



# New Information Marketplace Competitors: Issues and Strategies for Academic Libraries

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**abstract:** Administrative portals, e-braries, and other commercial information providers are challenging the academic library's traditional monopoly as the campus information gateway. Are these new information marketplace competitors a threat or an opportunity for academic libraries? Might they draw away the library's user base or can they be harnessed to provide access to more and better digital collections? This article examines the impact of these new competitors, presents results from a survey of library directors about their responses to information competition, and discusses strategies library directors can use to maintain the library's status as the user's first choice of information provider.

**O**n the morning that a medium-sized research university debuted its new campus portal, the library director was hardly prepared for what she discovered. There on the main portal page, somewhere on the lower third of the web page, under the category "campus information resources" was a link that said "Library." That struck the director, who thought that the link should carry the official name of the library, as odd. Upon further investigation the director found something worse than odd. The link that said "Library" in fact did not link to the campus library. Rather, it linked to a website that was nothing more than links to search engines, subject-organized links having no relevance to the institution's curriculum, links to the libraries of major research universities, and even worse, banner ads for "Ask-A" information services. The director had two immediate thoughts—who is responsible for this travesty and what do I do about it.

This scenario repeats itself at college and university campuses nationwide as library directors are discovering that their libraries are under siege by a new form of radical information competition. Just the word "competition" used in the same sen-

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tence with “campus library” is a radical concept for libraries traditionally have had no real competition. Certainly faculty and students have always sought out other sources of information, such as peers, especially when those sources are more convenient. More recently, the advent of search directories, search engines, and Ask-A services has given the library’s users other options for obtaining certain types of information. But those sources pose no real threat to the library’s array of electronic databases, electronic journals, subject-organized Internet resource pages, and of course, the librarians who are readily available to answer questions and provide help in finding and using the resources. On their campuses libraries have maintained a long-term, unchallenged position as the campus gateway to information.

The new brand of information marketplace competitors is leading library directors to question if the library can maintain its monopoly as the campus gateway to information. At their professional meetings and on their e-mail discussion groups, academic library directors are sharing their concerns and exchanging stories about the new competitors. Within a few weeks of the debut of one such service, there were multiple reports from library directors of finding posters advertising the service in the library and other campus buildings, of hearing from faculty, deans, and even a few provosts who had been contacted by salespeople. There was even one report from a library director who one day found that the new service had set up a table in the campus cafeteria so that salespeople could distribute literature and solicit students. Finally, these new information competitors generated significant attention from the media, in and beyond higher education. Stories about the new information market competitors have appeared in *The Chronicle of Higher Education*<sup>1</sup> and *University Business*<sup>2</sup>, while mainstream publications including *Time*<sup>3</sup>, *Newsweek*<sup>4</sup>, *Wall Street Journal*<sup>5</sup>, *Business Week*<sup>6</sup> and *Forbes*<sup>7</sup> have featured stories on them.

This article will provide some background on the new information market competitors’ services, but its primary goal is to examine what impact these companies may have on the academic library. It will also provide ideas and strategies that library direc-

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tors can use in coping with new forms of competition. Discussions among library directors and other librarians indicate that there is uncertainty and perhaps even some genuine fear about how new information competitors will influ-

ence the academic library’s role as the information gateway for its institution. Library directors are well aware that students already often seek the path of least resistance in looking for research resources, and that Course Management Software (CMS) systems, such as Blackboard and WebCT offer convenient ways for faculty to create links on

their course pages to commercial information providers. If an information competitor can establish a truly formidable array of electronic resources, coupled with 24/7 assistance from trained professionals, web-based training modules, and reasonable pricing, will it have the potential to supplant the academic library as the information provider of first choice among students and faculty?

## Literature Review

Prior to the first public announcements about Questia Media in approximately July 2000 (the company was founded in 1998), little was written about the potential for commercial competition within academic librarianship.<sup>8</sup> This was confirmed by a literature search of the following databases in the DIALOG system: ERIC (File 1); LISA (File 61); Information Science Abstracts (File 202); Library Literature (File 438). A "OneSearch" of these four files was performed using the search statement: ss librar?(10n)(competi?) and py>1998. One exception to this finding is reported by L. A. Davidson, who wrote in 1999 about competition from Internet sites, saying "rising expectations of users for ease and speed of information discovery is driving them toward ever greater reliance on the Internet, where increasingly valuable commercial and/or free resources . . . are independent of and often competitive with the library."<sup>9</sup> Another author, who writes about Internet competition for libraries outside the scope of new information marketplace competitors, is Wayne Bivens-Tatums. His article examines expert services on the web. It profiles several "Ask-A" and "expert" services, most of which are free or charge per question, and suggests that "from an academic librarian's perspective it's hard not to laugh at some of these experts." Bivens-Tatums does believe that "if we are to compete with and criticize them, we need to know what they do and don't do well."<sup>10</sup>

In addition, each of the following information competitors was searched. Search yields (after duplicate removal) are shown in parentheses: Questia (35); XanEdu (12); Jones *e*-global (5); ebrary (9). The majority of these articles were product news or announcements, with just a few discussing or analyzing the competitive implications for libraries. The first article to draw real, considerable attention to Questia and the potential for a competitive market in the traditional academic library environment was authored by Carol Ann Hughes. Hughes, an executive at Questia, explored the new "competitive space" in which academic libraries live rather than focusing on Questia. The article is an interesting scholarly look at the Internet's influence on student and faculty information-seeking behavior. The message is not one of doom and gloom, nor is it an advertisement for Questia, but raises important questions about a new competitive environment for libraries and where they would fit into what Hughes called "the knowledge industry."<sup>11</sup>

While there are several players in this new knowledge industry, Questia quickly became the focal point for debate and analysis within the profession. This is certainly owing to Questia's more aggressive marketing campaign, which included some direct engagements with librarians on campus. This quick reaction to Questia and new competition is evidenced by a number of articles published about Questia over the following several months. In addition to the journal literature on Questia, there was considerable debate about it within the academic library community, primarily questioning whether it presented a threat to academic libraries. An archive of selected postings exchanged

about Questia on the COLLIB-L discussion group is available on the *Library Juice* website.<sup>12</sup> It provides a good example of the grassroots reaction to new competitors.

