How/Where Do I See the Industry in Five Years:

ADRIAN W. ALEXANDER
Executive Director
Big 12 Plus Libraries Consortium
5109 Cherry Street
Kansas City MO 64110-2489 USA
VOICE: ++1-816-926-8765
FAX: ++1-816-926-8790
EMAIL: alexandera@lhl.lib.mo.us

Still dealing with a scholarly communication/scholarly publishing system that is driven primarily by the need (for promotion and tenure purposes) to create scholarly information rather than a need to consume all or most of that information. This system will continue to have a considerable influence on who the players are and what economic models are used in the industry.

BETTY BENGSTON
Dean of Libraries
University of Washington
482 Allen Library, Box 352900
Seattle WA 98195-2900 USA
VOICE: ++1-206-543-1763
FAX: ++1-206-685-8727
EMAIL: bbengt@u.washington.edu

If the "industry" referred to is scholarly communications, then I see more of the same: more print and more electronic information. We will struggle to deal with the flood of information. Libraries will be challenged to assist their users in retrieving and using information pertinent to their needs. We will continue to try to understand and deal with the economics of scholarly communications. Both libraries and publishers will have competitors in the publishing and provision of information to the scholarly community and to the public in general. Roles in the electronic environment will continue to evolve. I hope that the issue of archiving and long-term access to electronic information will have been addressed and that, at a minimum, we will have agreed upon "best practices".

PETER B. BOYCE
Senior Consultant for Electronic Publishing
American Astronomical Society
2000 Florida Ave. #400
Washington DC 20009 USA
VOICE: ++1-202-328-2010
FAX: ++1-202-234-2560
EMAIL: pboyce@aas.org

Five years is a long time. Five years ago in 1994, the first Web pages were just appearing. Electronic journals were limited to ASCII or a few ill advised experiments with page image delivery (such as Red Sage and Tulip). And the first linked electronic journals were a year in the future.

Things are changing with breakneck speed, but the underlying needs of the users for accurate and accessible information will remain. Libraries have traditionally provided gateways to information. They will continue to do so in the electronic information age.

In the past libraries have facilitated the accessibility of knowledge by accumulating collections of paper books and journals in one place. Now, the Web has made such accumulations of information under one roof unnecessary. Electronic information can be accessed from anywhere in the world. Already, in many academic disciplines, the young practitioners say, "If it isn't on the Web, it doesn't exist."

And, the character of information is changing. In five years the boundary between the traditional journals and information databases will have virtually disappeared. Everything of importance will be interlinked. Information will be packaged in ever smaller units.

Collections of information will be assembled upon demand for each reader according to his needs. And, new methods of creating, organizing, and transferring information will be springing up, accelerating the pace of change even more.

Location of reliable and relevant information no matter in which of the many different electronic formats it exists will be a major problem. The more effective libraries will be providing their patrons the assistance they need in tracking down just what they need. Providing the access through licensing, subscription, and other arrangements will continue to be provided through an institution's library.

Finally, as the early electronic formats become unreadable, by the new programs and browsers, the importance of having archival quality electronic information will dawn upon the users, the authors and those libraries which had been ignoring the problem.

These will be interesting times.

Pia Candinas

Librarian
Temple University Rome
Lungotevere A. da Brescia, 15
00196 Roma ITALY
Tel. ++39-06-3202585
Fax. ++39-06-3236459
email: tlbrome@bbs.nexus.it

I presume you refer to the book industry? If so, I regret not being particularly qualified in answering such a question. But I hope that the book industry will expand and integrate with data base systems and computer programs.

Beau David Case
Assistant Professor and Librarian for Europe and Linguistics
Ohio State University Libraries
1858 Neil Avenue Mall
Columbus OH 43210 USA
VOICE: ++1-614-292-2594
FAX: ++1-614-292-1918
EMAIL: case.42@osu.edu
http://www.lib.ohio-state.edu/claweb

Electronic publications will increase even more rapidly. I also expect a number of journal publishers to eliminate their paper subscriptions, and book publishers to decrease the number of scholarly monographs printed in the US.

I am not so optimistic about American academic libraries being able to provide the necessary technology and support staff to accommodate the proliferation of electronic publishing.

