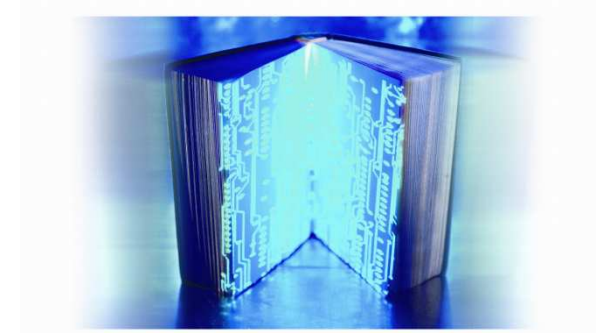




Springer

the language of science



E-Books – challenge and chance

Experiences in the digital age from an STM publisher's perspective

Spanish Association of Publishers Guilds
Madrid, June 17th 2010

Dagmar Laging

Vice President Sales



Agenda

Introduction

Market situation / Competition



Business model

Usage

Sales

Questions and discussion

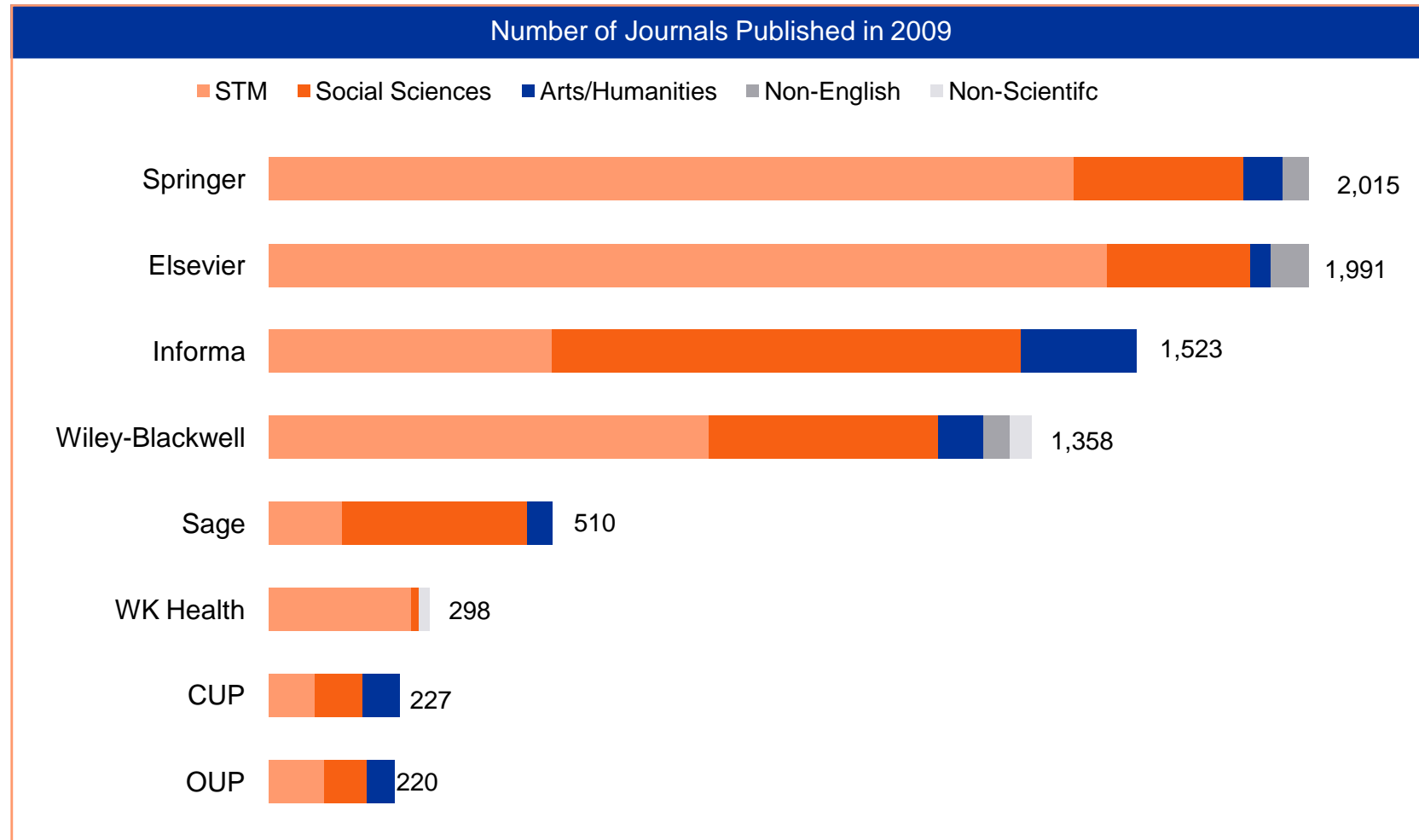
Some facts about Springer SBM

 Springer science+business media	
<ul style="list-style-type: none">• 60 Publishers in 20 countries• 2nd largest STM Publisher• Largest publisher in Germany• Owned by EQT Private Equity• Close to 900 Mio Euro turnover• 5,000 employees• 2,000 journals and 5,500 new books p.a.	

Historical overview (selected events)

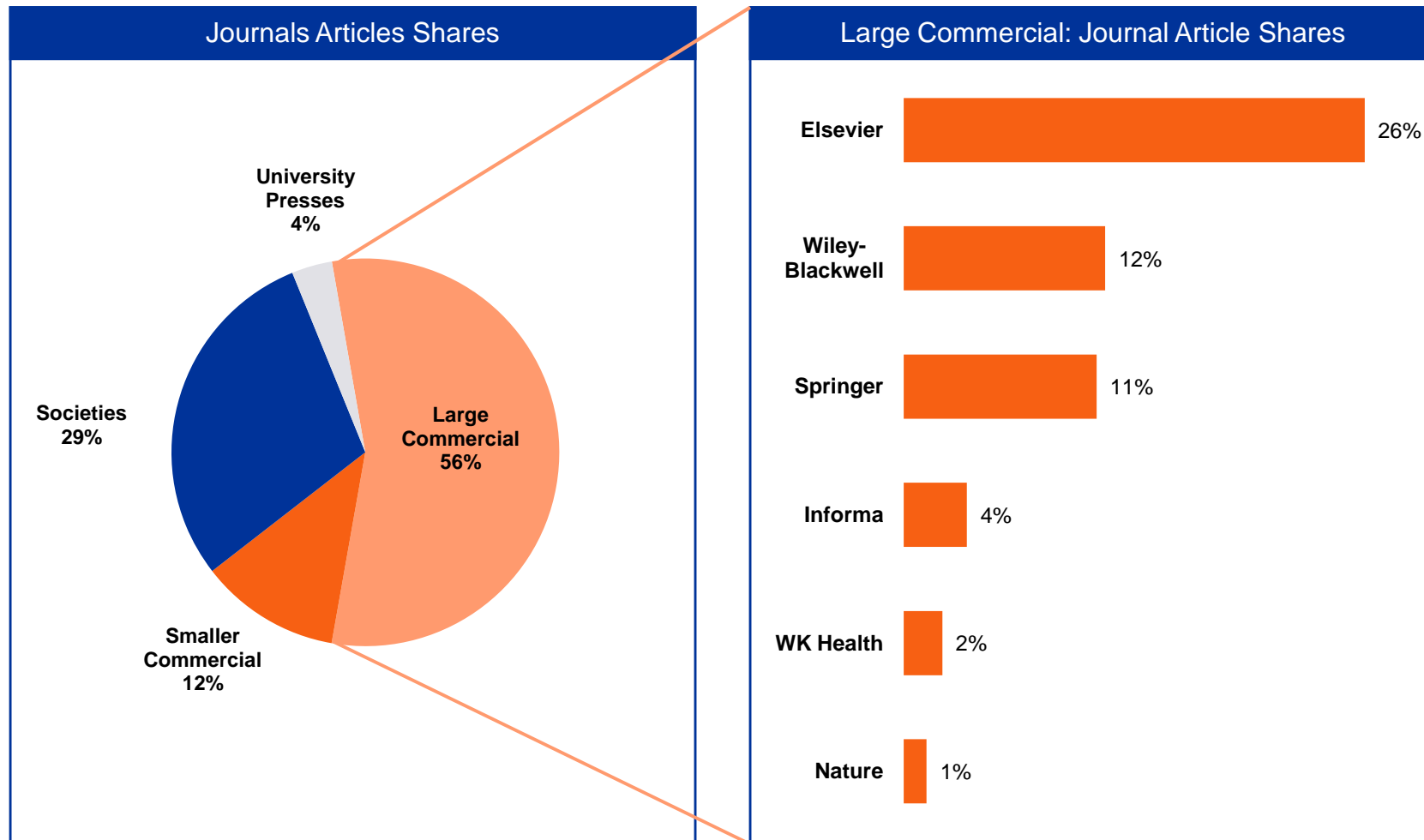
- 1842** Founding of the scientific publisher Springer-Verlag in Berlin.
- 1889** A. E. Kluwer founds his own publishing house in the Netherlands.
- 1946** Office in Heidelberg opened.
- 1964** Greater international focus and founding of Springer-Verlag New York.
- 1978** Founding of Kluwer Academic Publishers (KAP).
- 1998** Kluwer acquires Plenum Publishers in USA.
- 1999** Bertelsmann acquires the majority share in the scientific publishing house Springer-Verlag for its corporate division Bertelsmann Professional Information. Name of the new publishing group: BertelsmannSpringer.
- 2003**
- The British financial investors Cinven and Candover acquire Kluwer Academic Publishers (KAP) at the beginning of the year.
 - BertelsmannSpringer sold to Cinven and Candover in the spring.
 - As of October, BertelsmannSpringer is renamed Springer Science+Business Media.
- 2004** Merger of Springer Science+Business Media with KAP. The result is the second-largest publisher worldwide in the Science, Technology, Medicine (STM) field.
- 2005 – 2008** Acquisitions include Current Medicine Group, Humana Press, Bohn Stafleu van Loghum and BioMed Central.
- 2009** EQT and CIG acquire Springer from Cinven and Candover.

