

Changing Business Models in Scientific, Technical and Medical Publishing Marketplace

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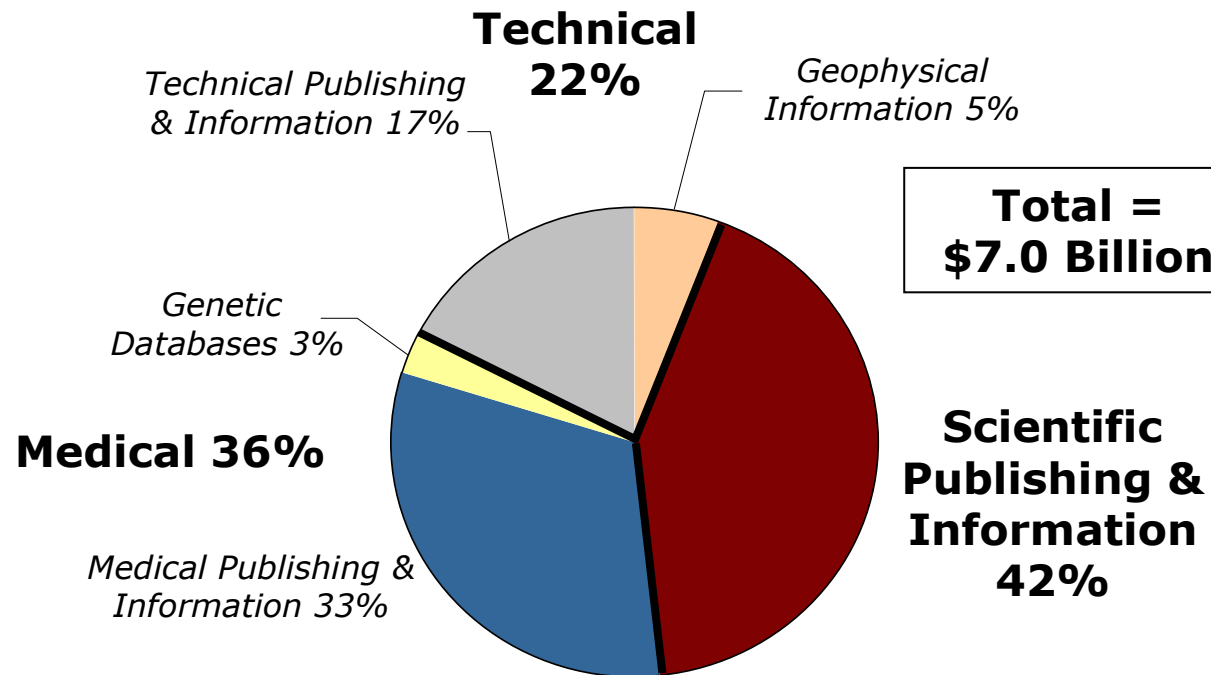
Chairman,
Digital Content Forum

