



The CHARLESTON REPORT

Business Insights into the Library Market

NOVEMBER / DECEMBER 2019

VOLUME 24, NO. 3

Notable and Quotable: Favorite Charleston Quotes

... A sampling of interesting statements noted by Conference Founder Katina Strauch during this year's Charleston Conference

If there is no dust jacket, it isn't a book.
The reward system is monograph crazy.
What fills the space between an article and a book?
It's hard to keep up with white papers and other types of papers.
Young sociologists are publishing twice as much as in past years.
Open access and increasing revenue are opposite desires.
Let people read in the format they want.
Print is on the rise and so is the researcher.
eBooks are still here but not as important as in the past. Has demand crested?
Analytics is more and more important.
There are no standards for interoperability.
There are fewer and fewer choices.
I believe that unbundling services is a trend.
There is an explosion of startups.
We are seeing the most innovation through startups.
We are seeing membership fatigue.
Seamlessness is important.
The disruption now has moved from content to services.
Market consolidation is now of interest to more than libraries.
Are people moving away from EZproxy?
No one can dispute the beauty and vision of freely accessible immediately available research content.
Are we heading to a "Library of Alexandria moment" when "essential content could go up in cyber-flames?"
It's a pretty disconcerting marketplace for now. Loss of choice and vertical and horizontal integration.
What does the alliance between Better World Books, Wikipedia and Internet Archive mean for libraries and collections?

2019 Charleston Library Conference: The Time has Come ... to Talk of Many Things!

... Reported by Leah Hinds, Executive Director of the Charleston Conference, <leah@charlestonlibraryconference.com>

The **2019 Charleston Library Conference** was held from Monday, November 4, through Friday, November 8. Preconferences and Seminars were held prior to the conference, on Monday and Tuesday, November 4 and 5. The Charleston Seminars are in-depth workshops that are offered either before or after the main Charleston Conference. This year's seminar was Acquisitions Bootcamp, presented in partnership with UNC School of Library and Information Science, an annual favorite for early career librarians. A total of **9 preconferences** were presented over the two days on topics such as Plan S and transformational agreements, data analysis, marketing for libraries, "hacking" your library, and more.

Our attendance was comprised of roughly 50% librarians, 22% vendors, 19% publishers, and 9% consultants, students, and others. These statistics were taken from the self-reported "Attendee Type" category on the conference registration form.

The main conference consisted of **7 plenary presentations**, **157 concurrent sessions** and lively lunches, **15 Neapolitan sessions**, and **41 posters**. Major themes of the meeting included analysis and assessment of collections and library users, open educational resources, changes in licensing practices, virtual reality/augmented reality, journal package options, the future of print collections, and open access publishing.

The conference was opened by a **keynote presentation from Brewster Kahle, Founder and Digital Librarian at the Internet Archive**, titled "Building Trust When Truth Fractures," in which he discussed working with the world's great libraries to digitize their collections and to make them available to users via controlled digital lending, a process whereby libraries can loan digital copies of the print books on their shelves. Internet Archive also made a huge announcement from the stage. **Brewster and Better World Books CEO, Dustin Holland, announced** that Better World Books is now owned by a non-profit affiliated with Internet Archive, Better World Libraries. This is seen as a major step forward toward their joint mission: providing access to the knowledge in books to everyone in the world. Now libraries which deaccession to BWB can have even greater social impact, because the Internet Archive will acquire, digitize, lend, store and digitally preserve millions of books from BWB's inventory over the next few years.

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Another plenary presentation on Wednesday included a **panel presentation** titled “A Collaborative Imperative? Libraries and the Emerging Scholarly Communication Future,” **chaired by Beth Bernhardt of Oxford University Press**, featured Lorcan Dempsey, OCLC, Jason Price, SCELIC Consortium, and Alicia Wise, Information Power Ltd. The session included short presentations from each panelist **reviewing key new trends and challenges**, including collaborative collections, transformative open access agreements, and consortial experimentation, highlighting opportunities for both libraries and consortia. It closed with discussion and Q&A from the audience. Wednesday afternoon featured **another keynote presentation from Patricia Flatley Brennan, the Director of the National Library of Medicine**, titled “Anticipating the Future of Biomedical Communications.” The talk described the exciting steps the NLM is taking to prepare for the future, and to identify critical challenges that can only be solved through partnerships between the NLM and the publishing community.

Thursday morning was opened by **keynote plenary speaker Kumsal Bayazit, CEO of Elsevier**. She spoke on “Collaborating to Support the Research Community: The Next Chapter.” Her talk focused on building bridges with the library community, moving towards greater open access, and product vision. There was a robust Q&A session with the audience, moderated by Cris Ferguson of Murray State University. Thursday afternoon featured the **Charleston Premiers: Five Minute Previews of the New and Noteworthy**. This session features short lightning round style presentations of new companies and products of interest to the Charleston community. **Audience voting at the end determined the following winners:**

Best Design: Cambridge University Press, Cambridge Open Engage

Most Impact: Our Research, Unpaywall Journals

Most Innovative: Atypon, Atypon Manuscripts

The Charleston Report, Business Insights into the Library Market is published six times a year by The Charleston Co., 6180 East Warren Avenue, Denver, CO 80222. Subscription price per year is \$155 (U.S.) and \$170 (outside the U.S.). FAX: 303-282-9743.

