



The CHARLESTON REPORT

Business Insights into the Library Market

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Libraries on the Move

The Boston Library Consortium (BLC) has announced an agreement with Reprints Desk, Inc. to provide access to its *A-Z Academic Document Delivery Collection* providing full-text retrieval of scholarly research papers to BLC's 17 member academic and research institutions. BLC member institutions will benefit through group purchase pricing incentives when they use Reprints Desk's external document delivery services and *Article Galaxy* software platform to retrieve scholarly journal articles and book chapters that may not be available via subscription. Reprints Desk will also work with member libraries to analyze actual and projected content acquisition costs to best ensure that inter-library loan and document delivery services are used cost effectively. Participating publishers in the service currently include Elsevier, John Wiley & Sons, Lippincott Williams & Wilkins, Springer, Nature Publishing Group, The Institute of Electrical and Electronics Engineers (IEEE), and dozens of others. For more information about the *A-Z Academic Document Delivery Collection*, visit <http://info.reprintsdesk.com/academic-articles>. To learn more about the Boston Library Consortium, visit <http://www.blc.org/>.

Short Takes

Taylor & Francis have issued results from their Open Access Survey identifying trends in responses according to age range or professional status. Among the findings are:

- The greatest support for the Creative Commons Non-Commercial No-Derivatives (CC BY-NC-ND) license was from young authors in their 20s or 30s.
- 32% of authors in their 30s selected CC BY-NC-ND as their most preferred license .
- Authors in their 50s and 60s favor the traditional licenses: Exclusive License to Publish and Copyright Assignment
- Copyright Assignment is the most preferred license for those over 70.

Basic results from the full survey and a copy of the questionnaire can be found at <http://www.tandfonline.com/page/openaccess/opensurvey>.

Highlights from the 33rd Charleston Conference

*... Reported by Katina Strauch, Conference Founder,
<kstrauch@comcast.net>*

The 33rd Charleston Conference took place November 6-9, 2013, in Charleston, SC. There were 1,629 attendees, the most to ever attend the Conference. Attending were staffs of small public library systems as well as CEOs of major corporations from all over the U.S. and the world.

The Conference took place at five venues — the Francis Marion Hotel, The Embassy Suites Historic, the Marriott Courtyard Historic, College of Charleston's Addestone Library, and College of Charleston's new Science Center. Nine plenary speakers, 450 concurrent sessions, 18 poster sessions, and 20 shotgun (pecha-kucha-like) sessions filled the two and a half days. The day before the Conference boasted nine preconferences and 101 vendor exhibitors.

Some of the major themes included the status of discovery in libraries, use and usage statistics for electronic resources, open access publishing in the U.S. and UK, patron-driven acquisitions, eBook platforms and providers, the role of the university press, and many other topics. A sampling of "take-aways" includes:

- Libraries are more interested in satisfying current end users than in adhering to the older tenets of librarianship. They are turning preservation over to providers and publishers.
- The acceptance of electronic books is not parallel to the acceptance of e-journals. Libraries are adding eBooks everywhere. In spite of this, end users in most disciplines want both p and e books whereas they are satisfied with e only for journals.
- Many end users say that the eBook is not stable. They ask the library to purchase print if they want to assure that the content will not disappear.
- There is a lot of experimentation with new delivery formats. For example, some libraries are starting to have pilot projects for e-textbooks. The delivery of chapters or sections of books seems on the horizon.
- Some universities are supporting open access costs not necessarily through the library. If this continues, how will this affect the overall library materials budgets?
- There are moves toward expanding the role of the "liaison" librarian. This role would include more interaction with teaching faculty in their own offices and environments, working with faculty on institutional repositories and helping them to launch new e-journals, as well as curation of data. Data and data curation are buzz topics.

The breadth of coverage of Conference topics underscores the fact that the Charleston Conference is now one of the major venues for leaders in the publishing and library communities to shape strategy and prepare for the future. Many session summaries will be published in the December-January *Against the Grain* and will be included in most of the issues to be published in 2014. The proceedings will be published by Purdue University Press and will be freely available online at <http://www.thepress.purdue.edu/>.

