



Signs of a Changing Landscape

How the Pieces Fit Together

NISO Webinar on Consolidation
Judy Luther
March 8, 2017



*Technological change drives social change,
and the impact of these changes is
accelerating exponentially.*

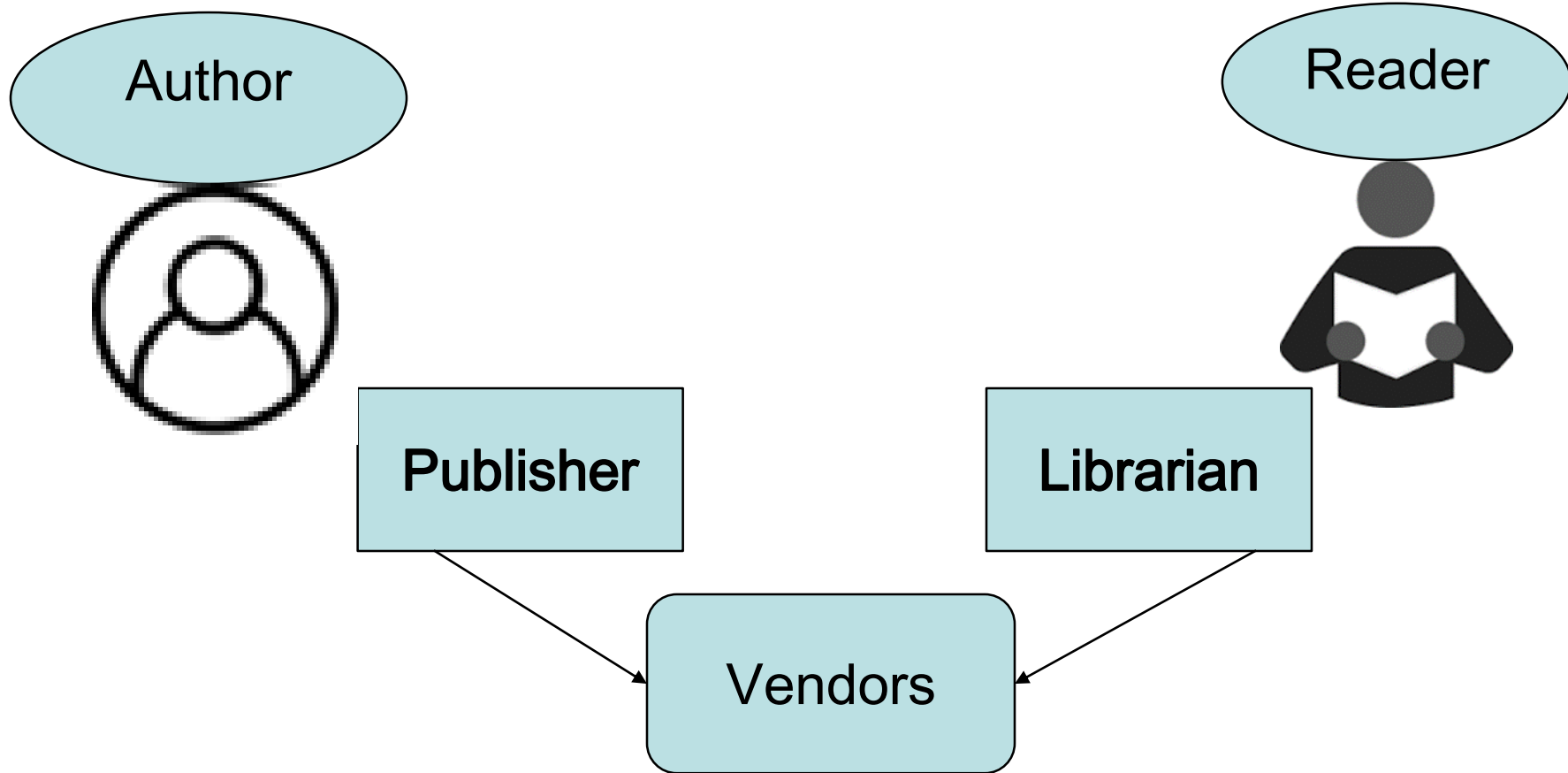
*Dr. John Moravec
Founder of Education Futures*



