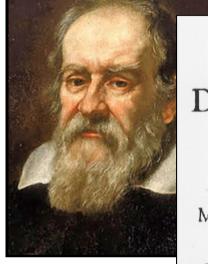


## Challenges Facing the STM Industry

Presented By: Martin O'Malley, Elsevier, MD, Corporate Markets Date: October 19, 2009

## Challenges facing the STM community 400 years ago





DISCORSI E DIMOSTRAZIONI MATEMATICHE, intorno à due nuoue fcienz,e Attenenti alla MECANICA & 1 MOVIMENTI LOCALI, del Signor

GALILEO GALILEI LINCEO, Filofofo e Matematico primario del Sereniffimo Grand Duca di Tofcana.

Con una Appendice del centro di grauità d'alcuni Solidi.



IN LEIDA, Appresso gli Elfevirii. м. р. с. хххvии.

#### 1638, Elzevier published Galileo

Challenges facing Elzevier then

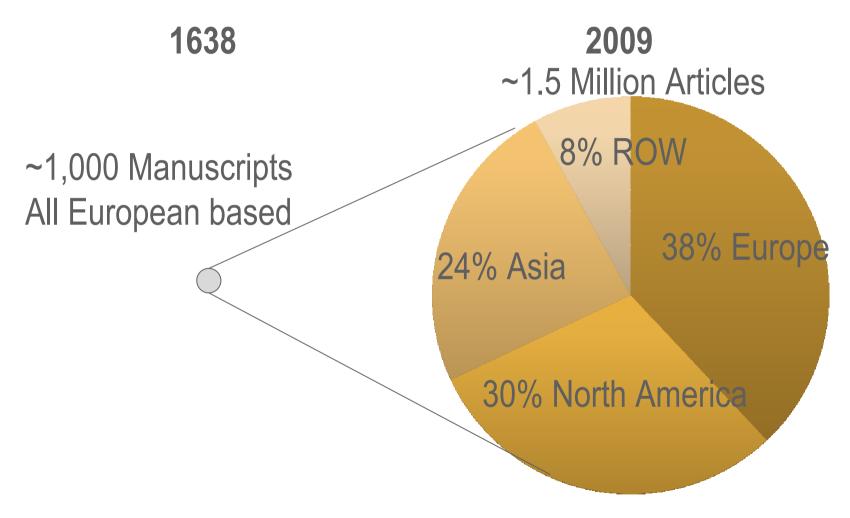
 Identifying and producing high quality content

•Operating a **content delivery** system

•Removing barriers to information flow



#### Since the 1600s publishing quantities and sources have changed



Plus...~600BLN web documents - 7M new daily, 1000 new books daily



#### How content is prepared has changed



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#### How content is delivered has changed





#### And it is changing again



• ~1.5M Kindles expected to be sold this year; sales of ~\$700M



#### Our competitors have changed





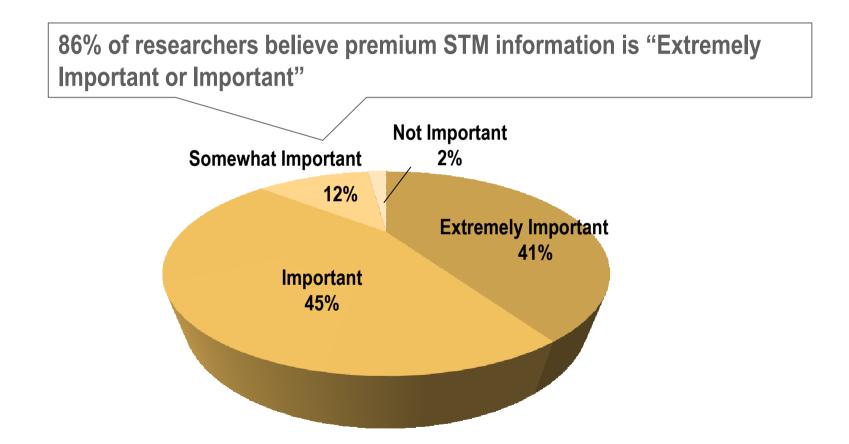
#### Interaction with content has changed



