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The eBook and the National Library

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Nylink's Shared Collection:
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determining checkout time, etc. Now that there are many participants in the shared collection, and usage statistics are available, **Nylink** has formed an eBook Advisory Committee of representative librarians from all types of participating institutions to help guide us in how we can best meet the current and continuing needs of libraries in their adoption of eBooks and management of shared collections.

As eBooks become more accepted and incorporated into library resources, libraries are growingly interested in developing their own unique collections. **Nylink** has worked out an aggregated discount structure with **netLibrary** so that these unique collections may also be purchased through **Nylink** and receive a volume discount based on all **Nylink** library activity.

Nylink librarians have learned a lot about what it takes to build a cooperative shared eBooks collection. (And had a reaffirmation of what many collection development librarians know—that good collection development is an art as well as a science!) Issues of availability of MARC records sometimes prevented their integration from coinciding with access, thus delaying use.

Challenges still to be met include how **Nylink** and libraries will deal with dated titles. Normally libraries do not retain books in certain subject areas indefinitely. For example, accrediting organizations require that an academic or hospital library does not keep medical titles, except those of historical interest, that have copyright dates of older than five years. Methods of keeping collections viable long term still need to be resolved.

While **netLibrary** has come a long way with developing statistical reports, there are still areas that need attention, such as the ability for the consortia to track use by institution across all participating libraries, and the need to classify a large number of “titles which have not been assigned a subject.”

The introduction of new technologies is always more challenging than anticipated. **netLibrary's** recent financial problems and subsequent filing for bankruptcy is a clear indication of the substantial risk in any new ini-

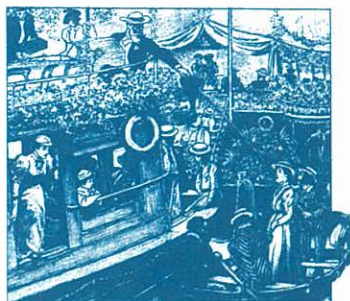
tiative. The issues around standards or lack thereof, the limitations and rapid obsolescence of eBook readers, and the fundamental reticence of moving to new information delivery methods have been more formidable obstacles than initially anticipated. Economic downturns have taken their toll on what has been considered the most viable solution for eBooks in the library environment.

The proposed purchase of **netLibrary** by **OCLC** is generally viewed positively by the library community, since, as a not-for profit library collaborative with a long history of success, there is new confidence in the long-term viability of eBook collections in libraries. Publishers, who do not have the long history of a relationship with **OCLC**, may be more reticent. However, the infrastructure that already exists in **OCLC**, including its established infrastructure for delivering content to libraries, its role in providing cataloging and metadata services, and its worldwide local connections through networks and service centers provide a platform for a more rapid expansion of adoption.

It seems inevitable that eBooks will become a growing percentage of library acquisitions, just as Internet use has exploded in the last six to eight years. Users expect to be able to access information no matter where they are; if libraries are going to retain their viability, they need to deliver on

their patrons' expectations. But do current models make the most sense? Some publishers are fearful that eBook sales might cut into their paper sales and thus undermine their very existence, so are hesitant to divert from traditional pricing models. eBooks present a formidable new set of challenges for libraries whose fundamental systems are geared towards the printed word. Transition to eBooks is frightening because it means that access control is not solely in the hands of librarians, and the acquisition, maintenance and continuation of eBook collections mean a fundamental change in how libraries do their work.

Will eBooks replace the printed word? As a long-time bibliophile, with offspring who are passionate book collectors, I seriously doubt it. Paper books have proved to be an accepted and stable method of communication for hundreds of years. However, eBooks are now an assumption of the information age, and will comprise a major part of information communications in the future. Adoption of the Open eBook Standard by **netLibrary** and others, the evolution of eBook devices, and the growing number of publishers interested in participating in eBook initiatives preclude a growing acceptance of eBooks by publishers, librarians, and the reading public. The potential impact of eBooks is still in its infancy. The evolution has just begun! 🍄



The eBook and the National Library

by **Mark Bide** and **Kim Richardson** (Rightscom, 10 Leake Street, London, England SE1 7NN; Phone: 44 20 7620 4436) <kim.richardson@rightscom.com>

What is the appropriate strategy for a national library in the age of the eBook?

