



The CHARLESTON REPORT

Business Insights into the Library Market

JULY / AUGUST 2021

VOLUME 26, NO. 1

Mark Your Calendars

ALPSP Virtual Conference and Awards, September 15-17, 2021 — The main themes of this year's conference are "Discoverability and Accessibility" and "The Great Reset: Scenario planning for life after COVID." Sessions include:

- What about books?
- Accessibility is good for business
- Exploring Discoverability
- Scholarly communications, evolution or revolution?
- Which Business Models will prevail?
- Changes in Scholar and researcher behaviours
- ALPSP Awards for Innovation in Publishing.

Delegates will have the chance to network with the conference community during regular breakout sessions throughout. To view the full programme and to register, logon to <https://alpsp.cventevents.com/event/5a76c9bf-384d-433c-8719-104efee5daff/sumar>.

OASPA 2021 Online Conference on Open Access Scholarly Publishing, September 21-23, 2021 — OASPA has issued its Preliminary Program for this year's online meeting. Delegates are welcomed from a wide range of backgrounds at all stages of their careers, including those who are working in publishing, librarianship, government, higher education, funding agencies, nonprofits, and other affiliated industries. Topics to be covered include:

- Open Infrastructure and Collaboration
- Covid Lessons
- Libraries and Open Access: Pathways to Transformation
- The Transformative Agreement Landscape: Where Are We Now?

Logon to <http://oaspa.org/conference/> to view the full Program and to register.

UKSG November Conference – Two Half Day Sessions, November 17-18, 2021 — Be sure to join the 2021 UKSG November Conference — "Open Scholarship 2021: the good, the bad and the ugly." This year's event will take place online over two consecutive half-days. Register for forthcoming information at <https://www.uksg.org/form/register-your-interest-2020>.

TCR Reports from the Field: Charleston In Between Virtual Event, July 28th 2021

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

This "mini conference" is a new departure — potentially the first of others — from The Charleston Conference, designed "to explore important late-breaking developments that cannot wait until November for discussion." The program can be found at <https://www.charleston-hub.com/the-charleston-conference/welcome/charleston-in-between-virtual-event/>. Recordings are already available to registrants and will eventually be accessible to others via the site. Technical problems at the start (only) cut time available for the rest of the meeting. Both the moderators gave strict time limits to speakers and also probed as they were speaking — sensitively of course. The meeting was in two parts.

Panel 1: Clarivate Acquires ProQuest

The first panel was moderated by Roger Schonfeld, the Director of Libraries, Scholarly Communication and Museums programs at Ithaca S&R. Schonfeld's own views have already been widely disseminated: <https://scholarlykitchen.sspnet.org/2021/05/18/clarivate-to-acquire-proquest/>. He allowed his panelists to speak for themselves both in their allotted five minutes and in subsequent wider interactions which included questions via Q&A (folded in below). He also laid out some suggestions for each of his separate sub-groups:

Products and Strategies

1. In his five minutes, Michael Clarke, Managing Partner in Clarke & Esposito, presented insights into the overall market dynamics raised for him and for others by the surprise that either EBSCO was not invited to bid or that, if they were approached, were they turned down or did they decide the cost was too high? Clarke also sees Clarivate coming to academic libraries with a stronger portfolio enabling packaging with competitive pricing.
2. Dracine Hodges, Associate Librarian for Technical Services at Duke, came next. She herself has a particularly specific "open" view following from her involvement in the international FOLIO project. Important to her was the availability of customisation. Does Clarivate understand this and do they understand the importance of privacy for librarians? And do they understand how diverse libraries are in their remit? Is Clarivate going to value mostly its

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shareholders or its customers? Librarians want to be part of the strategy. Of note, she stated that, since COVID, no purchase is essential. For example, Web of Science is no longer a “sacred cow.”

3. The last speaker in this subsection was James Phimister from the New England Journal of Medicine group, where his remit is Market Development, Analytics and Customer Insights. He was particularly impressed by the size of the new operation and gave some figures. Clarivate will double the size of its academic business and “this will change its DNA.” For the new business rivals (companies like Elsevier), Phimister considered that the purchase “has stirred the competitive pot” but what happens will be slow to evolve. Is bringing content together with analytics and systems the new big deal (Schonfeld), with new integrated pricing (says Clarke) or more opportunities for packaging (Phimister). Hodges from her FOLIO standpoint rejected this model as not sustainable.

