

Book Reviews

JSTOR – a History

Roger Schonfeld, Princeton University Press, 2003

Official histories make unlikely page-turners. In their efforts to record faithfully every board meeting, every memo, every item of expenditure, the authors of such works usually manage to wring out any possible enjoyment from the story. The story of JSTOR should be dull indeed: a committee-based initiative for the academic community does not sound over-exciting. Yet *JSTOR – a History* is rather different; it makes for an inspiring read,

Why is the success of JSTOR so important? It should be remembered that JSTOR's very existence was unexpected. Academic institutions would almost certainly never have come up with a similar initiative of their own accord. Harvard University had the idea of digitising all its journals – but not with the intention of sharing the result. JSTOR was initially funded by a trust, but has now moved to a position of autonomy and self-sustainability. This is all the more remarkable in that neither foundations nor universities (JSTOR's main customer) are skilled at operational management (or at becoming self-sustaining).

Although JSTOR is clearly one of the most valuable resources for information retrieval in higher education, its value to academia was by no means clearly understood at the outset. At least a year after JSTOR's launch, Kevin Guthrie, the CEO of JSTOR, believed the organisation's biggest selling point was that it freed up shelf space for other books – not the digital access and powerful full-text searching the resource provides.

What makes the book unusually interesting is that the author provides sometimes startling amounts of information, a no-holds-barred approach that reveals the wrong, as well as the right, decisions, listing for example the publishers who chose not to work with JSTOR (Elsevier, who chose to create Science Direct, Macmillan, publishers of *Nature*) as well as those who said yes. In this way, the author makes us feel caught up in the decisions, and, to a large extent, the partial knowledge, of the time. We see all the messy details of a new venture finding its way: at the end of its first year of operation, JSTOR had a revenue of only 60% of budget, while costs were 13% above budget. Any business start-up will sympathize with such figures, although not all have had JSTOR's patient and understanding backers.

The JSTOR business model was clearly not perfected from day one: the management team stumbled towards the model that exists today. Some key features were correct from the start (an online service, rather than CD-ROM-based), but others were only reached after trial and error. As Kevin Guthrie (who wrote the business model for JSTOR) put it, "During the planning process, non-profit leaders need to think less in terms of what their organization *must* do and

more in terms of what they realistically *can* do” Some of the fascinating details revealed by this study include:

- Although one or two libraries had considered creating archives of digital versions of journals for their own use, no other organisation had seen the benefit of providing such an archive to the academic community as a whole. No commercial or academic organisation would have created what JSTOR achieved.
- It took some years for the organisation to manage the text capture process efficiently. It required not only operational management skills to handle the throughput of content with the keyboarding agencies. In addition, it only became clear after the process had started that the print journal collections of most university libraries are incomplete. It required considerable resourcefulness to track down all the copies (remarkably, some publishers were vague even about what had been published, for example during wartime).
- JSTOR initially planned to digitise content from microfilm copies, but this idea was soon abandoned. UMI (the market leader in microfilming of journals) refused to work with JSTOR, despite repeated approaches – if you are the biggest player in a market, it doesn't make commercial sense to partner.
- Elsevier created its own digital article delivery service, Science Direct, rather than collaborating. Nonetheless, JSTOR's approach shows that a curated bundle from several publishers can be in many ways more valuable than a collection from a single publisher.
- Behind JSTOR is a guarantee that the archived copies will be available in perpetuity. Unlike other initiatives such as CLOCKS, JSTOR now has the resources to ensure that this guarantee can be fulfilled. Because of this, libraries are happy to purchase digital content that they have already bought in print form.
- In passing, the book reveals the inequitable nature of most interlibrary loans (“the non archivers (i.e. non-archiving libraries) can inter-library loan virtually anything from the archivers at any time. To do so, they pay only the direct cost of the loan ... and contribute nothing towards the cost of acquisition or the capital and operational costs of archiving.”

The book reveals a pragmatic, and by no means unblemished record of project management. The JSTOR team made a series of what the author calls “presumptively optimal choices”, in other words, guessing the process was going to be easy, only to discover it was not.

In the course of this narrative, the author reveals revealing details about business models for educational publishing. For example, JSTOR resisted being set up as an offshoot of any single US university because, as Schonfeld delicately puts it, “in the good-natured competitive spirit that has served American higher education so well, if JSTOR belonged to one university library, would other libraries resist paying fees to subscribe?”

Why has JSTOR been so successful that it is now a household name among students on both sides of the Atlantic?

- Although JSTOR captures journals for the academic community, it doesn't capture everything. JSTOR chooses a small proportion of the available journals and creates specific subject-based collections.
- JSTOR was a collective initiative, rather than the implementation of a single person's vision. Although Kevin Guthrie wrote the JSTOR business plan, the success seems to have been a combination of the Mellon Foundation's vision, and a pragmatic management team.
- JSTOR appeared at the right place and the right time: JSTOR's collections are essentially built around a host of non-commercial, not-for-profit journals that had reputation but that lacked commercial awareness.
- "JSTOR's experience demonstrates that, while few libraries were willing to pay for archiving alone, they were willing to pay for access, collection-building, and space savings."
- JSTOR is not primarily about space-saving for libraries – library budgets almost never include capital costs of building and maintaining space. Only 22% of libraries removed hard copies as a result of JSTOR.
- JSTOR's business model had to be a benefit to all parties: to the publishers, the libraries, and to the end users.

There are a few criticisms. The book is too long, at over 150,000 words, and with over 300 pages documenting the first five years of a committee-based digital initiative. But, as can be seen from the examples above, the wealth of well-researched details make this anything but a bland official history. There is no question the book is extensively researched – every statement has an attribution, and, remarkably, the presentations for every JSTOR board meeting, and every email from the time when the events took place, seem to have been preserved. To the author's credit, the story is far from a collective pat on the back to all concerned.

A more fundamental problem is the author's attempt to impose a thematic rather than a chronological arrangement. The result at times is a confusion of multiple perspectives that is anything but clear to follow - a more straightforward chronological approach would have been much clearer:

"This may have been impossible at the time ... there is evidence to suggest that at the time ... JSTOR did not have a clear vision of what its mission and activities would later become ... if [they] had a clear vision of JSTOR's future in

1995, which for these purposes they did not, it is unclear that sharing it ... would have been desirable.”

But these faults are forgivable, when the story is such a powerful and inspiring one. As for lessons to be learned from JSTOR’s experience, there are plenty to be seen. After all, the model of an organisation providing digitisation services for publishers on a non-exclusive basis, and even offering the captured files back to the publisher, is very similar to a more recent initiative, albeit one that has been received with very mixed responses: Google Book Search. How one initiative can be seen as an unqualified success, and the other arouse the fury of whole segments of the publishing community, is an indication of JSTOR’s achievement.