To some, this may seem an almost entirely irrelevant question, at such a nascent stage in the development of the eBook market. The age of the eBook seems a long way off; indeed there are many who believe (or maybe hope) that it will never come.

Is this expectation realistic? Probably not. The last ten years has seen an explosion of publishing (predominantly text-based) in an

online medium – the World Wide Web. There are differing estimates of the size of the Web, but there are certainly billions of pages of content, and this is growing at the rate of millions of pages every day. Much of this may not be very good publishing – or very profitable publishing – but publishing it most certainly is.

How and when the online distribution of textual content will have a measurable impact on “book publishing” as we have traditionally known it remain unanswered questions. However, the “eBook business” has been attracting expenditure of hundreds of millions of dollars in the provision of infrastructure and services – and that’s before the book publishers themselves begin to spend very significant amounts on making their books available in electronic formats.

The world’s largest software businesses are betting substantial sums on the eBook revolution. The world’s largest consultancies have been advancing extravagant forecasts for the growth of the eBook market over the next four or five years.

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MARK BIDE BIO

Mark Bide joined **Rightscom** from **Mark Bide & Associates** bringing thirty years experience in the publishing industry, as a director of the European subsidiaries of both **CBS Publishing** and **John Wiley**, and since 1992 as a consultant, writer and speaker on the impact of technology on intellectual property. He has researched and written extensively on issues related to the management of rights in the network environment and has continued to be closely involved in metadata and identification initiatives.

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Progress has admittedly been slower than some of these forecasts, but this is hardly surprising. The current generation of handheld dedicated “eBook readers” is hardly going to set the world on fire. But the next generation of handheld “tablet” computers will be very different: these are going to be desirable objects indeed. Screen resolution has improved to the point where there will be little perceivable difference between a screen and a laser printed page. The onscreen reading experience is set to improve out of all recognition (and that is without factoring in the potential of “electronic paper” or “electronic ink” radically to change the whole equation).

Yes, it may still be difficult to curl up with your “eBook” in bed or on the beach: but all of us spend a lot of our time reading in other places, too – not least commuting and at work or in the classroom. And, of course, in libraries.

The “eBook” – whatever it may ultimately prove to be – will have a real impact on the book business. The global network is “blowing to bits” the value chain that connects authors to readers and the roles of the players who form each link in the chain.¹ This information value chain includes both publishers and libraries.

Libraries and publishers, though, seem to be finding it hard to define ways of working together in the network environment. A recent *Washington Post* article² highlights the way in which some publishers see the “lending” of eBooks in libraries as directly competing with sales in the market place. It also demonstrates some librarians’ distaste for “digital rights management” technology that creates technological barriers to the widest possible sharing and dissemination of information.

At the same time the network has created a number of businesses – exemplified by *Questia*³ and *ebRARY*⁴ – seeking to provide services on a commercial basis that have been traditionally provided by libraries and librarians. These ventures have not met with universal approbation from librarians, who appear to see the involvement of other librarians in the development of commercial services as, in some very real sense, a betrayal.⁵

This is the obverse of the same coin that sees new business models being proposed which put the role of publishers under similar examination. No intermediary between author and reader can escape this scrutiny.

This is an uncomfortable process, since it requires such a fundamental self-examination and re-evaluation of the “added value” that a particular service provides to the reader. Some sources of added value in the physical world are substantially chal-

KIM RICHARDSON BIO

Kim Richardson is responsible for the development of **Rightscom**’s consulting services for the text industry. Prior to joining Rightscom, Kim held senior positions with leading publishers and publishing service providers, including **HarperCollins**, **St. Martin’s Press**, and **RR Donnelley**. Kim’s extensive experience has focused heavily on ePublishing; she has implemented new technologies and developed new business models for publishers across Europe and the United States.

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lenged by the coming network economy; others are being radically enhanced. Can libraries retain their traditional roles: selecting, acquiring and aggregating content, cataloguing it so that library patrons can find it, and making access to that content available “free at the point of use”?

Perhaps it is the national libraries that are best showing the way forward. **Lynne Brindley**, the Chief Executive of the **British Library**, has recently written of her strategic vision for the library.⁶

We are engaged in a strategic journey that recognises the centrality of the Web to our future... Our emerging vision has the strap-line of ‘making accessible the world’s intellectual, scientific and cultural heritage.’ We seek to make the collections of the British Library (and other great collections) accessible on everyone’s ‘virtual bookshelf’, wherever this may be – at work, at school, at college, at home.