Leading Publishers: Number of Journals

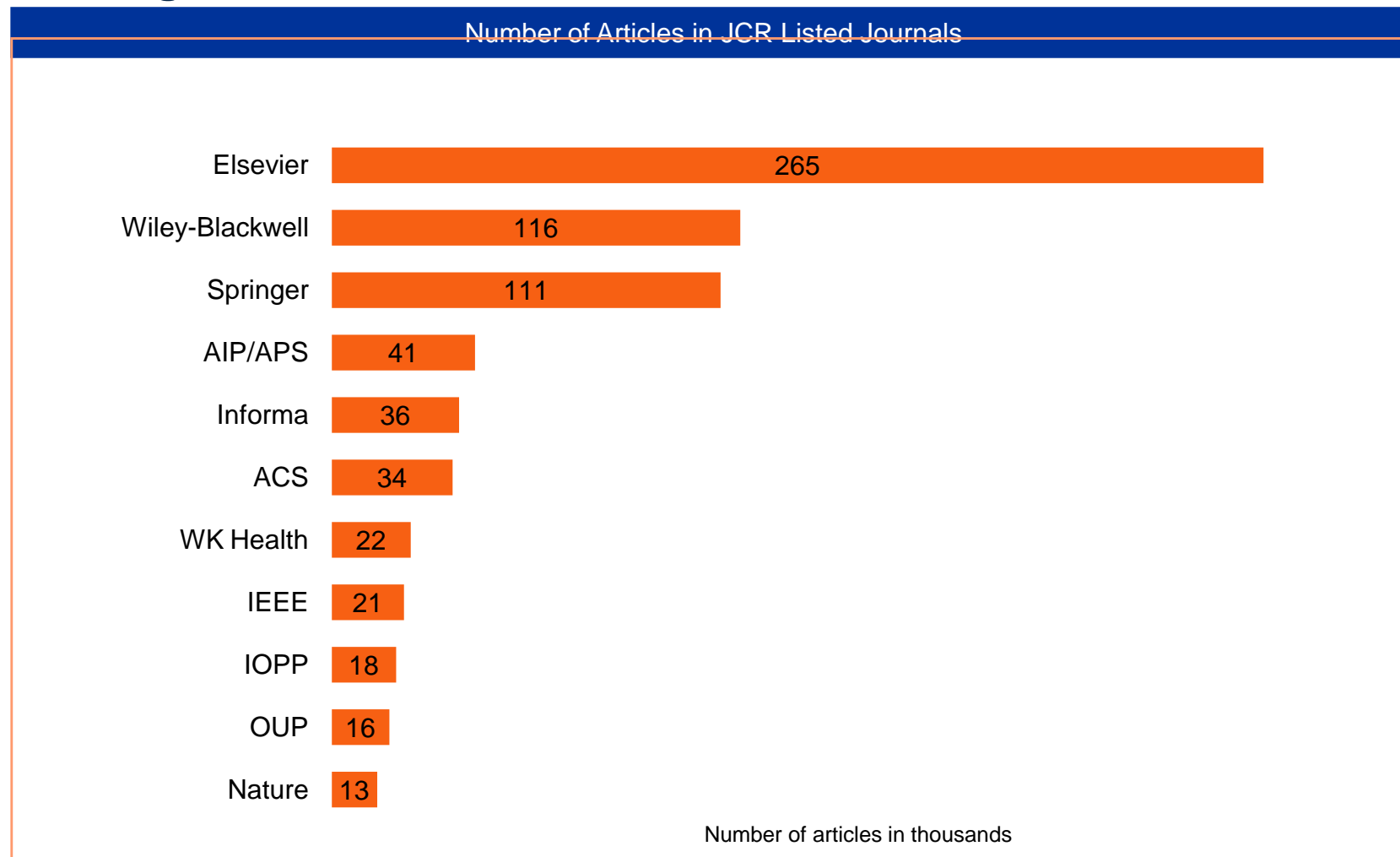


(STM: Social Sciences, Arts/Humanities: English-language scientific journals only; Non-English: scientific journals e.g. in German or French; Non-Scientific: magazines, newspapers, newsletters etc.; Springer including BioMed Central and Springer Professional Medicine)

Journals: market position

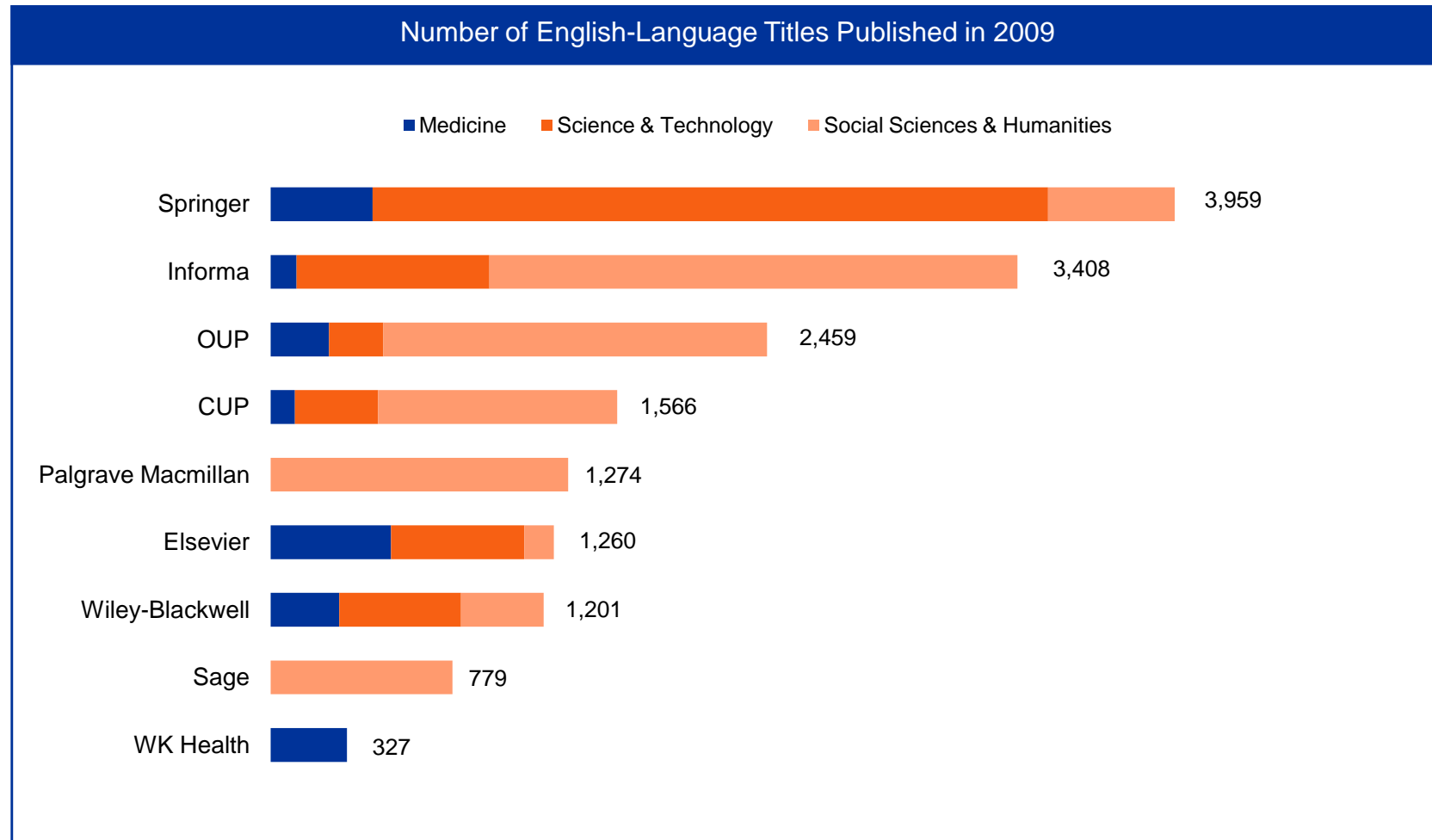


Leading Publishers: Number of Articles in JCR Listed Journals



(Number of articles listed in the ISI Journal Citation Reports Science and Social Sciences 2008 databases; AIP/APS including member societies; Springer including BioMed Central and Springer Professional Medicine)

Books: market positions



eBooks: Elsevier



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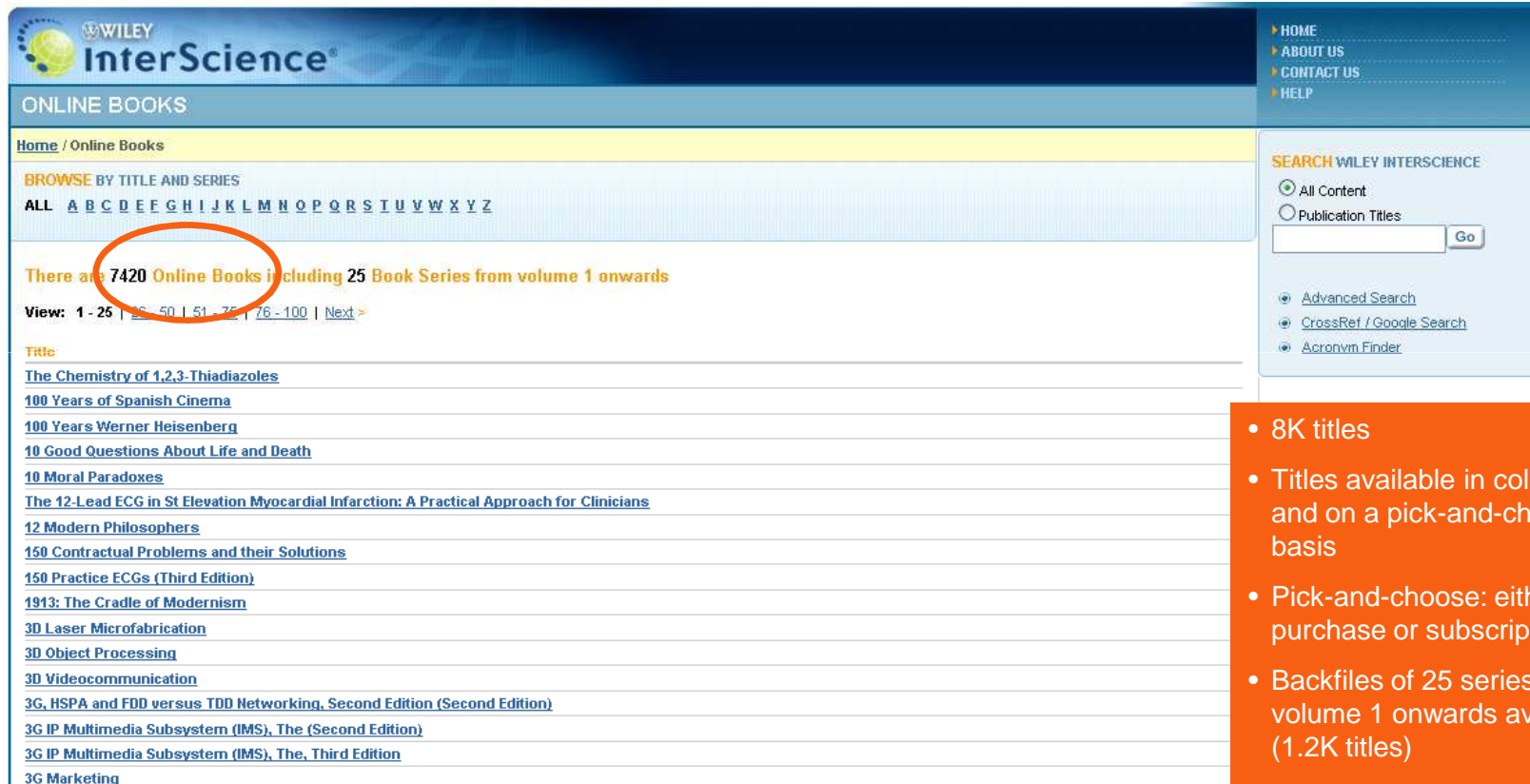
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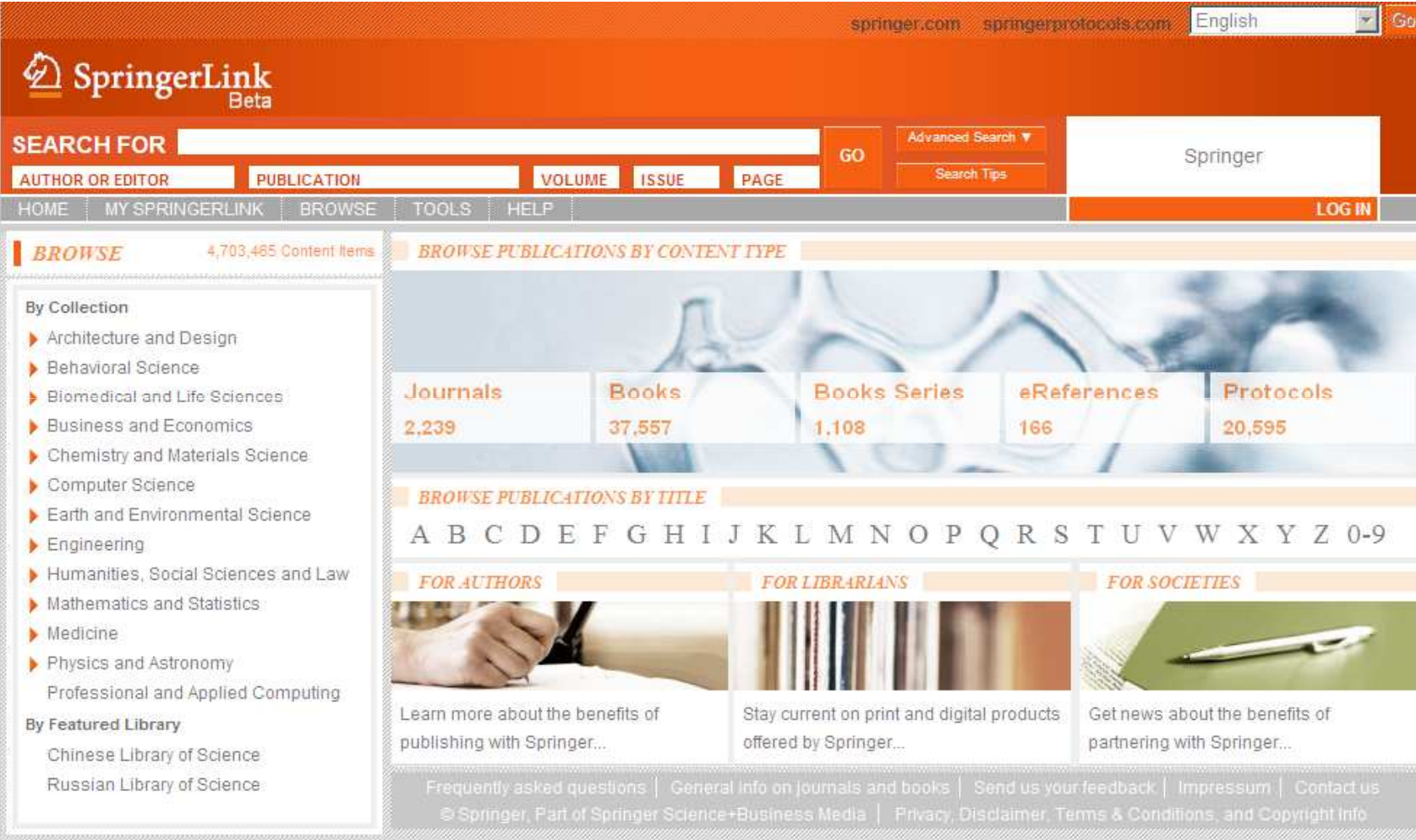
Books: market positions

