ASIDIC newsletter

No. 85, Spring 2003

ASSOCIATION OF INFORMATION AND DISSEMINATION CENTERS

ASIDIC Spring Meeting Attendees Hit the Jackpot
Association Name Change Under Consideration

ASIDIC met at the Treasure Island Hotel in Las Vegas, NV on March 30 – April 1 for its Spring 2003 meeting. About 55 attendees enjoyed a high quality program organized by **Craig McKinnis** and **Paul Vizza** (Kiplinger Washington Editors). The theme of the meeting was "What's Next: The Future of the Information Industry"—a topic which is surely relevant to everyone in the business! Following a keynote address by **Clare Hart** (Factiva), a series of speakers presented the viewpoint of content providers and content buyers. Then two significant trends, disappearing databases and e-learning, were explored, following which the meeting concluded with the always popular CEO panel. As usual, a summary of the presentations appears in this Newsletter. A highlight of the meeting was an appearance by **Morris Goldstein** (Nevada Slots), a former industry leader who is now in the gaming business in Las Vegas. **Jay ven Eman** (Access Innovations) was Local Host. He arranged the Monday evening events: dinner at the Golden Nugget and then a viewing of the Fremont Street Experience. Despite the many potential distractions nearby, the meeting was highly successful. ASIDIC attendees did indeed hit a jackpot, and not at the gaming tables!

Committee Reports

Treasurer: ASIDIC Treasurer **Kevin Bouley** (NERAC) reported that ASIDIC's financial position is improving, and there is reason for cautious optimism. Increased membership dues and better meeting attendance are principally responsible.

Executive: ASIDIC president **Miriam Drake** (Information Management and Planning) reported on the following items that were discussed at the Executive Committee meeting.

- A new Procedures Manual is being developed and will be available on the ASIDIC Web site shortly. It will be useful in recruiting people to serve on committees because it describes the responsibilities of each committee, and it will also have a section devoted to planning the meetings.
- Ideas continue to be solicited for ways that ASIDIC can add value for its members. Please e-mail your ideas to info@asidic.org.
- Thanks to Kevin Bouley and NERAC for assistance with the new design of the Web site.
- **Ray Lewis**, formerly of INSPEC, has resigned from the Executive Committee because he has moved to New Zealand. His replacement will be elected as the Fall meeting.

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Finance: **Dan Jones** (NewsBank) reported that the Finance Committee agrees with the financial report of the Treasurer, but meetings must not be a drain on the association's resources. So it is important that they be made attractive to many people.

Membership: **Carolyn Finn** (ISI) reported that ASIDIC has one new member (see below).

Sponsorship: ISI, Ovid Technologies, and INSPEC were sponsors for the Spring meeting. ASIDIC thanks these organizations for their generosity.

Publications: **Don Hawkins** (ASIDIC Secretariat) reported that an archive of previous issues of the *ASIDIC Newsletter* is being created. ISI has generously offered to scan the printed issues and create a CD-ROM. Printed copies of the newsletters will also be offered to a number of universities with information schools.

Association Name Change

The name of the association was discussed at the Executive Committee meeting. It needs to be modernized and updated because it no longer describes who we are and what we do. However, the acronym, ASIDIC, is a good one and should be kept. So all suggestions for a new name to fit the acronym will be enthusiastically welcomed. Please send them to info@asidic.org.

Fall Meeting

The Fall 2003 meeting will be at the St. Sulpice Hotel in Montreal, Canada on September 21-23. **Leslie Lees** (Consultant) is Program Chair, and **Randy Marcinko** (Nstein) local host.

The meeting will continue to focus on content. Now more than ever, understanding buyers, sellers, licensing, access to, and uses of content are as important as the content itself. Major changes are taking place in the ways users purchase content. Content suppliers are partnering with users in new ways and selling in new ways. Buyers, especially academic institutions are changing the ways they do business with suppliers and in their organizations.

At this meeting we will hear from content buyers, technology and content suppliers, and others who are adapting their products and business models to a rapidly changing environment. **Carol Tenopir** (University of Tennessee) has accepted an invitation to be the keynote speaker.

