

Marketing to Libraries Worldwide: Changing Markets, Changing Times

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What I'll cover

- About ALPSP
- The market for journals
- What's changing
- Coping with recession
- Some new initiatives
- Open access

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ALPSP

The trade association for non-profit publishers and those who work with them

358 organizations in membership at the beginning of 2010

- Increasingly international – 33 countries now represented.
- Varied membership: large and small and medium sized publishers are included (e.g. Institute of Physics, Monash University ePress, Unibio Press, OUP)
- Two types of member: 'Full Members' are publishers, 'Associate Members' are suppliers of services, including commercial publishers
- ALPSP members publish around 10,000 journals and many books, databases and other scholarly publications.

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Size of the market

- Annual revenues generated from English-language STM publishing \$8 billion in 2008
- Employs 110,000 people globally
- 2,000 journal publishers worldwide
- Main associations (inc ALPSP) include 657 publishers producing 11,550 journals (c50% of total journal output by title)
- Of these, 477 publishers (73%) are non-profit.

From: *The STM report: an overview of scientific and scholarly journals publishing* by Mark Ware and Michael Mabe, Sept 2009

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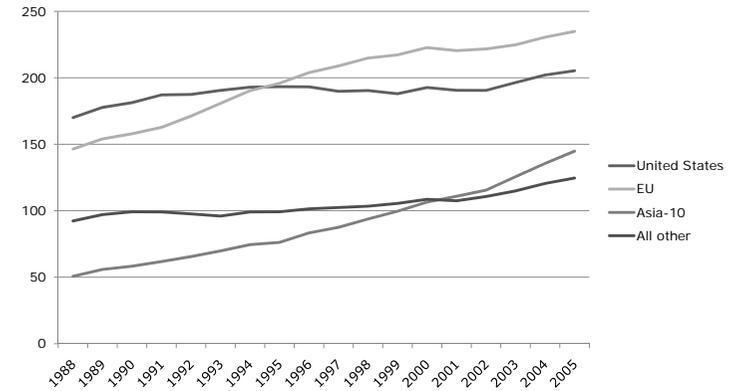
Global distribution – output of scientific papers

- USA – 29%
- Japan – 8%
- UK – 6%
- Germany – 6%
- China – 6%

These five countries accounted for 55% of the world's journal articles, while 23 countries accounted for 90%

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Fastest growing markets



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S&E article output, by major S&E publishing region/country: 1988-2005 (Science and Engineering Indicators 2008)

What's changing

- Market dynamics
- Customer behaviour
- Business models
- Products
- Customers
- Organizations
- Technology

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The changing market

- Competitive world – hard for small players
- Publisher mergers and takeovers
- 50% of journals published by 10 publishers
- Long tail of society publishers
- Stagnating/declining library budgets (5-25% cuts in 2010?)
- BUT . . .

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Coping with the recession

- Concentrate on quality
- Segment, integrate
- Maximise usage – market directly to users and harmonise messages to libraries, end-users and geographically
- Re-package content for new markets (e.g. bio-techs, developing world, direct selling in existing markets to new segments).

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Market dynamics

- Online journals at the cutting edge; 96% of STM and 87% of HSS accessible electronically
 - *Data-mining*; datasets as unit of publication linked to text
 - *Semantic web* (Chemistry and Molecular Biology)
 - Facilitation of *automatic extraction of knowledge* from research literature

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The (semantic) Biochemical Journal

"Pdfs paralyse the proper and efficient use of scientific knowledge. By burying information in static, unconnected journal articles, scientists waste countless hours either repeating experiments that they didn't know had been performed before, or worse, trying to verify facts that they didn't know had been shown to be false."

Professor Terri Attwood, University of Manchester

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BIOCHEMICAL JOURNAL

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BJ Central

SEMANTIC
BJ Bringing Life Sciences to Life www.BiochemJ.org

A new dimension in scientific publishing has arrived

What is all the fuss about?

Portland Press Limited and the University of Manchester are proud to present The *Semantic Biochemical Journal*, powered by Utopia Dc

Utopia Documents offers a completely new way of reading PDF files.

Once you have downloaded and installed [Utopia Documents](#), open any PDF in the current issue, and watch it come to life.

A user guide is available [here](#), and there are further FAQs below.