• 65 million mobile users interact on facebook



#### The value of information has likely changed





#### The need for information has affected user behavior

**2008** 100% = 40 hour week

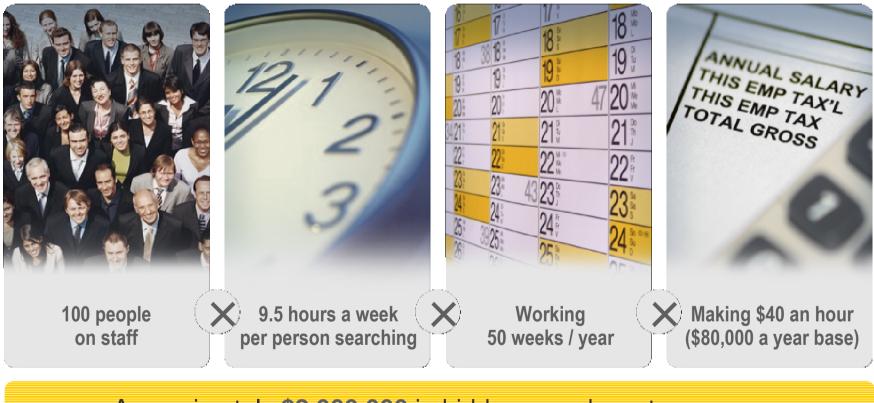
9.5 hrs searching gathering info

9.2 hrs organizing, analyzing and applying information Knowledge workers spend **nearly half of their week** on information retrieval and management

\* Source: 2007/2008 surveys of 6,300 knowledge workers, Outsell, Inc.



#### And this has impacted business



Approximately \$2,000,000 in hidden search costs per year

Source: Calculated based on IDC Hidden Costs of Searching 2008



### And you?

RCEMBER 25, 200	PERSON OF THE YEAR
	You.
4	
	Yes, you. You control the Information Age. Welcome to your world.

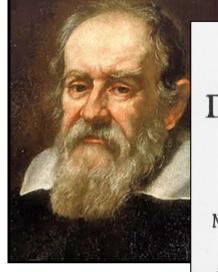
Well you've probably changed too

### Compared to 2000

- •You are **twice as likely** to book travel online
- •You are **four times** as likely to bank online
- •You are 50% more likely to be online
- In fact... some of you are probably online right now...?

### But have STM challenges changed?





E DISCORSI E DIMOSTRAZIONI MATEMATICHE, intorno à due nuoue feienz,e Attenenti alla MECANICA & 1 MOVIMENTI LOCALI, del Signor GALILEO GALILEI LINCEO,

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IN LEIDA, Appresso gli Elfevitii. м. д. с. хххvии. Amid relentless change key challenges remain