Sir Charles Chadwyck-Healey
Chairman, Chadwyck-Healey Ltd.
The Quorum
Barnwell Road
Cambridge CBS8SW UK
VOICE: ++44-1223-215512
FAX: ++44-1223-215513
EMAIL: charles.chadwyck-healey@chadwyck.co.uk
http://www.chadwyck.co.uk

Continuing growth of library consortia worldwide; some restructuring of the publishing industry to meet the demands of consortia; continuing growth of information delivered online via the Internet; greater acceptance by libraries that they buy annual access to remotely stored databases as and when they need them; do not confuse access with subscriptions and cease to buy databases outright.

Elizabeth Chapman
Librarian
Taylor Institution
University of Oxford
St Giles
Oxford OX1 3NA UK
FAX: ++44-1865-278165
EMAIL: elizabeth.chapman@taylib.ox.ac.uk

The book will not be dead but a lot of printed journals will.

Eleanor I. Cook
Serials Specialist
ACQNET/Appalachian State University
374 Bub Teams Road
Boone, NC 28607 USA
VOICE: ++1-828-262-2786
FAX: ++1-828-262-2773
EMAIL: cookei@appstate.edu

I would "like" to imagine we would have an industry where:

Publishers have gotten over their paranoia with fair use in the electronic environment.

Licenses, if they exist at all, are standardized and easy to understand.

Web interfaces are seamless, computers are light and easy to use, but books are still valued and useful.

Scholarly journals are transformed into articles by demand, costs are under control, back files are busily being converted into electronic format.

Something new is on the horizon and we do not even know what it is yet (I think we can bet on this).

Linda Crismond
National Diector of Sales and Marketing
Follett Audiovisual Resources
303 Mariner Drive
Tarpon Springs FL 34689 USA
VOICE: ++1-727-937-2974
FAX: ++1-727-943-7508
EMAIL: crismond@aol.com

Libraries will be more entrepreneurial with many of their services sponsored by non-governmental partners. Home entertainment centers with e-books, videos, music and access to Internet resources will dramatically affect the way libraries are used and the mix of people who come to libraries. Libraries will remain as an important place on campuses and in the community center. The need for librarians to organize and evaluate information will be as great as ever.

Knut Dorn
President
Harrassowitz
65174 Wiesbaden GERMANY
VOICE: ++49-0611-5300
FAX: ++49-0611-530560
EMAIL: kdorn@harrassowitz.de

In 5 years, some segments of the industry will have made great strides and set valid patterns for electronic business to business commerce, for communication lines

between libraries and users, and for novel forms of research support. But it will not be a uniform advance. My expectation is that there will be a mixed bag similar to the situation of today with members of the industry who are technologically advanced versus those that cannot overcome the inertia that affects part of the market and the academic system in particular.

Some standards for scholarly communication will have been developed, not only for the technology side where progress is already obvious, but also on the business and commercial level, where they are sadly lacking.

In 5 years, current trends will be more pronounced, such as consolidating and partnering among publishers and intermediaries, and consortia and networking arrangements among libraries, and, if libraries fail, among other academic institutions beyond the library level. The challenge that will determine whether the current players will survive is to find a financially viable framework for the communication flow and the data transfer demanded by today's research community.

Deborah Duke

Head, Collection Management
Enoch Pratt Free Library
318A5 Stevenson Lane
Towson MD 21204 USA
VOICE: ++1-410-396-5471
FAX: ++1-410-396-4441
EMAIL: dduke@mail.pratt.lib.md.us

In *When Things Start to Think*, Neil Gershenfeld says that "if the book had been invented after the laptop it would be hailed as a great breakthrough." Danielle Steel may have retired, but people will still be reading something. Publishing and authorship will be as viable and important as ever, and the topics (and quality) as varied. But the format of their products will be different. Most "informational" and date-sensitive material will only be available online. E-books, and books and periodicals printed in e-ink, will be the medium of choice for many readers. They'll find these formats convenient and easy to use for class texts, travel, casual reading, and temporary reference. While fiction authors may still be experimenting with its possibilities, nonfiction authors will take advantage of the capabilities inherent in the electronic format, routinely incorporating sound, video, hyperlinks, and other innovations into the presentations. Printed books, on the other hand, will still be preferred by many. Print will still be the best medium for many topics, and the "traditional" publishing industry will still be viable. People will still build personal libraries, but these libraries' contents—and formats—will vary with the tastes of the builder and the requirements of the topics.