	#1 Publisher	#2 Publisher	#3 Publisher	
Clinical Medicine	Lippincott W&W	Elsevier Health	McGraw-Hill	#4/5  Springer
Biomedical & Life Sciences	 Springer	Wiley-Blackwell	Elsevier	
Earth & Environmental Science	 Springer	CUP	Wiley-Blackwell	
Chemistry & Materials Science	Wiley-Blackwell	 Springer	Taylor & Francis	
Physics & Astronomy	 Springer	CUP	Wiley-Blackwell	
Engineering	Wiley-Blackwell	 Springer	Taylor & Francis	
Computer Science (research-level)	 Springer	IEEE	IGI Global	
Mathematics & Statistics	 Springer	Wiley-Blackwell	Taylor & Francis	
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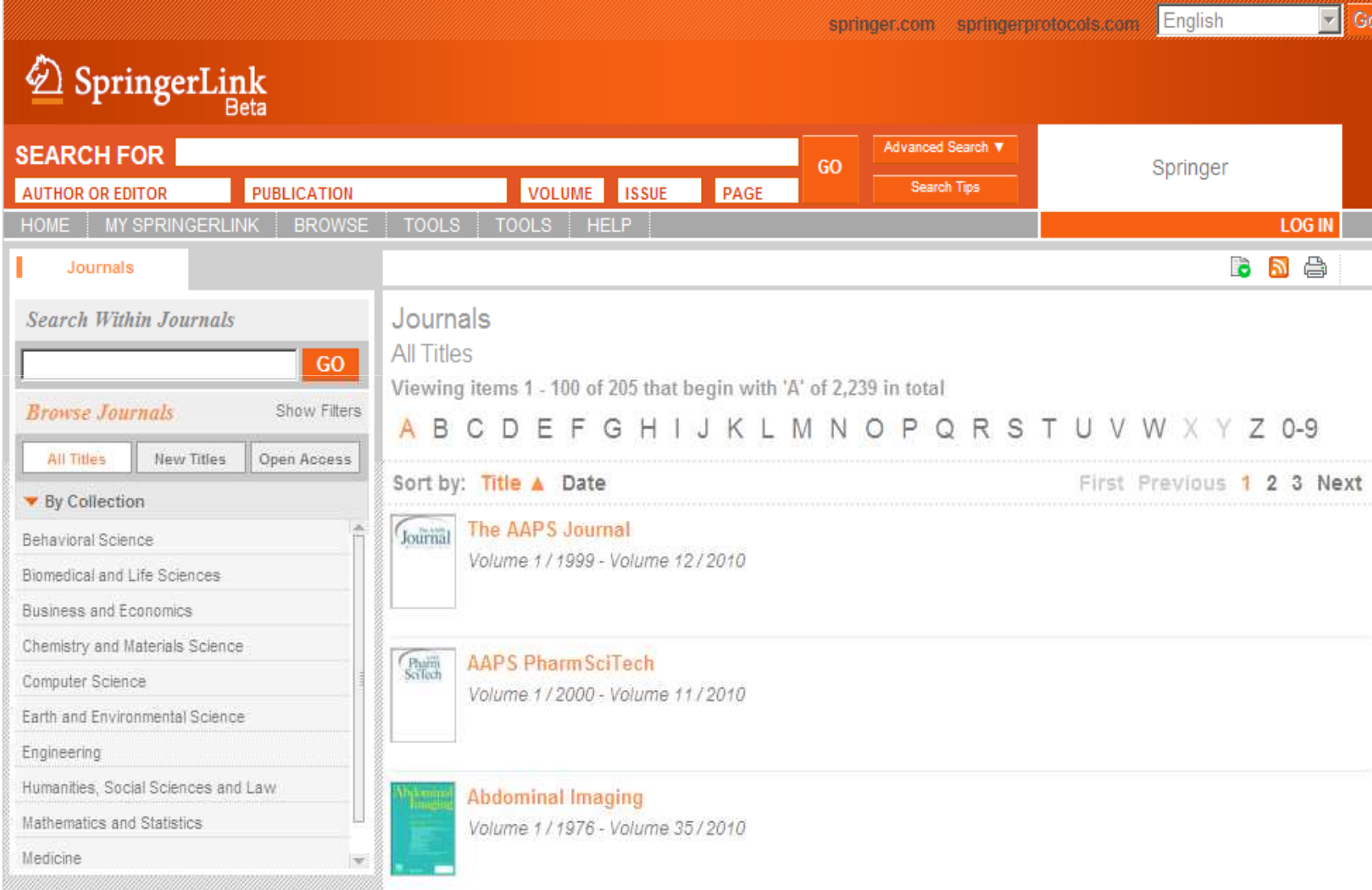
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The screenshot displays the SpringerLink Beta website interface. At the top, there is a search bar with the text "SEARCH FOR" and a "GO" button. Below the search bar are tabs for "AUTHOR OR EDITOR", "PUBLICATION", "VOLUME", "ISSUE", and "PAGE". The main navigation bar includes "HOME", "MY SPRINGERLINK", "BROWSE", "TOOLS", and "HELP".

The main content area is divided into two columns. The left column shows the book details for "Handbuch Brücken" by Gerhard Mehlhorn. It includes a "Browse This Book" section with a table of contents:

Content	Page Range
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Brückenbau auf dem Weg vom Altertum zum modernen Brückenbau	1-164
Ingenieuraufgaben im Brückenbau	165-193

The right column shows a preview of the book's table of contents, with chapters I through XXVI. Below the preview is a large banner for the book "Handbuch Brücken" edited by Mehlhorn (Hrsg.), with the subtitle "Entwerfen, Konstruieren, Berechnen, Bauen und Erhalten".

