



The CHARLESTON REPORT

Business Insights into the Library Market

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Mark Your Calendars

July 18-21, 2015 — 108th Annual Conference and Exhibition, AALL (American Association of Law Libraries), Philadelphia, PA. Details and registration at <http://www.aallnet.org/conference>.

September 9-11, 2015 — ALPSP Conference and Awards, sponsored by The Association of Learned & Professional Society Publishers, Park Inn, Heathrow, London, UK. Details at <http://www.alpsp.org/Ebusiness/TrainingAndEvents/ALPSPInternationalConference.aspx>.

September 15-17, 2015 — 7th Conference on Open Access Scholarly Publishing (COASP), sponsored by the Open Access Scholarly Publishers Association (OASPA), to be held in the Trippenhuis, The Royal Netherlands Academy of Arts & Sciences (KNAW), Amsterdam. Details available at <http://oaspa.org/registration-open-for-coasp7/>.

October 25-27, 2015 — Library Leaders Digital Strategy Summit, offered in conjunction with Internet Librarian 2015, Monterey Conference Center, Monterey, California. Registration and hotel information available at <https://resweb.passkey.com/go/infotoday2015>.

TCR Quotes

“Physics has the highest levels and longest history of green OA. The evidence from physics to date is that high levels of green OA don’t cause journal cancellations. On the contrary, the relationship between arXiv (the OA repository for physics) and toll-access physics journals is more symbiotic than antagonistic,” excerpted from lib-license post May 26, 2015, by Christina K. Pikas, Librarian, The Johns Hopkins University Applied Physics Laboratory, <Christina.Pikas@jhuapl.edu>.

Registration Now Open! 2015 Charleston Conference: “Where Do We Go From Here?”

Make plans now to join us in historic downtown Charleston, South Carolina, for the 35th annual Charleston Conference, Issues in Book and Serial Acquisition. Our theme for 2015 is “**Where Do We Go From Here?**” Preconferences and the Vendor Showcase will be held on Wednesday, November 4 and the main conference runs from Thursday, November 5, through Saturday, November 7.

Register now at <http://bit.ly/chs15reg>. Early bird registration rate is \$450, and the deadline to receive the discounted rate is **September 18**.

This annual conference on issues in book and serial acquisition will again be held in beautiful historic downtown Charleston, SC, with headquarters at the Francis Marion Hotel. Sessions will also be held at the Courtyard by Marriott Historic, the Embassy Suites Historic, and, for the first time, at the Gaillard Center Charleston (www.gaillardcenter.com). The brand new Gaillard Center, located in downtown Charleston on Calhoun Street, has state-of-the-art performance hall and meeting rooms, and we’re excited to be one of the first groups to use the beautiful new space.

We have a new web address! Bookmark <http://www.charlestonlibraryconference.com>. All of the old links and email addresses will re-direct to the new domain. We hope that the new site will be easier to navigate and that you will all find the information you need about the event.

“The Charleston Conference allows us to network, to talk as well as listen to each other,” says Conference Founder and Convener Katina Strauch, *“and to share new approaches and ideas. We can all succeed at the intersection of our various thoughts and responsibilities. Come on down!”*

Confirmed plenary speakers include **Katherine Skinner** (Educopia Institute); **Courtney Young** (Pennsylvania State University and 2014-2015 ALA President); **The Long Arm of the Law** panel, including **Ann Okerson** (CRL), **Bill Hannay** (Schiff Hardin LLP), **Lisa Macklin** (Emory University), and **Gary Price** (INFOdocket); **Jim O’Donnell** (Arizona State University); **Derek Law** (University of Strathclyde); and **Clark Morrell** (Rittenhouse). Other speakers will be announced soon at <http://www.charlestonlibraryconference.com/conference-info/speakers/>.

We have a fantastic line up of preconference sessions scheduled for Wednesday, November 4, on topics such as altmetrics, KBART compliant metadata, streaming video, data-driven decision making, e-resources management, visualizing usage data, and much more. Details are online at <http://www.charlestonlibraryconference.com/preconferences/>.

