



The CHARLESTON REPORT

Business Insights into the Library Market

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Short Takes

Amazon will offer students next-day delivery of textbooks and other items through co-branded Websites at UMass Amherst and Purdue who say that the deal will save students nearly \$400 annually on textbooks. Amazon is also giving the schools a 0.5-2.5% cut, which will net at least \$1.7 million in revenue for Purdue and \$1.5 million for UMass over four years, according to the *WSJ*. Read more at <http://www.engadget.com/2015/02/02/amazon-college-distribution-centers/>.

Don't Miss This

Springer has announced special rates now available for its print and eBooks to the organizers of Massive Open Online Courses (MOOCs). Once the MOOC organizer (i.e., the university) has negotiated the usage conditions, Springer provides an access-controlled URL that leads to the selected book. For the duration of the MOOC, registered students can purchase the book at a discount. MOOC instructors can request course material specially tailored to their MOOC students. Springer authors are able to publish a new edition or an adapted version of their own books which meet the specific requirements of their courses. Of note, the program is offered through Springer's trade/end-user division, rather than the library licensing division. For more information, or to request special pricing, logon to moocs@springer.com.

Hot Topics from 2015 ALA Midwinter: Staying Warm in Chicago

... Reported by *Lynda M. Kellam, Data Services & Government Information Librarian, University of NC at Greensboro, Jackson Library, <lmkellam@uncg.edu>*

Despite the 19 inches of snow and flight delays, this year's midwinter meeting was quite informative and lively. Midwinter focuses on committee work and meetings, but a few sessions were offered. Collection assessment, Open Access, and data sessions caught my eye.

- **Data-driven Decision Making**

Making data-driven decisions about resources was the focus of the LITA/ALCTS Electronic Resources Management Interest Group. Galadriel Chilton from the University of Connecticut opened with findings from the UConn Libraries' Massive Analysis Project in which they analyzed subscriptions to Scopus, Web of Science, and Google Scholar. Josephine Crawford from Kansas State University presented on her library's use of business term data to create a more systematic approach for assessing usage of electronic resources. Lynda Aldana from the University of Maryland, Baltimore County, and Randall Lowe from Frostburg State University presented on efforts to implement a DDA eBook model through the University System of Maryland and Affiliated Institutions (USMAI) consortium. They analyzed the eBook program's usage to inform later changes.

- **Open Access Publishing**

The ALCTS Scholarly Communications Interest Group's session spotlighted questions of Open Access publishing. Beth Bernhardt discussed UNC Greensboro's implementation of the Open Journal System (OJS), a journal management and publishing system (http://library.uncg.edu/services/scholarly_communication/open_journal_systems.aspx). She presented a straightforward how-to guide on implementing the system, including information on the library roles needed and challenges to supporting the service. Jonathan Nabe and Andrea Imre from Southern Illinois University Carbondale assessed their library's funding of Open Access publishing fees. They conducted a survey of faculty recipients of the award (called the COPE funds, <http://lib.siu.edu/cope>) to see if the funding influenced faculty views of OA. Most of the respondents said that the fund gave them a more positive view of OA. They concluded that a longitudinal study would be better to track interest over time. Finally, Kevin S. Hawkins, Director of Library Publishing at the University of North Texas, presented on his library's for-fee scholarly publishing service. Called Eagle Editions (<http://www.library.unt.edu/eagle-editions>), the authors must be affiliated with UNT and pay based on a sliding scale. All three presentations showed interesting models for the future of OA publishing!

- **ACRLMetrics**

Finally we learned about using *ACRLMetrics* data with Bob Dugan and Counting Opinions. Mr. Dugan recently published a guidebook called *Managing Data Using ACRLMetrics and PLAMetrics* with Peter Hernon and Joseph R. Matthews. *ACRLMetrics* is an online data service that makes data available from ACRL and the National Center for Educational Statistics (NCES). Mr. Dugan discussed the benefits of using *ACRLMetrics* and gave some examples for use of the data to assess library services and collections. The benefits of using this system are that ACRL and IPEDS data can be combined easily and templates can be used to analyze recurring questions over time. The guide is available from ALA Editions and will be reviewed in an upcoming issue of *Against the Grain*.