After the Hughes article one could almost do a timeline of articles on Questia, most of which are examinations or evaluations of the service. Several of these articles do question how Questia and other commercial information services would affect libraries, but none offer any research methodology that examines the impact or response to new information marketplace competitors. Gregory Crane examines what he calls “commercial digital publishers” as a single entity, and rather than discuss the competitive implications of these publishers, he focuses on the relationship between them and libraries. With the question, “can they make money,” Crane proceeds to identify ways in which the commercial digital publishers can pursue more productive relationships with higher education. He concludes that both universities and digital publishers could benefit from new partnerships.<sup>13</sup>

Several articles that appeared in mid-2001 provide good overviews of the chief competitors, particularly by providing closer looks at how they work and what they do. Mignon Adams profiles Questia, XanEdu, ebrary, Jones e-global library and even Blackboard’s CourseInfo product for its capacity to “be set up to completely bypass an academic library.” The influence of these competitors, with respect to costs, information literacy, ease of use, and marketing of services comprises the bulk of Adam’s article. As far as determining if these firms can effectively compete for the student’s dollar, she can only conclude that “whether or not they do will soon be known.”<sup>14</sup> Robert E. Dugan focuses exclusively on Questia, meticulously examining statements made by Questia executives about their product. For example, Dugan deconstructs Questia’s claim that its digitized library of 250,000 volumes will provide access to the “wealth of human knowledge” by cleverly pointing out that libraries with even a million volumes or more could hardly make such a claim. Even those with many fewer could reflect more effectively the curriculum of a specific institution. Dugan concludes “Questia cannot compete with an academic library’s carefully developed, curriculum-based resource collection in a multiplicity of formats.”<sup>15</sup> Nicholas G. Tomaiuolo’s look at Questia is slightly more tongue-in-cheek and includes an informal survey of some student users. He found that while students were critical of Questia’s content, the service’s paper writing support features, particularly citation formatting help, did appeal to them. Like Dugan, Tomaiuolo concludes that Questia has much more work to do to improve the product.<sup>16</sup> Others come to similar conclusions, typically stating that while Questia does not live up to its claims, it does offer some good features and content that potentially could supplement an academic library collection. These articles stress that academic libraries and faculty need to recognize that Questia and others, for good or bad, permanently alter the landscape of digital research.<sup>17</sup> This literature search does confirm that no other article, to date, has undertaken a research study to determine how library directors are reacting to these new forms of competition or to recommend strategies for responding to competition.

### Defining the Competition

Who are the academic library’s competitors? Companies or products that fit into this category can depend on the criteria used to characterize a competitor. This author uses

a somewhat broader definition that identifies both external and internal competitors. External competitors are unaffiliated with an academic institution, while internal competitors are those with a programmatic connection. External competitors are an easy-to-recognize group. It includes those for-profit companies that typically sell access to their resources directly to students and faculty at subscription pricing, through institutional licensing options, or by units or blocks of information used. External competitors include:

- Questia Media
- XanEdu
- Jones e-global library
- ebrary

These firms are receiving attention owing to their aggressive marketing efforts and innovative products. While netLibrary, the primary vendor of e-books to academic libraries, is sometimes included with those on the above list, it differs in one important way. Their business model is similar to traditional information vendors; netLibrary allows libraries directly to license its collection of e-books. A key characteristic of the external providers is their distinct practice of selling directly to the academic library's constituents. Also, unlike those listed above, netLibrary offers no ancillary student services, such as term paper writing assistance or access. "Add-on" services are another characteristic of new information competitors. They sell more than access to digitized books and journal articles and they attempt to provide a full package of services to help students perform research and write papers.

Here is a brief description of each potential external library competitor:

- *Questia Media*: Provides an online library that currently makes available over 65,000 digitized titles, primarily books in the humanities and social sciences, with additional content from a small collection of scholarly journals. Backed by \$135 million in venture capital, Questia markets its service directly to students. Its most common subscriptions are annual access for \$149.00, monthly access for \$19.95, and there is even a weekend access option. The company spends far more on advertising than its competitors, and ads appear during televised college sporting events and youth-oriented programs such as those found on MTV. In a recent article in the *Houston Business Journal*, Troy Williams, founder and CEO of Questia Media, wrote "online libraries provide a solution . . . by reproducing the qualities of traditional libraries while opening up access to information and knowledge."<sup>18</sup> Statements such as these, in which Questia equates itself to the academic library, raise the hackles of academic librarians everywhere.
- *XanEdu*: Unlike Questia, which is creating a database of entirely new e-content, XanEdu is a product that uses existing database content, and re-packages it for direct marketing to faculty. Owned by ProQuest (previously Bell & Howell), XanEdu can tap the enormous ProQuest databases that include journal articles, dissertations, microfilmed newspapers, and other academic content. The service is marketed to faculty, who use it to create "CoursePacks." These are customized reading collections selected from the ProQuest databases. Students then pay an amount based on the number of articles in the collection for access to the

CoursePack. The model is similar to purchasing a bulk pack from a bookstore, except that when the semester is over, the student no longer can access the readings. A typical price for a CoursePack is approximately \$25, but it may be more or less depending on the sources used and amount contained. XanEdu is marketed in professional literature targeted to faculty, at faculty conferences, and is offered through partners, such as Blackboard. At libraries where XanEdu is used, if the library has a subscription to ProQuest databases, the perception is that students are paying for access to information available from the library. In fairness to XanEdu, faculty can gather content from any ProQuest database and some other premium ProQuest content; it is unlikely any library offers all of the same resources. XanEdu also markets "ReSearch Engine", a search engine of full-text ProQuest content, directly to students at subscription prices (e.g., \$9.95 per quarter year).

