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## Notes from Mosier -- March of the Dinosaurs

Scott A. Smith

*Alibris*, [scott.alan.smith@comcast.net](mailto:scott.alan.smith@comcast.net)

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Send ideas by **July 31, 2010**, to any of the Conference Directors listed above.

Or to: **Katina Strauch**, MSC 98, The Citadel, Charleston, SC 29409  
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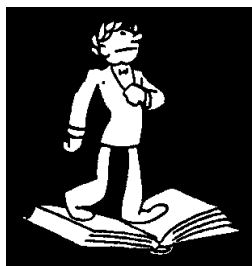
## Notes from Mosier — March of the Dinosaurs

Column Editor: **Scott A. Smith** (International Sales, Alibris; Phone: 503-951-8343) <scott.alan.smith@comcast.net>

Before waddling off to graduate school I worked for thirty years as a vendor, so it shouldn't be too surprising to learn I spend time thinking about the vendor world and vendor-library relations. I've been musing of late on the many changes that have occurred with vendors in recent years, and in this month's column I'll share some thoughts and observations with you.

Libraries are customers, and the products and services they buy inform the vendor world that develops to serve them. Sometimes companies are created in response to serve a defined market need, and sometimes companies develop new products and then seek to educate and thereby develop a market. This symbiotic relationship is very simple and straightforward: vendors need libraries and libraries need vendors.

Library buying practices and funding has a lot to do with this. Let's think about book vendors and serials agents. Up until the late 1950s library book vendors existed to serve primarily public and school libraries. Companies like **Baker & Taylor** and **Brodart** sold to academic libraries as well, but the academic slice of the pie chart was very small. When **Richard Abel** founded the company that



bore his name he identified academic libraries as a distinct market segment with unique needs. Many of the products and services still in use today were developed by **Dick** and the many clever people he brought together — e.g., **Don Stave** and the dear, late **Oliver Sitea** — were central to the evolution of the approval plan as we understand it today.

As federal funding of higher education exploded in the 1960s, the academic market became a more powerful force and a magnet for companies looking to sell books. Many of the vendors still serving the market today were established in the 60s and early 70s in response to this opportunity — **Book House**, **Emery-Pratt**, **Midwest**, and **Yankee** are examples.

Journal agents also grew and were largely identified by the markets they served. Thus we had **Faxon** for academic, **EBSCO** for public, **Readmore** for corporate, federal, and medical libraries. Foreign titles typically were sourced with country-of-origin suppliers, such as **B. H. Blackwell** for the UK, **Casalini** for Italy, and **Otto Harrassowitz** for Germany.

**EBSCO's** transformation from a print-based, public library agent to an undisputed market leader in content creation and

distribution to virtually all market segments is an interesting case in point. Clearly most other agents benefited from **Faxon's** demise. But **EBSCO's** growth was more than simply the luck of having a major competitor implode. They made several strategic business decisions: they expanded their focus to markets where hitherto their presence had been limited, they added electronic journals, content management, and other offerings to their suite of services, and they invested in staff training and development. This did not happen by accident.

In terms of real buying power, library funding has been in decline since the 70s. The consolidation within the book and serials industries (publishers and vendors) is a reflection of more limited budgets, expanding formats, and obsolete vendor systems.

Library automation vendors provide another example of market development and segmentation. Before the advent of the integrated system, companies developed individual modules, such as circulation or stand-alone catalogs. **Innovative Interfaces' Innovacq** product was an acquisitions and serials management system (arguably one of the best ever developed), widely used before their integrated product came to market.

In other cases products were developed before any clearly articulated market need was visible.

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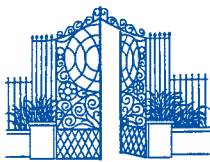
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### Rumors

*from page 6*

Great to hear of **great press for libraries and librarians**. Check out this article in *USA Today* (Author: Librarian, cybrarian appreciation is *Overdue*, by **Rob Fleder**). And, of all things, our bam-zowie columnist, **Dennis Brunning** the great, has an interview with **Marilyn Johnson**, the author, in this issue, p.62.