Be sure and reserve these dates; this is a meeting you will not want to miss. Because of its size, the academic sector has a significant influence on the whole information market. Montreal is a wonderful location for a meeting—and remember that costs will be in Canadian dollars, so attendees from the U.S. will find prices very attractive. The Monday event will be at Pointe-À-Gallière, the Montreal Museum of Archaeology and History.

New Member

ASIDIC welcomes the following new Member:

Sage Publications, Inc.
2455 Teller Road
Thousand Oaks, CA 91320
Representative: Blaise Simqu, Executive Vice President
E-mail: blaise.simqu@sagepub.com

President's Column

By Miriam Drake

ASIDIC members and guests attending our Spring meeting in Las Vegas were enriched by an outstanding program and entertained by gambling, glitter, glamour, and an awesome light show. Some folks took advantage of the games and slots and a couple went home with a few extra dollars. Craig McKinnis and Paul Vizza, our program chairs, assembled a group of speakers who informed, enlightened and presented ideas important to our businesses. Jay Ven Eman, our local host, selected two terrific venues for our Monday event, the Golden Nugget and the Fremont Street Experience, an extraordinary light show. As always, personal networking, catching up with old friends, and making new friends were special aspects of our meeting. I thank Craig, Paul, and Jay for a very successful meeting.

ASIDIC continues to provide a unique type of meeting where the environment is geared to helping us achieve business success through listening, learning, and exchanging knowledge and know how. Our Fall meeting in Montreal, September 21-23, 2003, promises to be equally enriching, informative and entertaining. Our venue is Le Saint Sulpice Hotel in old Montreal. Randy Marcinko, our local host, has arranged our Monday event at Pointe-À-Gallière, the Montreal Museum of Archeology and History. The Museum, opened in 1992, presents the results of 10 years of archeological digs. Historic old Montreal is a treat not to be missed.

Our program will be equally stimulating and exciting. Leslie Lees, Peter Simon, and Taissa Kusma are bringing together a terrific group of speakers who will address issues related to content: its sale, purchase, licensing, access, and use. Our keynoter will be Carol Tenopir, University of Tennessee. Carol is a well-known and respected author, columnist, speaker, and observer of the content scene.

I look forward to seeing you in Montreal. If you have questions or suggestions please let me know at mdrake@bellsouth.net.

TECHNICAL PROGRAM SUMMARY

Introduction to the Program

As those of us in the information industry are well aware, our industry has endured dramatic changes in the last couple of years. We have seen numerous businesses come and go, budgets shrink, content disappear, and a significant number of mergers and acquisitions take place. And one thing is certain—we won't find our future in the rear view mirror! The big changes that will determine our organizations' success lie ahead. So all sides of the industry are important: from the viewpoints of providers of content, buyers of content, e-learning. Presentations at this meeting should give us greater insight into our ever-changing business models and prepare us all for success as we move forward.

KEYNOTE ADDRESS

What is Coming Next? The Future of the Information Industry

Clare Hart, President and CEO, Factiva

Is there a future for the information industry? With all its changes—jobs, technologies, companies—we are in very exciting times, and there certainly is a future for the industry. Information management and dissemination are more important than ever in 2003. Companies have flatter structures and fewer people, but they need to keep abreast of developments so they can respond rapidly to market opportunities. Information management is important because information has a cost, but it supports decision-making and drives revenue. Everyone in the organization needs information to do their job, both internally and externally focused people. We need to think about both because there is a huge opportunity. We also need to help end users be more productive. They do not care about history; the main thing they know is putting words in a search box.

Organizations need to consider what they can become. Cost cutting is not a sustainable business model; innovation speed and execution are the primary differentiators. Everyone in an organization must think about process efficiencies and new products and services. People today are being expected to do the same amount of work even after downsizing, so we must give them more help. And the environment has become global, which raises important local cultural and commercial considerations. Partnerships with local agents are important because they know the local language, customs, and laws. For example, Factiva has offices in 41 cities and 24 countries, but management is mostly local. Products support both global and local needs.

Factiva has content in 22 languages and has developed a language-agnostic interface to its system. The interface uses "tokens" (similar to programming variables) to represent the fields in the interface. Users choose the language they wish to use, and the system translates the tokens into the appropriate term. For example, the token `${freeText}` might be rendered "Free text" in English, "Texte libre" in French, and "Свободный текст" in Russian. (In Factiva's system, even English is considered a translation!)