- *Jones e-global library*: Unlike Questia and XanEdu, which position themselves as online libraries for the individual student or faculty member, *e-global library* is marketed to institutions, as either a supplement to or substitute for a brick-and-mortar library. Originally developed as the virtual library of Jones International University, *e-global library* provides access to a limited number of databases. Given the "middle-of-the-road" flavor of the collection, it is unlikely to meet all the curriculum needs of any institution. What it can offer, with many online research guides and a staff of over forty around-the-clock librarians, is the sort of support many institutions need to provide to students in distance learning programs. *e-global* markets itself as a supplement that can help an existing academic library to accommodate better the needs of distance students. Since it offers a range of services, if not resources, which are more reflective of a full-scale academic library, it may have the potential to serve as an outsourcing solution for institutions seeking alternatives to the traditional library.
- *ebrary*: This company may have the most interesting business model. It created a substantial collection of digitized books and other materials and is making it accessible on the Internet to anyone. Users pay only for what they print or download, at costs that hardly exceed what they pay for library photocopies. *ebrary* is likely to market the service to just about everyone—faculty, staff, students and librarians, as it will depend heavily on large traffic volume. Unlike Questia, *ebrary* has no paper-writing tools. It does have an impressive group of publishers ready to provide content.

The second group of information competitors, though associated with the academic institution through some formal connection, presents a more subtle form of competition for the library. This category would include purveyors of CMS and campus portals. Firms in this category could include:

- Blackboard
- WebCT
- Campus Pipeline
- CampusCruiser
- Jenzabar



The academic institution acquires these firms' products. The vendors have no direct intent to compete with the institution's library. Rather they offer access to information resources simply as another add-on to a robust course or administrative support product. CMS and portals create a passive form of competition. Faculty who use them to make a nonlibrary or commercial resource available probably see this as a way to help improve student access to information resources. Creating competition for the library is probably the last thing on the faculty member's mind, but

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his or her actions channel students away from the library's information gateway towards other, perhaps less rigorous resources. Competition created by CMS and portals can take a more aggressive stance if the vendor creates a partnership with a commercial information provider. Blackboard, for example, partners with XanEdu. For faculty, this facilitates and perhaps even encourages the use of XanEdu to create CoursePacks.

### Survey of Library Directors: Methodology

Library director responses to the new competitors, as reflected by the literature and e-mail discussion list postings, range from strong mistrust to cautious uncertainty. There is no certain method for determining how library directors plan to respond to these new competitors, or for that matter, how much they know about these companies. To ascertain more information about the extent to which library directors know about them and how they are reacting to them, this author conducted a survey of a cross-section of academic library directors.

A survey instrument containing twenty-three questions was constructed to obtain information from library directors about their knowledge of new information marketplace competitors, the presence of competitors on their campuses, and faculty use of nonlibrary or commercial resources. Respondents were also asked how they would react to situations that involved interaction with competitors. A web-based survey was created using a service called SurveySuite.<sup>19</sup> Using a random sampling technique, the author identified a set of several hundred libraries and sent an e-mail message to each library director that described the research and contained a link to the URL of the library survey. The library directors were identified through a search of the *American Library Directory* database, which is File 460 on the Dialog Information System. A search was constructed to find all libraries identified as "college" or "university" that also had a budget over \$1 million, and that had a staff position identified as "director" or "dean." Libraries identified as "junior college" were eliminated from the search; this kept the results more manageable. In addition, at least one major information competitor, Questia, concentrated its marketing efforts on colleges and universities rather than the two-year college market.

The database search results indicated that approximately 2,000 libraries met the search criteria. A statistical formula was used to determine that a sample size of 300 libraries would be needed to provide an acceptable level of statistical precision. A random numbers generator was then used to create a list of 300 numbers between one and 2000. Those numbers were then used to identify what records from the *American Library Directory* would be displayed, thus producing a list of libraries whose directors would be targeted to receive the survey e-mail. The directory entries do not provide the director's e-mail address. An additional level of research was needed to visit the website of each library for which a record was retrieved to find the director's e-mail address. A small percentage of the director's e-mail addresses could not be found anywhere, and additionally a few non-U.S. or non-Canadian libraries were dropped from the survey population. The final number of library directors that actually received the survey e-mail was 207. In one month, those directors received the e-mail, along with a second reminder mailing. Overall, sixty-eight directors responded to the survey for a 32.8 percent response rate.

### Survey of Library Directors: Reactions to New Competition

The survey was designed to elicit the following information from the respondents about their libraries and institutions:

- the number of institutions where a portal or CMS is in use;
- the level of activity among users of the portal or CMS with respect to creating competition for the library;
- the level of knowledge among the directors about new information marketplace competitors;
- the director's attitudes and responses to actual or perceived competition to the library for serving campus constituents' information needs.

The survey respondents reflect a broad cross-section of academic institutions, with the concentration occurring among four-year and comprehensive institutions. The respondents are skewed towards the comprehensive university in this survey. According to table 260 in the *Digest of Education Statistics 2000*, four-year colleges outnumber comprehensive universities by 1,910 to 1,416.<sup>20</sup> There are far fewer research and doctoral institutions (517). Tables 1 and 2 provide a summary of the demographics of the survey respondents.

**Table 1**  
Type of Institution

Community or Two-Year	2	1.47%
Four Year College	24	35.29%
Comprehensive University	30	44.12%
Research University	10	14.71%
Other (medical schools)	3	4.41%



## Table 2

### Size of Library Budget (salary and materials)

Less than \$500,000	11	16.42%
\$500,000 - \$1 million	21	31.34%
\$1 million - \$2 million	18	26.87%
\$3 million - \$4 million	9	13.34%
Greater than \$5 million	8	11.94%

Respondents were asked about institutional use of either a portal or CMS. By far, many more have a CMS. Only nineteen respondents (27 percent) reported having a campus portal, but sixty-three (92.6 percent) reported having a CMS system. Among those reporting a portal, the majority (66 percent) indicated their campus uses a “home-grown” system. The other 34 percent was nearly equally divided among commercial vendors such as CampusCruiser, Jenzabar or Campus Pipeline. Information competition occurs when the portal provider creates prominent links to its own information resources rather than to the institution’s library. There was no indication that this was happening to an alarming extent, but several of the library directors (26 percent) reported that the link to the library on the portal page is poorly located. The majority (63 percent) reported satisfaction with the placement of the link to their library. Only four of the nineteen respondents said that there is no link to their library on the portal page. Table 3 shows how CMS systems were distributed among the respondents.

