Thought leader interview: Martin Marlow

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The UKSG Editorial Board decided it might be interesting to invite some key thought leaders in the information industry to be interviewed for *The E-Resources Management Handbook*. A list of five questions was drawn up, ranging from the reasonably straightforward – "How long have you been in the industry and what is the most significant change you have seen?" – to questions for the professional seer – "Where do you see the industry going in the future?" A number of professionals from varying backgrounds –Stephen Abram, SirsiDynix; Martin Marlow, Ingram; Peter McCracken, Serials Solutions; Jim Mouw, University of Chicago; Alison Mudditt, SAGE – agreed to be interviewed. The resulting material makes fascinating reading, giving a range of very different per-spectives on the information industry at this time of change and upheaval.

Why are you in this industry?

I think I am in this industry for many reasons. One of the main ones is that I still believe we're doing something that makes a difference and I feel good about that. It was the case right back in the beginning (in the CD-ROM days) but I still think it's true today. I certainly think you've got to have a passion for it. Things happen at an ever increasing speed in this industry, but it's still a lot of fun.

My career has been about building things – my own companies, new divisions in companies, products which are profitable but also give value to customers. I've moved through CD-ROM and client server to the Internet, through databases to electronic journals and e-books, but I still think it's fascinating how it's evolving. It keeps your mind sharp. The growth of the Internet keeps things fresh and exciting. It still keeps me engaged.

How long have you been in the industry and what is the most significant change you have seen?

I have been in the wider information industry for 28 years. I started off in print – newspapers, magazines, regional newspapers and magazines – and then I got involved with SilverPlatter Information – one of the first electronic information publishers and distributors – in the very early days of CD-ROM. I was with them for five or six years helping to build up both their sales and marketing, and carting single speed 1503 Hitachi CD-ROM external drive around Europe trying to convince people that this was the way of the future.

Then I came on board at Blackwell and carried on with expanding the CD-ROM, but from Blackwell's perspective – this was Blackwell Journals division initially. That was when the Internet really started up; full text started coming through and electronic journals started coming online. We brought Electronic Journal Navigator to market, one of the earlier e-journal aggregator platforms. I worked on a number of other products including finding tools, reference tools, and Blackwell Connect, which was their online content database and retrieval mechanism. So that was fun. I spent about five years with them too.

When I left I spent some time building my own businesses during the dot.com era, in e-learning and digital entertainment. I was in partnership with my brother who was (and still is) a film producer so he provided the creative input and I looked after the production, sales and marketing (as well as the books!). I was lucky enough to exit before the bubble burst.

Then I came back into the industry and joined ProQuest (in truth I never really left and was always attending shows like Online whenever I could). That was a different industry angle again, because it was

getting involved with global aggregation of e-journals and electronic content and seeing the value in the wider collections and cross linking. But there was also the specialist publishing – Chadwyck-Healey – as well as the start of e-book and e-journal integration. I was at ProQuest while we did a deal with MyiLibrary and was also involved with K-12 and e-learning, online newspapers, as well as microfilm (UMI).

Then I spent a while at Atypon Systems (the e-journals platform provider) building up their European office and looking after sales and marketing worldwide, before I came to Ingram Digital nearly two years ago.

I have been involved in most elements of the value chain, and also most areas in terms of e-journals, e-books and databases. It's just how it's evolved. As things move on and the industry moves on there are opportunities in different parts. I'm an entrepreneurial person so I like to build things.

The most significant change I have seen in the industry has to be the Internet. It has affected and is affecting all stages of the supply chain as well as the value chain. It has meant major reworks of most company strategies, and the ones that didn't adapt, died. It has totally changed the value and the influence of the end-user – the 'audience of one'. I still think it's moving very fast. The industry is changing and the Internet is changing as new elements develop. It keeps us on our toes. Moving electronic information online, the ability to integrate, the ability to cross-reference, the ability to add differing content formats together, to add further value to that content, to assist research and hone that research for better, more relevant results is amazing. Without the Internet we'd be in a totally different place.

What will replace Google?

Not the easiest of questions! There is a fear factor about Google, and in some ways quite rightly so. But I think that sometimes we lose the fact that Google is a great discovery and finding tool. Right now it pushes eyeballs to content like nothing else. I recognize all of their Book programmes and the potential impact there, but I don't think anything will replace Google - certainly not in the foreseeable future.

If you look at what's been done recently with widgets, it could be argued that Google is already embedded. We have our own widget at Ingram, it's very popular and a lot of customers are using it. Google have their own widget offering as well. So they are embedded and I don't think that they'll be going away any time soon.

Google will add to their offerings and they'll augment them over the years to come. We may see a shift into the content area, potentially even as a content owner. Certainly there will be a lot more tools and applications. But I think we have to take into account that at its core it's a retrieval tool. The semantic web and recommendation engines are providing context tools as well as content retrieval tools. That's where others need to differentiate. As I have said in a number of papers – and a quote I used from David Worlock – increasingly context as well as content is king. What we're starting to see is niche-based subject- or discipline-specific engines, content providers giving richer in-depth search experience with embedded relational recommendations and referral engines, and networks (not just communities) of like-minded users. Content providers are really looking at relational recommendation referral engines, putting together the networks around either subject areas or disciplines. I think we'll see that coming through, using Google as one of the discovery or binding tools perhaps, but not the only one. A lot of the larger players will consolidate, and take up multiple parts of the value chain, and I think they will be running alongside Google.