End users need access to all types of information: about partners, customers, and suppliers from both an internal and external viewpoint. Often they use search engines to look for it, but searching has problems because on the average, only 1.5-2.5 words are used in a typical search, and less than 10% of searches use Boolean operators. As a result, less than 30% of the first 20 documents returned are actually relevant to the search. Taxonomies help solve the searching problem by organizing content by company, industry, subject, etc. We can learn some lessons from existing businesses. Wal-Mart showed how to manage information, realizing that retail outlets control information flows, not suppliers.

Factiva has entered into a partnership with Microsoft. In new versions of Microsoft Office, users will be able to click on a term and be transported into the Factiva system, where they can search for information on the term. This is an example of how an information service can fit into a user's workflow and how information can be retrieved without needing Boolean expressions, search boxes, etc. Most end users do not want to search for information; they just want it made available to them so they can get on with their jobs. To ensure success in the information market, one must put time into building the network, break down ownership barriers, identify information-intensive work processes, and find problems that people are committed to solving. Understanding the business value and helping others recognize content as a strategic asset are also important.

SESSION 1: WHERE ARE WE GOING? THE FUTURE OF PROVIDING CONTENT

The Future of Providing Content

Dawn Conway, VP, Licensing and Content, LexisNexis

Content used to be a numbers game—who had the most databases. Now location is important: global, global, global! The future lies in integrating content into customer workflows. Present distribution models are not in tune with how users want to buy their content. Publishers must change and become comfortable with this. Branding is not as critical as providing answers, and intelligent content means extracting facts.

Enterprises are becoming local, regional, and global, and all types of content must be available to them. Distribution flexibility is key; content must be available through intranets, extranets, e-mail, and other platforms. Users now want to be able to mix internal and external information. They need local language sets and high value content. News is a given, but people will only pay for unique content. Data transfer must be freely available, without geographic restrictions.

The future of successful content provision involves global, high value content, anywhere and anytime, and customized the way users want it. The number of sources is not critical; having the right ones is.

What's Next? The E-Book Perspective

Marge Gammon, Sr. Director, Marketing and Publisher Relations, netLibrary/OCLC

The e-book market has developed for institutional libraries; there is no market for consumers. netLibrary has worked hard to make e-books familiar and comfortable to libraries. A large international market of over 1 million libraries is available. netLibrary has 8200 customers with book budgets that total $2.6 billion. Their database has 51,000 titles, half of them published since 1999, that libraries can select for their e-book collections. Usage grew about 60% from 2001 to 2002. It is of interest to note that the Pentagon library, which was destroyed in the 9/11 attacks, is being rebuilt largely with e-books.

The market for content is growing; the Web is predicted to grow from 2 billion to 13 billion documents by 2007. Every traditional format now has an electronic analog. No formats are disappearing, although print usage is declining, which means that libraries have a much more complex universe to deal with—more types of information, new technologies, funding challenges, and the need to create value.

Formerly, access and searching were more vetted, retrieving high quality items one at a time. Now, technology has increased search tools and options, so that remote users and distance learners can be served. The most popular e-book subjects include business, economics, management, social sciences, literature, medicine, history, religion, philosophy, education, and technology. E-books have proven very profitable for some publishers: one has made over $1 million, and five have made $500,000 or more.

Likely trends include:

- A “Return to the Special”: Growing appreciation for what is unique and rare, which is viewed as valuable, yet underutilized, such as research and learning resources. Library resources will increasingly need to be networked so they can be available at the appropriate stage within the learning and research environment.
- Books and journals will remain a rich business or commodity offering ease of access to information. New directory services and portals will help reduce costs and provide an emphasis on service.
- On the Web, there is ongoing interest in mediating access to high-quality Internet resources that linked to other resources and user interests.
- There will be more integration and linking to more types of content, access to content anywhere in the world, support for publishers migrating to “e” models, emphasis on win-win relationships that balance access, usage and compensation with digital behavior, and flexible mindset and business models.
- Programs to support advance planning will include a “portal mentality” to establish robust points of entry and full “discovery to delivery” support services

Content Provision at Dialog

David Brown, Executive VP, Business Affairs and Content Development

Dialog has been restructured into three business units: Dialog, NewsEdge, and IntelligenceData. They have 25,000 corporate customers in 103 countries. Dialog's three core assets are:

- Content: intellectual property, news, sci/tech, and business databases,
- Applications and solutions for the desktop and the information professional, and
- Service and support.