## Table 3

### Course Management Software System Used At Institution

Blackboard CourseInfo	38	55.8%
WebCT	27	39.7%
Other	3	4.5%

Several respondents appear to have more than one system because only sixty-three respondents indicated having a CMS, but there are sixty-eight total responses. Other systems included eCollege, Web Course in a Box (WCB), and WebFX (a homegrown system). No one reported use of Prometheus. Directors whose institutions offer CMS were asked about their knowledge of the extent to which faculty place links to the library on their course pages (table 4).

## Table 4

### Do Faculty Provide a Link to the Library on their Course Pages?

Yes	27	42.1%
No	3	4.6%
Do Not Know	20	31.2%
Other	14	21.8%

The responses suggest that the library directors are paying attention to the need for faculty members to encourage library use by placing a link or links to the library in strategic places on the course page. The large number of “other” answers came from

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respondents who indicated that some faculty do provide a link while others do not. Others said that they had just begun using the CMS and it was too early to provide a definite yes or no response. One way faculty learn about providing a link to the library is when the library director personally, or through the librarians on staff, is proactive in collaborating with faculty or otherwise reaches out to encourage them to provide the link. The respondents were asked if they or their librarians perform this type of outreach activity (table 5).

personally, or through the librarians on staff, is proactive in collaborating with faculty or otherwise reaches out to encourage them to provide the link. The respondents were asked if they or their librarians perform this type of outreach activity (table 5).

## Table 5

### Do Librarians Encourage Faculty to Provide a Link to the Library on their Course Pages?

Yes	43	63.4%
No	11	16.1%
Considering Doing This	11	16.1%
Other	3	4.4%



At many institutions the library staff is involved in managing the CMS or providing training for new users. That is a favorable condition for librarians to influence faculty to create links to the library. The results indicate the majority of the respondents are doing this through either their direct involvement as CMS administrators or through outreach programs to faculty. However, a moderate number are not. One area where library directors and their librarians may be less capable of exerting influencing is when faculty create links to non-library or commercial providers of information. The directors were asked about the level of this activity among their faculty using CMS (table 6).

## Table 6

### Do Your Faculty Provide a Link to Other Sources of Information or Commercial Information Providers on their Course Pages?

Yes, We Know Some Who Do	19	30.1%
No, None We Know Do This	8	12.7%
Do Not Know	34	53.9%
Other	2	3.2%

This provides some evidence that faculty indeed are creating links to non-library research entities on their course pages. The respondents were not asked provide specific names of competitors to which they knew faculty were linking. A greater cause for concern are the library directors who are unaware of the sort of research links that faculty create on their pages. This indicates that directors need to connect with faculty both to promote links to the library and to find out if faculty are linking to non-library resources. Upon finding an inappropriate link, the library director might be able to alert a faculty member to the advantages of linking only to the library on the course page. Ultimately, just as librarians may lack the ability to gather detailed information about faculty and their course pages, they are typically unable to prevent faculty from creating links to a nonlibrary information service if the faculty member chooses to do so.

It is difficult to compete without knowing the rivals, so the library directors were asked about their familiarity with different commercial information providers. We asked them about their knowledge of Questia, XanEdu, ebrary, Jones *e*-global library, and netLibrary (table 7). While netLibrary is not a true competitor it seemed reasonable to include a similar digital library that should be highly familiar to the respondents as a comparative benchmark.

Not surprisingly, Questia has the highest recognition among the true competitors. Many libraries already subscribe to netLibrary; this fact combined with its presence at both library conferences and in the trade literature make netLibrary significantly recognizable. High recognition for Questia was also expected because it has a controversial business model and is subject of scrutiny within the profession. It could be said that Questia is the library profession's "poster child" for commercial competition. Because XanEdu primarily markets itself directly to faculty there is less surprise that library

## Table 7

### Library Director Knowledge of Commercial Competitors

Competitor Name	Know It Well	Familiar With It	Know Little About It	Never Heard of It
Questia	10%	57%	20%	8%
XanEdu	4%	19%	52%	25%
ebrary	3%	23%	55%	16%
Jones <i>e</i> -global	1%	18%	50%	30%
netLibrary	46%	40%	8%	6%

directors find it unfamiliar. It does not advertise in the library literature nor go to library conferences. However, somewhat higher recognition of XanEdu might have been expected for two reasons. First, it is owned by ProQuest, a major vendor of information products to libraries and second, XanEdu is a partner of Blackboard, a CMS with which many of these directors are familiar. XanEdu is a competitor that manages to elude the attention of many library directors. The lack of recognition of ebrary and Jones *e*-global comes as a surprise because these competitors attend major library conferences and receive some attention in the library literature. However, both are newer to the scene than Questia and use far less aggressive marketing methods than Questia.

Can library directors effectively compete with new commercial information providers if they lack knowledge of these companies and their presence on campus? The directors were asked if they knew of the presence of any of the competitors at their institutions (table 8).

## Table 8

### Library Director Knowledge of the Use or Presence of Commercial Competitors on Their Campus

Competitor Name	Yes, It Is Used Here	No, It Is Not Used Here	Not Sure If It Is Used Here	Never Heard of It
Questia	6%	66%	20%	8%
XanEdu	3%	74%	10%	13%
ebrary	2%	66%	16%	16%
Jones <i>e</i> -global	2%	63%	15%	21%
netLibrary	49%	41%	4%	6%



Most directors appear to be relatively confident that information competitors are not in use on their campuses, but there are a significant number of directors that are not sure. It is somewhat reasonable to expect this. Should a faculty member choose to use one of these services or advise students to do so, there is no guarantee the library director is aware of it. For those with concerns about the use of information competitors on their campuses, it is now important to maintain a regular dialogue with faculty. Library directors should discuss with faculty the various commercial information providers making direct approaches to them. Faculty need to know that the library may be providing exactly the same resources. netLibrary is in some ways the aberration here, as it is in use at many libraries and should be familiar to directors. Again, its example is provided primarily for comparison. I also asked directors if they knew of any incidents on their campuses of information competitors marketing their services. With the exception of Questia, where 33 percent of the respondents reported an incident (e.g., posters, faculty or administrators contacted, salespeople on campus, etc.), there was little to report. For all of the other competitors, only 10 percent or fewer indicated an incident occurred on their campus.