So that's what we're looking at – social networking and recommendation engines adding content and comment to audiences that Google (amongst others) may well assist in pushing to those services. I also really want to emphasize the growth of the importance of metadata; being able to deliver rich, targeted, contextual, format-blind content. "Tell me what I know I know. Tell me what I know I don't know. Tell me what I don't know I don't know." But in that order! A lot of people will be looking to differentiate and add value here too.

What has been your biggest disappointment (in a work context)?

I can't really think of any real disappointments with my work because things keep moving on. There are maybe a couple of frustrations and some comments in terms of the speed of things. The historically slow

take-up of e-books has been intriguing. It's disappointing in the sense that it's taken a while to get to the stage where we can apply what we already know from electronic journals and databases (and the richness of electronic information that the industry can supply in those areas) to e-books. It has taken a while but over the last two years or so the whole thing has speeded up.

The other issue is standards in general. You have to apply commercial realism in any area of business, but we still struggle to implement standards that actually give value to all parties quickly enough. This is an ongoing challenge – not a disappointment, but something to keep working at.

Where do you see the industry going in the future?

I am looking about three to five years ahead to see where the information industry might be going. As a general catch-all, I do believe that we are at the tipping point for the next major shift.

Firstly, in terms of technology and technology as a service, one of the things we are now going to start seeing is the growth of what I call the MPPs, the multi-product platforms. Sophistication around federated search models within the systems and across systems – this is the nirvana, if you like – format-blind content and being able to cross-search on one platform across a number of different content formats. The federated search engines will have to get a lot more sophisticated. Librarians have been asking for this from way back in the beginning, and now it's possible.

I certainly think you'll see social networking, personalisation tools for data merging, social 'niche-based' networks and the growth of personal recommendation engines coming through into the semantic area in terms of context as well as content. Add that to the multi-product platforms and you do have something that's very powerful.

We are really starting to see horizontal searching coming in as the next generation of users hit the market. As 16- to 18-year-olds and those in university at the moment start to hit the workforce, that's certainly something that all elements of the supply chain need to think about in terms of technology as well as how they work their content. Those users are used to multi-resource searching across different formats as well as devices – watching television, being on Facebook, listening to music, a video game on in the background whilst doing their school assignments – and that is normal to them. As they move into the workforce they are going to demand that out of the professional tools and the information services that we supply.

DRM will still be there for valued research, and we need to protect it. Territorial rights need protection and that will still be an issue in the future. It could be a while before we figure that out. But it is interesting to note that in the retail and consumer space we're already starting to see 'DRM free' coming through. We've seen it in music and I think there will be a dynamic over the course of the next few years that will move some content to DRM free.

We are going to be seeing increasing moves to merging the availability of electronic journals, e-books, databases and indeed also metadata for the print. I think integration is the key word, both of the content and the discovery data, but also of the systems that they work on. I think we will start seeing lecturers and students acknowledging the benefits of new applications for online materials; buying micro-content and using virtual learning environments. The chunking of content will come through as systems allow, and new users will only wish to buy in that form. It's happening today with music and video on demand. That further points to the growing importance of metadata and bibliographic records. We need the integration of metadata with A & I databases, and content platforms with library acquisition processes, and that's where we come back to multi-product platforms.

Print won't die. It will always be there. But we will see an increase of joint print and electronic offerings – and differing models to match. We are in a great position to see that integrated offering and integrated demand start to come through. For example, text books will take time to come online but I think they will merge with virtual learning environments, and virtual learning environments will merge with collaborative learning tools. It's also interesting to muse that we might see some of what's going on in the education sector coming back into academic sectors in years to come.

Business and pricing models in e-journals and e-books may consolidate and e-book pricing experimentation will settle down. It doesn't mean to say that we're not going to be challenged in pricing. With content chunking, and also in the e-learning environment, people will understand that learning

objects can be collected together to create learning outcomes and will look at products that enable that to happen. As a result of that I think micro-payment models will come through – buying by the byte of information. There will be a lot of debate about how low or how granular you get. Do you tag the individual line of poetry or the individual diagram?

There will still be consolidation within the wider industry. I think you'll see the larger publishers aggregating around niches. The strong niche publishers will survive if they look to differentiate in at least some of the manners that I've been talking about. Also, because of multi-product platforms – because of the wish to search horizontally as well as vertically – I think there is a place for the aggregators because they will be able to deliver the breadth, and the different content formats with relevant pricing. It's going to be a bit of a rocky road and it's difficult to see who's going to survive and how things are going to evolve. The trusted companies, if they are smart and keep ahead of the game in terms of technical developments and being able to answer customer demand, will be around and will probably be thought leaders and consultants. Things will continue to move fast and recommendations will be key. As the industry consolidates, people will be looking for that trusted partner because it's getting more and more complex and more and more costly if you make the wrong decision.

There may well be new market entrants. I think we are going to see the merging of technology companies, conversion companies, content companies, search and production and management tool companies. Everyone is looking to buy and flourish and so we may see some new entrants, or consolidation of different company elements, looking to occupy a number of different places on the supply chain rather than just one or two – looking to spread the load. It may be that certain companies who are occupying horizontal space will use subsidiaries or purchase companies to occupy certain sector verticals as well.

So those are my thoughts on the future of the industry. That's where I'm at and it's still keeping me engaged!

Martin Marlow was interviewed for UKSG by Catherine Jamieson on 26 September 2008

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