OECD, WPIE
Broadband Content
Panel

Paris
June 2004

STM publishing: market size

Revenue by Content Segment, 2002

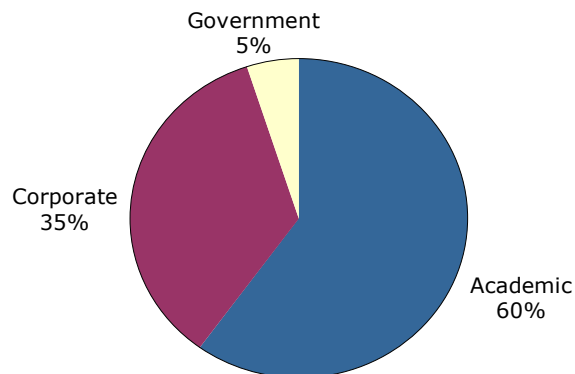


Source: EPS Market Monitor, November 2003

STM Publishing: Customer segments

**Figure 22:
Scientific & Technical Information
Market by Customer Segment**

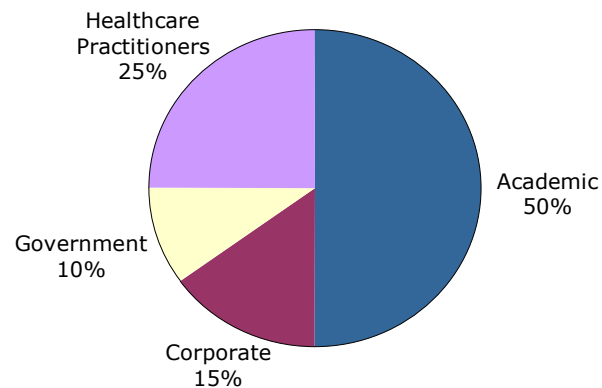
Total = \$4.5B



Source: EPS

**Figure 23:
Medical Information Market
by Customer Segment**

Total = \$2.5B



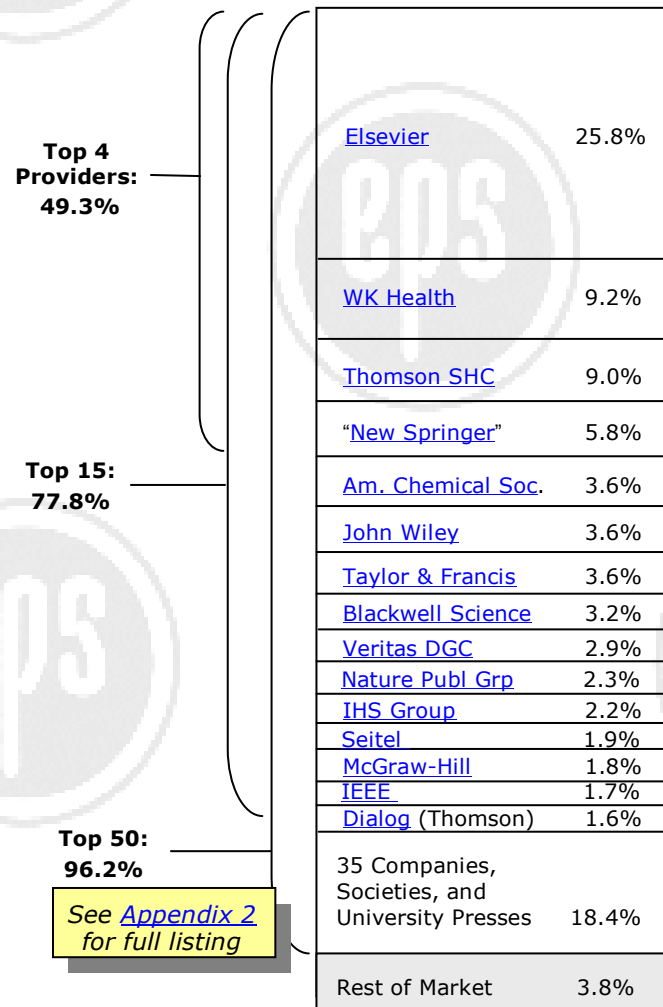
Source: EPS

Academic sector is largest for both Scientific & Technical and Medical Information providers

Competitive structure

- **STM information providers compete strongly in certain areas, and often enjoy dominant positions in lucrative niches.**
- **The combined Bertelsmann Springer and Kluwer Academic Publishers (KAP), create a fourth leading provider of STM information.**
- **Combined, the four leaders represent 49% of the market.**