When content grows in value, users expect providers to grow also, which has service implications.

Customers expect links to the full text from abstracts. It is possible to only show links to journals subscribed to; data on price, timeframe, and format can also be shown. Dialog has capabilities in search (Dialog Classic, DataStar), end user desktops (Profound, Dialog Select, Intelliscope), enterprises (NewsEdge, etc.), and integration (NewsPublisher, Intrascope, and portal tools). Customers are now deploying intranet content via portals; one forecast says that 1/3 of the largest 3,500 corporations will buy portal technology by 2003. Dialog's strategy is to leverage the rapid adoption of portal technology to offer its content to customers, thus providing the right information to the right person at the right time. It is important to understand the needs of such an audience: targeted content drives their business.

SESSION 2: WHERE ARE WE GOING? THE VIEW OF MAJOR INFORMATION BUYERS

Sun Microsystems: A Major Content Buyer

Cindy Hill, Manager, Sun Library and Learning Technologies, Sun Microsystems

Sun has 35,000 employees, many of whom are home workers needing the same tools onsite employees. Many home workers are able to sign up for a cubicle and come to the office as necessary.

Even though budgets for 2004 will be flat, there is still a need to provide innovative services. Employee self-sufficiency has become a mandate. The "six Rs" of information are: the Right information, at the Right time, to the Right person, in the Right context, in the Right format, and at the Right cost. It is important to emphasize cost. Information does have a cost, and users must recognize that.

What is important to us as information buyers (really, partners)? Providers and purchasers of information need to hold regular meetings with each other and discuss strategic goals of each party. They need to find synergies and opportunities to work together and be willing to experiment with different possibilities. Start small and be highly focused, then pick the "low hanging fruit" for some early successes. Finally, recognize that applications will grow and need to be scalable—think about this at the start. Collaboration will drive innovation, allow faster progress, and result in better ways to help end users.

Major trends and desires of information purchasers:

- Employees are working anywhere and anytime. Geography is not a reasonable boundary any more, and site licenses do not work. What do you do with a one-person office?
- Internal and external content is becoming strongly integrated.
- Content is no longer just text; it includes videos, multimedia, etc. It comes in multiple languages and multiple formats.
- We need a single search engine for all content. Employees keep pushing the searching envelope.
- Portals are taking over. The company library will become the content provider to the employee portal.
- Executives are beginning to realize that intellectual capital drives the revenue base.
- The information infrastructure is becoming much more visible to employees. For example, they recognize that taxonomies are useful.

In a partnership, both sides win. Co-branding is a good thing because it shows that the provider has been qualified and is supplying premium content. Usage metrics are important; if it cannot be measured, it cannot be evaluated.

Using Information to Create Business Value

Eliza Puzzuoli, VP, Issues Management, Prudential Financial

The mission of Prudential's Issues Management department is to bring the outside world into the company and to assess the external environment. It helps to shape the company's response to the outside world by developing public policy positions and business strategies, thus enhancing Prudential's reputation. The Business Library subscribes to 40 news services, which are aggregated internally. Most users get basic information themselves and turn to the library for their more complex needs. The trend today is strongly toward a self-service model on the intranet and Internet platforms. Customization, filtering tools, synthesis, and analysis are also of high interest.

Analysts at the library write a lot of content to avoid copyright problems. In the last five years, the budget has been cut in half, so the library now works in a "just in time" mode. They will pay a premium for convenience because that saves time and money. Flexibility and long-term relationships are also significant. Cost-effectiveness, flexibility, convenience, packaging of unique content, and value-added services are the factors used to judge an information vendor. Prudential's wish list includes foreign content, translation services, expert hotlines, a single search engine, and affordable e-content.

A Buyer Perspective on the Future of the Information Industry

Patty Ruger, eContent Buyer, DuPont

Buying and licensing of electronic content for DuPont's 80,000 employees is centralized, which leverages costs and avoids duplication. The content buying team is a corporate resource. It evaluates suppliers and their offerings, negotiates contracts, procures and delivers information and functions as a liaison to the DuPont libraries and end-users, publishers and other vendors. In addition to purchasing, they work with end-users and publishers to identify end-user training needs; organize the training and educate users on ethical and legal use of products. E-content at DuPont includes electronic access to information, external online databases, e-journals and e-books, multiclient studies and patents.