This is a challenging vision for any library, but particularly for a national library whose traditional mission has been to preserve the national cultural archive and to provide very limited access to that archive as a “library of last resort.” The new vision⁷

speaks of a very different role: if it is to be achieved, it will involve developing a very different set of relationships from those that have typically existed between libraries and publishers, particularly in the last two decades.

There is a real tension between increasing access and safeguarding rights holder interests. The Library recognises as a fundamental step that it will have “to work with publishers and others to investigate new paradigms and business models for the dissemination of information in the future.”⁸

In the same way, the **Library of Congress** is seeking ways of reaching agreements with publishers that allow each to retain its role in the chain. As **Winston Tabb**, Deputy Director of the Library, underlines, the publishers’ commercial role in the information dissemination process is a vital one.⁹

The **Library of Congress** has recently been voted \$100 million by Congress to support the preservation of the digital record,

across all media (including eBooks). It is now beginning a process of consultation involving interested parties – particularly publishers – to explore how a national library will manage the access and preservation issues that are inevitably raised by the deposit of e-publications.¹⁰ There is real uncertainty about how soon and to what extent the migration of publication to the network will take place – how soon will a significant part of the published record be available only in “e” form? When this becomes a significant issue, the **Library of Congress** needs to be ready to manage the consequences.

How will the **LoC** deal with the commercial implications? There is evidence from existing deals that the Library has struck with publishers of electronic resources that it will take a sympathetic position to the concerns of publishers with regard to the commercial impact of access to electronic resources. The Library’s focus (for the time being at least) is simply on providing access to these resources “on site” – although in this instance the “site” concerned is extended to mean all Congressional offices as well as the buildings of the **LoC** itself. Already the Library is finding that resources being made available in this way are much more heavily used than those made available only in paper – which suggests that the creation of electronic access adds real value for this group of users at least.

The Library has found that working cooperatively with publishers pays dividends for both sides. As **Winston Tabb** told us: “Publishers are much more generous of spirit than libraries give them credit for.” He is optimistic that arrangements can be made that will ensure that wider access can be provided to electronic resources as they cease to have commercial value – and that the long term preservation of e-publications will have value for publishers that they will ultimately acknowledge!

With the increasing availability of information in electronic formats – and anytime, anywhere access to the network – the potential for intermediaries to add value to the information dissemination process is not diminishing, but it is changing. Publishers and libraries will make much more progress by working together than they will by confrontation. Providing content and providing access should work together through

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Health Science eContent Distribution: The Challenges and Opportunities



by **Sherry Thompson** (Vice President, Library Services, Majors Scientific Books, P.O. Box 819074, Dallas, TX 75381-9074; Phone: 800-633-1851; Fax: 972-353-1300) <sthompson@majors.com>

Majors Scientific Books, a health science book distributor since 1909, prides itself on being a “one stop shop” for available health sciences information, no matter the container, for the scientific community. Our vision statement expresses it in the following way: “To be a provider of accurate information to the scientific and business community: be it print or electronic, be it content or bibliographic information.” Prior to 1993, **Majors** was organized into three primary service areas—books, continuation/serials, and journal subscriptions. Although equally committed to all three, we decided in the early nineties to sell **Majors Scientific Subscriptions**. Our competitors’ focus on newly developed document delivery services suggested we would need to make a significant financial investment to remain competitive in that market. For the first time in our history we limited our vision statement and excluded content packaged as journals.

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mutually beneficial processes to achieve a mutually beneficial goal: the satisfaction of the reader. 

Endnotes

1. A concept explored in detail in Evans, P. & Wurster T. S. *Blown to Bits: How the economics of information transforms strategy* (2000) Boston: Harvard Business School Press.
2. Cha, A. E. “Books by the Byte; Libraries’ E-Lending Opens With a Subplot: Copyright” (July 4th 2001) *Washington Post* <http://www.washingtonpost.com/wp-dyn/articles/A16060-2001Jul3.html>.
3. <http://www.questia.com>.
4. <http://www.ebrary.com>.
5. See, for example, an email to web4lib, 1 February 2001. <http://sunsite.berkeley.edu/Web4Lib/archive/0102/0006.html>.
6. Brindley, L. “Taking the British Library forward in the twenty-first century” *D-Lib Magazine* (Vol 6 No 11 Nov 2000) <http://www.dlib.org/dlib/november00/brindley/11brindley.html>.
7. Now more extensively expressed in *The British Library: New Strategic Directions* (May 2001) a strategy discussion document available at <http://www.bl.uk/>.
8. *ibid.*
9. Personal communication, August 2001.
10. The Library of Congress already has the necessary legislative framework to enforce deposit of e-publications, but is not doing so until it can properly understand and express the requirements.