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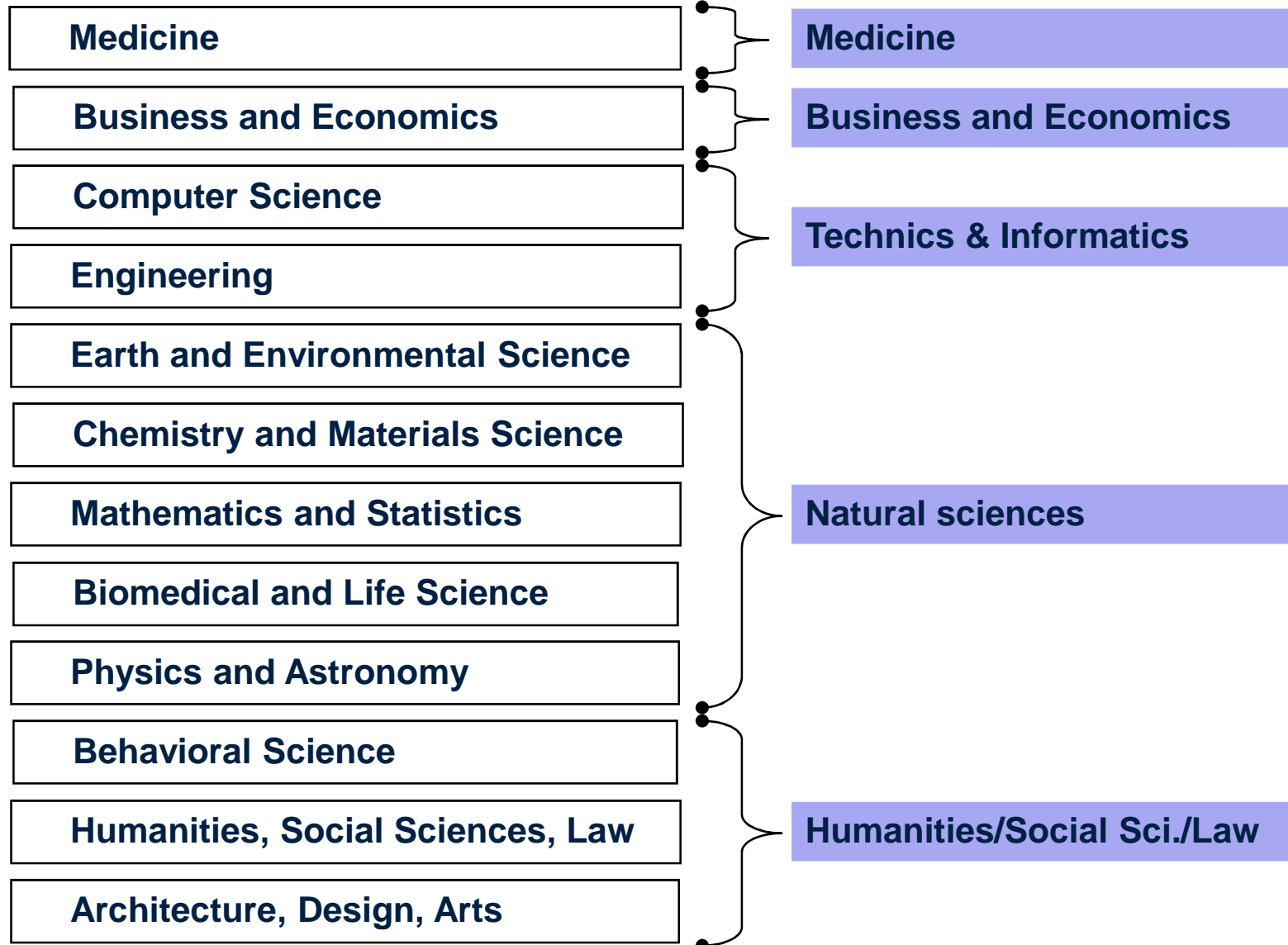
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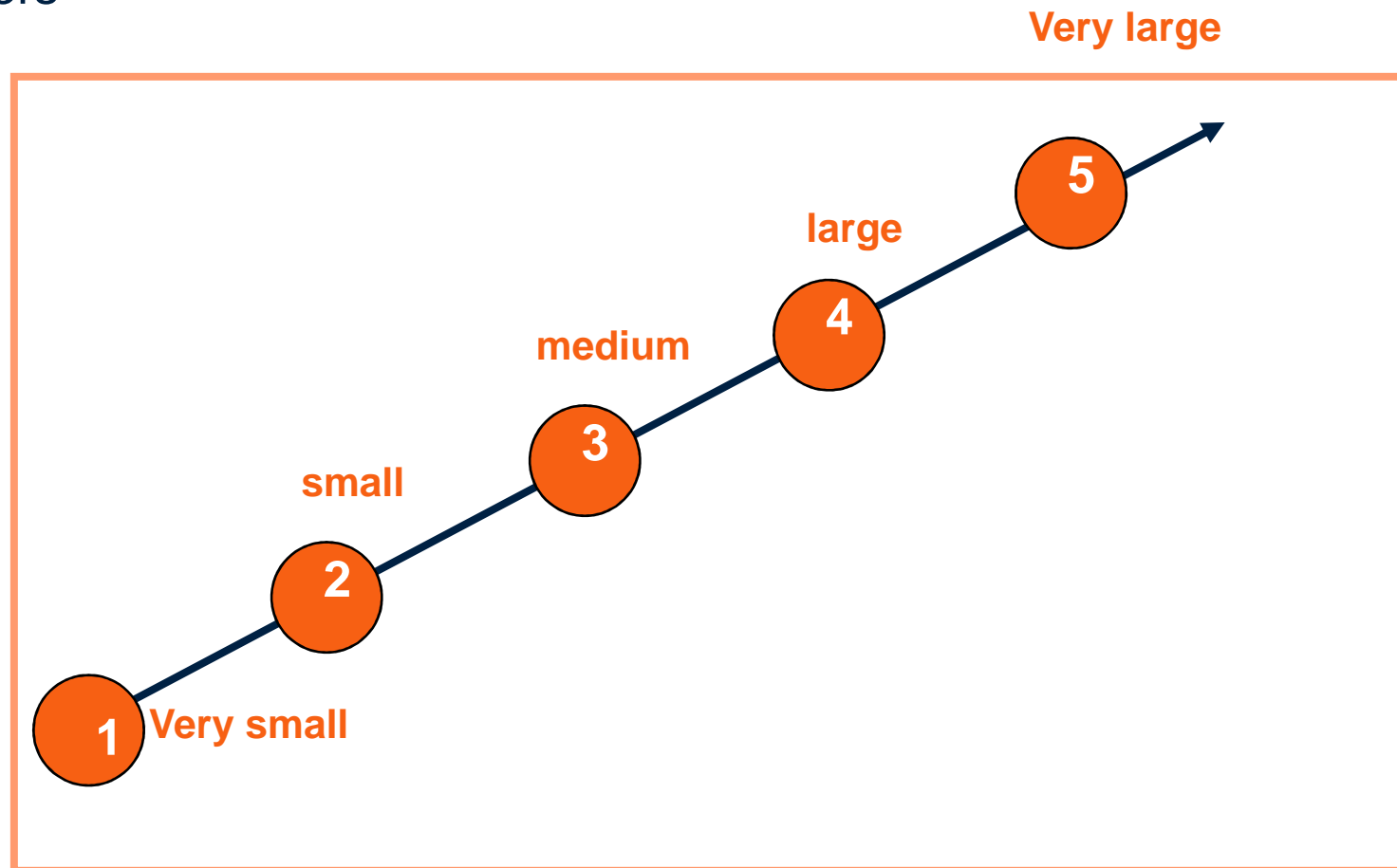
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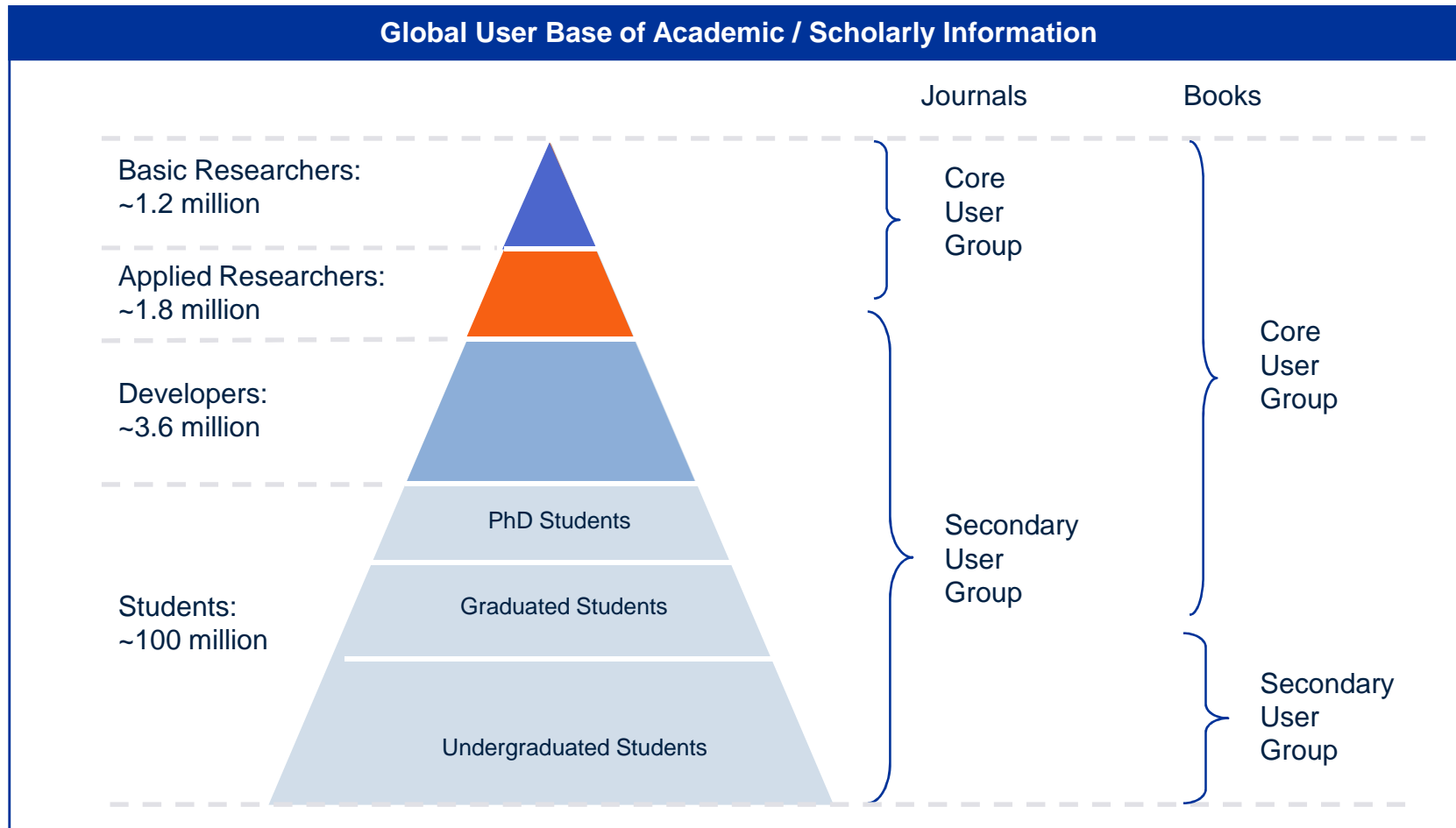
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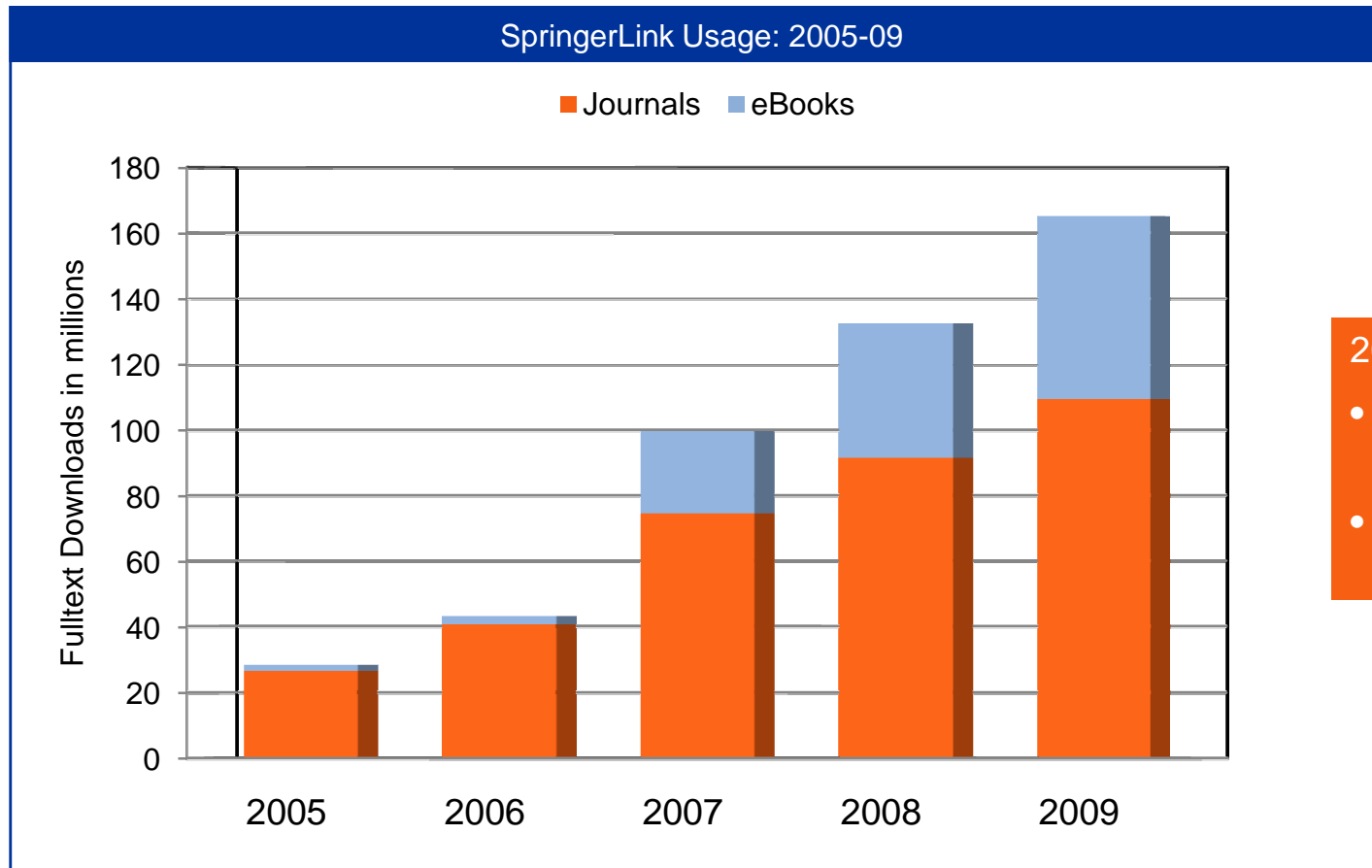
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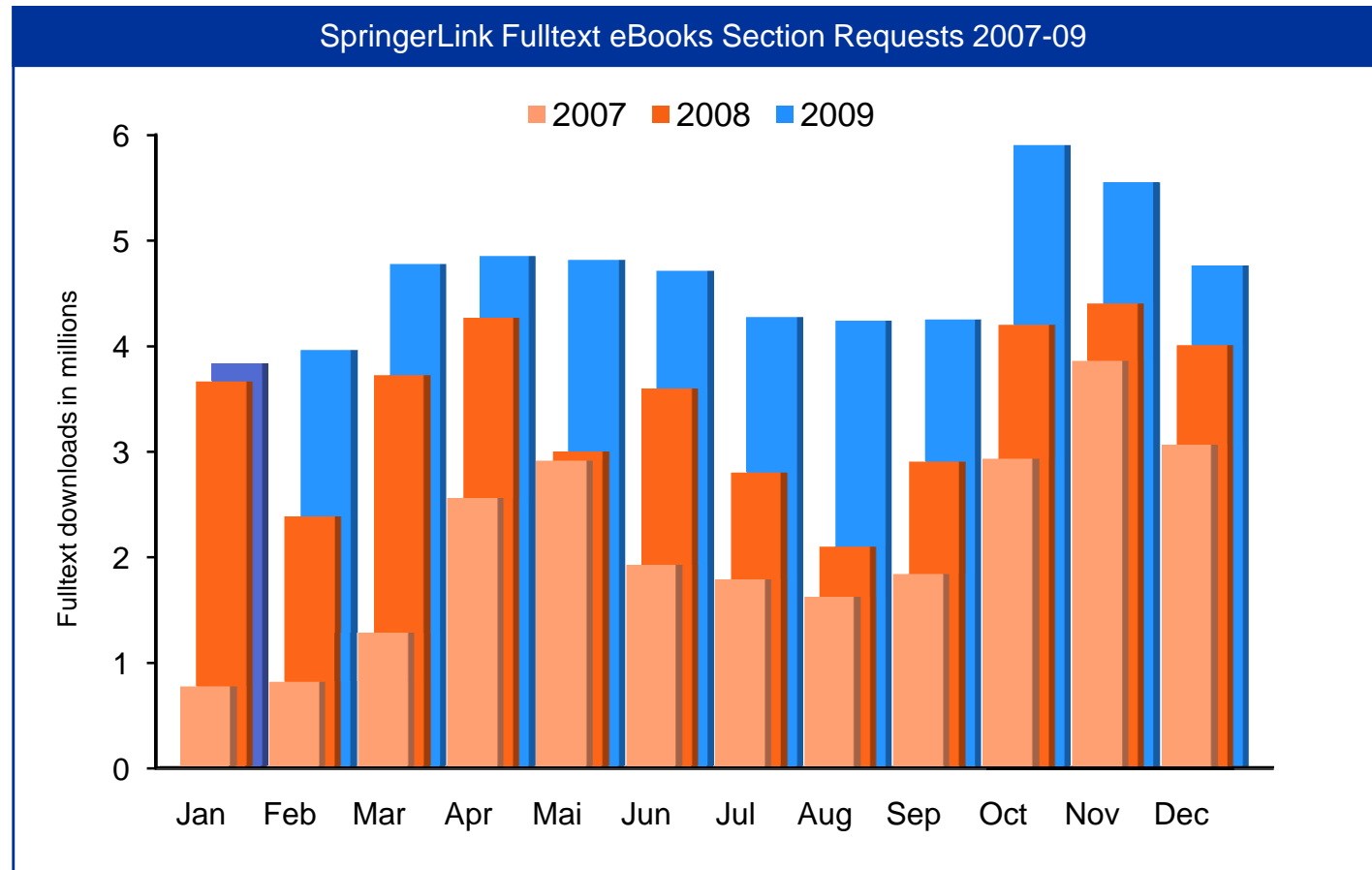