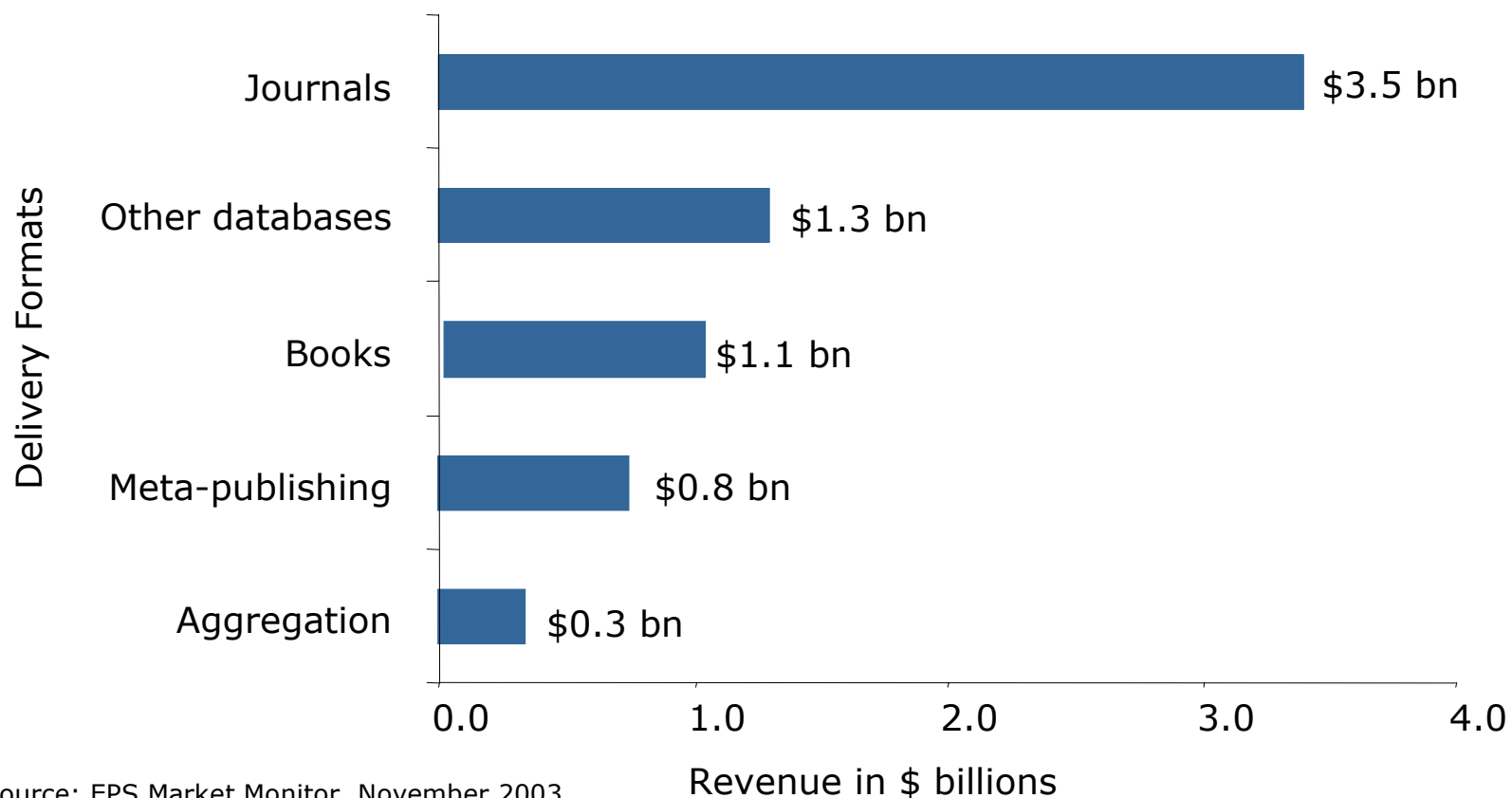
**Figure 29:
Overall Market Shares of STM Information Providers, 2002**