The 2 basic concepts of libraries (guardians/gatekeepers of the world's knowledge, and equalizers of access) will still remain. Libraries will continue to lose patrons who are

willing to pay for personal electronic and hardcopy access, or who are willing to settle for what's freely available. But five years from now, people still won't want to purchase the materials—or individual licenses for them—that they need to use only once or occasionally. Publishers may take on limited "guardianship" roles, subject to the vagaries of corporate mergers, and especially if books indeed never go out of print (although many of them still should). But libraries will still be needed as stewards, navigators, and information middlemen who pay the cost so it's available to all.

Dror Faust
North American Representative
Puvill Libros
264 Derrom Avenue
Patterson NJ 07504 USA
VOICE: ++1-201-279-9054
FAX: ++1-201-278-1448

The role of the book dealer is evolving into service providing to clients.

Anthony W. Ferguson
Head, Collection Development
Columbia University Libraries
535 W. 114th Street
New York NY 10027 USA
VOICE: ++1-212-854-7401
FAX: ++1-212-854-9099
EMAIL: ferguson@columbia.edu

Content will increasingly be developed directly to the user when they want it and how they want it. The library itself will continue to serve as the place where researchers assemble to interact with each other and, when appropriate, with non-digital forms of information.

J. Charles Germain
President
Publishers Communication Group
875-81 Mass. Ave.
Cambridge MA 02139 USA
VOICE: 800-494-6514 x115
EMAIL: jcgermain@pcgplus.com

Still struggling to resolve the issues of archiving and copyright in an electronic environment.

Dr. Rolf Griebel
Leikender Bibliothesdireckher
Bayerische Staatsbibliothek

München GERMANY
VOICE: ++49-089-28638300/301
FAX: ++49-089-28638309
EMAIL: griebel@bsb.badw-munchen.de

I hope activities such as HighWire and SPARC will be successful. I hope the academic market of periodicals will diminish in favor of more quality.

BAS GUIJT

President
Martinus Nijhoff International
P.O. Box 1853
Zoetermeer 2700 CZ NETHERLANDS
VOICE: ++31-079-360-4411
FAX: ++31-079-362-1427
EMAIL: guijt@nijhoff.nl

The printed scientific journals will have disappeared almost completely. Subscription agents will be busy with the distribution (supplying access) as they did with the printed versions. Public interest magazines will continue to exist as do monographs.

DANIEL P. HALLORAN

President
Academic Book Center
5600 NE Hassalo Street
Portland OR 97213 USA
VOICE: ++1-503-287-6657 x206
FAX: ++1-503-284-8859
EMAIL: danh@acbc.com
http://www.acbc.com

Supply of information to libraries is consolidated into fewer companies with integration of the delivery of various types of information.

KAREN HUNTER

Senior Vice President
Elsevier Science
655 Sixth Avenue
New York NY 10010 USA
VOICE: ++1-203-366-7137
FAX: ++1-203-366-0041
EMAIL: k.hunter@elsevier.com

Fortunately, this is not something I think about too much, given my previous answer. But, if I were to speculate, I think the journals business (and at this stage I know nothing about books) will be characterized by fewer but larger publishers (both for-profit and not-for-profit), moderated prices (reality-based pricing based on negotiation

and new models for electronic journals), more journals only available in electronic form (but still the minority) and more direct connections between publishers and libraries and publishers and end users. Archival concerns will not have been totally resolved, either at the institutional level or per-publisher archiving of author data. Licensing and copyright issues, which blow hot and cold now, will have been largely sorted out until such time as there is another major tectonic shift.

Diane Kerr

Director of Book Operations
Dawson
Crane Close
Wellingborough
Northants NN8 2QG UK
VOICE: ++44-1933-274444
FAX: ++44-1933-225993
EMAIL: kerr@dawson.co.uk

The next five years will be a very turbulent period for our industry. Changes that have long been presaged but not yet materialised might now come to pass. There might well be a totally new and unforeseen development that could trigger fundamental change.