The survey also sought to collect information about library directors' attitudes towards information competitors and how directors respond to competition. First, the respondents were asked to say whether they agree or disagree with a series of statements about information competitors.

Library directors appear to lack complete confidence that the growing number of information competitors is no threat to their libraries. That only 43 percent selected to disagree with the above statement indicates that among most directors there is a sense that information competitors need to be tracked and observed. The author expected that a larger percentage of the respondents would disagree.

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**Given that a number of the respondents reported an identifiable action by information competitors on their campuses, perhaps it is understandable that a fair number see competitors as potential threats.**

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## Table 9

### Commercial Information Providers Are a Potential Threat to the Library's Status As Primary Campus Information Gateway

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Strongly Agree	4.4%
Agree	16.4%
Neutral	35.8%
Disagree	31.3%
Strongly Disagree	12%

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agree with the statement. Given that a number of the respondents reported an identifiable action by information competitors on their campuses, perhaps it is understandable that a fair number see competitors as potential threats.

## Table 10

### Commercial Information Providers Are Just One More Set of Dot.com Enterprises That Will Fail and Go Out of Business

Strongly Agree	4.4%
Agree	16.4%
Neutral	35.8%
Disagree	31.3%
Strongly Disagree	12%

While 43 percent of the respondents may not see information competitors as a threat, the majority either believe these companies are here to stay or are not convinced enough to say that they agree they will be short-lived enterprises. That library directors believe information competitors are achieving or have the potential to achieve viability and yet are not threatened by them suggests that perhaps library directors believe they can co-exist with these firms. Also these data suggest that information competitors' presence cannot take away from what the academic library offers, as suggested by table 11.

## Table 11

### The Library Gives Something Special (e.g., materials, staff assistance, space, etc.) to Students and Faculty that Won't Be Affected by Commercial Information Providers

Strongly Agree	28.3%
Agree	40.3%
Neutral	10.5%
Disagree	16.4%
Strongly Disagree	4.5%



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This table suggests that most library directors are confident that their libraries offer services that will continue to draw their constituencies, despite what the competitors provide. The responses to the question presented in table 12, however, show no real consensus on whether or not directors believe it is their job to keep information competitors off their campuses. Many of the directors provided comments about their role in responding to competition. Some said that they would refuse directly to counter actions by information competitors, but would instead do their best to promote what the library offers and to educate users about the inadequacies of the competition. Others indicated that they would be more aggressive in their efforts to compete.

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## Table 12

### It is the Library Director's Responsibility to Act to Counter Commercial Information Providers that Offer or Sell their Services Directly to the Library's Constituents

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Strongly Agree	12.1%
Agree	27.2%
Neutral	19.7%
Disagree	25.6%
Strongly Disagree	15.1%

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Admittedly, it is difficult to develop questions that best can ascertain how library directors will respond to competitive pressures. For many, any exposure to the new information competitors reflects only what they have read. Only a few have had direct interactions on their campuses with competitors. The survey's last four questions presented hypothetical situations involving interaction with competitors in which the directors had to choose between two different courses of actions. The goal was to gain some insight into the frame of mind of the directors as they confronted the situations. Table 13 shows that the majority of the directors would take a nonaggressive stance after discovering that their faculty link to information competitors. Though the directors wish the faculty to avoid such activity, most would be unlikely to request directly that they reconsider their action. What faculty choose to do in the realm of the classroom is protected by academic freedom and directors may not think it wise to infringe on that basic principle. Still, respondents commented that despite avoiding direct confrontations with faculty they would pursue other avenues, such as campus-wide awareness campaigns intended to alert faculty about why the library can offer more than its competitors.

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## Table 13

### Response to Discovering Faculty Linking to Information Competitors

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Contact Faculty	33%
Do Not Contact Faculty	67%

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The question in table 14 reflects actual events. On some campuses Questia did set up booths in order to sell subscriptions to students. Cafeterias and student centers became places where students were solicited. Though many librarians found this disturbing, the responses indicate that most directors would act conservatively. They would not act to have the booth removed. Some commented that they doubted they could make such a thing happen on their campus. Some suggested this unintentionally would send the wrong message, one of censorship or fear. Again, those who commented indicated that their style would not be confrontational, but rather would focus on education and creating awareness on their campuses. They believed they would accomplish more by making their constituents aware of what the library offers, and how it is superior to competing services. Despite that, a not inconsequential number indicated they would act more aggressively.

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## Table 14

### Response to Discovering an Information Competitor Selling Services to Students at a Booth Located in a Student Gathering Place on Campus

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Ignore Presence of Booth	73%
Act to Have it Removed	27%

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Another outcome of new information competitors is that some administrators seek out these services for their potential to save on spending for library resources. As reflected in table 15, the directors were presented with a question about a provost who rejects a request for a new librarian, believing instead that money can be saved with a subscription to Jones *e*-global library. The directors were asked if they would challenge such a decision. While several directors commented that they thought the word "challenge" was too strong for how they would react, a majority would certainly seek to



discuss, rather than immediately to follow such a directive. Unlike the other hypothetical situations, this one is far more substantial in its ability to harm the library by denying it resources. That may account for the near solidarity among the directors in their response to challenge the provost, or at least “discuss” the matter.

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## Table 15

### Response to Provost’s Directive to Subscribe to an Information Competitor as Alternative to Hiring an Additional Librarian

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Follow Directive	4%
Challenge Directive	96%

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Demanding that a competitor’s table be removed or questioning faculty’s right to link to whatever they choose are thornier issues. A library director rightly may choose to sidestep it in favor of more thoughtful responses. Table 16, however, presents a situation that affords library directors the opportunity to act decisively. Accordingly, the majority would. Again, this situation is one that did occur on some campuses. Many library directors acted to change the link on the portal page, while others chose to advise their constituents to avoid that link. Mirroring those actions, those who responded to this survey indicated that they too would act to make sure the link on the portal page connected their constituents to the library.

