

HighBeam Research

Title: Ejournal hosts: the next generation.

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Thanks to the Web, we've gone from an era of print books and journals to the idea that "If it's not online, it doesn't exist." Who can ignore users' expectations for desktop access to much of the world's most important literature? The need to address rising user expectations, continual technological developments, and powerful new standards means every econtent provider in the library market can gain insights directed to journal publishers.

While most scientific, technical, and medical (STM) publishers make their work available online, the majority of journal publishers do not. In keeping with the 80/20 rule, the largest publishers that went electronic in the first wave are now also converting their journal backfiles and bringing them online. The second wave consists of mid-sized and smaller publishers--mostly in the social sciences and humanities--that are seeking cost effective solutions for managing journals on their Web site or delivering their content to libraries.

Yet for better or worse, publishers selecting a service provider today have many options and capabilities at their disposal that weren't available during the first generation. Because of the rapidly changing landscape, publishers should reassess their ejournal delivery method to evaluate new opportunities every two to three years.

Undoubtedly, Net-nascent publishers of print journals need help navigating the options and opportunities today's epublishing provides. So, in response to clients of ours coming to us seeking to begin epublishing or to select a different outsourced service, we invested six months identifying and researching the nine services covered in this article. We began by examining Web sites and searching

the literature, and advanced to email surveys and in-depth phone interviews with company executives. Collectively we label this group "ejournal host services."

THE PLAYERS

Ejournal hosting companies provide a platform that allows users to search, browse, read, forward, print, and download articles from a publisher's Web site or from a branded site that aggregates journals from many publishers in one searchable database. The companies included in this article provide support to a broad range of publishers.

A look into the history and origin of the current major players offers insights into their strengths and market orientation:

- * AIP Scitation: started as a platform for society publishers.
- * Allen Press: started as a press and partnered in creating the service for BioOne.
- * Atypon: designed the software for HighWire, Blackwell's Synergy, and CrossRef.
- * Extenza e-Publishing Services: launched by Swets as a new service.
- * HighWire Press: began with selected titles in life sciences and medicine by societies
- * Ingenta: had its own service and bought Catchword.
- * MetaPress: recently launched as a service by EBSCO.

Two academic research libraries have launched their own ejournal publishing initiatives in specific niches: Project Euclid at Cornell University focuses on

nonprofit publications in math and statistics and Project MUSE at John Hopkins University Press focuses predominantly on university press titles.

Journal editors and societies can also work with large publishers that provide complete support for both print and electronic publishing, such as Blackwell's Synergy, Elsevier's Science Direct, and Kluwer Online.

TIMING IS EVERYTHING

Choosing an ejournal provider or deciding to change an existing one is a major decision that warrants an RFP and requires a minimum of six months to select and implement an ejournal host regardless of the number of titles involved.

Month 1: Compile lists of basic and new features, and decide if each is "essential," "nice to have," or "optional." Choose the top five. Determine how large of a back file will be included and establish the budget for the project.

Month 2: Conduct preliminary reference checks with customers of potential providers to identify vendors to be considered.

Month 3: Prepare and distribute the RFP.

Month 4: Allow a month for responses to be received.

Month 5: Allow a month to evaluate the responses, obtain additional information as needed, check references, and make a selection.

Month 6: Submit sample issue files before a final cost and production timetable can be confirmed.

Month 7 to 9 ... up to 12: Allow three to six months from the time a letter of agreement is signed until the publication can be moved to the public Web site.

Migrating from one vendor to another can be easier and less work than migrating from a proprietary system. While vendors generally cooperate with each other, this is not always the case and can add to the time required for migration. Ensure that your contract states that you own the metadata and reformatted files created by your vendor. Specify a timetable for their return to you or a new vendor when the contract is terminated. Require the right to withdraw all or part of your backfile from any vendor aggregation at the termination of the contract.

COST COUNTS

In general, ejournal hosting costs are structured as a one-time setup fee and an annual maintenance fee, based on a number of factors. However, the ways fees can be assessed vary widely; they may be broken out or even combined. They can also vary by title based on the unique characteristics of each journal. Make certain that all fees are included in the response.