Be sure to Mark Your Calendars for next year's conference: November 5-8, 2014. See you there!

TCR Reports from the Field: The Print to Digital Transition Comes to Taiwan

... by Karen Christensen, CEO, Berkshire Publishing Group LLC, <karen@berkshirepublishing.com>

A chance remark in the OUP offices in New York in 1998 first led my company, Berkshire Publishing Group, to China, and 15 years later a brief meeting at ALA in Seattle sent me to Taiwan for the first time, to speak at the Taiwan Digital Publishing Workshop (TDPW) on December 6, 2013.

Taiwan is an island off the southeastern coast of mainland China, the nation officially called the People's Republic of China (PRC). Taiwan is, as far as the PRC is concerned, a province that will sooner or later be reunited with the mainland. The Taiwanese, however, call their island the Republic of China, and until recently official policy has included reclaiming the mainland their grandparents fled when Communists seized control in 1949. (An old name for Taiwan is Formosa, by the way, and one still sees it occasionally on packets of tea.)

The relationship between Taiwan and the PRC has been tense, with military installations on both sides of the Taiwan Strait, and in 2013 remains complicated. But as the PRC has opened, reformed, and developed over the past 30 years, the economic well-being of Taiwan has become increasingly tied to the PRC. Trade between Taiwan and China was US\$180.71 billion from January to November 2013, an increase of nearly 20% over the same period in 2012.

Travel between the PRC and Taiwan becomes easier all the time, and there is an increasing amount of intermarriage, too, as well as closer professional and personal relationships of all kinds. Tourism is growing. I saw many PRC tourists in the National Palace Museum (where one can see the vast PRC treasure trove brought from the mainland by Chiang Kai-shek), and the audience at the TDPW was keen to hear about the Chinese digital market, which my company has been exploring for the past seven years.

Taiwan, I should add, is a democratic, prosperous country with a reputation for electronic manufacturing that dates back to the 1960s. Every American who knows Taiwan well describes

it to me as technologically advanced, with a robust business climate. These friends are surprised when I tell them that eBook adoption is slow in Taiwan, and that Taiwanese publishers have barely begun to use digital opportunities to expand their market. This is something of a crisis because international eBook platforms such as Google, Apple, and Kobo are in the process of entering the Taiwan market, and publishers are not really ready for it. This led the Ministry of Culture (MOC), under the leadership of Chou Pei Chi (Peggy), director of the Department of Humanities and Publications, to sponsor the event I spoke at. I joined Donald F. Brown, a consultant with extensive experience in magazine publishing, and a group of expert speakers from Taiwan and the PRC.

The 2013 Taiwan Digital Publishing Workshop was a two-day event for senior publishers organized by the Taiwan Digital Publishing Forum (TDPF). The forum represents all stakeholders in Taiwan's digital publishing industry, and is a member of both the Book Industry Study Group (BISG) and the International Digital Publishing Forum (IDPF). The latter works to get publishers to adopt Epub3 standards and, more basically, to encourage publishers to convert to, and manage all their content in, standard digital formats.

Although the topic of the workshop was digital publishing in general, the majority of the delegates came from book publishers. There were others from magazine and newspaper companies, and from new online book platforms for children's book apps and eBook collections. I was told I could identify the "online" people by the fact that they carried backpacks, not briefcases.

Politics divide the PRC and Taiwan, but they are also separated by their written and printed language. The spoken language is the same — no more different than New York and Boston English — but the Taiwanese have stuck to the character set now referred to as "traditional," while the People's Republic of China uses "simplified" Chinese, a set of characters designed under Mao in the 1950s to expand literacy.