Traditionally, the library network handled fulfilled all content needs, but with today's changing roles, the number of physical libraries has greatly decreased. A dedicated help desk team fields requests and questions that are received via Web and e-mail request forms. A formal, data-driven quality practice is used to select content for purchase. Contractual issues continue to delay the delivery of content to the customer, and negotiations are still much harder than they need to be. Vendors still want unilateral protection. DuPont is willing to provide protection against its own misuse, but will not be an "insurance broker" for the vendor. Vendors who are willing to work with their customers always have the best chance to win business.

DuPont supports vendor competition and looks for opportunities. Vendors can assist buyers by showing customer value and customer focus. Bundling is becoming increasingly unpopular at DuPont. It increases the unit price of desired products and is viewed as a way to force the purchase of unpopular products by linking them with desired products. It puts a strain on relationships and is a budgeting nightmare, especially in a usage-based environment. Vendors should let the buying community pick and choose the offerings; in an all-or-nothing situation, DuPont will choose nothing, and the vendor will lose the sale.

Budgets are getting tighter. The days of buying whatever the user wants are over. But there are opportunities even in the worst of economic times. Vendors and customers can be good partners and should seek flexibility, fairness, and efficiencies to lead to a win-win situation. Content purchasing decisions are driven by what is "Critical to Quality" and the "Voice of the Customer". Usage statistics are more important than even in such an environment.

The Web provides free content, but who are the privileged "free" users? Most "free" content is not offered for global "for-profit" institutional use. Click-through licenses have liabilities. Copyright laws are very serious business; just because content is accessible does not mean that access should be encouraged. Who takes responsibility for the quality? The quality of content is directly related to everyone's business success, and consistency in quality leads to sound business decisions and maximizes ROI.

Today's e-journal pricing models are bad for all concerned. No business, including publishers, can force revenue stability. Publishers must work with customers to find a fair solution and develop better pricing models and formulas for print attrition. Again, good usage statistics are critical.

Challenges present opportunities; we must adapt and seize opportunities. Bundling and restrictive pricing models are relationship killers; cost optimization can be good for all parties. Partnering is the key to our future.

SESSION 3: MISSING DATABASES: The Impact. Is This A Trend To Watch?

Blaise Simqu, Executive VP, Sage Publications

Sage publishes over 350 scholarly journals, as well as about 500 books a year. Since they late 1980s, they have actively licensed their journal content to aggregators, such as UMI, H.W.Wilson, LexisNexis, and others. None of these licenses generated significant revenues. In the early 1990s, Sage licensed course packs to Kinko's and realized significant revenues in the first year of the agreement. However, Kinko's lost a copyright lawsuit in 1993 and left the course packet business. Sage had also licensed content to EBSCO, who sub-licensed it to Northern Light. Sage only found out about this later.

Until 1996, Sage was a proponent of licensing to aggregators because of the potential revenues. However, cancellations of subscriptions to their print journals began to increase in 1998, and when they did a survey asking why, about 10% of the respondents said they cancelled because the material was available electronically from an aggregator. So between 1998 and 2002, Sage terminated all license agreements except those with ProQuest and EBSCO, and those were converted to one-year agreements. They also began closely tracking journal cancellations and royalty payments. The survey was repeated in 2002, and this time, 30% of the cancellations were directly attributed to ProQuest and EBSCO. Sage considered this a serious threat to their business because they cannot survive on revenues from royalties alone.

As a result of the 2002 survey, Sage terminated its agreements with ProQuest and EBSCO and removed its content from their databases. Even though they offered the data directly to users as "Sage Full-Text Collections", a firestorm erupted on many library listservs. Sage Full-Text Collections are subject-specific databases envisioned as research tools for students and faculty, with 20-year archives and guaranteed links to the full text. The price for the direct-access databases was significantly higher than for the aggregated databases.