The addition of the journal's backfiles to the hosting equation can substantially add to the cost as it may involve not only multiple formats but also multiple providers. Many vendors are willing to spread set up fees over several years and some may be willing to absorb or reduce them to gain an important customer.

Annual conversion and metadata generation costs are based on the staff time involved in file conversion and manipulating. Text-only publications cost less to convert while those with illustrations, graphics, and special characters are more expensive. Some vendors charge for writing conversion scripts, others do not. Fees are calculated by the number of issues or that number and the average number of articles per year.

Quality control inspection can be done by the vendor, the publisher, or both. Ejournal hosts prefer publisher involvement as they want to avoid giving instructions that may incur fees to typesetters, printers, or other vendors working for the publisher.

Vendors may not charge for the distribution of metadata to an established group of A&I vendors, but may charge for additional distributions, especially if they require any customization. Access control fees can be assessed per subscription, and/or the vendor may charge to load subscriber data.

While each publisher pays its own CrossRef membership fee, vendors can handle DOI assignment and registration. Vendors with substantial hosted content can provide reference DOIs from this content so that only the first look-up incurs a charge.

MAKING THE RIGHT DECISION

Each vendor offers certain core functions and each publisher must carefully consider these and evaluate how well they coincide with specific requirements.

One factor would be a publisher's plans for Web site development. Do you have a Web site and only need to plug in content, or do you want the vendor to host the content on their site with or without your branded page? Is a simple template generated page adequate, or do you need to develop a full-featured, customized Web site?

With content in digital form, users don't want to repeat searches across databases, so it can be advantageous to have your content grouped with other titles in that discipline. This is both a factor in the selection of a hosting service and in the decision to host the content yourself. The larger the society publishers, the more likely they are to be able to support hosting on their own.

Content and document format types will also figure prominently in the decision-making process. Do you presently support formats other than journals, such as e-books, conference proceedings or searchable databases? Will you need support for dynamic, frequently updated content, like reference books? Do you need to distribute daffy news? Will you need to support continuing education

course content or article bundles? Do you want to support article-at-a-time publication? All providers can accept Postscript, SGML, HTML, XML, and PDF. Not all can accept LaTeX and would need to work with your typesetter to generate output in their DTD from Quark/Pagemaker. Many support the de facto DTD standard developed for the National Library of Medicine.

Any publisher selecting an ejournal hosting provider should also take a good look at the back end control features like access, administrative, and authentication control. Do you want a control module that allows you to support customer service and fulfillment, or other functions? How robust is the vendor's access control? Will they be responsible for user support or will you? How does the vendor monitor use and respond to possible license violations? How quickly can adjustments be made to add new subscribers, or cut off violators?

And, without a doubt, one of the most compelling reasons for publishers to go digital is the insight that usage reporting provides. What reports do you need that you create now? Will comparable reports be included in the basic service, or will they require customized development? Can you generate reports on demand or will the vendor have to create them for you?

GROWING YOUR BUSINESS

Some of the most striking changes in the last year make it clear ejournal hosting is a service, not a product. These relatively new features--which include linking, marketing, member/individual services, Google support, ecommerce functionality, compliance, and improved usage statistics--can help grow your business and increase usage. Most will become standard features, while marketing and ecommerce will likely continue to require additional fees. The broader message is to select a vendor that will monitor new developments and continue to enhance the services you receive.

The new OpenURL standard and associating linking technologies such as the DOI enable the user to connect seamlessly from a citation of references within articles, end notes, and abstracting and indexing databases to the full text of the article. Increasingly, the actual location of full-text will not matter, but maintaining the linking mechanism, paired with authentication, will be ever more important. Make certain that your ejournal host provides full support of the OpenURL framework, reference linking, and meta-search; when negotiating, include language that requires support of yet-to-be-developed standards.

Most vendors include marketing support features in their services, such as granular usage statistics. Ingenta, AIP Scitation (formerly the American Institute of Physics Online Journal Publishing Service), and Project MUSE market their products as aggregations. Four vendors have an affiliated marketing service, which can be employed regardless of host selection: Allen Marketing and Management, Publishers Consulting Group (Ingenta), Publisher Promotion and Fulfillment (EBSCO, MetaPress), and Extenza Marketing Solutions. Atypon is introducing a marketing module. Many of the services also employ marketing services and agents on their own behalf and to promote their hosted content.