TCR Reports from the Field: 2015 PSP Annual Conference — “Beyond Disruption: Publishing in the Real World”

This year's annual meeting of the Association of American Publishers / Professional and Scholarly Publishing Division took place February 4-6 at the Ritz Carlton in Washington, D.C. Our thanks to Martha Whittaker, Senior Manager, Marketing Strategy, American Society for Microbiology <mwhittaker@asmusa.org> for the following summary.

Keynote: Don Tapscott, President and CEO of The Tapscott Group and author of *The Digital Economy* (recently republished in a 25th anniversary edition), reflected on changes he has witnessed since 1994, when he first started following the internet. He suggested that the “Information Age” has turned into the “Networked Intelligence Age” because it’s not just about content but also collaboration and sharing. We are in an era of “re-intermediation,” a process of adding value to services that the internet has allowed us to dis-intermediate, for example, travel sites that help travelers discriminate among the seemingly endless variety of flights, hotel rooms, tour guides, and discount prices. This re-intermediation is introducing a new type of middleman. Tapscott also spoke of what he called “the contradictions of privacy” — the differences between what we say (we must have privacy) and what we do (give important personal information to geo-location services and ecommerce sites).

Plenary: Event Horizons, Investment Community Perspectives on the Professional & Scholarly Information Industry. Four representatives from the worlds of venture capital and merger & acquisitions gave their perspectives on the current state of the scholarly publishing industry. Included were Ann Ripsanu (Wolters Kluwer Health), Thane Kerner (Silverchair) and Brian Napack (Providence Equity). Panelists agreed that content is no longer a scare commodity and pure content plays are not interesting. Other observations included the following:

- Brand trust becomes more important in a time of information over-abundance.
- Investors are looking for integrated solutions; companies must be strong in both content and technology.
- There has been insufficient due diligence around technology in the past.
- Technology must be interoperable with other players in the industry.

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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 Rebecca Lenzini, <rlenzini@charlestonco.com>, Editorial Offices, 6180 East Warren Avenue, Denver, CO 80222. TEL: 303-282-9706, FAX: 303-282-9743, (c) Copyright 2014, The Charleston Co. All rights reserved. ISSN 1091-1863.

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- Publishers are now seeing BlackBoard as an attractive partner because of its workflow integration.

Investors are looking for companies that integrate partners into the overall value proposition. They are looking for local partners in emerging markets. For those with a long term perspective, double digit growth may still be possible in certain areas. A distribution network already in place is attractive. Panel members agreed that a company’s commitment to Open Access will come up in the due diligence, but it is not a factor in driving up the valuation. Investors are “not interested” in Open Access as a value proposition.

Other points made by the panel:

- Go deep into your market.
- Focus on youth.
- Form partnerships.
- Become masters of the tools.
- Ask if anyone is using a product or service you are considering.
- Collect data on your customers, using surveys. “Big Data” is usually anonymous.
- Use data for your business model. Non-profits often bring investors the “logic model” which is a qualitative assessment of the business. Investors want data and measures of impact.
- A company’s data and its ability to manage are value-drivers in an acquisition.

Prose Awards Luncheon: The Prose Awards annually recognize achievements in professional and scholarly publishing. The winner of the grand prize award, the RR Hawkins award, was presented to Cambridge University Press for *Capital in the Twenty-First Century*, by Thomas Piketty.

Symposium: Prospering in a Multimedia World: Publishers as Non Traditional Content Providers. This program covered trends in dealing with non-text materials resulting from research — “products of research” rather than just “publications.” Figshare, as presented by founder Mark Hahnel, is a digital repository where researchers can preserve data research outputs such as figures, videos and datasets and make them discoverable and usable by other researchers. Anselm Spoerri from the School of Information and Communication at Rutgers talked about visualization and the “stories that reside in supplemental data.” Visualization helps both the researcher and the reader discover new value in data. Some publishers are now collecting APCs (article processing charges) for managing research data. One speaker on the panel suggested that data APCs are becoming the new “color-printing charges” for publishers.

Symposium: Chunking Book Content for Extra Profit. This well-attended symposium explored new ways of serving up content, now that revenue is dwindling from digital archive and backlist sales. The two most important requirements to make chunking practical are knowing what you have (by using standard identifiers

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and semantic tagging) and knowing what rights you own. Speakers suggested starting with current content because it's a manageable set and reminded the audience to remember that rights for print do not always translate into rights for digital.