Sage wants to remain in the business of guiding library users to specialized resources. They recently signed an agreement to license 20 business titles to ABI/INFORM. This move may seem at odds with the decision to remove their content from aggregators' databases, but Sage took the step because it does not have a core journal collection in business and would not be able to build one. Being in ABI/INFORM is critical to their journals' success and rankings. They were able to negotiate much improved financial terms, so that they receive more online revenue for those 20 journals than they were formerly receiving for all 350 journals. Thus, the journals could survive even if all print subscriptions were cancelled.

The ProQuest View

Vince Price, VP of Marketing, ProQuest Information and Learning

What business are we in? What are people willing to pay for? For many years, the publishing business never changed. Then came online databases, followed by the Web. Now we must examine what we do and change to meet marketplace conditions.

ProQuest is in the *time* business. By identifying materials needed for research, we provide finding tools to help researchers save time. We need to find a way to connect researchers to the full text without creating channel conflicts. They want materials quicker than ever. Producing a CD-ROM takes six weeks. Web publications can take up to 48 hours, but with electronic feeds, that time can be cut to four hours.

We must respect the revenue streams of the publishers: advertising, licensing revenues, subscriptions, royalties, etc. Publishers must stay financially healthy, so it is important not to create conflicts. High quality content is expensive, and publishers know that.

Publishers have trouble reaching small users. If we can find a way for them to implement differential pricing, they will get revenues from them. One way they have done this in the past is by embargoes. Suppose every publisher created its own collection of materials. Libraries would then have to organize their collections by publisher, so we would still need finding tools, especially if the content disaggregates. Subject indexes are the value proposition in selling time. The opportunity for publishers in aggregated databases is to reach customers they would ordinarily not reach. Most publishers are better off getting usage of their products, no matter where it comes from.

In the future, we can expect to see more content in databases, but the elite material may still be embargoed. Some content now freely available may become embargoed, but it is better if the bulk of the content is not embargoed.

Whose Article Is It Anyway?

Barbie Keiser, Caliber Associates

There are no guarantees in the information industry, but there are many issues that information professionals and providers must consider, such as database coverage, understandable billing schemes, reasonable embargo periods, backfile access, perpetual access after subscriptions are cancelled, and ownership concerns if a product comes into the possession of a new owner. If there is a fee to access a product, users expect it to be accompanied by powerful and sophisticated search tools. They also want some assurance that a file will remain available even if it is sold to a new owner. They may be tolerant of some embargoes.

Users need a way to access the full text and link to document providers (providing such links is the only way for bibliographic databases to survive). They are also concerned about levels of access, electronic archiving, redistribution rights (electronic, Web posting, or restricted), and the effects of the Tasini decision. Tasini concerns have become important because publishers have begun to purge databases of materials authored by freelance authors (see a recent article regarding Elsevier's databases in the *Chronicle of Higher Education*).

Some challenges of copyright are: license agreements governing what may be made available electronically and usage counting and authorization (current needs vs. historical records). Vendors can help users by finding an appropriate balance for their user agreements. They need to use tools and technology and be creative when designing discounts for volume users. Databases tend to be chosen on the basis of unique content, the value they can add to the research process, their archives, and their search capabilities. Cost and delivery options must be flexible—it cannot be all or nothing. Users want the ability to slice and dice and customize the output to their applications.

Information producers can help improve access by developing discovery tools within disciplines and portals, using a "best practice" approach to indexing, making it easy for users to find "more like this", and providing tools that detect and report database changes to the user.

SESSION 4: ELECTRONIC LEARNING

Reaching the New Learner

John Barnes, Sr. VP, Business Development, Gale Research

E-learning represents a huge opportunity today. During the dot-com era, over $1.2 billion was spent on e-learning systems. There was much hype, and many companies failed. Now the second wave of development is coming and bringing a new level of opportunities. We are seeing an entire spectrum from the emergence of virtual high schools to corporate training departments, and everything in between.

Online courses provide the full environment of instruction, functionality, research and interaction to shape the student's learning experience. They are effectively the lecture hall, study room, instructor's office, and library all in one. The drivers for e-learning are the same as for many things in society: technology, convenience, cost savings, customization and adaptability, scalability, and global reach.

There are over 2 million students taking electronic courses today, but they represent only a small percentage of the potential market (perhaps only 2 to 3%). The University of Phoenix, a virtual university, has 120,000 students, most of whom have never entered a classroom. The University's revenues were $1.2 billion in a recent year. About 350,000 K-12 students are fully online today.