There are paradoxes too; there are some trends, which can be discerned, but which conflict with each other and could cancel each other out in due course. This all makes strategic planning a rather hazardous business.

Many of the trends to be expected over the next five years have been well rehearsed and debated in the press and in meetings already. There will surely be further consolidation and absorption of smaller independents. At the same time the new industry environment favours new start-ups and innovations as never before. Breakdown of traditional publishing formats in STM journals will gather pace stimulated by Internet trading and the settling down of e-commerce and electronic copyright management. Low value, high volume monographs face similar challenges but the book as the staple medium for leisure and study is stronger than ever. Internet trading in books on the other hand will cause significant turbulence. The twin issues of consolidation and e-commerce also combine to support continuing globalisation in the industry, with the prospect of significant increase in access to and from the developing countries.

Libraries and institutions will step up their exercise of customer power to influence industry change. Consortia and SPARC type initiatives will trigger change, but conservatism inherent in the peer review, reward and tenure process will be an inhibitor. The supply chain compression already underway will continue but existing intermediation will be replaced by new requirements for gateways, authentication, e-commerce and copyright management, the so-called re-intermediation which will imply new roles, rules and value-adds.

The paradoxes stem from the fact there are underlying constants. Customers, whether libraries, individuals, companies or institutions need a stable and competitive industry. Margins can be squeezed, but in the end services that are wanted must be paid for. Libraries want one-stop shopping but only up to a point, they also want choice and to play the field. Consortia, regional, national even institutional initiatives can trigger fundamental change but it is the market that will sustain it. Events have a habit of coming full circle.

Gilles de La Rochefoucauld
Director
Aux Amateurs de Livres
62 Avenue de Suffren
Paris 75015 FRANCE
VOICE: ++33-1-45-67-1838
FAX: ++33-1-45-66-5070
EMAIL: glr@auxam.fr

An increasing substitution of electronic format to paper format for serials.

A much greater use of EDI in books processing (quoting, ordering, invoicing) along with a great deal of "servicing": marking materials with Library date labels, bookplate, barcode, stamp, magnetic security tapes.

Edna Laughrey
North American Representative
Aux Amateurs de Livres/ATG
291 Tower Drive
Saline MI 48176 USA
VOICE: ++1-734-429-1029
FAX: ++1-734-429-1711
EMAIL: elaughrey@aol.com

I believe libraries will have:

Outsourced most of the technical services activities - cataloging, acquisitions and serial check-in.

Rely more on non-print materials.

Be much more dependent on other libraries for group purchases and loans.

I see a dramatic change in the role of the librarian:

In a college/university setting librarians will manage the library and be trainers in the use of library materials.

All other activities will be outsourced or assigned to paraprofessionals or clerks.

In public libraries I see a similar situation but with more reliance on librarians to work directly with patrons.

I see many fewer vendors and most of them will be full service, supplying the former technical service activities.

Angie Whaley LeClercq
Director
Daniel Library
The Citadel
171 Moultrie Street
Charleston SC 29409 USA
VOICE: ++1-843-953-1267
FAX: ++1-843-953-5190
EMAIL: leclercqa@citadel.edu

The library will continue to be important as a place. It is a major cultural institution on campus and should increase its role as a purveyor of cultural events. In addition the library will offer students a gathering place for study and access to information provided by the information experts. Librarians will craft and hone their skills as providers and interpreters of electronic content. However, they will have to package and promote their services as end users, will be wooed by the primary content providers and may be mislead into thinking that everything needed is on the Internet, and can be purchased for $35 a month.

Rebecca Lenzini
Publisher
The Charleston Advisor
618 S. Monroe Way
Denver, CO 80209 USA
VOICE: ++1-303-514-3302
FAX: ++1-303-282-9743
EMAIL: rlenzini@carl.org

I see urban public libraries as cultural centers, almost museum-like in look and feel; small public libraries struggling but serving as Internet hubs for citizens who need that service; corporate libraries as virtual entities with corporate librarians fully integrated as information managers into corporate teams devoted to various projects and products; academic libraries almost a combination of the earlier categories, with the building serving as a sort of "cultural center" and those serving faculty trying to integrate themselves as corporate librarians do now, all with increasing access by students, faculty and researchers to materials over the Internet, with less and less dependence on any library interaction.