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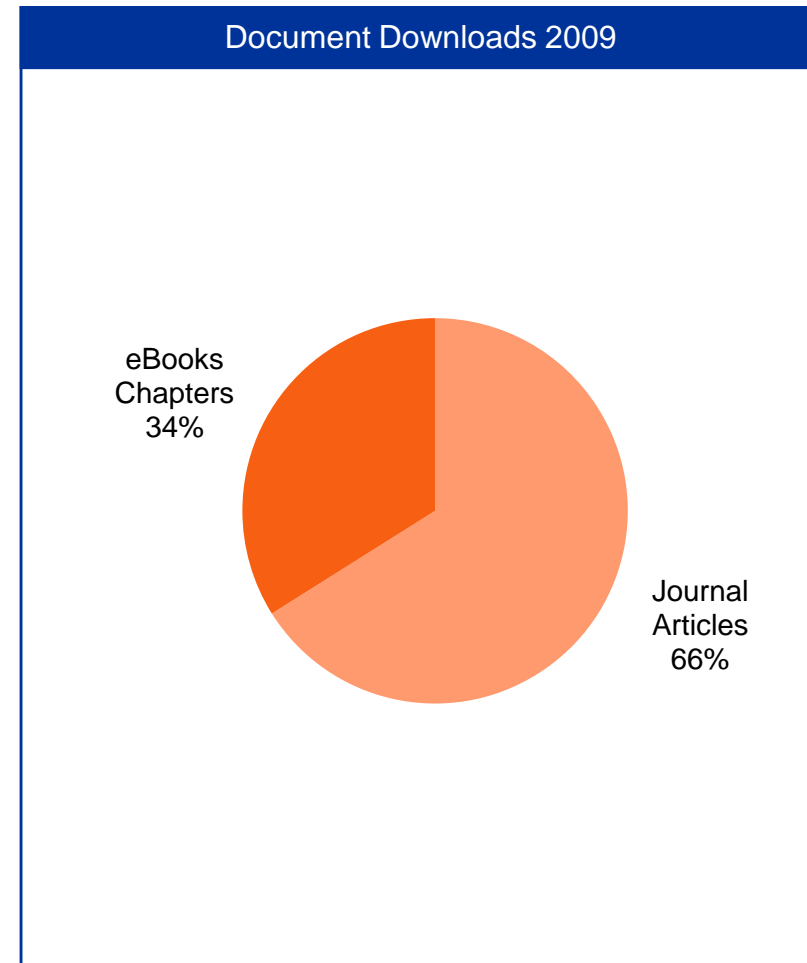
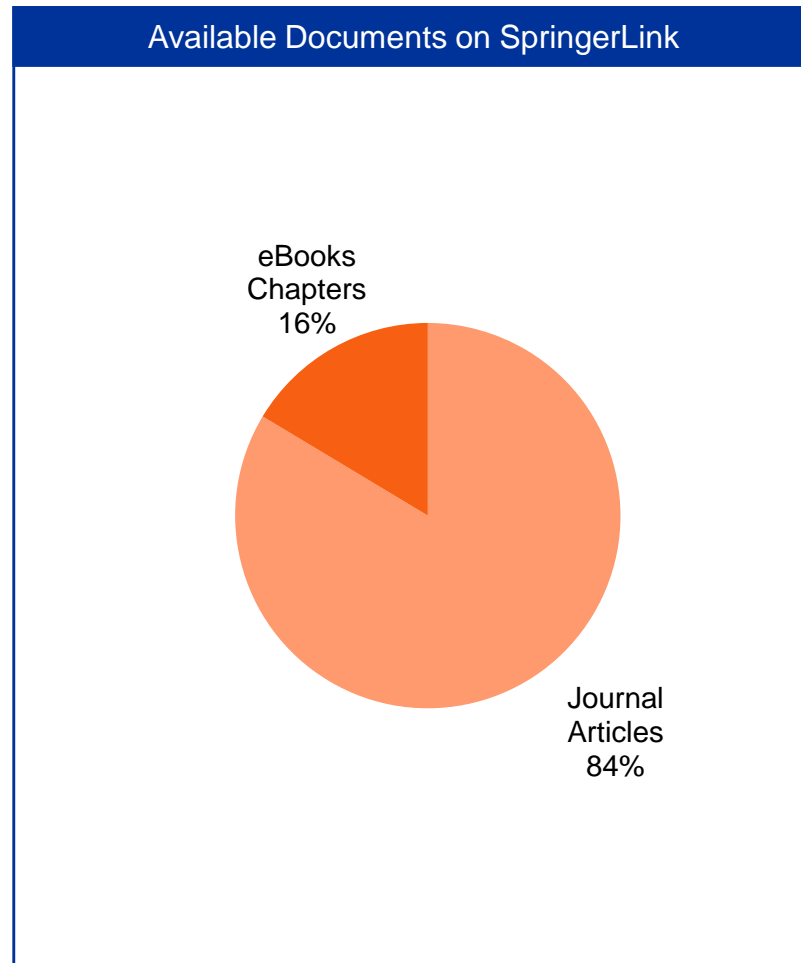
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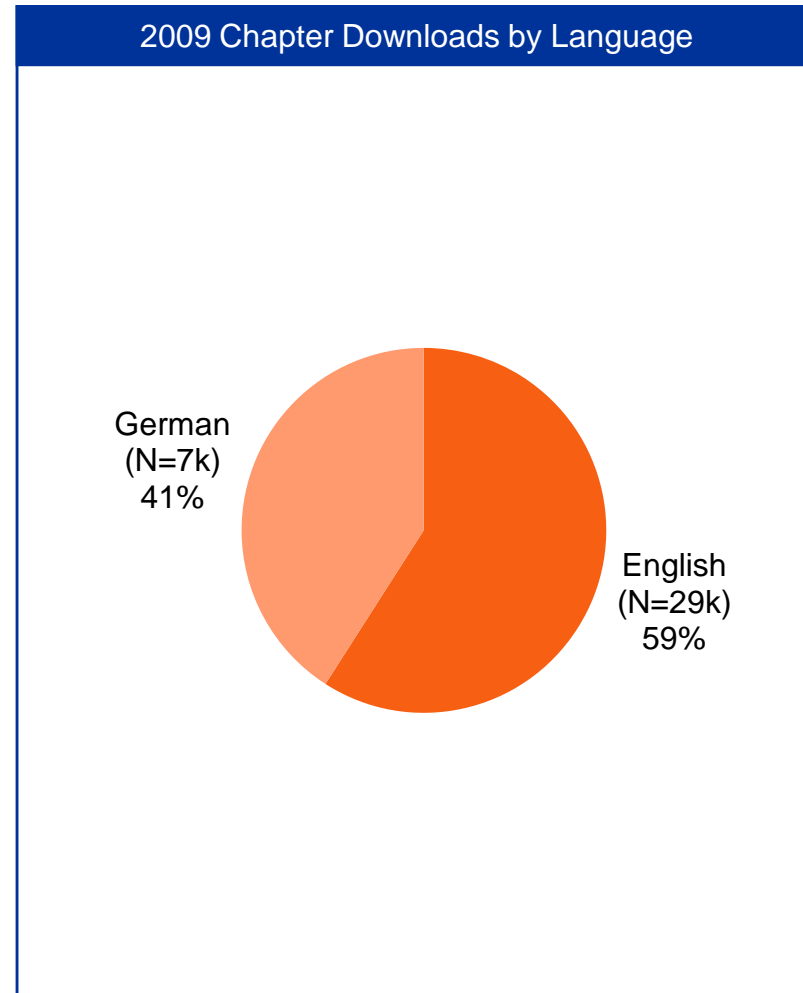
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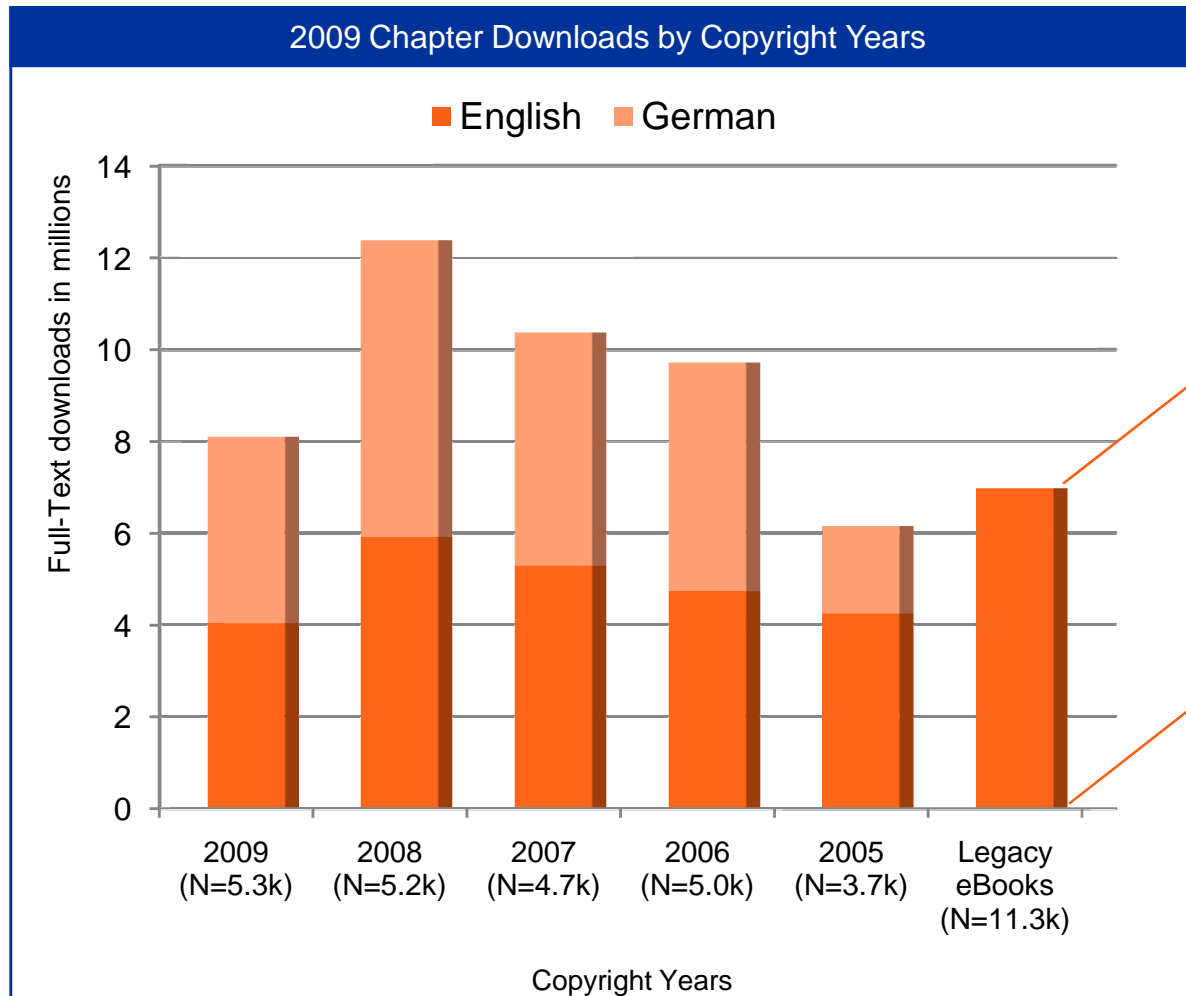