CONSOLIDATION



Relationships in 2000 – Print + Electronic





Horizontal Consolidation

From “Heads of Houses”

Academic Press
Butterworth-Heinemann
Cell Press
Churchill Livingstone
Harcourt
Morgan Kaufmann Publishers
Mosby
Pergamon Press
Saunders



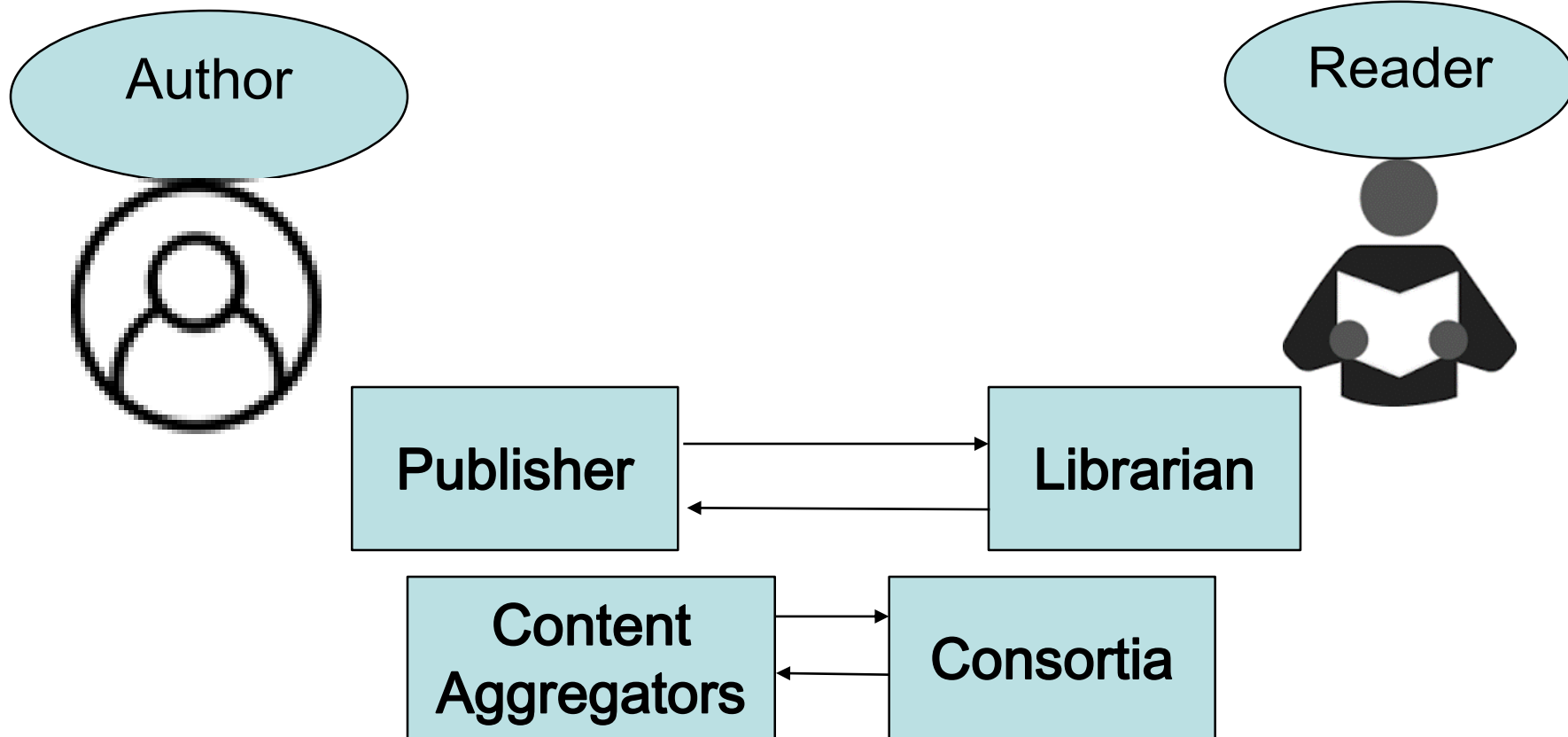
Publishing Corporations



CONTENT



Relationships in 2010 – Electronic [+ Print]





Where Have All the Vendors Gone.....