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## Table 16

### Response to Discovering New Campus Portal Has a Prominent Library Link that Links to Portal Developer’s Own Set of Information Sources (not to the library home page)

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Do Nothing—Users Know Where to Find the Real Library Home Page	18%
Request that Link is Changed to the Library Home Page	82%

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While these last several survey questions sought to gauge how library directors respond to competitive challenges to the library’s position as campus gateway to information, they probably failed to reflect adequately how directors truly might react in these situations. The directors surveyed had the opportunity to provide comments at

the end of the survey. They were particularly invited to respond to the last questions that forced them to choose one of two opposite reactions. As expected, many indicated they would be more likely to take some alternative action—perhaps similar to their response, but in a more balanced way. Many directors, for example, indicated they would focus more on education and marketing to alert, in a positive way, faculty and students about the library's offerings, rather than focusing on delivering what, in politics, would be called a "negative campaign" against a competitor. Despite what weaknesses these questions might have, they do provide some picture of the degree to which library directors are thinking about ways to handle competitors.

### How Organizations Respond to New Competitors

More and more in modern life we are presented with a great many choices. Consumers are accustomed to having many options. In the 1970s there were 140 motor vehicle models from which to choose; there are 260 today. An average supermarket has 40,000 different products on its shelves. Even among individual manufacturers, choice is spreading. In the 1970s Colgate offered two different toothpastes. Today they offer 17 different types of toothpaste.<sup>21</sup> Is it any surprise that library constituents should anticipate or even welcome some new choices in how and where they can find their information? Certainly, there are publication formats where libraries will maintain their monopoly. Patrons seeking unique collections, archival materials, or long runs of scholarly journals yet to be digitized will still need to use their library. Increasingly, competitors will find ways to duplicate these collections, or simply will realize that many college students will accept whatever information they can get with the least amount of effort. Surviving and succeeding in this sort of environment requires a bit of competitive business sense.

Academic librarians tend to lack business acumen. The traditional library science curriculum pays little attention to marketing or techniques for achieving success in a competitive environment. Fortunately, libraries are not alone in the predicament of engaging with new competitors. In recent years industries such as banking, auto dealers, insurance, and supermarkets have found themselves confronting new competition in the form of dot.com enterprises, not unlike what libraries are experiencing. Traditional nonprofit hospitals have been buffeted by competition from for-profit hospital chains, specialized medical practices, and surgery centers. With this competitive industrial upheaval occurring both prior to and after the e-business explosion, valuable lessons can be derived from the experience of firms and industries that have survived the infusion of new competition. To identify strategies for surviving new competition, a literature search was conducted in the *ABI/Inform* database. The search concentrated on identifying case studies of industries and firms that developed new methods (or improved old ones) for increasing competitiveness.

The most salient strategies gleaned from the literature search fell into several categories:

- **Knowledge of the Environment:** In order to be competitive you must know who the competitors are and the environment in which the competition is taking place. Competitive intelligence is commonplace in the corporate world, but quite



foreign to the library sector. Among the Inc. 500, 343 companies reported spending some part of their week on the task of competitive intelligence. Lois Mitten, CEO of the Children's Discover Center, hires mystery shoppers to gather information about her competitors and her own center's competitiveness.<sup>22</sup> If you don't know the competition, you can't outsmart it.

- **Customer Service:** Many industries beset by new competitive forces are focusing their efforts on becoming customer-centric or customer-adaptive. This means customers' experiences and needs are heeded; resources, marketing, and services are modified based on what customers have to say.<sup>23</sup> If businesses can understand better the wants and needs of their customers, they can shape customer services to conform to those desires, resulting in a customer who will return to the business rather than seeking out rivals.
- **Technology:** Technology can be used to achieve competitive advantage. There are many examples from consumer product firms. Swatch achieved great success by integrating pager devices into watches—they captured a significant percentage of the pager market in countries where the watch is sold.<sup>24</sup> These and other examples show that companies do not necessarily need the latest and greatest technology, but need to be creative in developing imaginative uses of technology.
- **Marketing:** Marketing and business are a natural combination. What business doesn't market its products or services? Well, until recently most energy suppliers, especially electric companies, had regional monopolies and excepting "public service" type ads, the lack of competitors demanded little marketing. The advent of deregulation changed that and now electric utilities are battling multiple competitors. The slightest concern that power from a new entrant into the market might be even slightly unreliable is often enough to get many customers to stick with good old Big Power.<sup>25</sup> Therefore, marketing strategies that expose competitors' weakness and that reinforce the long-standing strengths of the traditional provider are being used by large utilities.
- **Self-Assessment:** Just as it is important to maintain a perspective on the external landscape, the library director must know his or her organization's strengths and weaknesses. One consistent recommendation for organizations in a new competitive environment is to conduct a self-assessment in order to determine where it is most prone to a competitor. Hartford Hospital, flagship of the Connecticut Health Systems, was a typically challenged health care organization. Needing to gain competitive advantage in its region, it used the Malcolm Baldrige self-assessment to identify strengths and weaknesses. As an outcome of the process, Hartford Hospital developed a highly admired complaint management program.<sup>26</sup>

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- **Differentiation:** With today's unprecedented levels of consumer choice, the best way for a product to emerge as the clear choice is for it to be distinctly different in such a way that consumers will know why it is different and why it is a superior choice. Theodore Levitt, the Harvard marketing guru, wrote a book titled *The Marketing Imagination*. In it he stated that any product or service could be differentiated. Consider the number of toothbrush brands available. Oral-B created a powerful source of differentiation with a toothbrush that tells customers when they need a new one.<sup>27</sup>
- **Staff Resources:** Another frequent suggestion to competing organizations is continuous staff development for higher-level performance. The director is only as good as the staff he or she develops and the resources with which they are equipped. "People—and productivity growth through people—are increasingly the winning edge determining the competitiveness both of companies and countries," correctly contends Frank P. Doyle, General Electric Co.'s corporate vice-president for external and industrial relations. The "advantage will go to companies that are lean and agile; to managers who listen and leaders who communicate; to cultures that are entrepreneurial and liberated; to people who are technically and culturally fluent and flexible," Doyle believes.<sup>28</sup>
- **Alliance Building:** A less frequently suggested strategy for organizations faced with new competition is to explore the possibility of new alliances. Alliances may form to strengthen one of the partners. The alliance may be with the new competitor. Many business alliances are formed for reasons that are preemptive. Although there may be a positive result for both companies, the dominant motivation for one or more of the partners is to block a competitor from partnering with a company in a particular market or application.<sup>29</sup> In the case of the preemptive alliance, two or more firms join forces to take on a new competitor.