Chapter Downloads by Language

- At the end of 2009, there were approx. 36 thousand eBooks available on SpringerLink. Thereof, 29 thousand were in English and 7 thousand in German.
- Usage of German language titles was particularly high. More than 22 million chapter downloads, or 41% of total usage, were for those titles.
- The 29 thousand English language titles accounted for more than 32 million downloads, or 59% of total usage.



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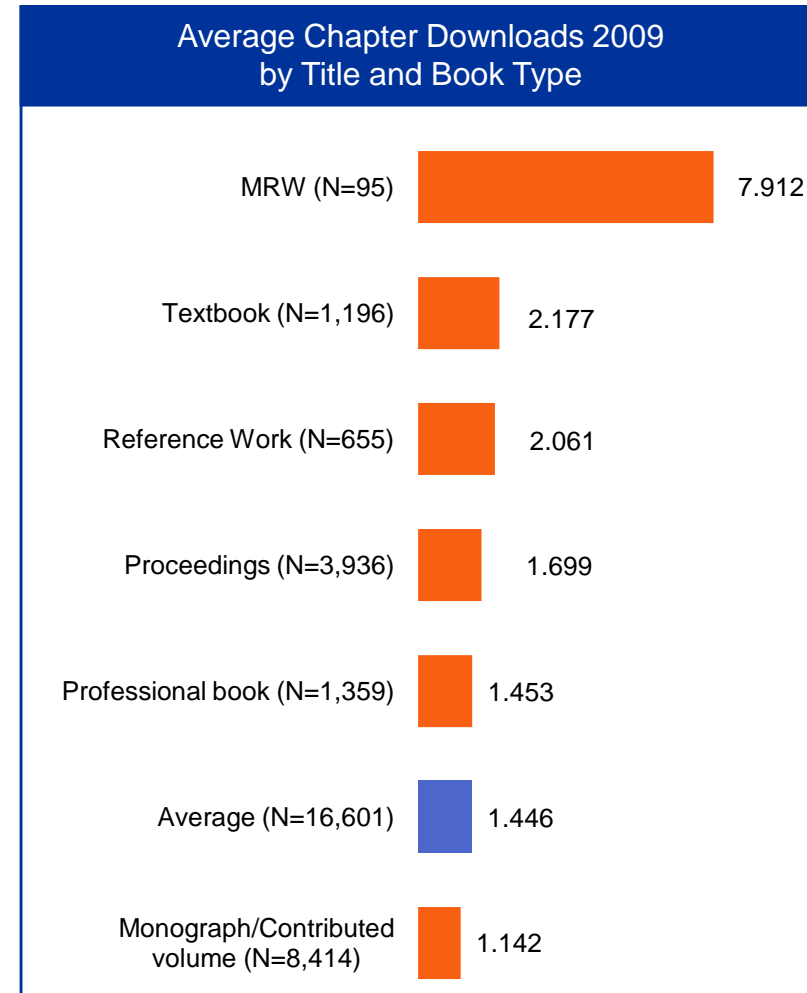


Legacy eBooks: chapter downloads in 2009

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- LNM 0.7m
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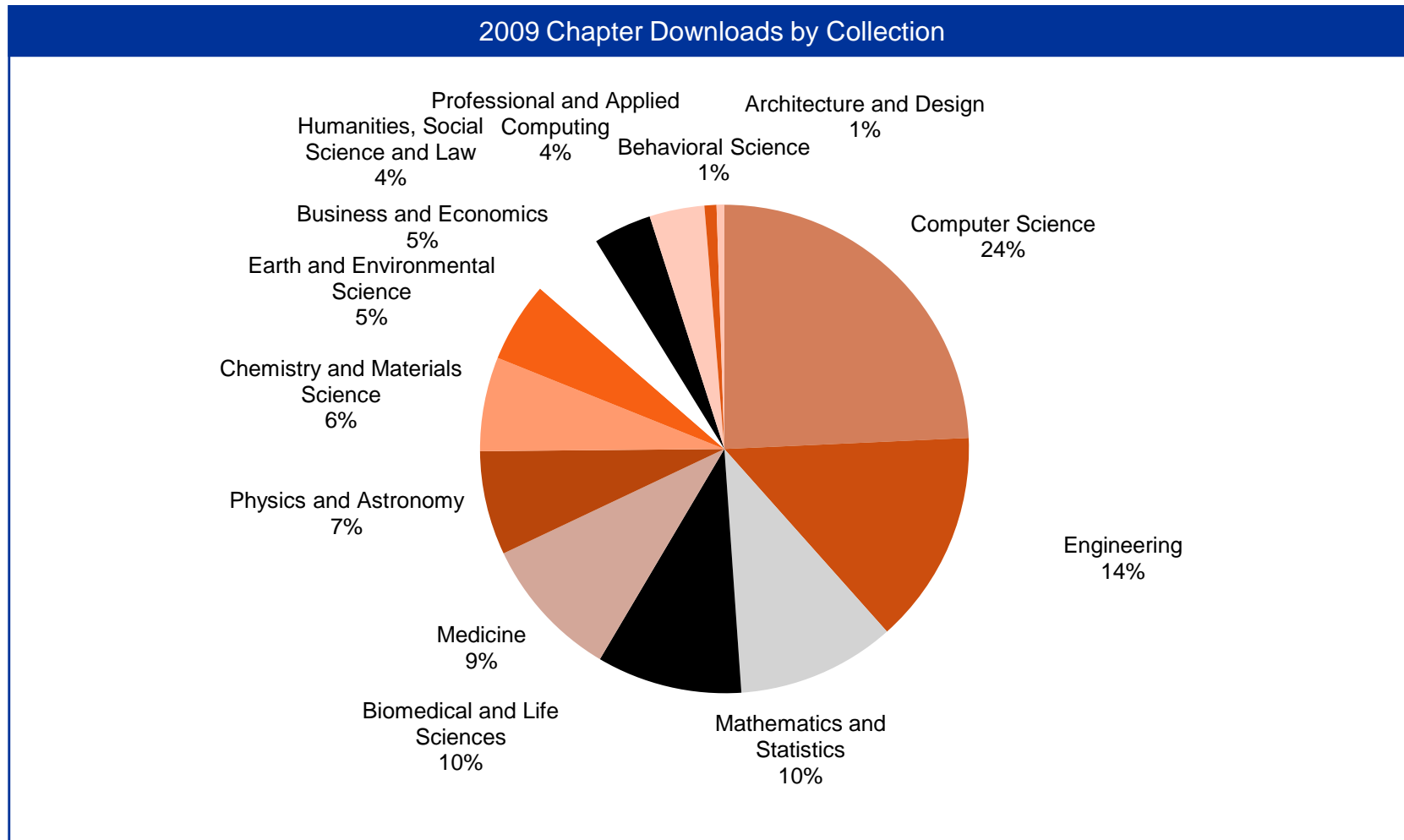
Chapter Downloads by Book Type – English Language Titles

- The average title in an English language eBooks collection (CY 2005-09) received 1,446 full-text chapter downloads in 2009.
- (Major) reference works and textbooks have proven to be particularly popular with users. Clearly at the top are the MRWs, with an average of 7,912 chapter downloads. However, an average MRW contains almost 1,400 sections, putting the high number of downloads somewhat in perspective.