Data and Marketplace

4. Claudio Aspesi, a Consultant to SPARC, was the first speaker concentrating on marketplace issues. He was surprised by the purchase as before he has seen the future of the company would be downstream (corporate) rather than the upstream (academic). He has discussed the reasoning for this with others who were more insiders — all saw the Clarivate purchase as strictly financial, bringing up ProQuest value to Clarivate value. They are buying options.
5. Kaitlin Thaney is Executive Director of Invest in Open so she is speaking for her organisation: she believes in open. She is really concerned with loss of privacy and new surveillance from the new conglomerate. Higher end scholarship should make the decisions about use

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 2021, The Charleston Co. All rights reserved. ISSN 1091-1863.

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Publisher: The Charleston Co.

Graphic Design: Toni Nix • Masthead Design: Jack Thames

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of AI, however institutions are willfully empowering commercial entities. She also said the new Clarivate looked rather like Elsevier. By buying up smaller companies, Elsevier has cut choice rather than increased efficiency. There is a need for regulation to prevent mergers like this. Schonfeld pointed out that the acquisition has not closed yet so what can we/should we do to stop it? He looked to Europe where Germany looks to regulate data analytics.

Implications for Publishers

6. Gwen Evans, who is in charge of Global Library Relations at Elsevier, went first with the publisher view. We librarians are not in the library business but the higher education business. Publishers have to recognise where they are in the higher education ecosystem. What interested her was what metadata comes together and how can this help librarians? Campuses not worried about bundles as such for Microsoft and Adobe so no intrinsic objection.
7. Todd Toler, who runs Product Strategy and Partnerships at Wiley, was struck by the size of the new Clarivate which is five times the size of his company. However, both ProQuest and EBSCO still have their sales forces, with EBSCO’s international force seen as superior, and his soundings of colleagues suggested no change in publisher channel strategies. His bottom line: “watch this space.”

Panel 2: Exiting the Tunnel: Reflections from savvy executives upon what the bright light of post-Covid offers to them.

Panel 2 was moderated by Ann Okerson, Senior Advisor to the Center for Research Libraries. Her session title was rather longer and of course the subject was wider. She gave her speakers nine minutes to speak and also provided some questions for guidance, among them: what does normal look like, will some of the changes continue to be used or will we go back to where we were before, and finally how virtual will we all be. She also recommended an article in *The Economist’s* July 3 issue entitled “The Long Goodbye to Covid 19” <https://www.economist.com/leaders/2021/07/03/the-long-goodbye-to-covid-19>.

1. Kevin Guthrie, the President of Ithaka, spoke from a leadership position and with the structure of Ithaka in mind. At Ithaka, weekly interaction by Zoom with its four geographically separated offices has led to being more personally connected. JSTOR free access has been extended to 2022 and during that time Ithaka intends to work out how to maximise access while making the money which will enable them to do their job. Some initiatives have been delayed including a project on big data. Ithaka will be sensitive about how people who wish to/need to telecommute in future and how this can be accommodated. A stated goal is “closing equity gaps.”
2. Amy Brand, CEO of MIT Press, also concentrated on strategic plans. Digital has happened but print is still needed by some. She argued for the MIT solution and the greater role for academe. University leaders now see the need to take on dissemination and the need