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 2018, The Charleston Co. All rights reserved. ISSN 1091-1863.

Contributing Editors: Tom Gilson <GilsonT@cofc.edu>

Editorial Board: Rebecca Lenzini, Katina Strauch

Chief Financial Officer: Rebecca T. Lenzini

Publisher: The Charleston Co.

Graphic Design: Toni Nix • Masthead Design: Jack Thames

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On Friday morning, **the Long Arm of the Law session was back again for another musical number**, including Ann Okerson of CRL, Bill Hannay of Schiff Hardin LLP, and Michelle Wu of Georgetown University Law Center discussing current legal issues affecting libraries and the information industry. The week was capped off by a **Closing Session and “Poll-A-Palooza”** on Friday afternoon featuring a poll session hosted by Erin Gallagher of University of Florida, and a **closing summary from Stephen Rhind-Tutt** of Fairfax House Group.

For more detailed reports on the plenaries and other conference sessions, see the **Charleston Conference Blog**, written by **Donald Hawkins**, at <https://against-the-grain.com/tag/chsconfblog/>. The full schedule with session titles and descriptions, speaker listings, as well as sponsors is available at <https://2019charlestonlibraryconference.sched.com/>. Videos of all plenary sessions and Neapolitan sessions, along with select concurrent and lively discussions, are being uploaded to the conference's YouTube channel at <https://www.youtube.com/user/CharlestonConference>. Subscribe for updates and notifications as new content is made available.

The **2020 Conference will be held November 2-6**. We hope to see you there!

Registration Open for Athens 2020

Registration is now open for the **22nd Annual Fiesole Retreat to be held from April 7-9, 2020, in Athens, Greece**. The theme for the Retreat is “Tradition Meets Innovation.” We extend our thanks to the **National Library of Greece** who will serve as our co-host and will welcome us to their beautiful new facility inside the **Stavros Niarchos Foundation Cultural Center** <https://www.snf.org/en/initiatives/snfcc/>.

The **Pre-Retreat Preconference on Tuesday, April 7, will focus on Greek initiatives** highlighting the creativity and forward thinking of our host country. The full day session on Wednesday, April 8, will begin with a **discussion of Cultural Heritage** and the Challenges and Opportunities presented by new and emerging approaches. Following lunch, we will **examine Copyright** and specifically how initiatives in the EU are affecting all of us. The final half-day session on Thursday, April 9, will **address Open Access Monographs, Digital Humanities and Research Outputs** in search of mutual understandings of opportunities for the scholarly enterprise.

Registration as well as the Preliminary Program and Hotel information are now available at the Retreat website: https://www.casalini.it/retreat/retreat_2020.asp. Sponsorships are also available. To learn more, contact Rebecca Lenzini at <rlenzini@charlestonco.com>.

Happy Holidays!

from the Staff at The Charleston Company

TCR Reports from the Field: Frankfurt Book Fair, October 16-20, 2019

... Reported by Anthony Watkinson, Principal Consultant, CIBER Research and Honorary Lecturer, University College London, <anthony.watkinson@btinternet.com>

The Frankfurt Book Fair is the biggest gathering of publishers in the world. It is essentially a rights fair by origin and also a place where sales people in publishing houses meet their international officers and representatives. The hierarchy in the industry appear on the first day and can be briefly glimpsed briefing their senior staff and meeting others at their level when they are not finalising deals in nearby hotels. Very few librarians from outside Germany attend.

Academic publishers, related vendors and consultants have their big networking day before in a hotel across town. Most items of interest to librarians are raised there and not in the Book Fair proper; however librarians are typically not there unless speaking. Registration is not cheap. For details of the programme and some of the presentations see <https://www.stm-assoc.org/events/stm-50th-anniversary-frankfurt-conference-2019/>. Notes on some key presentations follow:

1. The **keynote speaker** was Annie Callanan CEO of the Taylor & Francis Group since 2017. Her title was **The Worst of Times: The Best of Times**. The situation is dire for publishers because the world has forgotten what we do and why we do it. Authority has given way to influence. The modern version is that truth is only what we choose to hear. Facebook is where you go to find cures for cancer. But there is hope in a tale of two realities. Feelings are not facts. Publishers substantiate advanced knowledge. They serve experts. Evidence based assertions are quantifiable. Much of her presentation was relevant to other intermediaries like libraries.