As for publishers, I see them playing a continuing and major role in quality control over networked information, but probably more similar in nature to the role played now by scholarly societies than by commercial publishers.

Charles B. Lowry, Ph.D.
Dean of Libraries and Professor,
College of Library and Information Services
University of Maryland
4121 McKeldin Library
College Park MD 20742-7011 USA
VOICE: ++1-301-405-9127
FAX: ++1-301-314-9408
EMAIL: clowry@deans.umd.edu

Within five years the industry (I mean by that scholarly publishing and academic libraries) will still be in transition to digital formats. However, within ten years the market will be more mature. Today approximately 56,000 of the 175,000 journal and magazine titles published worldwide are covered by abstracting and indexing services such as *The Readers Guide to Periodical Literature* or *Chemical Abstracts*. Similarly, fewer than 4,000 magazine and journal titles are available currently in electronic form. Books as a form for representing current scholarly information are still appearing almost exclusively in print form. Moreover, the experiments in digitizing out-of-copyright books for preservation are all accompanied by programs to produce high quality hard copy. There is strong evidence that the ergonomics of the book will sustain the format for the foreseeable future. However, I expect a rapid migration of the scholarly journal to electronic formats just as we have already seen with abstracting and indexing services, thus providing one of the largest "targets of opportunity" for creating a comprehensive digital library. The University of Maryland and other USM Libraries plan to aggressively work to provide to its users, index and abstract coverage of the largest number of journals possible within reasonable cost. As yet, no single provider has brought together abstract and index information or full text access for this body of literature so critical to the business, discovery of new leading-edge knowledge and learning. We anticipate that through one or more on-line providers we can provide A&I coverage of more as many as 40,000 titles as a feasible near term goal. At the same time, within a decade we anticipate a core collection of no fewer than 12,000 journals critical to the teaching in all of Maryland's colleges and universities and equally important to economic development. With such resources, we may expect to provide seamless access to journals through our MdUSA and MdPAC services by 2010. We may envision students working at a distance from their library being able to search indexing services and dynamically retrieve the articles they need to fulfill an assignment. Such a capability will soon be achievable and will represent a giant step toward "Memex" Vanavar Bush's 1945 vision of a self contained scholars workstation. The value in time saved to our citizenry and more important the access in remote and underserved parts of the state should not be underestimated.

Frederick C. Lynden
Director, Scholarly Communication & Library Research
Brown University
Providence RI 02912 USA
VOICE: ++1-401-863-2162
FAX: ++1-401-863-1272
EMAIL: ap010037@brownvm.brown.edu

Will still be a mixture of paper and electronic. Will still be seeking a stable format for publications.

Marilyn Gell Mason
Director
Cleveland Public Library
325 Superior Avenue
Cleveland OH 44114 USA
VOICE: ++1-216-623-2800
FAX: ++1-216-623-7015
EMAIL: mgmason@cpl.org

Everything is being driven by changes in technology. This will have a profound impact on how we think about collection development, especially in the area of scholarly journals.

Sarah C. Michalak
Director, Marriott Library
University of Utah
J. Willard Marriott Library
295 South 1500 East
Salt Lake City UT 84112-0860 USA
VOICE: ++1-801-581-8558
FAX: ++1-801-585-3464
EMAIL: michalak@admin.lib.utah.edu

New forms of technology available for accessing information. Less dependency on wires and cabling. Lots of video and audio moving around quickly with high resolution. Ubiquitous network access with almost complete convergence of voice, video and data. A thriving, but perhaps somewhat smaller print publishing industry with public reaffirmation of fondness for books. Mega-publishers will have come and gone and come back again. Use of library buildings will wane for a while and then will have waxed again.

Oscar Puvill Moles
Puvill Libros S.A.
Estany, 13-17 Nave D-1
08038 Barcelona SPAIN
VOICE: ++34-3-298-8960
FAX: ++34-3-298-8961
EMAIL: info@puvill.com

As to Puvill Libros, we would like to be a market leader and prestigious bookseller.

Bob Neville
Assistant Dean, Technical Services
College of Charleston Library
66 George Street
Charleston SC 29424 USA
VOICE: ++1-843-953-5530
FAX: ++1-843-953-8019

A little closer to the Jetsons than the Flintstones. The battle to acquire, archive, present and manage electronic resources still rages.