[www.usatoday.com/news/education/2010-02-25-overdue25\\_ST\\_N.htm](http://www.usatoday.com/news/education/2010-02-25-overdue25_ST_N.htm)

Was thrilled to learn that the **Johns Hopkins University Press (JHUP)** has appointed **Dean Smith** as **Director, Project MUSE** effective March 10, 2010. **Dean Smith** comes to **JHUP** with extensive publishing leadership experience and expertise in digital publishing initiatives, product management, technical direction, global sales and marketing, and strategic development. As **Director of Content** for the **American Society for Training**

**and Development, Smith** created a digital publishing strategy for the society's periodical, book, and research publications. During a decade-plus tenure with the **American Chemical Society, Smith** oversaw dynamic growth in worldwide electronic access to the society's publications, designing innovative pricing models, emphasizing library customer relations, and implementing effective internal management systems. He previously spearheaded electronic publishing efforts for a variety of medical publication products at **Chapman & Hall**, and led traditional journal publishing programs at **C&H** and **Springer-Verlag**. An accomplished writer and published poet, he holds a BA from the **University of Virginia**, and an MFA in Creative Writing from **Columbia University**.

[muse.jhu.edu](http://muse.jhu.edu)

I was so saddened to learn of the death of **Jamie Galbraith**, quite a wonderful Scotsman, salesman, and friend. We have an obituary from **Scott Alan Smith** in this issue. See p.14.

*continued on page 24*

## iPod Shuffle Winners from the ERM Systems Usage Trends Survey

The winners of an **iPod Shuffle** were drawn after the survey closed. The two winners are **Joanne Romano**, Licensing and Serials Librarian, **Houston Academy of Medicine-Texas Medical Center Library**, Houston, TX, and **Dung-Lan Chen**, Bibliographic Services/Acquisitions Librarian, **Skidmore College**, Saratoga Springs, NY. The survey results are reported in this issue (see p. 34). 🌱

### Notes from Mosier

*from page 8*

eBooks are an example of this: **netLibrary** had some initial, enthusiastic adopters, but many libraries were unsure of how to integrate eBooks into their collections (many still are). Early reader devices also met with a tepid response (remember the **RocketBook?**). Although electronic resources now represent a significant part of collections, formats are not yet mature. Whether or not librarians embrace the current generation of readers, e.g., the **Kindle** or the **Sony eBook Reader**, remains to be seen. It's also unclear how the eBook providers will fare—inconsistent publisher coverage, awkward user interfaces, limits on simultaneous use and pricing issues may well prevent their sustainability.

This brings me to another point: vendors to no small degree must compete with their suppliers (there are many, many industries where this is not true). Hence another challenge for providers of digital content (e-journals, databases, etc.) is how to deal with publishers. If enough major publishers, say, the top 15 or 20 STM houses and university presses, aggressively and successfully market their own packages directly to libraries, the remaining content, be it from smaller academic presses or grey literature in general may be too expensive or too impractical to handle. Margin erosion can be dramatic indeed.

After the demise of the **Richard Abel Company** there was a tendency among libraries to avoid consolidating too much business with any single book vendor. Librarians would often say they didn't want "all the eggs in one basket." This gradually changed, and consolidation with fewer suppliers became more common, particularly as integration of workflows with vendor systems, and consortial buying became more widespread.

This began to swing back in the 90s. The emergence of Web-based companies like **Amaزون** and **Alibris** provided libraries with alternatives, offering greater speed and more choices of condition and price. The result for the "traditional," brick-and-mortar wholesalers was loss of market share, quite often of mainstream trade publishers. Also, as budgets continued to decline, many libraries scaled back their approval plans and re-visited their firm order procedures.

On the other hand, the evolution of digital content and cheaper storage offered opportunities for new ventures, such as the "solutions" folks—by whom I mean **Serials Solutions** and **Syn-detics**, as a couple of examples. Moving forward we can expect cloud computing and open source to have an increasing impact in the market.

Another shift is demographic. A lot of people were drawn to librarianship and to the vendor world during the expansion of the 1960s. Many of us are retiring or changing direction in our careers.

What might we conclude from this? Vendors come and vendors go; while some known companies will endure, others will be absorbed or simply go out of business. Hence the title of this month's column: the dinosaurs will disappear. Those life forms capable of adaptation or migration will live on. New products, new constituencies, and new librarians and vendors will shape the new and emerging opportunities to come. Stay tuned! 🌱