Subscription Agents

EBSCO Subscription Services

Faxon

Swets

Harrassowitz

Casalini Libri

Association of Subscription
Agents

Book Vendors

Blackwell's

Coutts

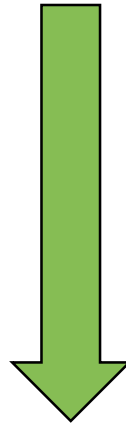
YBP



Vertical Integration

EBSCO

- Books
 - NetLibrary
- Book Vendor
 - YBP
- IMLS
 - Folio



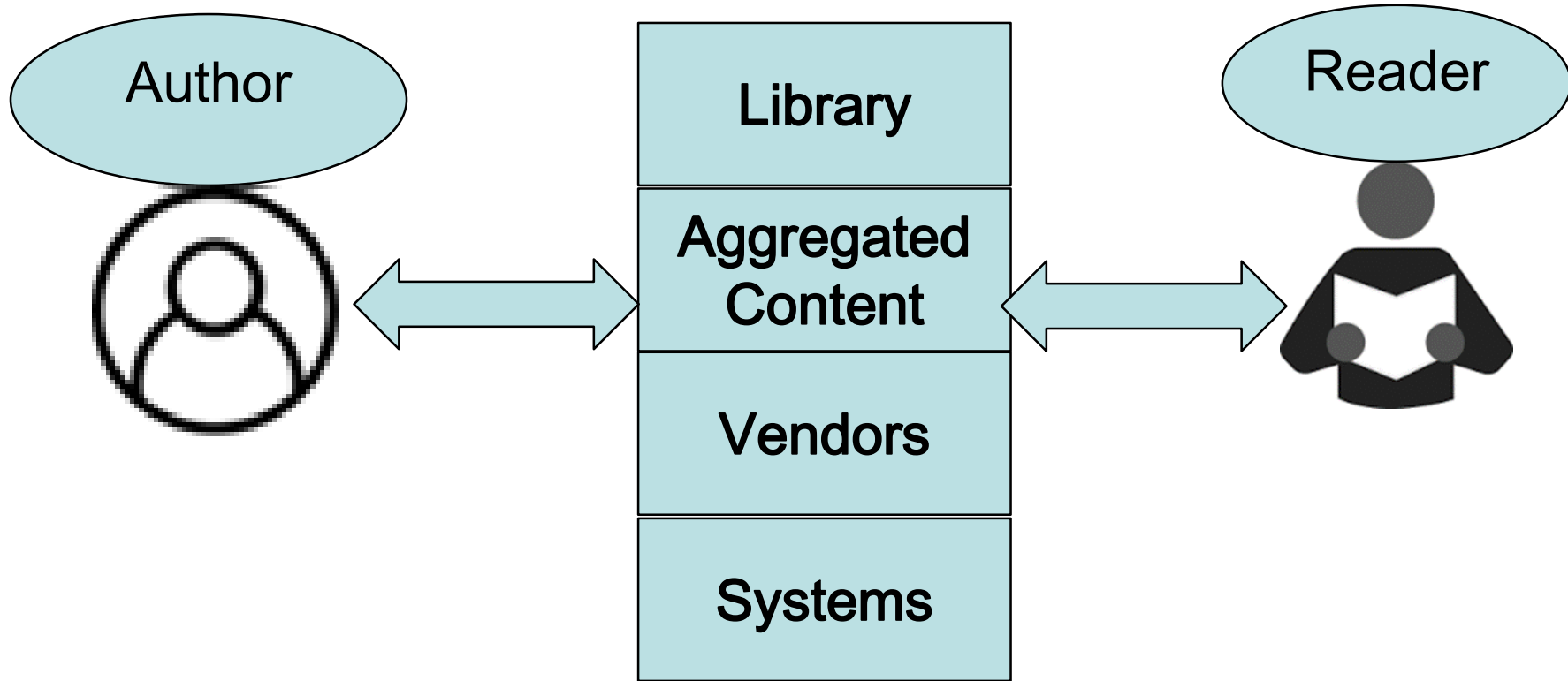
ProQuest

- Books
 - Ebrary & EBL
- Book Vendor
 - Coutts & MyiLibrary
- IMLS
 - ExLibris

CONTENT & SYSTEMS



Relationships in 2020





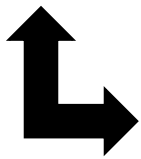
TRANSFORMATION



Vertical Integration

WILEY

[Publisher]



[Publishing
Partner for
Societies]

Wiley **drives progress**
and **fuels innovation**

<http://www.wiley.com/WileyCDA/>



Thomson Reuters >> Clarivate Analytics



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Citation Indexes
Impact Factor



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Analytics**



Clarivate™ Analytics accelerates the pace of innovation by providing trusted insights and analytics.