The next generation of e-learning will feature improved instructional design (programmed vs. presentation), further standardization, enhanced communication among virtual communities of students, increased user control, "blended solutions" (traditional methods integrated into electronic courses), and integration of "the library" (high-quality reference and research content) into the curriculum. Opportunities for information companies include online databases, customizable e-content course packets, content integrated into courseware, and reference and research content.

e-Learning: What comes next?

Isabella Hinds, Sr. Director, Content Alliances, WebCT

WebCT began at the University of British Columbia in 1996 and now has users in 81 countries. It is a leader in electronic course management systems and is creating a level of detail that has never been available before. Between 1996 and 1999, forward-thinking instructors adopted e-learning systems. Most of the software consisted of stand-alone systems, and there was little online content available. The focus was on meeting course needs, not campus-wide objectives. There was minimal collaboration and no integration with other campus systems. By 2000, the demand for e-learning came from all areas of the campus, and now the majority of courses have an online component. Campus-wide deployment of e-learning is tied to institutional goals, and it is being integrated with other campus technologies.

E-learning customers want to leverage their buying power. They are creating communities of faculty and are moving towards new models of shared resources. Academic institutions want to attract and retain students. They are beginning to track, analyze and improve the quality of their offerings to serve wider and more diverse audiences. Because of shrinking budgets and revenue streams, they must do this by expanding capacity but not physical facilities. E-learning provides them with a good avenue to do this. They are very concerned with ROI and managing their intellectual assets.

Today's academic systems must support multiple entities in a single installation, with central administration, shared resources, and local control. They must provide content and performance management capabilities beyond course boundaries. WebCT has built the industry's first academic enterprise system. It goes beyond individual course management and mirrors existing structures, operations, and workflow. ROI is optimized, and multiple entities in a single installation can be supported. It can be integrated into existing campus infrastructures, and its modular and scalable architecture is based on industry standards. By collecting and storing student learning data, student performance can be assessed, and the learning experience can be improved. The system can track how content is used and control the use of copyrighted or licensed content. The online learning experience can be customized; students can interact with the system in a variety of ways, thus fostering lifelong learning relationships. At the University of Central Florida, after the system was installed, student performance was significantly improved. Course completions expected to rise by 150 students per year, but the per-student costs were reduced by 31%.

Both publishers and WebCT benefit from this solution. WebCT has used technology that can be applied to content. It provides complete backend support and a large installed base on a common platform that is built on open standards. Publishers have access to large numbers of users and resources to build new types of content products. The purchase decision for the publisher's products is being shifted from students to institutions. This system has the potential to eliminate the used book market and appeal to a large number of computer-savvy students (today's sophomores were born the year the PC was introduced) who are visual and impatient learners. It is likely that "growth by demographics" is over.

In the future, the course management system will be the predominant vehicle for delivering electronic content to students. Other functions will move to it, and it will be used to authenticate into licensed learning materials, such as e-reserves and library-based reading lists. Course management systems have also been successful in delivering digital content than other means. The highest desirability for content is small supplemental units providing critical product differentiation and strong value. Digital learning content must meet customers' desires for quality and take advantage of the available media by solving instructional problems, exploiting the advantages of electronic content, and protecting the rights of its owners. Librarians are increasingly becoming involved with content management systems to ensure that students use what they buy.

Learning Linked to Results

Karen Reimer, Manager, e-Learning Strategies, General Motors University

In today's business environment, the world is getting smaller, and the competition is getting tougher. Customers demand more value, and change is constant. Learning must be continuous to help employees stay contemporary, competitive, and energized. General Motors (GM) is the world's largest vehicle manufacturer, with operations in more than 30 countries and sales in 200 countries. Its 350,000 employees produce 8.5 million vehicles a year. GM's cultural priorities include acting as one company and moving with a sense of urgency, but maintaining a product and customer focus.

GM has established a corporate learning center, "General Motors University" (GMU), a global network of learning resources to help employees improve their competitive performance and to grow GM's business. GMU has 16 functional colleges that develop curricula tailored to the needs of GM employees. It was established in 1997 and provided over 800,000 hours of learning in 2002 by offering 1,900 courses for 86,000 professional employees. It also has a distance-learning program, GMU Online, which has 75,000 Web enrollments.