### Recommendations for Library Directors: Responses to New Information Competitors

What lessons might library directors learn from the experiences of both for- and nonprofit enterprises coping with new competitors? How might library directors adapt strategies used by long entrenched firms to compete with newcomers to their industries? Directors can adapt the strategies identified above, individually or in combination, to the operating procedures of their libraries if they wish to outperform the competition. In lieu of implementing these strategies, directors should at least allow them to serve as reminders of the change necessary in this new era of competition. This section of the paper will consider how these strategies might be best practiced in academic library settings.

- **Environmental Scanning:** The survey results showed that with the exception of Questia and netLibrary, few library directors could state that they knew some key competitors. Competitive intelligence skills are more commonplace in the domain of business librarians, but library directors can utilize these skills to develop a keen sense of external environment happenings. Environmental scanning should be a routine part of the planning process. To aid in this process



directors need to acquire information from library industry sources, as well as those from peripheral fields, including but not limited to higher education, computing technology, Internet development, and educational technology. Limiting oneself to library information almost guarantees that valuable news about potential competitors will be missed. XanEdu, for example, has received virtually no coverage in the library literature. Since the product is marketed directly to faculty, it is typically discussed in their literature, not ours. Many of the best pieces of information about Questia are found in newspapers from Houston, where the company is headquartered. Those stories were often reported in lesser known weblogs, not the mainstream library journals. When mainstream journals do publish news of this sort, it is often out of date when received and too late for directors to act on the information. Library directors must develop better strategies for gathering intelligence about their competitors. Once competitors are identified, directors should test the services to find out what they offer, how they work, and how they are priced. Then, a competitive analysis can identify what potential challenges the competitor presents.

- **Customer Service:** What can academic libraries offer that Internet-based competitors cannot? The answer is personalized service delivered by a caring, customer-driven library staff member. How many libraries do what is necessary to cultivate and develop such a staff member? Not enough of them. In a competitive environment librarians must give their users a reason to want to come to the library. A contemporary standard among the best-known customer-service organizations is the practice of customer-adaptive service. It is based on continuous surveying of customers to assess the quality of services and identify customer needs. How many academic library directors are implementing customer adaptive services within their libraries? To give users reasons to come to the library, or at least use its services and resources, directors must put into place a mechanism for developing customer-adaptive services. Directors need to regard their users as customers but that may not sit well with some in academia. "Student-centered services" seems a more appropriate way to describe this change in service orientation. The ultimate test of customer-driven services is to ask the question, "Would they pay for this resource or service?" If the answer is no, directors must determine if the service is necessary, and if it is, then the service should be restructured to satisfy users to the degree that they would pay to use it, if required.
- **Technology for Competitive Advantage:** If the library offers superior resources and a highly effective website, users may have no motivation to seek out competitors. But given the competition's technology resources, it might be difficult for library directors to develop technology as a competitive force. While our applications of technology are good, the competition has the financial resources to develop better websites, create larger and more sophisticated databases, and employ more tools and new technologies for marketing their services to our users. For example, how soon will our library databases be ready for wireless and handheld computing? Competitors may already be working on these new delivery technologies. Directors must assess whether existing technologies can

be better leveraged to attract and serve users. Consider, for example, libraries that have developed “my library” websites that allow users to personalize the library web site. Tools such as OCLC’s SiteSearch or WebExpress can be used to create a single, uniform interface to multiple databases to reduce user confusion about database interfaces. Technology is the great equalizer. Used wisely, directors can employ technology that attracts and keeps users connected to the library databases. It also requires continuous monitoring of the competition and their use of new technology.

- **Marketing:** There is no dearth of literature about marketing for libraries and techniques for improving the promotion of library resources. But as with technology, academic libraries will be distinctly disadvantaged when it comes to marketing. It is difficult to compete with any company that has millions of venture-capital dollars for extensive radio and television advertising, or mass distribution of brochures. Library directors cannot compete financially, but their advantage is direct access to the campus constituents and information about them. Typical competitors know little or nothing about our courses, curriculum or common student assignments. Directors can use this to their advantage when developing marketing strategies. Demographic knowledge of one’s customer base is essential to creating a successful mixture of resources, but the importance of knowing the capabilities of competitors’ products cannot be underestimated. For example, just knowing the pricing models and structures of competitors’ services enables library directors to point out how the library offers better value.
- **Self-assessment:** The periodic user satisfaction survey is the most common device used by library directors to learn what users think of our organizations and services. Surveys of this sort can be informative, but our users often lack full awareness of the attributes of a competitively strong library. They may be satisfied with some services that we ourselves know need vast improvement. A better assessment exercise would be modeled on the type of self-study libraries perform when preparing for a major accreditation review. Studies of this sort may require the library to assess itself against some accepted standard of quality performance. This might include an examination of libraries at peer institutions to identify areas in which the library exceeds or fall short of expected performance levels. Alternately a self-study might pinpoint a list of resources and services of known competitors. The library could then identify how well it compares to that competitor, and degree to which it could respond from a position of strength.
- **Product Differentiation:** Sufficient knowledge of a competitor’s products should make it relatively easy, given the library director’s knowledge of his or her own resources, to differentiate the library’s resources. While commercial enterprises may set out to develop a new product that is intentionally different from existing products, like the toothbrush that tells you when it needs replacing, a library director may only be able to identify advantages that differentiate the library’s resources. Consider the case of a portal’s library link that simply lists links to freely available Internet sites. The library’s more extensive array of electronic resources should be promoted as unique and different such that it warrants fac-

ulty and student attention. Academic libraries by accord of their own virtues create a “default” differentiation from commercial competitors. The library’s resources are unique to that institution; they were selected to meet the needs of the faculty and students, and are tailored to the needs of the curriculum. In order to reach potential customers at all institutions, new market competitors must keep their product somewhat generic and therefore less useful to the needs of any one customer. Library directors can use this to their advantage in stressing how library resources are uniquely acquired for the institution, and how they differ from generic, one-size-fits-all competitor databases.