We are also offering three workshops prior to the conference, part of an ongoing series of Charleston Seminars:

Acquisitions Bootcamp — <http://sched.co/3WQO>
Monday, November 3, 9:00 a.m. – 4:00 p.m. and
Tuesday, November 4, 9:00 a.m. – 12:00 p.m.

This seminar will offer an intensive one and one-half day boot camp on acquisitions from three different perspectives: public services, technical services, and the vendor side. The major emphasis is on the nuts and bolts of the acquisitions process from selecting materials, especially e-books, to assessing collections and articulating the return on investment to the

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2015 Charleston Conference — from page 1

parent organization (academic/special/public libraries). Using an interactive hands-on approach, with case studies, small group discussion, and best practices attendees will gain pragmatic knowledge they can apply in their home institutions. This class is ideally suited for librarians new to selection and acquisitions workflows.

Legal Issues in Libraries — <http://sched.co/3WQM>
Tuesday, November 4, 9:00 a.m. – 4:00 p.m.

Beyond Bright Lines (or, Things librarians didn't know they need to know about the law, but they really do!) Librarians are faced with legal issues every day but, without knowing what to look for, it can be easy to miss or misunderstand them. Conventional wisdom that offers easy answers can be tempting but may provide a false sense of security. Even worse, by trying to follow rules we don't really understand, we may unnecessarily impede the library's ability to do good work. Through a series of discussions and group activities, this day-long session will prepare librarians to make informed, thoughtful decisions in key legal areas that are becoming ever more crucial in institutional settings.

Understanding the Library Market — <http://sched.co/3Z7i>
Tuesday, November 4, 1:00 p.m. – 4:00 p.m.

Attention publishers and vendors of library-related materials: new for the 2015 Charleston Conference, we have a Charleston Seminar workshop just for you! We'll discuss how to target libraries that will buy your publications, making your marketing budget effective, improving your understanding of the library market, and using library associations to focus your spending. Learn from veterans in the field how libraries buy, who are the library buyers, and how purchasing decisions are made. You can't afford to miss out on this workshop focused on the library market at the premier international annual library conference for book, serial, and electronic resource acquisition. All the major decision makers will be there, and so should you!

Check the Conference Website for more details at www.charlestonlibraryconference.com, or contact Leah Hinds with questions at leah@charlestonlibraryconference.com.

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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 2015, The Charleston Co. All rights reserved. ISSN 1091-1863.

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By the Numbers

50%... of all scholarly papers published in 2013 came from the top five most prolific publishers, according to a new study from the University of Montreal. Findings are based on analysis of 45 million documents indexed in the Web of Science between 1973-2013. Read the complete study and results at <http://journals.plos.org/plosone/article?id=10.1371/journal.pone.0127502>.

\$27.98 billion... is the 2014 net revenue reported for the U.S. book and journal publishing industry, according to StatShot Annual, a yearly statistical survey by the Association of American Publishers (AAP). The figure is a slight revenue increase of 4.6% from 2013, which was \$26.75 billion. For more details logon to <http://publishers.org/news/us-publishing-industry%E2%80%99s-annual-survey-reveals-28-billion-revenue-2014>.

Berlin Preconference: “Collection Development in Digital Times”

... personal takeaways by Carol Tenopir, Chancellor's Professor, University of Tennessee School of Information Sciences, <ctenopir@utk.edu>

The **Fiesole Retreat Series** each year offers a Preconference to deal in more depth with one particular area of scholarship and collection development. This year's session focused on “**Collection Development in Digital Times**,” placing an emphasis on how the digital transition is changing the way we think about collection development. A particular emphasis was placed on the Humanities & Social Sciences, with an eye to discussing what can be done to reduce the marginalization of HSS compared with STM. A further question was whether usage statistics can reasonably and reliably represent the value of disciplines which may not attract a critical mass of users.

Among my takeaways from this session were the following:

- ...writing is part of the intellectual creation process and is tied to the language in which the author thinks
- ...subject collections are moving to “discipline-driven information provisioning”

In the Humanities...

- ...it is difficult to come up with a common standard for metadata
- ...discovery still happens in libraries

Mass digitization...

