

## A topsy turvy e-world

*There's a sea change in e-books and e-libraries, argues Adam Hodgkin, as the currents bear the market towards free access*

A slogan I've used often in the past year runs: "E-libraries are working: e-books are not." The phrase grabs attention because my audience usually assumes that I'm an enthusiast for e-books. I work for xrefer, a reference book aggregator that I founded with three colleagues four years ago. Since we aggregate (a horrible word that means collecting together and put into a common framework) reference books into a packaged web-delivered service for libraries, there is an obvious sense in which our offering is all about e-books. So why should I, apparently, be shooting myself in the foot?

At this point I need to explain to my audience how the service we provide works very well for what electronic libraries need, and that delivering the service is really about designing a reference resource which uses the content of 150 high quality reference titles in a new way. There are enough differences between the way a web-based reference service works and the way in which conventional books work for it to be pretty misleading to be thinking of them as e-books.

So, in struggling to avoid the "e-book" moniker that tends to be pinned on our business, I point out to the librarians that:

- our "books" don't have page numbers;
- they can't easily be read from cover to cover;
- they are not downloadable content-chunk e-books, but part of a 24/7 web service;
- they do not preserve the typography of the original books, but in subtle ways they reuse and leverage the intellectual arrangement of the originals;
- they have more links between each of their sister reference titles in the library than they have internally within their covers;
- these are books that can be easily searched, but we throw away the indices;
- furthermore, they may lack illustrations (they may also have more illustrations and more colour illustrations) but some of them have sounds—and you never find sounds (audio files) in printed books;

- these are books that are not for sale and they can only be subscribed to as a collection;
- oh, and by the way, they are really all mini-databases broken down into entry-based records and, as it happens, some of them really are databases and not books at all.

Having rattled off this list of differences between our e-books and the conventional concept of an e-book it is usually time to turn to the really interesting question of why “e-libraries really are working” and why all libraries are gradually (or in a few cases rapidly) becoming e-libraries. The short answer to this being that librarians have realised that their patrons now expect to have access to authoritative and trusted publications through a web interface. E-libraries are library services pushed through a web browser.

### **New patter for 2004**

However, this litany of why e-books don’t work but e-libraries do is not really going to be enough to grab the attention of librarians or publishers in 2004, because in the last year the landscape has changed decisively. My patter is going to have to move on for three reasons.

First, it is now pretty much accepted that the e-book concept as it has been touted since 1998 is a busted flush. Anybody can pour scorn on e-books, and knocking e-books is now the quickest filler-article for any technology-minded journalist. Last year the Financial Times had an article headlined “Have e-books lost the plot?” This year we may well see the Wall Street Journal run a story on “eNough of eBooks” and I am hoping to see the Economist produce an analysis of “Why e-books do not furnish a room”. So many people are now down on e-books that it may indeed be time to come to their rescue. After all, no can deny that inexorably, and erratically, but inevitably all books are becoming rather more electronic. Most publishers, in their bones, suspect that there has to be a way of making money and directly benefiting from the availability of books on the web, and not just by selling more books through Amazon.

### **Radical drivers for change**

But two other rather important things have happened in the last year—two radical, seemingly unconnected developments that will have a dramatic effect on electronic libraries and the electronic distribution of books. The first sea-change is that the “open access” model (primary research being freely available without constraint) for content distribution is taking strong hold in the area of scientific, technical and medical publishing. While most publishers are worried by this—especially if they have profitable lists of specialist scientific periodicals—it can be argued that the development is a

hugely positive and encouraging one for the publishing and library community as a whole.

The second important development is that, thanks primarily to the Apple iPod and iTunes experiments, it finally looks as though the music business and music publishers will soon be coming to terms with the profound challenge to their markets posed by the threat of web distribution.

### **Turned on its head**

Now, this is getting a bit confusing, indeed topsy-turvy. How is it that STM publishing seems to be moving towards a world in which a lot of expensively acquired content is given away free, while the music business, having peered into the anarchic abyss of Napster and Grokster, is moving rapidly towards a distribution model in which individual tracks are monetised, traded, downloaded and enjoyed at 99c a piece?

Two years ago the conventional wisdom was all the other way round. It was widely believed that charging for technical and professional content through a subscription mechanism was easy, but charging consumers for frivolous fashion items on a per-piece basis was straight fantasy.

Roll the web technologies and markets forward to 2004 and we may well be moving towards a world in which scientific and medical research results are given away free (not wrapped up in obscure and mostly inaccessible periodicals that no ordinary mortal can afford to buy), while subscription services and pay-as-you-go contracts control our personal music collections. The web is still very young and these conflicting gusts of free access and end-to-end availability tussle with the development of new markets for services for which nobody ever previously saw a rationale. How is this going to affect the place of e-books in e-libraries?