See [Appendix 2](#) for full listing

STM publishing: market breakdown

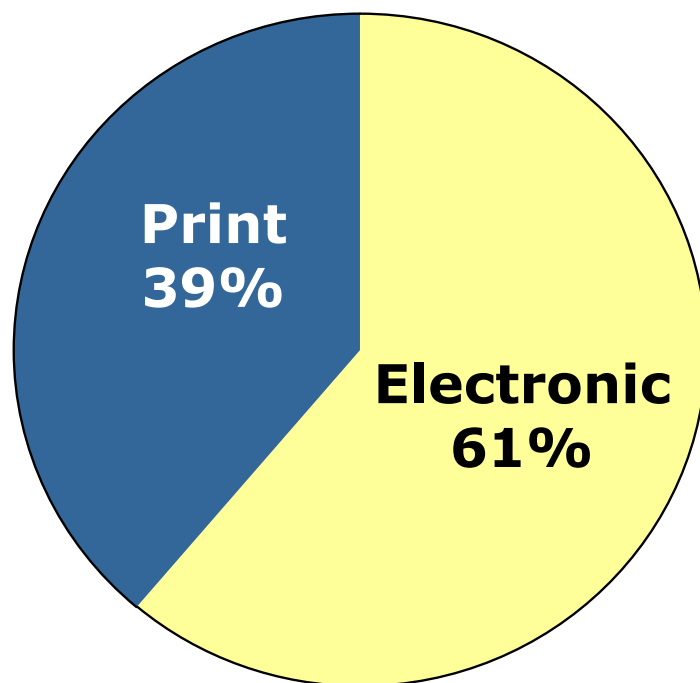
Revenue by Delivery Format, 2002



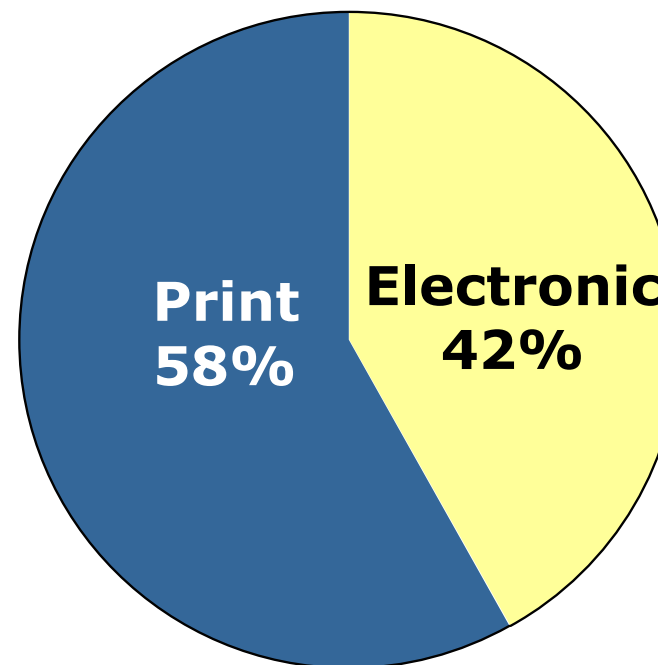
STM publishing: market in transition

Print vs. Electronic Delivery, 2002

Scientific & Technical Information



Medical Information



Source: EPS Market Monitor, November 2003

Open access: key questions

- **Is “author pays” economically viable?**
- **Will commercial publishers be forced to follow the OA pioneers?**
- **Is there room for hybrid models?**
- **How will commercial STM publishers be affected?**
- **What are they doing to counter the threat?**

Open Archives v Open Access

Open Archives (institutional repositories)

Interoperable
(like Open Source)

Way of storing
and searching
content

Not *necessarily* free
to end-user

Open Access (author pays)

Content is *free* to
the end-user

Alternative publishing
models (e.g. author
pays BioMed Central,
PLoS)

Organised author
self-publishing
and peer
review

Where is Open Archives going?

Open Archives now:

Early adopter institutions/disciplines organise access to their intellectual assets for internal and external user communities

And in the future?:

International searchable access to federated open archives (by discipline) containing free and paid-for content and pre- and post- prints

Barriers to progress?

- Can institutions/academics manage a vast publishing programme? (Content tagging, editorial, updating, version control, author control)
- Will federated search technologies work and really enable cross-searching?
- Will publishers release post-prints?
- Will user/author behaviour change?

The battle for content navigation

PRIMARY	Abstracts and Intelligence	NAVIGATION
ScienceDirect (Reed Elsevier)	Scopus Abstracting 14,000 titles Agreements with ACS	Scirus/Science Direct navigation
(Thomson)	ISI Citation Indexes Biosis Contracts with IEEE, CABI	ISI Web of Knowledge (Science)

Key battleground factors

- **Persistent identity (DOI) and granularity**
- **Google, CrossRef and Cross Search**
- **Can scholarly standards be maintained in a period of rapid change?**



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