- ...should be done in close cooperation with publishers
- ...must build confidence with rights holders
- ...may not effect sales

Two essential book takeaways for librarians and publishers...

- Defend books by increasing visibility, demonstrating quality, and transforming services
- Measure impact of books by citations (impact on other scholars) AND by social impact (reviews)

Berlin 2015: 17th Fiesole Retreat Round Up

... a personal perspective from *Katina Strauch, Editor, Against the Grain, <kstrauch@comcast.net>*

A Bit of Background

The **Fiesole Collection Development Retreats** began in 1999 at the instigation of **Mario Casalini**. Mr. Casalini was the founder of **Casalini Libri**, and he wanted to start a series of meetings in Italy much like the **Charleston Conference**. The **Fiesole Retreats** focus on **collection development** issues but they are smaller, more focused, and attended by international opinion makers. **Fiesole Retreats** have been held all over the world, including in Cambridge, Glasgow, Oxford, Singapore, Hong Kong, Melbourne, Amsterdam, Leuven (Belgium), Lund (Sweden), and St. Petersburg (Russia). Every four years the Retreat returns to Italy, as it will in 2016.

Notes and Quotes from Berlin

This year's **17th Fiesole Collection Development Retreat** was held May 6-8 in Berlin, Germany, and featured the theme "**Competing in the Digital Space: Evolving Roles for Librarians and Publishers.**" Humboldt University Library was the local host.

Following is a snapshot from my notes showing some of the provocative quotations and primary themes that emerged during the 17th Fiesole Retreat.

Libraries and Collections

- Are monographs only relevant in humanities and social sciences?
- Will the print monograph survive?
- What is a digital collection in the 21st century?
- How digital should the book of the future be?
- Blogs need ISSNs – standards of identification are needed.
- The digital library is a reservoir rather than a curation.

Role of Libraries

- Are libraries becoming the long arm of publishing companies?
- A local digital collection is not the future in the digital space.
- The library is a partner for researchers and students.
- Use and reuse have new dimensions.
- Is the library an information gateway in the digital space?
- Do we need local discovery tools?

Role of Others

- Will gold OA succeed in the humanities? Who will pay?
- What is the best advice for success? Small is beautiful.
- Digital platforms can and are bringing people together to discuss content.
- OA access is needed for 21st century research.
- User data and usage data are not the same thing.
- Can annotations be subject to privacy in the digital environment?

Controversies

- The monograph will not last much longer.
- There is less and less added value in local discovery.
- We (librarians) are not competition for the delivery space anymore.

Popular New Words:

- freemium • megajournal • OA monograph

Check out powerpoints and slides from Berlin and all past retreats at the Fiesole Retreat repository: http://www.casalini.it/retreat/retreat_2015.html.

Berlin 2015: Another Perspective

... by *David Worlock, "The Deniability of the Blog," May 12, 2015, DavidWorlock.com, printed with permission*

The speaker of the event, for me, was **Anya Smit**, the challenging university librarian from Utrecht. Designing a library which will soon be an entirely digital concept, she and her colleagues set aside the format limitations of "book," or rather reconstruct them so that a blog becomes a "book." I loved the openness of her approach and her disdain for limitations as to what a library might contain and how its knowledge exploration might be bounded.

We had, after all, started the meeting quite conventionally with **Michael Mabe**, giving a fascinating account of the history of the journal and the article from **Henry Oldenburg** onwards to celebrate the foundation of the Royal Society Transactions in 1665. In many ways this made an admirable book-end to Anya Smit's talk, illustrating how completely we have removed ourselves from the age of format and how completely the chain of scholarly communication in a digitally networked world values contributions by impact and timing, and not by process and format.

In many ways **Deni Auclair** of Outsell hammered this home when she gave a complete analysis of how the STM marketplace is behaving. I am still slightly alarmed by the fact that there is a \$10 million gap between Outsell's estimated market sizing and the \$25 million revenue base claimed by the STM association of publishers. There is of course bound to be a difference between a measurement of publishing revenues and the information actually bought by customers, given that data sales are so important to research and will arguably become more important. Will we see the journal market continue to grow but diminish in overall terms as a proportion of what its market actually buys? And will this be exacerbated by the impact of Open Access? Deni pointed to the relative lack of impact of OA on publisher revenues, less than 1% of which were derived from author publication fees.