(Only major categories are shown; Reference Works include Encyclopedia, Handbooks, and Reference Works; excl. Protocols and legacy titles; data adjusted for abnormal usage spikes due to massive downloading)

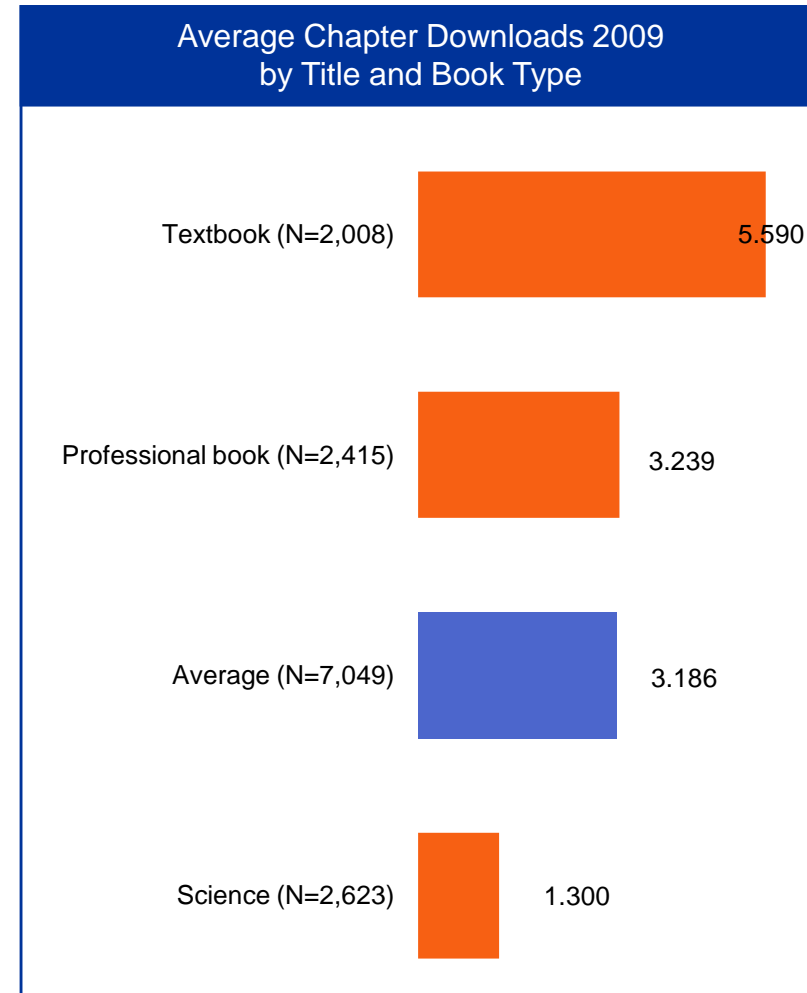
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Chapter Downloads by Book Type – German Language Titles

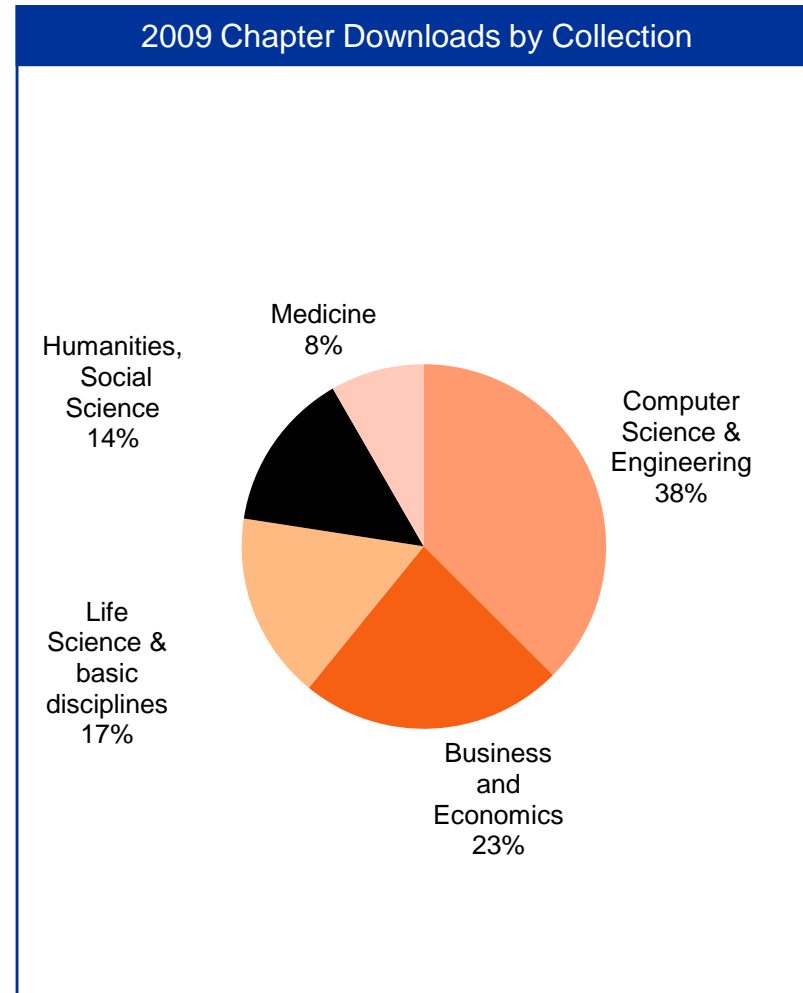
- The average title in a German language eBooks collection (CY 2005-09) received 3,186 chapter downloads in 2009.
- German language textbooks are extremely popular, with the average title having more than 5,500 downloads in 2009.
- The professional book program seemed to be also highly attractive to SpringerLink users in the academic and corporate environment, while the scientific books (mostly dissertations from GWV) showed lower download numbers on average.



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Chapter Downloads by Collection – German Language Titles

- In 2009, the German language eBooks collection Computer Science & Engineering received 8.4 million chapter downloads, making it the most used collection by far.
- Second comes the Business and Economics collection with 5.3 million downloads, followed by the Life Science & basic disciplines (3.7 million), Humanities, Social Sciences (3.2 million) and the Medicine collections (1.9 million).

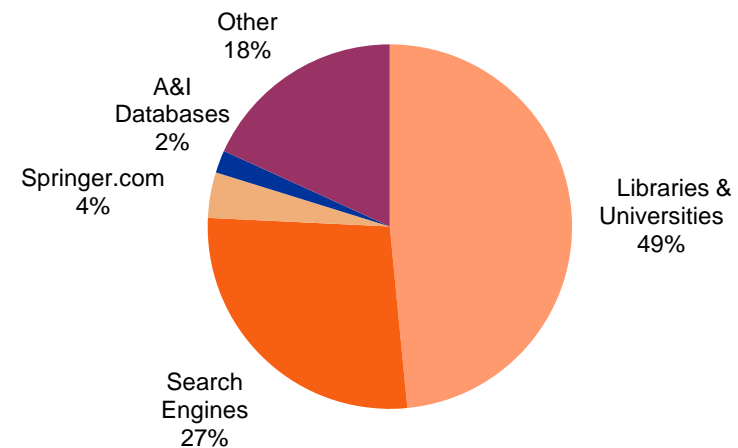


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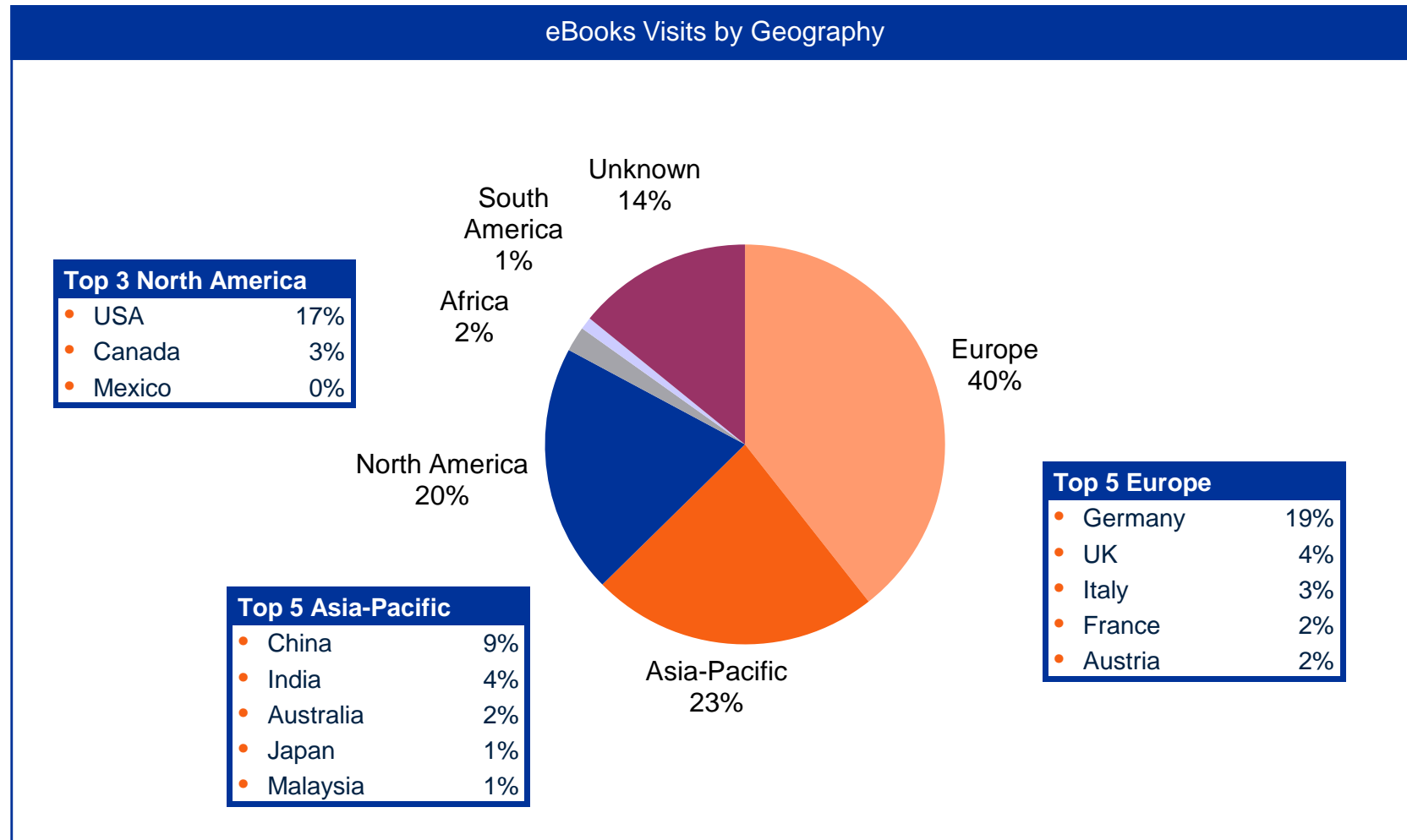
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Chapter Downloads by External Referral



(Source: Coremetrics, Jan-July 2009, excluding Direct Loads and Internal Referrals)

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Source: R&D Magazine: Global 2009 R&D Funding Forecast