Identifying and producing
 high quality content

•Operating a world class **content delivery** system

•Removing barriers to information flow

Keys to identifying and producing high quality content



1. Staying close to the research community

2. Maintaining quality assurance

3. Continually improving identification & production processes

## Identifying content to promote requires true engagement with research communities





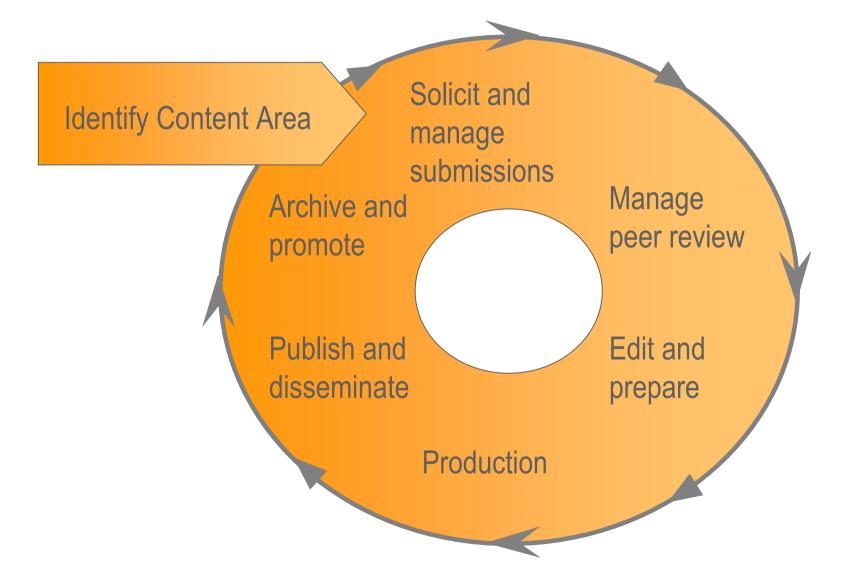
## •Engaged editorial boards

•High community visibility & leadership

•High standards of peer review

## From identification through promotion, the STM industry is involved in sustaining a large and intricate process





## Evolution is critical: Organizations, companies and products are testing new ways to identify high quality content



PLoS One introduce method peer review, Mendeley and Connotea provides tools for article tagging and sharing solicits users commentary 🖌 🏟 💀 Academic software for research papers | Mendeley 🚹 🔹 🔝 🔹 🎰 🔹 🔂 Page PLosone 60 A Browse S RSS MENDELEY Sign **RESEARCH NETWORKS BETA 0.9** Remember me Forgot your password? **Browse Articles** PLOS Get Mendelev How it works About us Blog Support 1 - 10 of 30 articles published in Anesthesiology and Pain Management. O By Publication Date 1 | 2 | 3 Nex By Subject Organize, share Jove Identifies high quality video 'articles' Published 08 0 The Contribu and Neuropa and discover Ombretta Cas Anesthesiology and Pair Management B Dublished 24 S **ve** Search Enotonal Gestalts: Appraisal, Change, and It research papers > Biochemistry A High-Throu > Biophysics RSS Anesthetics Thegard, An Subscribe Submit Home > Biotechnology Wendy A. Lea, J Roderic G. Ecke > Cardiovascular Disorders Editorial Board Like iTunes<sup>™</sup> for research papers. Home About JoVE Advertising The Team Contact Us Published 16 S > Cell Biology R55 Anesthetics > Chemical Biology Mendelev is a free research ISSN 1940-087X > Chemistry Period of Bra Categories management tool for desktop & web. Mathias De Roo > Computational Biology Daver, Jozsef Z > Computer Science PP Medicine JoVE is in PubMed! chological Mon Ju Visualizing Single-molecule DNA Replication with > Critical Care and Emergency Med Published 16 S Neuroscience 2001 Organizationa Mon 3ul 27 Association Developmental Biology Fluorescence Microscopy Publish With Us! > Dermatology RSS Postoperativ Nathan A. Tanner, Joseph J. Loparo, Antoine M. van Oijen We are accepting submissions Cellular Biology ious Emotion > Developmental Biology Surgery Department of Biological Chemistry and Molecular Pharmacology, Harvard Medical Schoo Plant Biology Daisuke Nishia > Diabetes and Endocrinology Re Shinya Kasai, Y This protocol demonstrates a simple single-Microbiology > Ecology RS Sora, Masakazu molecule fluorescence microscopy technique rch & annotate PDFs > Evidence-Based Healthcare Immunology for visualizing DNA replication by individual Subscription FAQ Published 15 S > Evolutionary Biology replisomes in real time **Basic Protocols** Selective Tai > Gastroenterology and Hepatology in the Spinal > Genetics and Genomics -Joseph A. Jeffry Premkumar > Geriatrics RP Mewsletter Sponsored Articles > Hematology RS See all Published 11 Se RSS RSS > Immunology 855 First Things > Infectious Diseases 855 twitter.com/JoVEJourna Obtaining High Quality Prehospital RNA from Single Cell Narine and Aquatic Sciences View Protocol > Campala, Ug 🖸 BOOKMARK 📲 🎡 🖪 ... Populations in Human Browse Issues Postmortem Brain Tissue 2009 Isolation and Animal Serum Free Expansion of Human Umbilical Cord Derived Mesenchymal Stromal Cells (MSCs) Issue 31: SeptemberIssue 30: August Electrochemotherapy of Issue 29: July and Endothelial Colony Forming Progenitor Cells (ECFCs) umours Rad Labor Andreas Reinisch, Dirk Strunk More Issues. reparation of Gene Stem Cell Research Unit, Medical University of Graz, Austria Gun Bullets and Biolistic This protocol describes the isolation and Fransfection of Neurons subsequent expansion of mesenchymal in Slice Culture