Maureen Pastine
University Librarian
Temple University Libraries
Paley Library
1210 W. Berks Street
Philadelphia PA 19122-6088 USA
VOICE: ++1-215-204-3259
FAX: ++1-215-204-5201
EMAIL: mpastine@nimbus.temple.edu

See an even greater need for librarians in a far more technological work and recreational life – but am concerned that we are an aging profession, not taking some of the leadership/risks that we need to assume. See far more collaborative partnerships on the horizon – internally and externally.

Fred Philipp
CEO and President
Blackwell's Book Services
6024 S.W. Jean Road, Bldg. G
Lake Oswego OR 97035 USA
VOICE: ++1-503-684-1140
FAX: ++1-503-603-0774
EMAIL: fred.philipp@blackwell.com

Significantly changed through continued consolidation of publishers; consolidation of library suppliers; major library consortium forming world-wide; continued dependence on web-based services will effect the library community world-wide.

Werner Reinhardt
Universitaetsbibliothek Siegen
Adolf-Reichwein-Strasse 2
57068 Siegen GERMANY
VOICE: ++49-0271-740-4228
FAX: ++49-0271/740-4279

EMAIL: reinhardt@ub.uni-seigen.de

Dependent on the subject a smaller or greater will be the same or very similar to what we see now. Librarians will have to become more and more navigators through the information world and within navigating they will have to compete with other people working in this field.

JOHN R. SECOR
CEO
YBP Library Services, Inc.
999 Maple Street
Contoocook NH 03229 USA
VOICE: ++1-603-746-3102
FAX: ++1-603-746-5628
EMAIL: jsecor@ybp.com

I don't think anyone can foretell the future of this industry. It is simply too dynamic. Having said that, I see continuous dilemmas that will need to be clarified and I see the need to get our arms around this industry's many confusions so we can concentrate our minds on creation.

WARD SHAW
Chairman and CEO
CARL Corporation
3801 E. Florida Avenue, Suite 300
Denver CO 80218 USA
VOICE: ++1-303-758-3030
FAX: ++1-303-758-0606
EMAIL: wshaw@carl.org

Which industry? There are very few congruencies occurring at the moment.

EDWIN A. SHELOCK
Director
Turpion Ltd.
11 Rue Georges Divenah
Hemonstoir 22600 FRANCE
VOICE: ++33-2-96250676
FAX: ++33-2-96250693
EMAIL: edwin.shelock@wanadoo.fr

In five years time there will be no resolution of the problems, but the pressures and conflicts between new authors and old bureaucracy will have mounted strongly and there may be a tendency showing. The access to the Internet will divide the two functions of publishing, communication and career preferment and research grant awards. The anarchic nature of the Internet will have its effect and will increasingly be the means of full communication despite the assignment of copyright. Perhaps we will see the beginnings of a new order but

I doubt it. The inertial effect of 250 years of progressive commercialisation and the bureaucratic acceptance of this with such terms as "outsourcing" and the rigid requirement of "published" work for preferment and grant applications will tend towards a continuation of an obsolescent system to the detriment of good order. Only after much sorrow will a new order emerge and that will take more than five years.

Kenneth Soehner
Chief Librarian
Thomas J. Watson Library
The Metropolitan Museum of Art
1000 Fifth Avenue
New York NY 10028-0198 USA
VOICE: ++1-212-570-3934
FAX: ++1-212-570-3847
EMAIL: ksoehner@interport.net

Developing at a fast rate, with basic issues of securing funding, support and providing service more or less unchanged.

Heather Steele
Director, Academic Services
Blackwell's Information Services
P.O. Box 40
Hythe Bridge Street
Oxford OX2 6RF UK
VOICE: ++44-1865-261396
FAX: ++44-1865-262538
EMAIL: heather.steele@blackwell.co.uk

Blurring of information formats through electronic technology, more consolidation of vendors and publishers, virtual libraries.