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- to develop internally, not outsource with commercial solutions. Open Access is now seen as important even by commercial publishers and the big development is preprints: MIT is starting overlay journals. Value Driven publishers need to work with faculty on value signaling (reputation) and how it works. Also first world constructs are no longer sufficient — no answer yet but they are starting a new book series on global epistemology. In general MIT are both intensifying work on previous initiatives and creating new ones.
3. Peter Brantley, Director of Online Strategy at UC Davis, picked as the biggest positive change that University of California have now bought in to their consortial ILS after 40 years (!) and OER has been presented to the UC Regents for the first time. UC Davis bookstore has launched “equitable access” (<https://ucdavisstores.com/EquitableAccess>). UC are exploring Controlled Digital Lending policy guidelines and use cases — “where comfortable to lend for libraries when book not available in any sensible way may be the way it works.”
 4. Rob Manuel, President of the University of Indianapolis, provided a slide of institutional demographics illustrating the different sort of institution he represents where 48% of students are first generation to attend college and 54% are Pell eligible, requiring that care be essential. “The storm is the same but the boats are very different.” The university has been assailed during COVID with threats of cutting whole departments — “shoddy research” from business entities has contributed to undervaluation of the education being offered. Technology can be a friend in such a situation. He is also looking closely at the real value of applied degrees in teaching and in nursing (also suffering from attack). Reputation is crucial in bad times like this and so is liquidity.
 5. Mimi Calter, currently Deputy University Librarian at Stanford but due to move to Head the Library at Washington University in St. Louis on October 1, spoke primarily about “services at the other end of the tunnel.” Under COVID the move online has worked. No consensus yet as to whether it will be less physical for the future. Keeping doors open is certain but there has to be equity for those off campus. How to support classes is an example of a problem. Course reserves are a pain point. As far as her staff is concerned, some say they will not come back! When is telecommuting possible?
 6. Nancy Kirkpatrick, CEO of OhioNET, joined in digitally from an airport. COVID “has shown up the inequities of our profession.” From her perspective, pre-pandemic life was not good for all of us and we cannot to go back to the old normal. Now is the time to get together all the data we need to make the ideal the actual: after all we are core information scientists in our training. For example, were all levels of staff offered flexibility. One question was — Can diversity be helped if one is remote? Yes — because micro-aggressions can be avoided.
 7. Jim O’Donnell, University Librarian and Professor of History at Arizona State University is focused on collections. Digital transformation is done and won, and it is the future of print which we need to consider. In the music industry vinyl is surging but it is a specialised space: in the library unique special collections are the equivalent of vinyl. The age of collecting is over and it is access that people want. In a time when if it is not online it is not literature, copyright arrangements will have to change. Remembering all those passwords is going to be replaced by one click — two factor is a dead end.
- Final thought: As a Director of the Charleston Conference but not involved in this experiment, I was pleased and impressed and hope it can be continued.

Don’t Forget

2021 Charleston Conference Registration is Now Open

This year’s theme is “On the Road Again!” The 2021 Charleston Conference, to be held November 1-5, will be a hybrid event with options for attendance in person and online. We are so excited to welcome attendees back to the beautiful city of Charleston, SC, as well as continuing to offer a robust and interactive virtual conference experience through the Pathable platform. Agenda and more details available soon! <https://www.charleston-hub.com/the-charleston-conference/>

Conference registration includes: 5 days of conference sessions, events, and networking opportunities, as well as access to video-on-demand recordings within 48 hours and for one year after. Also included is a one-year complimentary subscription to *Against the Grain*, the premier journal linking publishers, vendors, and librarians. To register, logon to <https://charlestonconference.regfox.com/2021-charleston-conference>.

Short Takes

The British Library has announced a Scholarly Communications Toolkit, a series of five leaflets available in PDF as well as InDesign formats via its Research Repository: <https://bl.oro.bl.uk/collections/884767e4-44c5-4cbd-98aa-3e72ce1ac75e?locale=en>.

The leaflets are designed to provide advice to researchers and research-related staff about publishing, open access and sharing research online, copyright and Creative Commons, and research data management. They are available openly under the CC BY license, and are also available to other organizations to download and edit for their own purposes. The BL states that it “envisages these will be primarily of use to researchers and support staff outside of universities, but universities are very welcome to take and adapt content as well.”

Don't Miss This!

The Charleston Advisor is pleased to announce its 23rd year of publication has begun. The first issue of the journal appeared in July 1999 with a goal to provide authoritative “peer-reviewed reviews” of online products of interest and importance to the library community. Since then, over 1,000 databases and services have been reviewed by practitioners in the field.

TCA's July 2021 issue (v.23, no.1) is now available at www.charlestonco.com. Included in the latest issue are the following reviews:

- Declassified Documents Online: Twentieth-Century British Intelligence (Gale/Cengage)
- Dimensions (Digital Science)
- Education Source (EBSCO Information Services)
- Google Books Ngram Viewer (Google)
- IBISWorld (IBISWorld)
- Library and Information Science Source (EBSCO Information Services)
- Mindscape Commons (Coherent Digital)
- Music Index with Full Text (EBSCO Information Services)
- NewspaperArchive.com (World Archives)
- ProQuest One Business (ProQuest)
- SAGE Campus (SAGE Publications)
- Sex & Sexuality Module II: Self-Expression, Community and Identity (Adam Matthew Digital)
- The Women's Tribune (Accessible Archives)

Don't forget! Reviews from this issue as well as over 500 updated reviews from past issues are available and fully searchable in the ccAdvisor database, a joint project of Choice and *The Charleston Advisor* now offered through EBSCO. Learn more at <https://www.ebsco.com/products/research-databases/ccadvisor>.



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