Open access to much periodical content may make a big difference to the way university and research libraries operate. Incidentally, because it's free, it will make it much easier for all libraries to offer widespread access to primary literature, and this will increase demand for secondary publications (e.g. digests) enabling less sophisticated users to make the most of primary research.

If the open access model for STM periodicals takes over, there will be a redistribution of resources within institutions and between publishers. It would be likely that the money saved by killing subscriptions to over-priced technical periodicals will be spent in other ways. Money saved from a journals subscription budget could be used to provide direct support to academics who will need to pay editorial charges—open access journals still require editors and the review process.

### **Effects of substitution**

One of the effects of this substitution will be a lot more material being published. We may also predict a rapid growth in added-value services; among these, the provision of more secondary publications which abstract, assess, cite and measure or increase the accessibility of all the free, open access, primary literature.

There will be yet more scope for added value from those publishers and aggregators who can provide access to textbooks and reference work in the broadest sense. There will be more interest and value in services that integrate, synthesise and digest the results of primary research. Libraries which, as a result of open access, spend less on the provision of access to high quality scientific literature may be able to buy in secondary resources that review and distil the primary materials.

Who is to say that the open access model may not affect and change the pattern of traditional textbook, handbook and reference publishing? Of course it will, and many of these effects will be entirely positive. The open access movement will encourage efficient and competitive models of secondary service.

There is, however, good reason for thinking that the open access style of publishing will not come to dominate teaching materials—the textbook, handbook and reference sectors (apart possibly from monographs): their authors have significant interest in the commercial success of their products. Writers of scientific papers, on the other hand, have effectively no interest in the commercial success of the periodicals in which their research appears. They get no payment for their contributions. Even the editors of scientific periodicals have minimal interest in, or concern for, the financial well being of their publications. They may be paid an honorarium but even the editors of the most prestigious and profitable scientific periodical will not be on a royalty.

### **Secondary benefits**

If libraries, universities and colleges redeploy their resources away from scientific periodicals, which have been eating up an increasing proportion of their budget, towards secondary literature, teaching resources and other services that add value to primary research materials, this will benefit those commercial publishers that have been developing appropriate products and services.

One suspects that some of the large STM publishers are already reviewing their publishing objectives with this resource shift in mind. One of the challenges for specialist publishers will be to develop services and delivery

systems that take advantage of, and add value to, open access assets without being completely free and open access in delivery.

Although librarians may be predisposed towards free services, they also have an interest in developing specialised services that suit the unique requirements of their institution. In fact, it is the importance of delivering appropriate content resources for different customers that will be one of the ultimate justifications for commercial aggregators in a world where the open access paradigm is widely accepted. The current inflexible bundling practices of most publisher aggregators are no longer a winning formula, and will make it harder for publishers to deliver desired, needed and user-definable services in the future.

### **Cool tunes**

So what about the iPod and iTunes? Why are these such landmark developments for the electronic publishing industry in 2004? The fact that the device is cool and stylish and that the technology is capacious is very important. But I would argue that the key to Apple's success this last year, is that, for the first time, there is a personal music device which makes it really easy to customise, select and create one's own music selection or portable library.

Selection and individual definition of a collection is the fundamental benefit. Music publishing is very different from text publishing, but the striking significance of the Apple-led development is the proof that consumers will buy devices and pay subscriptions for services which (a) are fashionable and stylish, and (b) cater to and enable individual selection and personal definition.

### **Selection, selection, selection**

People who don't understand publishing often assume that the role of the Gutenberg era publisher was to produce and sell books. Yes, but that is to look at the business the wrong way round. The key to successful publishing has always been selection (either a lot of selection or, in some cases, hardly any). Successful publishers select, find, fake or make the right products; and the system-benefit which publishers have delivered to the academic and scholarly world is that not everything gets published.

This need for the editorial process will be even more compelling in an open access world where nearly everything will be available, and the emphasis will increasingly move away from what is available to questions of delivery, reputation, selection and post-publication recognition.

The first publisher or aggregator who can figure out how to put open access scientific and scholarly articles on an iPod-type, cool, slim, chunky, projectable reading device (preferably one that also plays music i.e. the iPod

of 2005) will have reinvented the failed e-book model of five years ago. Steve Jobs are you listening? Or do I mean reading? Can you imagine all the beautiful added value services that will be called for in that wireless, web-based, multimedia world?

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