This is just the beginning. Come back soon and see what else you can do with all those flat, boring PDFs...

Why did we embark on the *Semantic Biochemical Journal* experiment?

With researchers drowning in a sea of data and knowledge highly fragmented across huge databases and millions of journal articles, p ways to unlock this information.

["Calling International Rescue: knowledge lost in literature and data landslide"](#) explains why the University of Manchester and Portland Pr experiment and invites you to take part.

Why is using the term lookup feature in Utopia Documents any different to using, say, Google or a specific database?

First, Utopia Documents searches numerous appropriate databases for definitions and records, so it's rather more convenient than having to search manually. Second, even though the software searches some quite generic sources (such as Wikipedia: DBpedia) for information, these searches mean that only results relevant to biochemistry and molecular and cell biology are returned.

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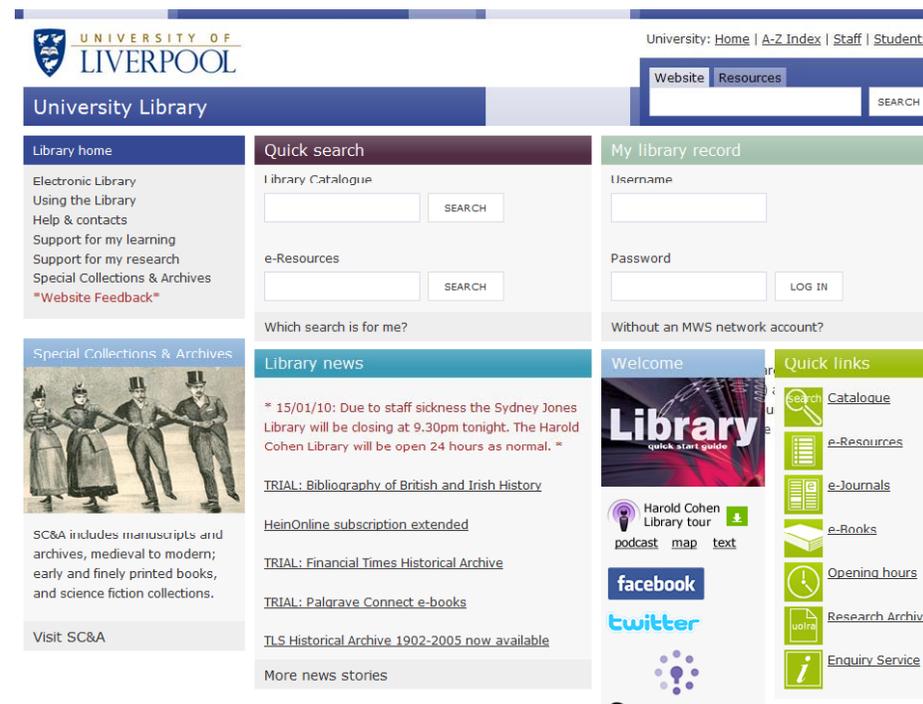
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Changing libraries: the future for library collections?

Jane Harvell, Head of Research Services and Special Collections, University of Sussex Library presentation at an [ALPSP seminar](#) in London during November 2009:

- Shared storage is one future?
- There will be more Open Access and free content
- A continued research (and teaching) publishing infrastructure
- We will have flexible solutions for supporting teaching
- Better online presentation of content – currently not researcher centred (<http://www.deepdive.com/>)
- International coverage
- Archives and Special Collections will give us our distinctive brand

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The screenshot shows the University of Liverpool Library website. At the top, there is a navigation bar with the University of Liverpool logo and links for Home, A-Z Index, Staff, and Students. Below this is a search bar with 'Website' and 'Resources' tabs. The main content area is divided into several sections: 'Library home' with links to Electronic Library, Using the Library, Help & contacts, Support for my learning, Support for my research, Special Collections & Archives, and Website Feedback; 'Quick search' with two search boxes for Library Catalogue and e-Resources; 'My library record' with fields for Username and Password, and a LOG IN button; 'Special Collections & Archives' featuring a historical photograph and text about SC&A including manuscripts, medieval to modern books, and science fiction collections; 'Library news' with a notice about the Sydney Jones Library closing at 9.30pm and a list of trials including Bibliography of British and Irish History, HeinOnline subscription, Financial Times Historical Archive, Palgrave Connect e-books, and TLS Historical Archive; and a 'Welcome' section with a 'Library quick start guide' and social media links for Facebook and Twitter. A 'Quick links' sidebar on the right contains icons for Catalogue, e-Resources, e-Journals, e-Books, Opening hours, Research Archive, and Enquiry Service.

