEO, GiantChair, described new models for collaborating on digital collections and emphasized financial sustainability models.

A very informational and entertaining session was delivered by Jon Orwant, Chief Engineer for Google Books. Orwant described the process for creating metadata for the trillion fields in the Google Books catalog (<http://books.google.com>). He discussed the problems and inconsistencies with ISBNs, multi-volume works, and languages. Google has now scanned over 15 million books amounting to 4 billion pages and 2 trillion words in 463 languages (including 3 books in Klingon!). Orwant engrossed the audience with examples of creative applications by Google engineers such as mash-ups for maps and linguistic analysis.

Reflections on the 30th Charleston Conference

... Reported by Katina Strauch, College of Charleston and Conference Organizer

It seems that end users have moved to the front of the line in the information industry as we take note of the D2C model (direct to consumer). The library is being bypassed, the traditional role of the scholarly publisher is in flux, and the book and journal content is morphing in all sorts of new, unique, and innovative forms. How can the industry keep up?

Interestingly enough the word “stewardship” only came up twice in the Conference by Brian Schottlaender (UCSD) and Jon Orwant (Google). Is the library no longer the steward of the world’s information (with patron-driven everything)? Is the library abdicating this role to Google, a commercial entity? Is the role of the library still a repository for the future or is it now just for current users?

Heard Around the Conference

From Rick Anderson, University of Utah: “The library is being bypassed”...“The library is a lot bigger and fuzzier”...“Budgets are flattening- flat is the new increase”...“You can never anticipate what will turn people’s clocks.”

From Joseph Esposito, GiantChair: “The author pays model doesn’t generalize”...“This consortium model is outside the market; it’s necessary to socialize an idea”...“Sometimes thinking big gets in the way of starting small”...“Focus on the value created not the cost”...“The free rider problem has undermined the university presses in this country”...“They need a strategic plan before an operating plan.”

More Quotes:

“Nothing will happen if all possible objections must be overcome.” (Samuel Johnson quoted)

“The Spandex principle is at work; we are jamming a lot into brands and process — can create distrust, be careful.” (Kent Anderson)

“Doubt is the father of invention.” (Galileo quoted)

From Dean Smith: “‘sports guy’ is the authority in the community and no one knows who he/she is”...“The currency of scholarly publishing between librarian and publishers is trust.”

From Hazel Woodward: “Libraries must trust both publishers and authors”...“Trust — the smallest word that makes the biggest difference.”

From Allen Renear: “The importance of trust is greatly exaggerated”...“There is too much to read; text mining and strategic reading are necessary”...“Disaggregated enhanced reading”...“We will see sentences from many different articles brought together.”

From David Nicholas: “Researchers use generic sources; they don’t focus on the bells and whistles.” (based on Charleston Observatory Report)

From Deanna Wamae: “Social media overlays are needed in the library catalog”...“Use is age agnostic”...“Utility will determine.”

E-book Bits and Bytes

Ed. Note: Although the big news at the end of 2010 was the release of Google's eBookstore <http://books.google.com/ebooks> there has been some interesting end-of-the-year news for electronic books.

Elsevier announced that it has enabled the text-to-speech option on all of its ePub book titles. The text-to-speech function enables an e-book to read aloud. This will facilitate access by readers who would otherwise face a range of access challenges through blindness, dyslexia, or motor difficulties. Read more at: <http://www.prnewswire.com/news-releases/elsevier-enables-its-e-books-to-read-aloud-increasing-access-for-people-with-print-disabilities-111516794.html>.

Barnes & Noble released the full-color Nook just in time for Christmas www.barnesandnoble.com/nookcolor/index.asp. The new color LCD panel weighs 15.8 oz, but since it is not an e Ink model the battery will have a shorter life. The US price is \$249.

The New York Times will now provide Best e-Sellers along with their existing bestseller lists <http://www.nytimes.com/2010/11/11/books/11list.html>. Janet Elder, the editor of news surveys and election analysis for *The Times*, said the newspaper had spent two years creating a system that tracks and verifies e-book sales. "We've had our eye on e-book sales since e-books began," Ms. Elder said. "It was clear that e-books were taking a greater and greater share of total sales, and we wanted to be able to tell our readers which titles were selling and how they fit together with print sales." eBooks.com and Google eBookstore are among the electronic bookstores displaying the latest *NYT* e-Sellers list.

Aptara has released their second e-book survey this year of more than 600 publishers in trade, professional, and educational markets <http://www.aptaracorp.com/ebook-survey2/>. The survey reveals that while 64% of publishers are offering titles in e-book format, the majority of publishers are struggling to maximize e-book profits. Among the key issues are:

- eReader/content format compatibility issues. Even with a nearly universal e-book format standard (EPUB), today's highly fragmented e-reader market makes quality e-book production a moving target.

- A widespread inability to calculate return on investment (ROI) from e-books — confirming that most publishers are not employing scalable digital workflows, but rather retrofitting print production process and forgoing significant cost savings.
- Only 7% of publishers are implementing enhancements in their e-books, suggesting there's not broad awareness of the EPUB standard's inherent and existing support for links.

The full text report is free but registration is required.

Good eReader offers this informative video: "How to copy e-books to the iPad via iTunes." <http://goodereader.com/blog/tablet-slates/how-to-copy-ebooks-to-the-apple-ipad-via-itunes-and-ibooks/>

And don't miss this....Did you realize the e-reader is "the equivalent of the brown-paper wrapper?" The *NYT* reports that Romance is now the fastest growing segment of the e-reading market according to Bowker <http://www.nytimes.com/2010/12/09/books/09romance.html> outselling general fiction, mystery and science fiction. "Romance," said Matthew Shear, the executive vice president and publisher of St. Martin's Press, which releases 40 to 50 romance novels each year, is "becoming as popular in e-books as it is in the print editions." Barnes & Noble is courting romance readers more aggressively than ever. William Lynch, the chief executive, said in an interview that until recently Barnes & Noble was a nonplayer in the huge romance category, but that it now has captured more than 25% of the market in romance e-books. Sometime next year, he said, he expects the company's e-book sales in romance to surpass its print sales. And finally, of note, the new Nook Color mentioned before also includes a "romance store."

Must Reads

From the university library at Harvard, director Robert Darnton addresses what he sees are the greatest issues that libraries have had to confront in 2010: periodical subscription prices and the "economic conditions of scholarship"; the divide between professors' needs and expectations and the costs to sustain the subscriptions; and, the need for a national digital library. Darnton's report is an honest look at the steps one library and university have taken to address some of the "fluidity, uncertainty, and opportunity" that exist in today's information society. He believes that the mission of the groups controlling the information must change from a profit-seeking model to one that provides everyone with "access to a commonwealth of culture." Read more about Darnton's explanations of challenges faced by Harvard and other academic libraries in his article "The Library: Three Jeremiads" <http://www.nybooks.com/articles/archives/2010/dec/23/library-three-jeremiads/>.

Comments Are Solicited!

"Open and accessible supplemental data: How librarians can solve the supplemental data arms race" by Liz Lorbeer and Heather Klusendorf Dec10-Jan11 issue of *ATG*, v.22#6, op ed. See www.against-the-grain.com/.

The issue that publishers are getting out of the business of accepting supplemental data was discussed more than one time during the 30th Charleston Conference. In August of this year, the *Journal of Neuroscience* made the announcement that the Society for Neuroscience Council took this step because they felt that this was the best option for protecting peer review. The statement can be found at <http://www.jneurosci.org/cgi/content/full/30/32/10599>. **TCR** would like to hear from other publishers about the publication of supplemental data.