It was by chance that my company, Berkshire Publishing Group, had just published its first Berkshire book about Taiwan, under a new custom imprints program that allowed the US-Asia Law Institute at NYU to launch *Challenge to China: How Taiwan Abolished Re-Education through Labor* in print and eBook formats in only a month. The topic was timely and pressing — in fact, the PRC announced less than two months later that it would indeed begin the process of dismantling the "re-education through labor" camps. *Challenge to China* was written in English but included traditional Chinese characters in the text and in the glossary. My staff takes this kind of thing very much in stride, but I was reminded that when I first went to China in 2001 I carried along a copy of what I thought was a "Chinese" edition of one of my own books, *The Green Home*. The book I showed so proudly was a Taiwanese edition, read from back to front, printed in columns of traditional characters (rather like the gothic script *Blackletter* that one occasionally sees in 20th-century German books — our standard script is "roman").

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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.

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TCR Reports from the Field *from page 2*

While the Taiwanese have been technologically advanced for decades, less than 37% of publishers there have any kind of eBook business. Of the top 100 bestselling books in Taiwan, only 15% have digital versions. Most of the medium to large companies that attended the workshop have at least “some eBooks” now, but print is very much their focus. While they see the print business — in books, magazines, and newspapers — declining, they are not optimistic about digital business models.

On the other hand, they know that global eBook companies such as Kobo want to bring their platforms to Taiwan. I was impressed by the publishers’ pragmatism about digital publishing. They were not willing to be forced into a new market because it was fashionable. They wanted to be sure they could make money, and are understandably worried about getting ahead of their customers, who seem content with print and are unwilling to pay for eBooks, as they are accustomed to free digital content. They don’t see a market in Taiwan sufficient to justify the costs, and they are very conscious of IP issues. Their contracts with authors often don’t include digital rights. An art publisher I met said she doesn’t have e-rights to the images. Paying for digital content is probably the single biggest issue for Taiwan publishers, and this means that piracy is a grave danger.

The publishers I talked to were thinking about digital publishing because they had to, but they were unconvinced that Taiwanese readers would take to eBooks any time soon. I argued that their market is not just in Taiwan but with the millions of global readers of traditional Chinese characters. And because it’s easy to convert from traditional to simplified Chinese (but not the other way around), a book published in Taiwan can become a PRC edition very easily.

I argued that they have a bigger market than Taiwan itself — millions of readers around the world — and that because Taiwan’s traditional characters can easily be converted to PRC-simplified they have a vast potential market that is untapped. I also said that Chinese-language eBooks would have a market in libraries, which came as quite a surprise to them.

The latest figures show 12 million Taiwanese using mobile devices (3G/WIFI) to access the Internet. This is 55.2% of the population, where the figure in the PRC is 29.7%, according to the China Internet Network Information Center. The biggest eBook channels are telecom operators such as Chung-Hua Telecom and Taiwan Mobile.

Training editors and others to handle digital workflow is a big challenge, especially since Chinese publishing doesn’t have the style standards we have in English (APA, MLA, Chicago, Berkshire international). The audience sat up when I showed them how my editors use a concordance macro to find and fix inconsistent spellings, hyphenation of terms, and capitalization. This can be crucial for accurate search in digital publications.

We also talked about the difficulties in getting Chinese characters onto Western mobile devices such as the Kindle. I’ve dealt with this for the past few years. The new-generation Kindles handle Chinese quite well, but many people like me see no reason to upgrade their devices, so when Berkshire has a book with Chinese characters (we often include names, places, quotations, and short phrases in the original language) we have to use an image file for every instance in order to be sure that the text will appear completely, and then we add the actual character to the metadata to ensure that we’ll be able to

make the text fully searchable in Chinese, too. It’s a real pain, and we commiserated over these difficulties. But I couldn’t agree with the people I spoke with who thought Amazon was not allowing Taiwanese books because they feared political backlash from the mainland.

One conversation sticks in my mind. My lunch companions were bemoaning the fact that Taiwan’s old global identity, “Made in Taiwan,” is gone — Taiwan now produces few physical products for export — and there’s nothing to take its place. “How about making Taiwan’s brand be ‘Free press’ in contrast to the mainland?” someone said. There were mixed reactions at the table and I’ve had mixed reactions since then. Taiwan does have a free press, and a democratic system. But it was hard for me to see how that could translate into a global brand, and how directly challenging China would be good for Taiwanese business.