Evolving to always identify and produce high quality content remains a constant STM challenge.

Keys to operating world class content delivery



1. Derived from trusted knowledge sources

2. Delivering to the needs of the user

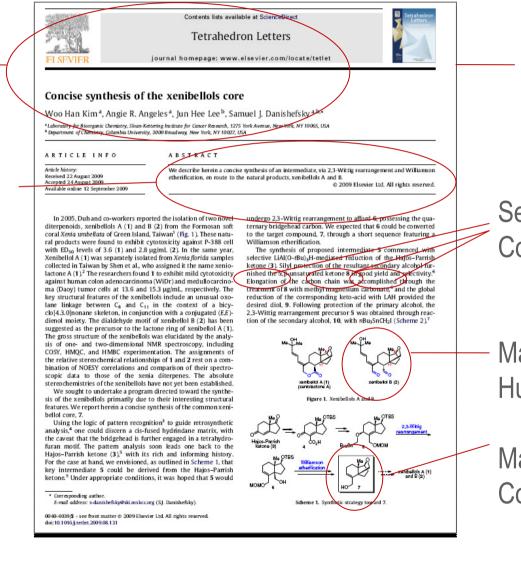
3. Delivering content within a user's context

## Trusted content forms the foundation of databases, tools and applications



Meta-data extracted (e.g. authors, title)

Abstract content



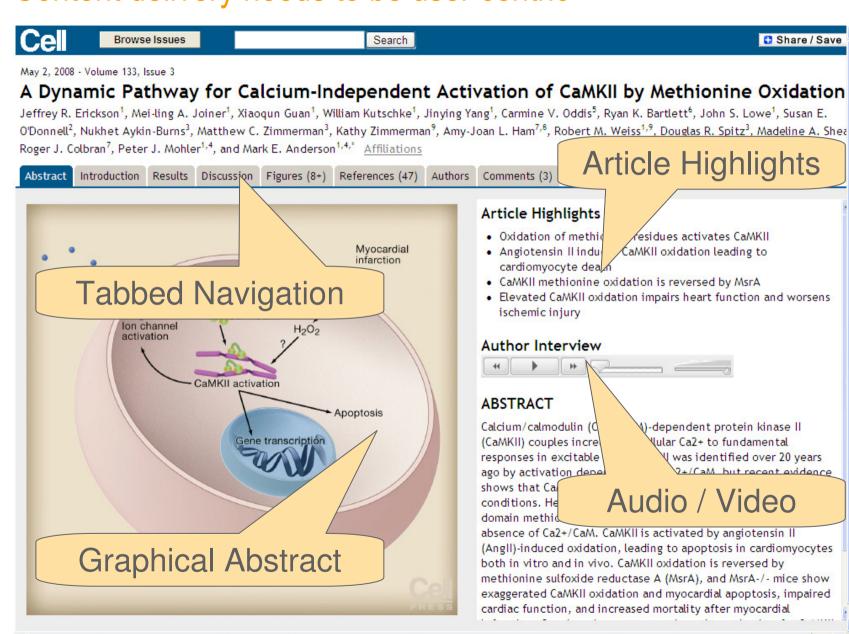
Primary Content: Full Text Article (patent, book, other)