However, the divestment of the subscriptions divisions allowed us to fully concentrate on developing additional services for our library customers using the newly accessible World Wide Web. Web services are used to gain up-to-the-minute information on medical titles, their availability for sale, and tools for tracking customer purchases. We’ve also developed new skill sets valuable to operating in the eCommerce and eContent environment. Even though disintermediation is considered a natural result of eContent availability, it is in reality creating new partnerships and increased cooperation. No one wants to hear the word disintermediation in association with their profession and our intention is to remain a viable part of the supply chain.

Since the subscription division divestiture, monographs made their commercial debut as eContent. Our subscription jobber experience is proving helpful to us as we determine our path for distributing content instead of objects. Our focus at **Majors** is evolving to include questions about how our identity might change if and should we become primarily a distributor of electronic content. Physical books lend themselves to control. The process is straightforward and simple: order the book (CD, audio cassettes, video, etc.) from the publisher; receive it into the warehouse, pick pack and ship it for the customer, invoice and collect the payment. Of course, there are many variations on the theme, but overall it’s consistent with distribution methodology. eContent lacks a physical container allowing it to defy the types of control normally imposed on physical objects. Depending on the publisher’s intent for an eProduct, significant changes in its content could be made daily. From a monograph distribution point of view, content changes lead to new editions and thus a new product to sell. While updating ease is an attractive eContent feature, especially for health science literature, it brings with it new considerations for a print distributor. For the print distributor, inventory control is a defining element of the business. A distributor’s inventory goals consist of having the right stock at the right time, timely order turnaround, accurate inventory selection, warehouse location in proximity to your customer, and adequate warehousing space. New goals and strategies will have to be created for the distribution of eContent, goals and strategies similar to ones for subscription jobbers: problem-solving ability, customer service skills and strategies that address the management of data.

The benefits of eContent distribution are numerous: no returns, no warehousing space, no damages, no inventory control. However, there will be new problems to solve, ones in-

herent in distributing data rather than objects. The hurdles include everything from licensing issues, potential access problems, internal and external customer training issues, negotiation disagreements between parties, to solving misunderstandings about contracts. Regardless of what you distribute or how you do it, customer service is the most important skill needed by any distributor since that is the criterion most often used by customers, that is what customers remember. Our Account Specialists may need new skills to meet the challenges of eContent distribution, but fortunately their customer service skills are transferable. Again, our experience as a subscription agent continues to guide us as we define ourselves more broadly as information distributors. In the end, will we be a bookseller or a subscription agent or information broker or, most likely, some new combination of all three roles?

Everything indicates, and we agree, that print books will be around for a very long time; however, we have to prepare for a future with fewer print sales. When CDs came onto the market, health science print sales increased. This was a surprise, but the CD seemed to enhance, not compete with, the printed version. Comprehensive treatises with a lengthy publishing history will more than likely continue in their current print format for years to come. However, once a profitable eContent solution emerges, publishers may add an electronic version of print titles to their offerings along with original eContent titles. The power gained by adding video and interactive qualities to products used for teaching in the health sciences is exciting. Two products that stand out as examples of what we may see in the near future are *Stat Ref* and *MD Consult*. These two individually combine preferred medical tomes in their respective products with sophisticated proprietary search engines. Both are more ambitious in intent and design than a collection of stand alone eBooks. Because of their accessibility at the user’s desktop, along with multiple title searching, both are popular in health science libraries. Time sensitivity is critical in the health sciences more so than in any other profession, and these kinds of products provide clinicians efficiencies not available with print materials. The electronic version of *Harrison’s Text Book of Internal Medicine*, one of the best known and frequently used titles in the health sciences, became available several years ago. It is coexisting nicely with the print version. For the foreseeable future, and until the problems inherent to eContent delivery are resolved, we believe print books will continue to be health science publishers’ format of choice.

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