Plenary: Librarians as Publishers. The goal of this session was to explore how library publishing initiatives fit into the mission of the research library of future. The Library Publishing Coalition was founded in 2014 with approximately 50 member libraries interested in digital publishing. The recently published second edition of its digital Directory lists 124 publishers from around the world. Charles Watkinson, Associate University Librarian and Director of the University of Michigan Press, and a founder of the Library Publishing Coalition presented three reasons why libraries get into the business of publishing.

1. Challenge the status quo by providing an alternative to the traditional publisher.
2. To fill unmet needs for the publication of “grey literature” (conference proceeding, technical reports, niche publications) thereby providing a service to the faculty.
3. To educate the next generation about information literacy. Undergraduate driven journals are learning vessels for students.

Library publishing creates opportunities for collaboration — among students, students and faculty, faculty and librarians. They are usually funded out of library operating budgets, so the sustainability is not assured.

Questions from the audience included: Are librarians taking on publishing because they failed at institutional repositories? Is it publishing or posting?

CHORUS Update: Howard Ratner, Executive Director of CHORUS presented an update on CHORUS which has now been in production since July 2014. It secured a partnership with the U.S. Department of Energy in August of 2014. CHORUS is expanding internationally and also according to Ratner, “will have a place” in data. Discussions are underway with all the federal agencies. The CHORUS value proposition is that it addresses all the stakeholders in the information chain and does it using an existing framework. In Ratner’s words CHORUS provides a dashboard for agencies and keeps “public eyeballs on the publisher Website.” Both discovery and compliance are provided by CHORUS. As of January 2015, CHORUS had

loaded 64,648 records, 23,358 of them publicly accessible as of February 3.

Plenary: Researchers Our Ultimate Customer! How Do We Provide Them More Value? In this session, Glen P Campbell from The BMJ Publishing Group (North America) and Simone Sacchi from Columbia University’s Center for Digital Research and Scholarship spoke about programs at their respective organizations to support authors and researchers. Campbell stressed researchers often do not feel in control of the publication process. BMJ supports the researcher with workflow solutions that improve basic publishing. The third speaker, William Jackson from the Medical College of Wisconsin, spoke directly about his experience as a researcher, author and graduate research advisor. He flatly stated, “Researchers don’t care about Open Access.” In his opinion, support for Open Access from established authors is more about challenging the tenure and promotion process than about advancing science. Jackson said for him the best thing about publishing in OA journals is that he doesn’t get reprints or permissions requests. Jackson took issue with manuscript submission systems that most publishers are using. It can take all day to submit a manuscript. Researchers object to digital formats that separate illustration and graphics from the text. He prefers PDF files that can be read off-line and have the same appearance as print. He also objects to getting review manuscripts that have not had at least initial copy-editing. Doing some editing prior to review would make reviewing much easier — particularly for non-English speakers.

Plenary: Disruptors/Innovators. The final session of the conference highlighted four innovative service companies. Chirantan Bhatt of tapCLIQ, a mobile marketing company, reviewed his company’s attempts to leverage mobile users by providing convenience, relevance and personalization. Eric Hellman talked about his company UnglueIt, which has just loaded the Project Gutenberg files into Github so that texts can be version controlled, with proper authorship and attributions. Stephen Leicht from UberResearch explained how his company is giving data about researchers and research trends to funding organizations to inform their decisions about supporting research. UberResearch also works with university administrators to assist them in measuring the research impact of their institutions. Finally, Daniel Stinfil, co-founder of Prepcube talked about using courses delivered by text messaging to prepare students to take college entrance exams. Text messaging is the communication medium of preference for Millennials and high school students.

Mark Your Calendars

March 25-28, 2015...ACRL 2015, Portland, Oregon. Registration and hotel information available at <http://conference.acrl.org/registration-pages-169.php>.

March 30-April 1, 2015...UKSG 38th Annual Conference and Exhibition, SECC, Glasgow, Scotland. Program and all details available at <http://www.uksg.org/event/conference15>.

May 6-8, 2015....17th Fiesole Collection Development Retreat, “Competing in the Digital Space: Evolving Roles for Libraries and Publishers,” Berlin, Germany. Preliminary Program and Registration/Sign-Up available at http://www.casalini.it/retreat/retreat_2015.html.