#### Semantically Indexed Content

Machine-Aided Human Indexing

Manually Indexed Content

### Content delivery needs to be user centric



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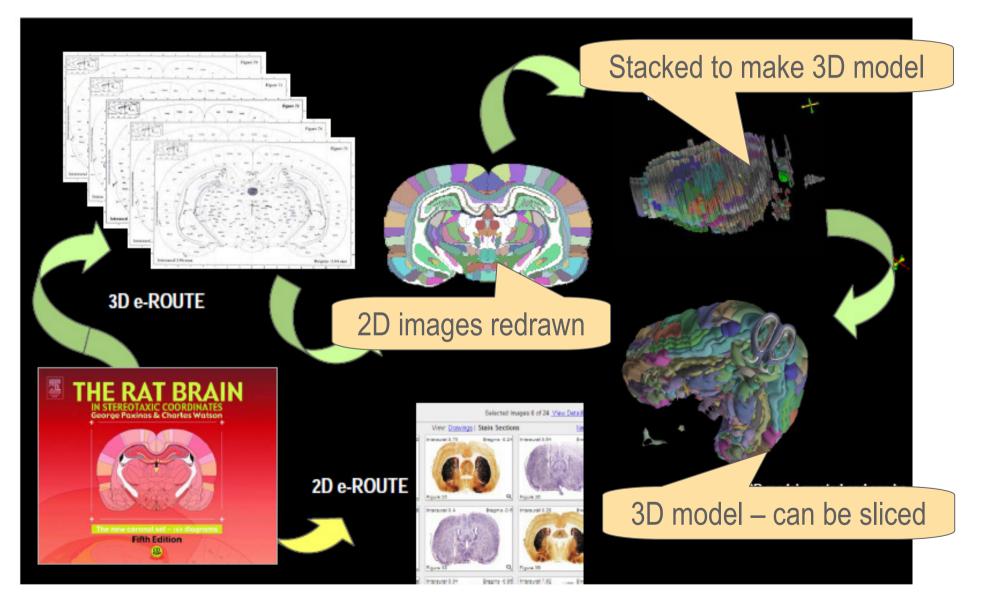
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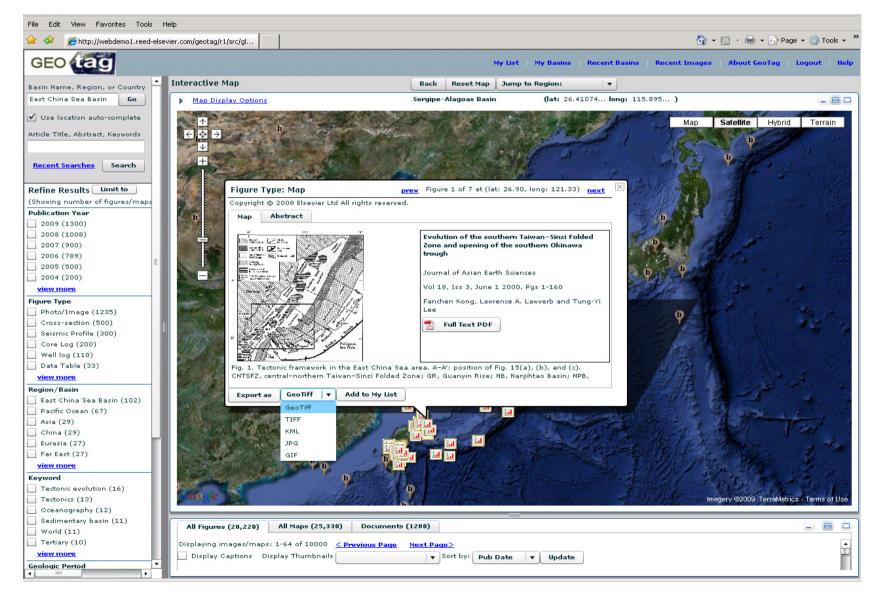
### It should be intuitive and interactive...