Ms. Chou, the MOC director, said that it may not make economic sense to publishers to digitize large numbers of books now but that without doing so, and quickly, Taiwan won’t have the critical mass of content needed to make inroads in the mainland China market and to reach readers elsewhere in the world. Her department plans to fund the conversion of books because it is essential to the long-term health of the industry and also important in maintaining Taiwan’s identity and reputation in the world.

The MOC’s plan, as I understood it, is to subsidize the conversion of thousands of Taiwan publications so they can be sold on eBook platforms, and to add English introductory material and metadata. If this is done quickly and well, then researchers and readers around the world who prefer to read in traditional characters will have a vast range of material at their fingertips, and Western libraries’ ability to build ebook collections in Chinese will be dramatically improved. There will also be far more potential for reaching readers of simplified Chinese, in the PRC and around the world. Taiwan’s opportunity, it seems to me, is to be a bridge between the PRC and the United States and other Western countries, because it has been so closely integrated into the global economy during the period when mainland China was isolated. I’m looking forward to seeing the role that Taiwanese publishers take, and to working with them as more of their content becomes accessible to global readers.

Mark Your Calendars

January 24, 2014, 2:00 – 4:00 p.m — RMG Town Hall 2: Discovery, e-Books, and Demand-Driven Acquisitions at RMG’s Annual Presidents’ Seminar: The View from the Top, ALA Midwinter Conference, Philadelphia Pennsylvania Convention Center Room PCC-117. Registration not required. More information at <http://www.rmgconsultants.com/>.

February 5, 2014, 9:00 a.m. – 3:15 p.m — PSP/EIC Pre-Conference on “Expanding Your Markets on a Global Basis!” The Ritz Carlton Hotel, 1150 22nd Street, NW, Washington, DC 20037. More information at <http://psp2014conference.com/conference-seminar-agenda/expanding-your-markets-on-a-global-basis/>.

Check This Out!

Insights: the UKSG Journal (ISSN 2048-7754) will become a fully Open Access journal beginning v.27, no.1, January 2014. All previous content, including Volume 26 (2013), will also be made openly available. To learn more about *Insights* (as well as its previous title *Serials*), logon to <http://www.uksg.org/insights>.

Don't Miss This!

Stanford University Libraries has announced the second Stanford Prize for Innovation in Research Libraries (SPIRL), a prize to recognize and celebrate innovation through programs, projects, and/or new or improved services that directly or indirectly benefit readers and users. Eligibility for SPIRL includes research, national, or other libraries that support research activities. Awards will be based on a single programmatic or project undertaking and/or a sustained culture and profile of encouraging effective and sustainable innovation. The effect of such efforts must have measurable impact on the library's own clientele as well as the potential for influencing the practices and/or standards of research librarianship generally. Entries must be received on or before January 15, 2014. For more information logon to <http://library.stanford.edu/projects/stanford-prize-innovation-research-libraries-spir1>.

The Charleston Advisor 2013 Best and Worst Awards

For the 13th consecutive year *The Charleston Advisor* has sponsored a series of awards for the best and most problematic electronic products of interest to libraries. The awards are not necessarily limited to services reviewed by TCA, but TCA reviews (if available) were consulted in the final consideration. These awards are published on an annual basis. Categories include Best New Product, Most Improved Product, Best Content, Best Interface, Best New End User Product, Best Pricing, Best Customer Support and the Lemon Award. Members of the editorial board made the final selections in a September 2013 conference call. To see the full list, logon to www.charlestonco.com.

TCR Quotes from the 33rd Charleston Conference

"Ease of use trumps access."

"There should be no non-disclosure agreements."

"Collection development isn't what it used to be."

"We are in opportunity overload."

"Execution is more important than ideas."

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