Open Access

- Full Open Access (“Gold”) – version of record made available immediately
- Delayed Open Access – as above, but delayed
- Self-archiving (“Green”) – final peer reviewed accepted article, either immediate or delayed

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Full Open Access

- Immediate Full OA: journal contents made available immediately (see PLOS)
- Optional (or Hybrid) OA: part of a journal content is made available immediately.

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Institutional Repositories

- Growing rapidly – Eprints project lists 1,300 archives of which 713 as institutional or departmental level research repositories
- Number of articles listed by Eprints is about 3.2 million, or a mean 4,500.

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Subject Based Repositories

- arXiv (1991) – 530,000 e-prints
- RePEc – 285,000 working papers, 430 journal articles
- PubMed Central – 1.3 million research articles, of which 136,000 open access.

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Unfunded mandates

“Repositories are parasitic on the existing journal structure for their peer-review process”

Ian Russell, CEO, ALPSP – 2009

See the exchange of views at
<http://www.timeshighereducation.co.uk/story.asp?storycode=409057>

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US Scholarly Publishing Roundtable

- Committee on Science and Technology of the US House of Representatives (www.aau.edu)
- White House Office of Science and Technology Policy (OSTP)
 - Academic Administration – three provosts
 - Academic Libraries – three librarians
 - Publishers – one commercial, two societies, one new OA start-up
 - Three researchers in library and information science

Shared principles

- Peer review must continue its critical role in maintaining high quality and editorial integrity
- Adaptable business models will be necessary to sustain the enterprise in an evolving landscape
- Scholarly and scientific publications can and should be more broadly accessible with improved functionality to a wider public and the research community
- Sustained archiving and preservation are essential complements to reliable publishing methods
- The results of research need to be published and maintained in ways that maximise the possibilities for creative reuse and interoperation among sites that host them

Roundtable recommendations

1. Agencies should work in full and open consultation with all stakeholders, as well as OSTP, to develop their public access policies
2. Agencies should establish specific embargo periods between publications and public access
3. Policies should be guided by the need to foster interoperability
4. Every effort should be made to have the version of record (VoR) as the version to which free access is provided
5. Government agencies should extend the reach of their public access policies through voluntary collaborations with non-governmental stakeholders
6. Policies should foster innovation in the research and educational use of scholarly publications
7. Government public access policies should address the need to resolve the challenge of long-term digital preservation
8. OSTP should establish a public access advisory committee

ALPSP response to the Office of Science and Technology Policy – Public Access Policy consultation (www.alpssp.org)

Publishers should determine if and when versions of the article to which they have added value should be made freely available and this will vary greatly depending on the needs of different research disciplines.

In summary ALPSP:

- Believes that publishers should be allowed to control their own business models without the government expropriation of value added by private organizations.
- Encourages additional research to assess the level of demand and purpose of access to the peer-reviewed literature by researchers and the public so that the most appropriate and cost-effective solution can be found.
- Suggests that the United States should instigate a large-scale, cooperative research study involving relevant stakeholders (akin to the PEER project in Europe) to gather evidence to inform OSTP policy in this area.
- Asserts that the system of peer-reviewed journals greatly assists research efficiency and suggests that Federal agencies work with publishers to find acceptable policies for public access that do not have a deleterious impact on publishers' ability to add this value.
- Publishers should determine if and when versions of the article to which they have added value should be made freely available and this will vary greatly depending on the needs of different research disciplines.

New Organizations

- New competitors for content (Google, Wikipedia, Institutional Repositories)
- New ways of monetizing and delivering content
 - [DeepDyve](#) – research rental
 - [PubGet](#) – access to sub'd PDF's
 - [Mendeley](#) – research management tool for desktop
- Higher levels of competition for publishers (authors, subscribers, societies)

Which means . . .

So what?

- Understanding these market changes
- Understanding the likely impact on your business
- Maintaining your company and journal profile

Is more important than ever . . .

Thanks



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