#### ...and customized to a community or individual's workflow needs





STM challenges in **removing barriers** to information flow



1. Creating infrastructure

2. Building partnerships

3. Ensuring sustainability

## For the free web an information infrastructure is being built



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	API	Description	Category	Mashups	Enterprise	MP3s TO YOUR SITE
All	Google Maps	Mapping services	Mapping	1550	OPEN SOURCE GET IT TODAY	CLICK TO GET PAID ►
Advertising (12)	Flickr	Photo sharing service	Photos	388		
Answers (3)	YouTube	Video sharing and search	Video	328	🍦 openkapow	Developers!
Auctions (2)	Amazon eCommerce	Online retailer	Shopping	267	Mashups	Open ID
Blog Search (7) Blogging (18)	Microsoft Virtual Earth	Mapping services	Mapping	160	in ' Minutes	at Microsoft
Bookmarks (15)	eBay	Online auction marketplace	Shopping	155	No Kidding!	
Calendar (4)	Yahoo Maps	Mapping services	Mapping	122	5	Try It!
Catalog (1)	del.icio.us	Social bookmarking	Bookmarks	121		
Chat (11)	411Sync	SMS, WAP, and email messaging	Messaging	120	IBM Mashup Center	APIs 🔜
	Google Search	Search services	Search	118	Unlock.	
Community (48)	Yahoo Search	Search services	Search	115	Remix. Unleash.	from Orange
Database (6)	Twitter	Community site	Community	95		find out how
Dating (1)						to use them >

• Ebay serves 5 Billion API calls a month

### Through APIs interoperability is enabled



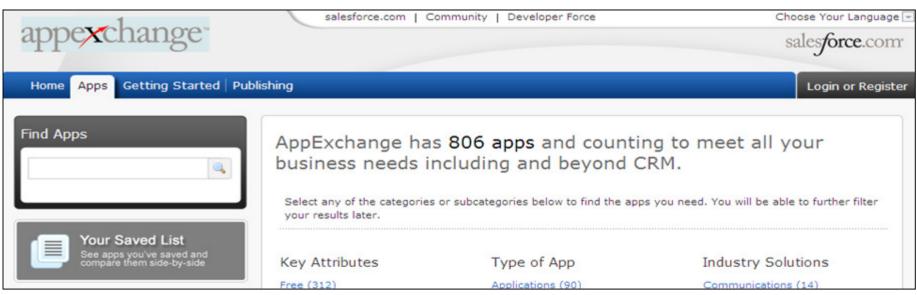
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myspace + twitter							
Sync your status automatically! *BETA	► Sync Now						
Get Started	New to MySpace?						
Syncing up is easy	Why Sign Up for MySpace?						
1 Go to the Sync tab within My Account.	😤 Stay in touch with friends & family						
2 Set up the desired services that you would like to sync with MySpace. Right now you can sync with Twittermore networks coming soon.	Share your photos, albums & videos Find old classmates & co-workers It's FREE!						
3 Click Confirm and you're all set.							
Once you've synced your account, simply update your status on MySpace as you normally	» Sign up now						
would (from your Home page, Status and Mood page, or mobile phone). When you update	Did You Know?						