To read the complete blog post, logon to <http://www.davidworlock.com/2015/05/the-deniability-of-the-blog/>.

TCR Reports from the Field: 2015 SSP Annual Meeting

... by *Martha Whittaker, Senior Manager, Marketing Strategy, American Society for Microbiology, <mwhittaker@asmusa.org>*

The Society for Scholarly Publishing's annual meeting, "The New Big Picture: Connecting Diverse Perspectives," was held this year in Arlington, Virginia, from May 27-29. It was a lively event with 900 attendees and approximately 50 vendors in the exhibit hall.

Keynote speaker **Charles Watkinson** of the University of Michigan Library and Director of the University of Michigan Press led off speaking about his own rethinking of "seriographs" and "monocals." He talked about the journalization of books in the digital environment, where the edges of book spaces are bumping up against the edges of serial spaces. Charles encouraged the audience to think of this as a good thing because "the best things happen at the edge." He referenced a *NY Times* opinion piece by **Akiko Busch** that talks about the exciting things that happen in places of transition, where one thing is turning into something else. Read the article at <http://www.nytimes.com/2013/12/27/opinion/life-on-the-edge.html>.

Ken Auletta, columnist for the *New Yorker* magazine and author of the 2010 book, *Googled, The End of the World As We Know It*, entertained the audience on Thursday with stories of his adventures in the media business and his conversations with the visionaries of that world — including

an early conversation with the founder of Snapchat in which Auletta failed to see the promise of this new start-up which now has a valuation of \$10-20 billion.

Friday's keynote speaker was **Jennifer Lawton**, a former president of MakerBot, the global leader in desktop 3D printing. She talked about believing you can do anything, and never giving up. Her "top ten" list for success includes: you direct your life — don't let anyone tell that you can't, ask for help, share your experience, network, stop-look-listen, and go slow, steady, hard as hell.

Amy Brand, formerly of the Harvard Office of Scholarly Communication, and now VP, Academic and Research Relations at Digital Science, reported on her survey on the demographics and educational background of publishing industry employees. She reported that the industry is 62.6% female and 35.8% male, but that not surprisingly most executive positions are held by males. Her full data set is available on Figshare at http://figshare.com/articles/Demographics_and_education_of_scholarly_publishing_professionals/1424476.

A final note: Visual Practitioner **Greg Gersch** captured the highpoints of this vibrant meeting on a colorful graphic. Be sure to enjoy it at <http://ifvpcommunity.ning.com/photo/society-for-scholarly-publications-eureka?context=user>.

Libraries on the Move

Canadian Public Libraries for Fair Ebook Pricing, a coalition formed by the Canadian Library Association, Canadian Urban Libraries Council, Ontario Library Association and Toronto Public Library, have launched fairpricingforlibraries.org in an effort to take a stand on the issue of raising awareness of high ebook prices charged to libraries. According to the group, some multinational publishers charge libraries as much as three to five times more for ebooks than the consumer price, while others place caps and time limits on use, resulting in fewer titles and fewer copies for library readers to discover. Read the full press release at <http://www.newswire.ca/en/story/1555517/fair-ebook-prices-are-long-overdue>.

The Digital Public Library of America (DPLA) has joined forces with Europeana and Creative Commons (CC) to create a collaborative, interoperable platform for international rights statements. The International Rights Statement Working Group brings representatives from the three organizations together and has spent the past 12 months outlining a proposal for a common framework to provide rights statements for both national and international cultural heritage objects. So far, the Working Group has released two white papers addressing these requirements, and will accept comments on them through June 26. To learn more about this development, be sure to read the DPLA Update entitled "Developing and implementing a technical framework for interoperable rights statements" at <http://dp.la/info/2015/05/20/developing-and-implementing-a-technical-framework-for-interoperable-rights-statements/>.



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