- **Staff Resources:** Library directors know how valuable their staffs are to the success of the operation, and support sending them to conferences, training programs and workshops to facilitate continuous performance improvement. Well trained staff who understand the value of customer service can make all the difference in giving users a reason to come to the library, rather than turning to a competitor. Likewise, when staff give poor customer service it creates a hostile environment that will surely send patrons away vowing never to return. Library directors do not have at their disposal the funds necessary to provide the level of staff training delivered in corporate environments. Despite this the director must take responsibility for creating an environment that welcomes patrons and invites them to enter and stay. That largely depends on developing a customer driven staff. A significant barrier to achieving an effective customer-driven service orientation within the library is the heavy use of student workers. Academic libraries could hardly survive without student labor, but they are often the weak link in the strong service chain. Lacking training and proper motivation, students can

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**Well-trained staff who understand the value of customer service can make all the difference in giving users a reason to come to the library, rather than turning to a competitor.**

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contribute to a hostile environment. Directors must pay attention to student workers as an integral element of customer-driven staff, and take appropriate action to provide students with the necessary customer service training and work environment to enable them to participate fully in the library’s customer-driven service model.

- **Alliances:** Can the type of alliances being used in business to ward off competition be used in libraries? That is not certain, but there has been some interest in the possibilities. More radical strategists would suggest that libraries explore alliances with their competitors in order to begin a dialogue about whether the competitors could be licensed by the library and campus. Some libraries have already or are now considering the purchase of subscriptions to Questia for their students. That’s a novel approach, one that suggests it might be prudent to embrace rather than retreat from the competition. While ebrary is not gearing its services to libraries, a library could certainly create an account that could be

used by its clientele when they need books found on ebrary that the library does not own. Some of the competitors' databases might strengthen the library's collections. The key is for the library to take the campus lead in creating these alliances, rather than waiting for competitors to create alliances with students and faculty. Finally, libraries have always made intelligent use of consortia and cooperative ventures with other libraries to create economies in acquiring resources. Using this model of cooperation, academic libraries could create alliances that would develop far better resources than anything the competitors have to offer.

These recommendations represent just some of the strategies library directors can use to attract and maintain high levels of constituency usage. There are other ones. For example, many academic libraries are incorporating coffee lounges into the building to create a social as well as intellectual environment. Computer commons are effective at drawing students into academic libraries. While we have not yet reached that state where directors must take decisive action in confronting competitors, there is no doubt that libraries will continue to face new forms of competition. Directors who become versed in strategies used to confront and compete with new commercial information providers will be well-positioned to maintain their strategic advantage over competitors entering the information marketplace.

## Conclusion

Owing to the rapid pace of change in the information marketplace, by the time this paper is read or within a few months of its publication, the landscape for new competitors will change. Some of the companies may disappear, some may restructure themselves, and new competitors may surface. It is already happening. In November 2001, Questia, struggling to reach its projections for subscribers reduced its workforce by half. A more significant development was the bankruptcy of netLibrary, a firm rescued only by an OCLC takeover. netLibrary was identified here, properly this author believes, as a non-competitor. But if a firm with subscriptions in over 6,000 libraries whose primary product is digitized books, similar to several of the competitors, failed in the commercial information marketplace, how will these competitors attract enough customers to make this a viable business enterprise? Despite the apparent lack of a stable financial and marketing model and other inherent difficulties involved in developing a successful, subscription-based competitor to the academic library, new competitors appear eager to try to enter the marketplace.

Knowledge Venture Inc., in a press release dated December 11, 2001, announced the launch of Authority Finder, described as a "new website that gives students the tools and resources they need to write better term papers." Its resources are described as "authoritative academic journals," from content licensed under an agreement with Gale Group. Various subscription options are offered, including six months of service for \$45.00.<sup>30</sup> This firm appears not to be put off by the dismal experiences of Questia and netLibrary. The players and business models are likely to change and library directors should not expect the academic library environment to revert to its former competition-free self. Owing to this change the profession must answer the question, "Should aca-



demographic libraries compete when it is compatible with our goals?" Many librarians cringe at such talk. For them, rethinking the library in a business model is an anathema. To simply attribute new information marketplace competition to the dot.com business phenomena or to the entrepreneurial initiative (or greed) of a few companies misses the significance of the new competitive realities at hand.<sup>31</sup> Rather than fret about new information competitors or reject notions that academic libraries and business models are compatible, academic librarians should acknowledge it all as a much needed wake-up call. To realize the digital library vision and to shift the academic library from passive gateway to dynamic information service, the profession must adopt some competitive practices and do so before we become completely irrelevant to our constituents.

This article provides an examination of the new atmosphere of competitiveness in academic librarianship. Through an analysis of library director responses to questions about new competitors, the author determined that academic library directors need more proficiency with the skills and strategies that will prepare them for this new competitive era. The type of skills and strategies needed were suggested through a series of recommendations. The research methodology employed in this study was not without faults. The use of a questionnaire to assess the true state of mind of library directors about information competitors is a key weakness. Constructing questions that authoritatively and accurately would capture director's reactions and responses to competitive situations presented significant challenges. The era of competition in academic librarianship is just beginning and there will be many opportunities for research in this area. Future studies could benefit from other research techniques beyond the survey questionnaire. For example, a qualitative analysis making use of interviews with library and information science professionals about information marketplace competitors could yield interesting results.

In his *Harvard Business Review* article on the changing competitive landscape for nonprofit organizations, William Ryan makes a salient point about any nonprofit, be it an academic institution or its library, which must deal with the significance of the new competitive reality. He said, "the point is not whether nonprofits can survive competition (or possibly opposition), but whether nonprofits can adapt without compromising the qualities that distinguish them from for-profit organizations."<sup>32</sup> Library directors, as part of their mission to challenge competitors, must adhere to the basic values that make academic library communities strong. These values include, but are not limited to focusing on personal attention and quality customer care, standing in defense of intellectual property rights, and humanizing a service whose foundation is supported by technology. The library director's mission is to maintain the library's mantle as the primary gateway to academic information sources for their constituents. If they do that, but lose sight of our basic values in the process, then academic librarianship will not have gained much.

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