GMU uses leading e-learning technologies to offer its courses, including distance learning, Web-based learning, and blended learning. Its goal is to enable change by focusing on capacity, performance, and results. GMU estimates that by enhancing employees' skills, the company saved $10 million in productivity gains in 2002. Web-based training has grown substantially and now accounts for about 50% of all hours spent in educational activities.

Two issues drove GMU's Web-learning initiative:

1. How can we reduce training costs and still offer our employees the quality train-

ing they need?
2. How can we help our employees deal with the demands for their time and still have time for learning and development?

The following strategic principles were developed:

- Maintain one architecture with the right set of e-Learning templates and standards,
- Focus on workplace learning critical to results and development,
- Keep investment low and smart,
- Ensure effective learning and application,
- Experiment safely with different approaches, and
- Evaluate progress continually.

Today, GMU offers approximately 1,000 courses, about 1/3 of which are specific to GM. The program is global, with learners in 46 countries. Web courses are supporting four corporate-wide initiatives, and several blended learning programs are offered. For the future, GMU is moving towards a completely standards-based program, with more interactive and engaging content, more blended learning, full adoption of virtual classrooms, and the inclusion of a performance support/content management system.

SESSION 5: CEO PANEL

Rob Granader, CEO, Marketresearch.com

Marketresearch.com is the largest aggregator of market research reports and syndication studies. The company was launched in June 2000 as a “small store” on the Web and continues to do well, even in today’s difficult times. They serve users with a heavy emphasis on customer service. There is no subscription fee, which has proven to be a very successful business model—they are acquiring about 350 new customers a month.

Google is not the answer to many users’ needs, but it is a good starting point. Many times, one must find an aggregator and go to the actual information to answer a question. Marketresearch’s customers typically are always too busy to do their own searches, so they rely on good customer service and personal attention from the searcher. Customers do not pay a fee unless they buy a report, and they will not pay unless they know they will get an answer.

Leslie Poole, CEO, Javien

Javien helps providers deploy premium content on the Web. They provide a catalog of digital assets and monitor sales and usage of the content. In 2003, there was a significant change on the Web, with a move away from free sites and toward more paid ones. Publishers want to take advantage of this trend to sell their content. One opportunity for them is to provide paid searches of their archives. One example of success was Forbes.com, which made $5,000 in the first month its archive was available. We must recognize that a single small search may be the start of a relationship.

Mike O'Donnell, CEO, iCopyright

iCopyright, now Data Depth, licenses technology to publishers wanting to operate their own licensing systems. They have 800 publishers as their customers. Four major trends are now influencing the market:

1. Value-based pricing is a major driver.
2. Charging for consumption is replacing subscriptions to an entire bundle of information.
3. Push is coming back. (It never really went away.) Pushing content to users bypasses gatekeepers and gets content to desktops.
4. Teaming and alliances for syndicated rights to content are becoming important.

Morris Goldstein, President and Owner, Nevada Slots & Supplies

[Ed. Note: As CEO of Information Access Corp., Goldstein was a long-time active member of ASIDIC. When IAC was sold to Gale, it had 2,500 employees, and the sale price was over $500 million. Shortly thereafter, Goldstein left the information industry and entered the gaming industry. He now owns his own company selling used slot machines and other gaming equipment. Attendees warmly welcomed his attendance at the ASIDIC meeting. Much of his presentation was based on a predictive article that he published in a 1990 issue of **Information Services & Use***.]*

Some things do not change. The information marketplace is still segmented, and there are a variety of ways to purchase information: subscriptions, pay per view, etc. In-depth research will always require a variety of ways to obtain information. Technology has enabled segmentation pricing.

The Internet is oriented towards solutions to problems, and people will pay for that. It is not always necessary to retrieve every answer or every reference. We must know our markets and work on licensing and pricing. Publishers' concerns over revenue erosion will not change.

The information business has consolidated, and there are fewer services and higher prices. Technology has revolutionized the concepts of precision and recall, and the focus has shifted from products to solutions. A possible solution to the information overload problem would be the integration of answers to questions and automatic generation of "consensus abstracts". In such a system, the user would receive a single abstract summarizing several stories on the same subject (with links to them). This would work well in the medical area, where consumers could access a "Health Reference Center" and receive solutions to their health problems.

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