Pamela Stennett
Library Sales Manager
Cambridge University Press
The Old Schoolhouse
Kilkerran, Maybole
Ayrshire KA19 8LS Scotland UK
VOICE/FAX: ++44-1465-811296
MOBILE: 0374-111653
EMAIL: pstennett@cup.cam.ac.uk

Smaller, still in constant change and still searching for standards and solutions as it adapts to globalisation and all aspects of electronic communication and commerce. Fewer players all round, with libraries grouped together in consortia and vendors and publishers each in new groups and partnerships. Mine is a European view. One of the

reasons I am looking forward to Fiesole is for the chance to learn how the industry looks and works from a different perspective.

Bruce Strauch
Professor of Law
The Citadel
209 Richardson Avenue
Charleston SC 29409 USA
VOICE: ++1-843-723-3536
FAX: ++1-843-723-3536
EMAIL: strauchb@citadel.edu

Scholarly publishing follows what economists call the perfect competition model — low barriers to entry, hence constant new entries driving down profit margins and the constant destruction of the weakest. The rise of big conglomerates does not change the character of the industry. Rather the conglomerates will find they have to make very hard choices about which journals to let die. They imagine they are sufficiently ruthless to do this, but they will face the unceasing new entry of small publishers with lower operating costs and more creativity. We may see a few giants stumble and fall.

Katina P. Strauch
Head, Collection Development
College of Charleston
Editor, Against the Grain
209 Richardson Avenue
Charleston SC 29409 USA
VOICE: ++1-843-953-8020
FAX: ++1-843-953-8019
EMAIL: strauchk@cofc.edu

Libraries will keep their place in society and I believe that ultimately libraries will have to continue the role of archiving the printed word (either print or electronic) for future generations.

Anna Maria Tammaro
Coordinatore Centrale
Universita di Firenze
S. Marco 4
50125 Firenze ITALY
VOICE: ++39-055-2757216
FAX: ++39-055-2756291
EMAIL: tammaro@unifi.it

Electronic publishing will change the transmission of information and the actual book chain.

Dan Tonkery
President
Info Quest
15 Southwest Park
Westwood MA 02090 USA
VOICE: ++1-781-329-3350
FAX: ++1-781-326-5484
EMAIL: tonkery@faxon.com

STM titles will be online as well as most monographs. 60% of all new materials will be in electronic form.

Caroline Vogelzang
Vice President Commercial Services
Kluwer Academic Publishers
P.O. Box 989
3300 AZ Dordrecht NETHERLANDS
VOICE: ++31-78-6392284
FAX: ++31-78-6392268
EMAIL: caroline.vogelzang@wkap.nl

The impact of electronic publishing will be more visible. How the end user will want to access information and how the search mechanisms should work will be more clear. Still, I feel that the books and journals will also still have an important role.

Martha Whittaker
VP, Marketing
Academic Book Center
3587 22nd Street
Boulder, CO 80304 USA
VOICE: ++1-303-938-9353
FAX: ++1-303-938-9353
EMAIL: marthaw@acbc.com

Increasingly centered around electronic materials—but with far less electronic text and more visual, non-print content. Traditional (print-based) literacy will continue its decline, but people will still read for pleasure. There will be continued growth in publishing of printed books, reflecting their value as an archival source and a record of accepted scholarship. But electronic journals as we know them today will decline in favor of more engaging electronic media.

The challenge of publishers will be to survive economically while keeping up with the public's taste and demand for "entertaining" content presented via expensive technology.

The librarian's challenge will be to make this content accessible; the vendor's to make it manageable.

SUZANNE WILSON-HIGGINS
Marketing Director
Blackwell Information Services
P.O. Box 40
Hythe Bridge Street
Oxford OX2 6RF UK
VOICE: ++44-1865-792792
FAX: ++44-1865-791438
EMAIL: higgins@blackwell.com

That would be March 2004... probably...

More consolidation i.e. fewer bigger and bigger players - more consortia, bigger publishing groups etc.

More electronic and more multimedia but still a hybrid marketplace where paper and print work together.

More science and therefore more results and therefore more publications whatever the form.

New nimble businesses, small niche publishers, small niche service providers, electronically creative businesses.

Enough trading partners participating in electronic business to make it very real.

The Euro rivalling the US dollar for global currency dominance and most products priced in Euros.

Internet2 a reality whatever it turns out to be and publishers responding to what it is.