Ejournal host services that have catered to societies have more experience in the development of personalized services for individual subscribers like stored searches that can be executed on a schedule, table-of-contents alerts, the ability to export citations to a software package such as ProCite, and member-only discussion forums. With the decline of print and individual subscriptions, social science and humanities publishers may retain their individual subscribers by offering enhanced functionality.

Six months ago, only a few vendors allowed Google to spider their content, but all now offer this publisher option. This increases the discovery and use of content for both subscribers and non-subscribers. (STM publishers that are

working with Google have noticed dramatic increases in levels of use and documents sold.)

There's been a remarkable increase in providing ecommerce support, especially in allowing real-time subscription orders, pay per view, sales of article bundles, free sample issues, and other types of sales and promotions. These options represent a significant opportunity but may incur additional fees.

Again, understanding the way readers use ejournals provides a significant competitive advantage. Project COUNTER is the recognized international initiative authorizing publishers' usage statistics and compliance. Libraries will increasingly consider usage in making renewal/cancellation decisions; publishers can prepare use-based pricing models.

LOOK TO THE FUTURE

The major trends referenced in this article will continue in the foreseeable future: the decline of print subscriptions, the growth of databases, and increasing reliance by readers on access to the information they need in electronic form.

In the print world, usage by readers was unknown and publishers could only gauge usage by authors from citation rankings. In the electronic world, usage will drive renewals and accessibility will determine usage. Publishers will want to closely monitor the usage statistics for their journals, assure that their hosting service adheres to the most recent standards, and obtain feedback from both librarians and end users on the availability of their content to ensure both the widest possible access and continued support.

Finding content will continue to grow in importance as more ejournal hosting providers recognize that users find content in one of two ways--brand recognition or discovery. Readers either know about the database that holds your titles or discover them through a growing array of technological advancements. The

paths that lead users to content will include: users searching a diverse or subject specific full text database, searching an index and linking from a citation to the full text of the article, searching across multiple databases using metasearch software acquired by the library; and searching Google, which is spidering the content of scholarly publishers.

Accustomed to the ease of Google, user expectations are driving the development of new technologies (DOI) and new standards (OpenURL) for linking that will make connecting to full text across multiple systems a seamless experience.

Keep in mind, as you make the move to digital, that branding is only effective with your core users who know your journals by name or can find the database that contains them among the 200+ databases typically licensed by large academic institutions. As the volume of online content continues to increase, technological tools take on new importance in the discovery and delivery process. Use will become the driver in library's decisions about content that is cost-justifiable. You can't afford to be passive and merely make electronic content available; you need to drive traffic to it by partnering with the ejournal host service that best meets your goals.

TABLE 1 Ejournal Hosting Providers

Company	Website	Origins
Allen Press	www.allenpress.com	full service printer
Atypon	www.atypon.com	software developer
Extenza	www.extenza-eps.com	subscription agent
HighWire Press	http://highwire.stanford.edu	library
Ingenta	www.ingenta.com	commercial service
MetaPress	www.metapress.com	subscription agent
Project Euclid	http://projecteuclid.org	library
Project MUSE	http://muse.jhu.edu	library/university press
Scitation (AIP)	www.scitation.org	scientific society publishers
Company	Aggregator	Marketing
Allen Press	www.publiclibraryofscience.org	service
Atypon	www.blackwell-synergy.com	module

	www.bioone.org	
Extenza	own site	service
HighWire Press	own site	by client publishers
Ingenta	own site	service
MetaPress	own site	service
Project Euclid	own site	of aggregation
Project MUSE	own site	of aggregation
Scitation (AIP)	own site	of aggregation

Company	Discipline	Publisher Size	Journals Hosted
Allen Press	STM, all sciences	primarily small	100+
Atypon	STM, general	medium to large	1000+
Extenza	general	small to medium	120+
HighWire Press	STM, some humanities and social science	all sizes	336
Ingenta	general	all sizes	*
MetaPress	STM, general	all	1,767
Project Euclid	math, statistics	primarily small	30
Project MUSE	humanities, social sciences	small to medium	240+
Scitation (AIP)	physical sciences, engineering, all science	small to medium	220

* A comparable number was not available from Ingenta

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