Clarivate enables you to discover, protect and commercialize new ideas, faster.



Knowledge

We own, curate and analyze the most complete and authoritative knowledgebase



Technology

We commit to using best-in-class technology that enables expert solutions to be delivered consistently and with confidence



Focus

We are dedicated to serve the innovators who strive to make a difference



Expanding the Audience – Research Admin

- Clarivate – **Converis**
 - Manage complex research teams and projects in a unified flow.
- Elsevier – **Pure**
 - Facilitates an evidence-based approach to your institution's research and collaboration strategies, assessment exercises and day-to-day business decisions.



- Symplectic – **Elements**
 - Capture, analyse and showcase research with the world's leading Research Information Management System (RIMS)



START-UPS



From Transition to Transformation



**Collaborative
Knowledge
Foundation**

The Collaborative Knowledge Foundation's mission is to evolve how knowledge is created, produced and reported.

CKF envisions a new research communication ecosystem that gives rise to wholly unique channels for research output.

CKF is building open source solutions in scholarly knowledge production that foster collaboration, integrity and speed.

CKF was founded in October 2015 and is supported by the Shuttleworth and Gordon and Betty Moore Foundations



Digital Science



SERVES INSTITUTIONS, PUBLISHERS, RESEARCHERS



.....More.....and More.....

INSTRUMENTL

Matches researchers with relevant grants



PHYSICS



COMPUTER SCIENCE



CHEMISTRY



ENGINEERING



BIOLOGY



SOCIAL SCIENCES

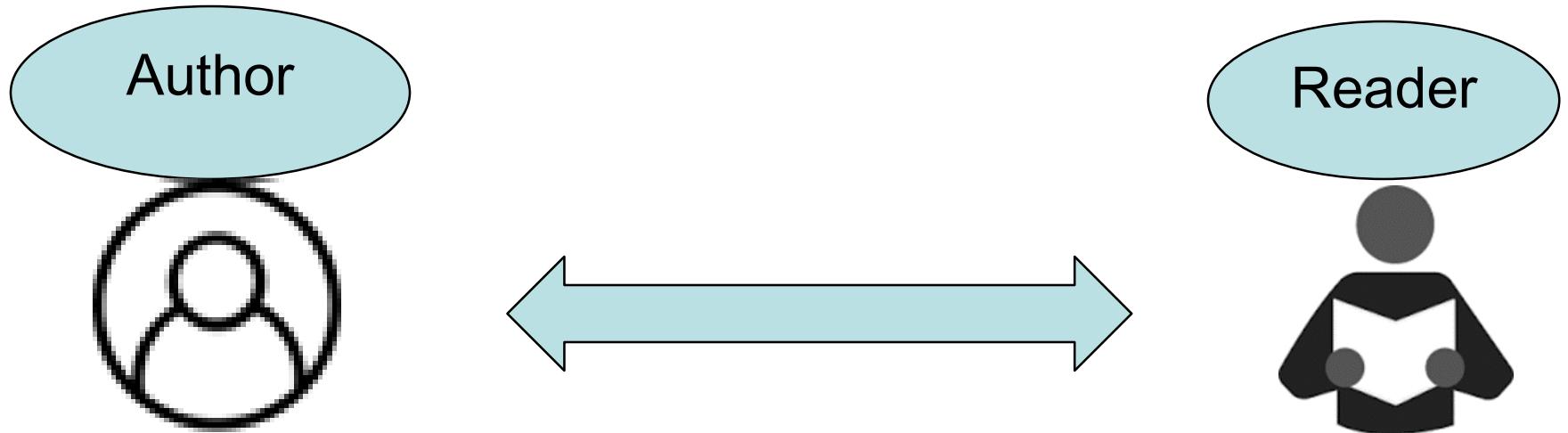


MATHEMATICS

Cloud based executable research platform



Relationships in 2030 ?



The Future ?



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