TCR Quotes

“When asked what expectations librarians have for publishers in optimizing discovery of licensed resources, librarians ranked the wide availability of metadata as the most important, followed by collaboration with library systems, standards compliance, and clear statement of content index coverage (transparency).”

Excerpted from “Improving the Discoverability of Scholarly Content: Academic Library Priorities and Perspectives,” a new SAGE white paper released at ALA Midwinter, based on a February 2014 survey. The full study is available at <http://ow.ly/HLe5p>.

Highlights from the 10th APE Conference, January 19-21, 2015, Berlin

... by Anthony Watkinson, CIBER Research, <anthony.watkinson@btinternet.com>

Academic Publishing in Europe (APE), now in its tenth year, provides a distinctively different outlook on the preoccupations of European publishers and librarians. There are different emphases from the big UK meetings later in the year — UKSG and ALPSP and also the STM seminars in December. Newbie Kent Anderson (super Scholarly Kitchen chef and controversial new editor of *Science* magazine) described the atmosphere as “fresh and frisky as some of the meetings in the U.S. used to be.” See his report at <http://scholarlykitchen.sspnet.org/2015/01/26/going-ape-thoughts-and-insights-with-a-european-perspective/>.

Here are four points of possible interest particularly to the library community:

- The pre-conference began with a Keynote from Wim van der Stelt, the Vice President in charge of publishing strategy at Springer. He was unusually frank. He could say nothing about the Macmillan/Springer merger because he did not know anything. However the title of his presentation was **Times are changing: between owning and sharing. The next Paradigm Shift.** For him publishers have a choice. In the new sharing economy you can either fight the trends or work with them. You can defend copyright but at the same time develop new services. You could call this the Elsevier approach though Wim did not say that. Alternatively you can embrace Open Access even if, as a questioner pointed out, many researchers are not keen. Sources of funding are keen. This was his choice, a personal one, but Springer as the biggest Open Access journal publisher has (he said) found that the Open Access model works financially.
- It is traditional at the full conference that a “eurocrat” should open the proceedings. This year it was Dr. Celina Ramjoue, who is head of sector for Open Access to scientific publications and data at the European Commission. Her message from Brussels was **Towards an Open Science Vision.** This message is one also taking hold in the USA. Open Access for publications is just a start. Open data and open software are also part of a spectrum of openness that includes open source and citizen science. Interestingly she admitted that this movement must not be top down from government but there has to be a change of culture among scholars.
- APE used to have more of a program for book publishers although now the small European university presses attend more rarely. However, a presentation from Peter Berkery from the Association of American University Presses did find a prominent place on the first day. Membership is all “mission-driven.” Like many libraries (as the 2014 Charleston Conference showed) not all U.S. university presses have worked out a strategy — and they have to do that. Berkery wants to work with libraries. For both presses and libraries advocacy and visibility on campus is the aim. Likewise for both presses and libraries collaboration is a must and is happening. He pointed to nap.edu/academy-scope/ as an example of what is available. However this is very much a work in progress.
- In the U.S., responses to the OSTP directive from the agencies are yet to come except for the DOE. In Europe, in Germany and in the UK in particular, researchers, librarians and publishers are working with mandates, article processing

charges, and Creative Commons licenses. In the globalized world funders are not confined country by country. There was one session on **the practical side of Open Access — building an APC billing infrastructure** setting out a range of solutions and emphasizing the need for automation and cooperation to avoid confusion and extra costs: nothing new there. Perhaps more revealing was a session on **the suitability of the CC-BY license for research publication** which saw Robert Kiley of the Wellcome Trust and a major advocate to the use of the CC BY (attribution only) license for all outputs they fund confronted by three publisher representatives (two of them lawyers). Wellcome and other funders want maximum re-use and it does not matter whether it is commercial. The lawyers said they were handicapped by lack of case law but thought that CC BY might not be compatible with German authors’ moral rights. Wellcome might accept CC BY ND (ND = non derivative) because humanities scholars want to control versions but not CC BY NC (NC = non-commercial) which enables publishers to maintain revenue. It is all very confusing at present.

As is the norm for all meetings in recent memory, there were several slots for new dot coms. The conference program lists them. Some were obvious losers and others looked likely to be bought by a large company in a few years. Some were very relevant to librarians keeping up with research and researcher needs.

To follow up, be sure to logon to www.ape2015.eu for the programme and eventually the video.



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