• By linking applications through APIs it is possible to query across applications in real time

## And partnerships provide the potential for symbiotic growth







## Companies, like Apple, have engaged a community in its own development

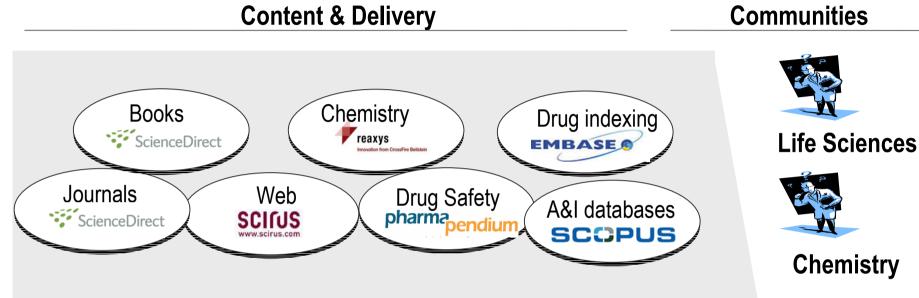




- 85,000 Applications
- Over 2,000,000,000 downloads

## Elsevier wants to play a key role in removing barriers





- We publish over 2,000 journals
- We index over **14,000 STM journals** and large numbers of patents
- We extract **millions of facts** from the published literature to serve a range of communities
- We index over 350 million science related documents on the web

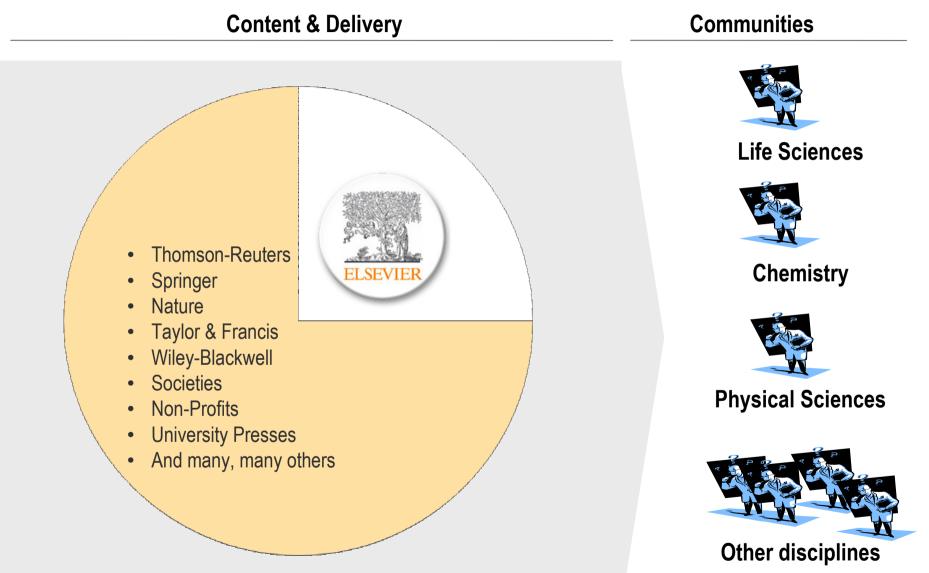


**Physical Sciences** 



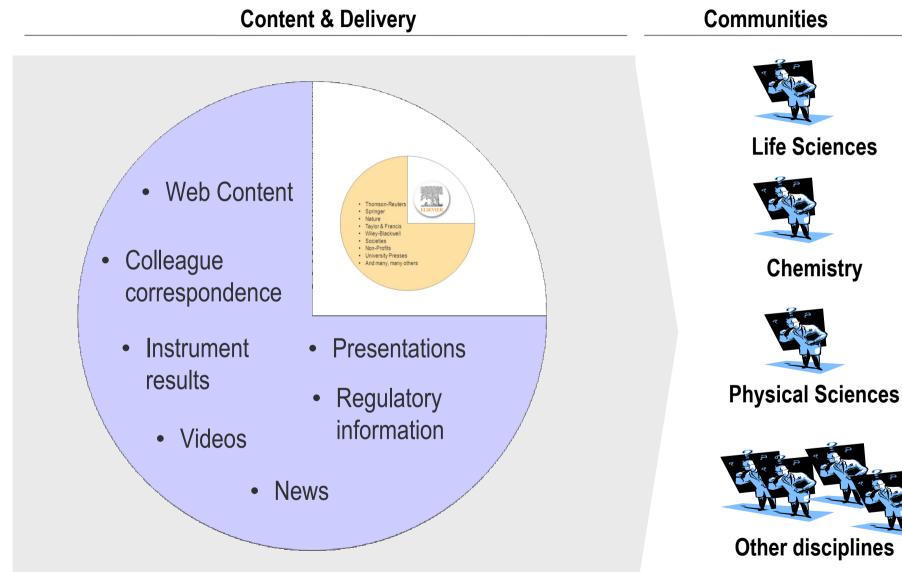
## But we are also only just part of the industry