2. The **first panel** was concerned with **Keys to Innovation**. The moderator was Daniel Ebnetter, the Chief Executive Publisher of Karger Publishers, again in post for about two years. His preliminary illustrative fact was from the motor industry where only 2% of the current market share is electrified vehicles yet one company (Daimler) have decided to move from combustion engines. To translate to our industry, if we look at journal article open access market share it is now about 25% by volume and 10% by value. **We face the same challenges — changing strategies, changing organisations and changing technologies**. The panel engaging with this were Sam Herbert — co-founder of 67 bricks, the software development consultancy; Steven Inchcoombe — the Chief Publishing Officer of Springer Nature; Jayne Marks — Vice-president for Global Publishing at Wolters Kluwer Health; and a relative newcomer Pierre Montagano, Director of Business Development at Code Ocean, a research collaboration platform. The discussion led by Inchcoombe discussed what strategic approaches companies should use. Currently most publishers are majoring on **adaptive innovation** but how much re-invention should they pursue? Marks led on **organisation for the future**. They know how to do digital but what is their vision for the future and how do they manage cultural change among their staff. You do need to bring in new competencies but it is also a matter of encouraging current staff. How do you become risk takers? How to reward innovation across the company? Herbert led on **technologies**. He perceives a mounting pressure for innovation particularly driven by customers. For Montagano **executing the solution** is important: their mission at Code Ocean is to make scientific code more reusable, executable, and reproducible and they are working with a number of companies in partnership.

3. **A Round Table on Research Data — Cite, Link and Share** followed, moderated by Eefke Smit, Director of Standards and

Technology at STM. Her basic theme was that Research Data is the heart of Open Science. **2020 is the year of research data**. The round table were “experienced publishers” comprising Grace Baynes, Vice-President for Research Data and Product Development at Springer Nature; Wouter Haak, Vice-President for Research Data Management at Elsevier; and Iain Hrynaszkiewicz, Publisher, Open Research at Public Library of Science (PLOS). It was surprising that the panel were in accord on most questions. Springer Nature have a lot of material on their site — see <https://researchdata.springernature.com/> and <https://researchdata.springernature.com/users/8075-grace-baynes/posts/40275-how-can-we-accelerate-data-sharing>. Baynes argued that publishers have to have clear policies and be **supportive of open behaviour**. Haak spoke not just about sharing but also linking. This leads to **more citations**. Elsevier have rolled out data policies in 1,800 journals but there is **resistance among editors**. Funders are slow to espouse relevant policies. Hrynaszkiewicz’s experience was that discussions about research data, open science and reproducible research often generate **shocking statistics of wasted money and unreliable research findings**. Transparency is central and asking for transparency starts with a low tech solution: policy. At PLOS they have had a strong data sharing policy since 2014 but it costs

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or rather it should be recognised that it is an investment: <https://journals.plos.org/plosone/s/data-availability>. Several panellists mentioned the importance of recognition — “badges.” From the floor Gerry Grenier (IEEE) referred to a NISO prototype being rolled out next year: <https://www.niso.org/standards-committees/reproducibility-badging>.

4. The **after lunch presentation** was given by Donald Samulack the President of US Operations for Editage/Cactus Communications describing a Global Survey (5 Asian countries plus UK and USA) on author attitudes to open access — https://campaign.editage.com/global_survey_report_2018/. What he drew from this was **Open Access — one size does not fit all**. The OA message is not getting through was his summary. There were some interesting national results. 18% of Chinese authors liked OA because publication was guaranteed. UK stands out in terms of mandates as a reason for publishing OA (37% of researchers said this). USA comes second with only 7%.

5. The **second panel** was moderated by Christopher Kenneally of the Copyright Clearance Center (CCC). The topic was not a legal one but the rather new area of **AI Ethics**. He drew upon a panel comprising Marjorie Hlava, President, chairman and founder of Access Innovations, the pioneer in knowledge management; Carlo Scollo Lavizzari of Lenz Caemmerer who advises the STM and publishers on copyright issues and other related legal concerns; and Niels Peter Thomas, the Managing Director for books at Springer Nature. Kenneally presented a challenge: “**Organizations like STM and the industry at large should debate and eventually**

must agree to fundamental concepts and principles of conduct that will guide editors and executives to know right from wrong as ...AI solutions proliferate.” There is a transcript available in the CCC’s Beyond the Book series (<https://beyondthebookcast.com/>). According to Lavizzari STM are already discussing these sort of questions in their Future Lab (<https://www.stm-assoc.org/standards-technology/future-lab-committee/>). His view is that “**Human activity and also technology simply are so multi-faceted that laws alone**” do not suffice. In the financial markets “You can have laws galore but at the end of the day, the ethics of the financial advisers are secured through professional standards and ethical rules... I think it is the same here.” Publishers “will have a great role to assure that the data used to train machines before they are let loose, so to speak, in the wild is correct.”

6. Finally in the programme proper there was the **Executive Panel** moderated by Michael Mabe, outgoing CEO of STM. The executives concerned were Tracey Armstrong, CEO of the Copyright Clearance Center, Annie Callanan (T&F), Daniel Ebnetter (Karger) and Judy Verses, Executive Vice President Research at Wiley. The central question was: **what does innovation mean to your company?** There was a high level of consensus. Innovation has to be in all parts of the company but you have to let some ways of working go and take risks. You need to be willing to look outside the industry and not be afraid to partner. You need to be aware what the problems are. **Is legacy a problem?** The answer is not always. Some of the executives were more interested in buying start-ups than others who preferred to rely on internal development. All agreed that the corporate culture was really important in the sense that it had to be open to change.



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