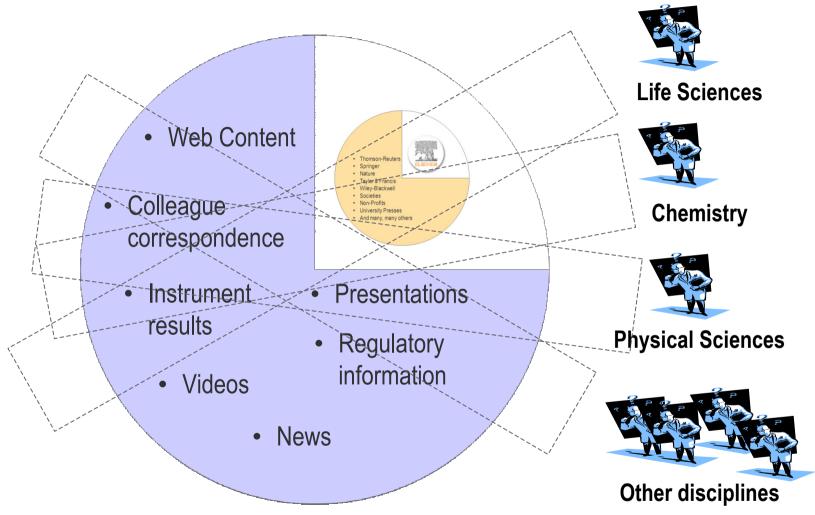
And all of us, are just a fraction of the content and media that our communities turn to for their information needs





## Users want to have their own "lenses" to view all relevant content





- Provided users trust the content, they are source agnostic
- They do not want to be impeded by barriers to information flow

Elsevier intends to play a leadership role



1. Creating infrastructure

• APIs, taxonomies, nomenclatures,...



2. Building partnerships

• Netbase, Nextbio, ...



3. Ensuring sustainability

• Science, Commercial viability

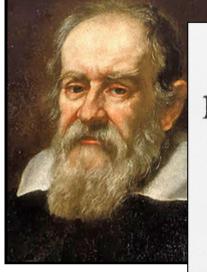
### Openness is imperative





## Over 400 years, key challenges stand the test of time





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## Identifying and producing high quality content

•Operating a world class content delivery system

•Removing barriers to information flow

# We just need to execute in a world that has fundamentally changed



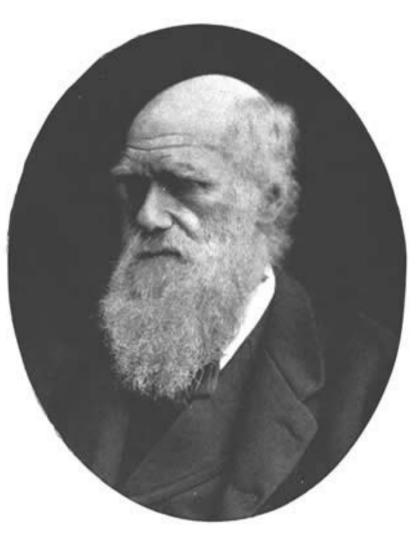


## ...and adapt!



*"It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change."* 

- Charles Darwin



## Thank you