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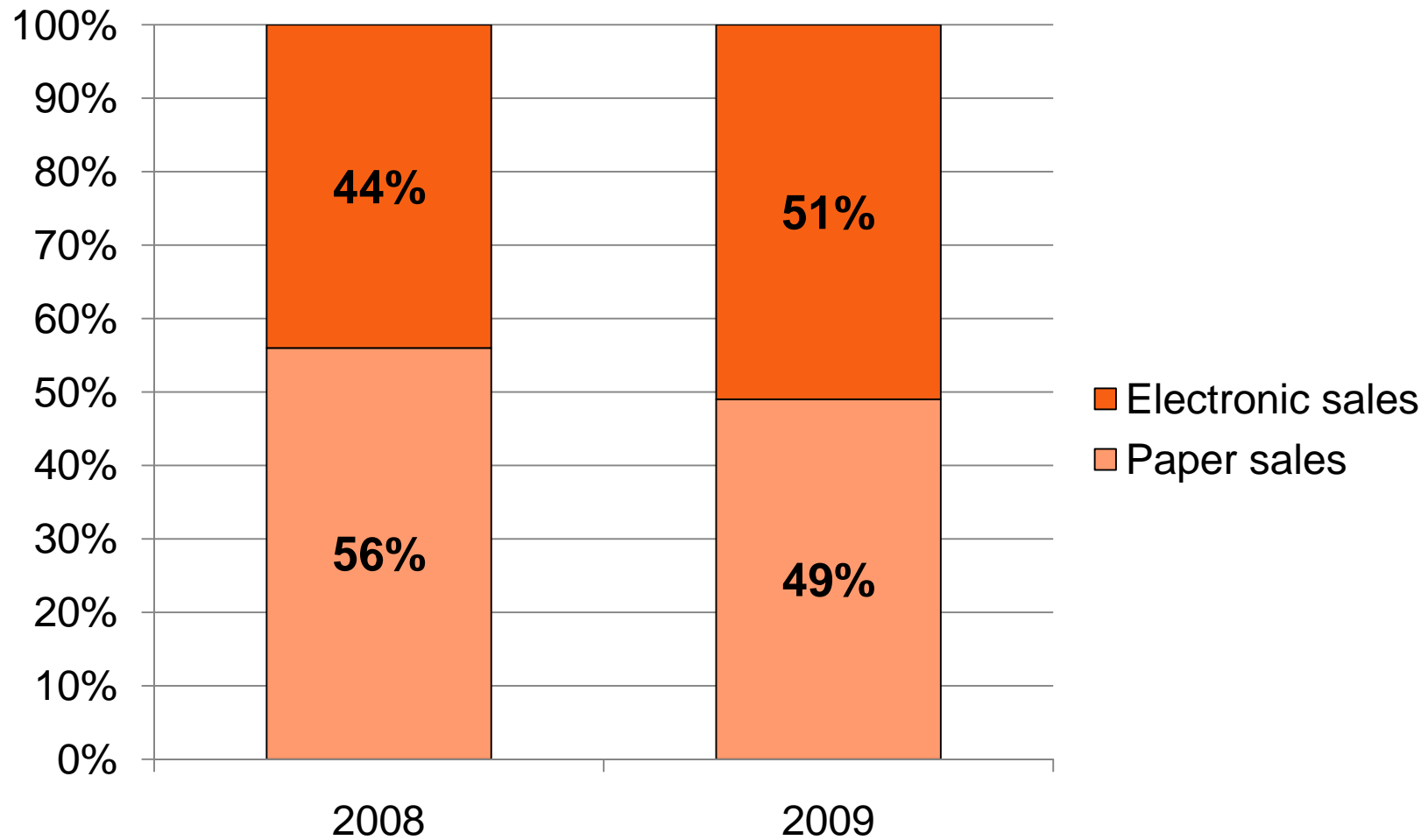




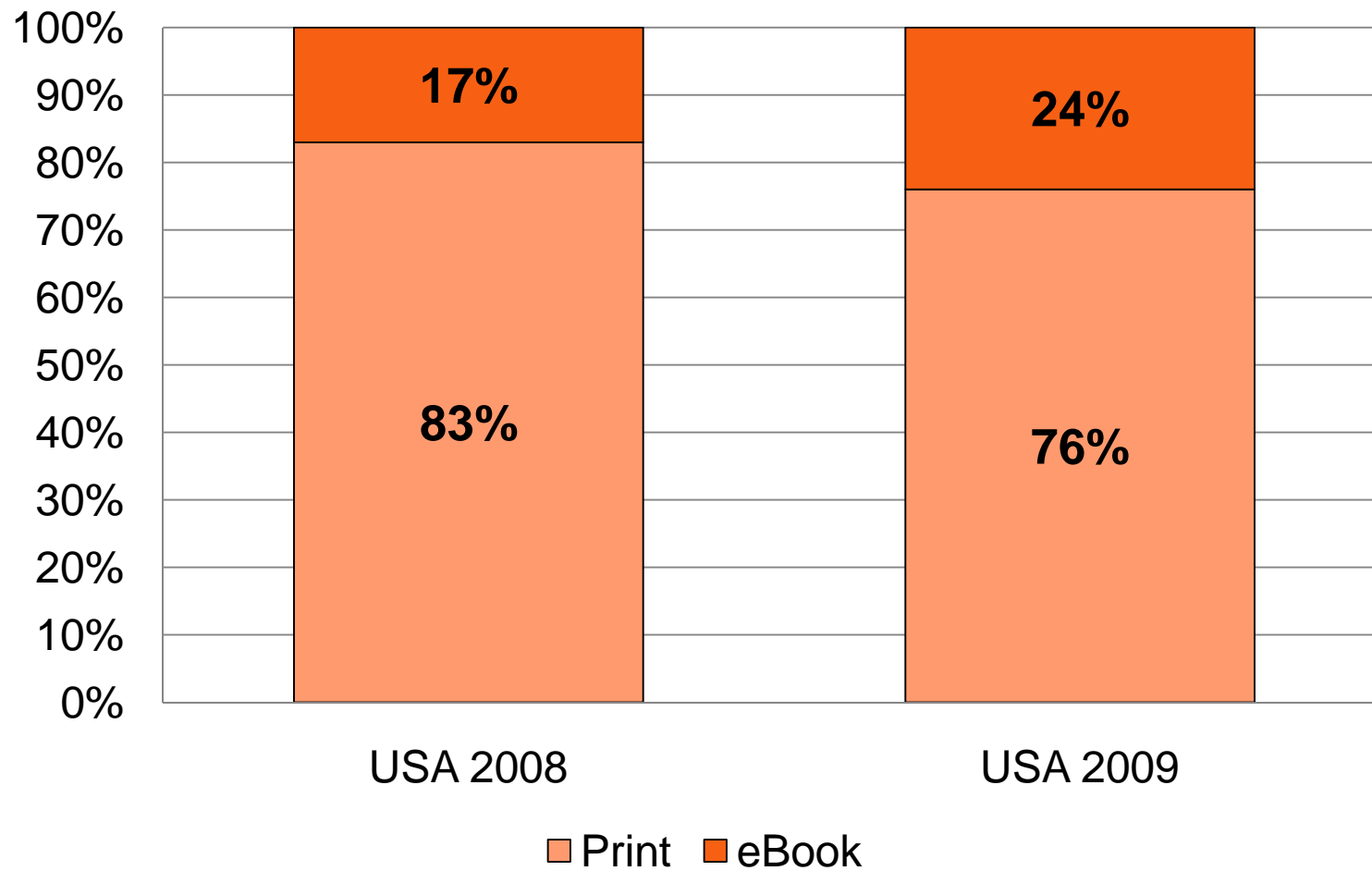
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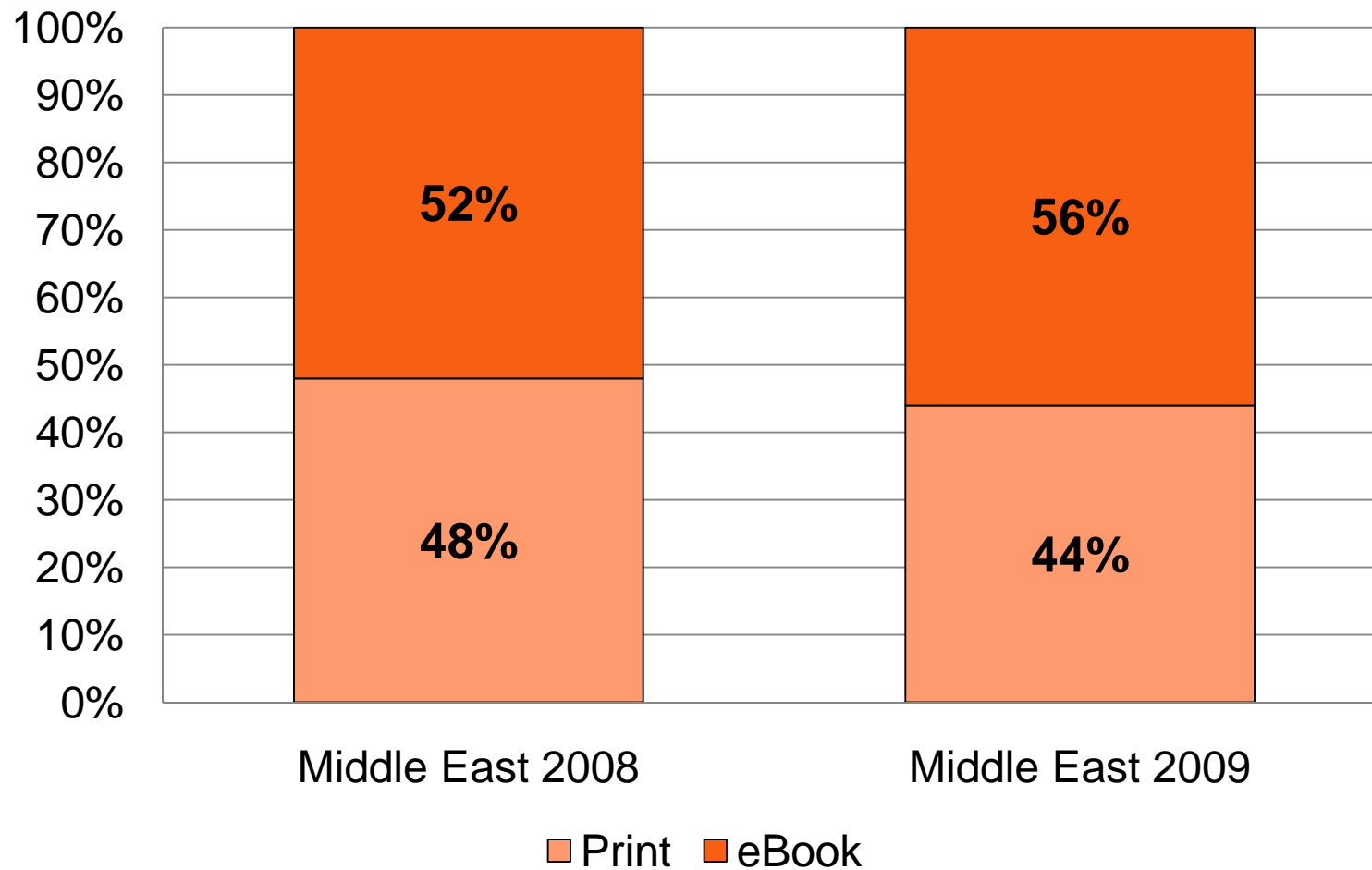
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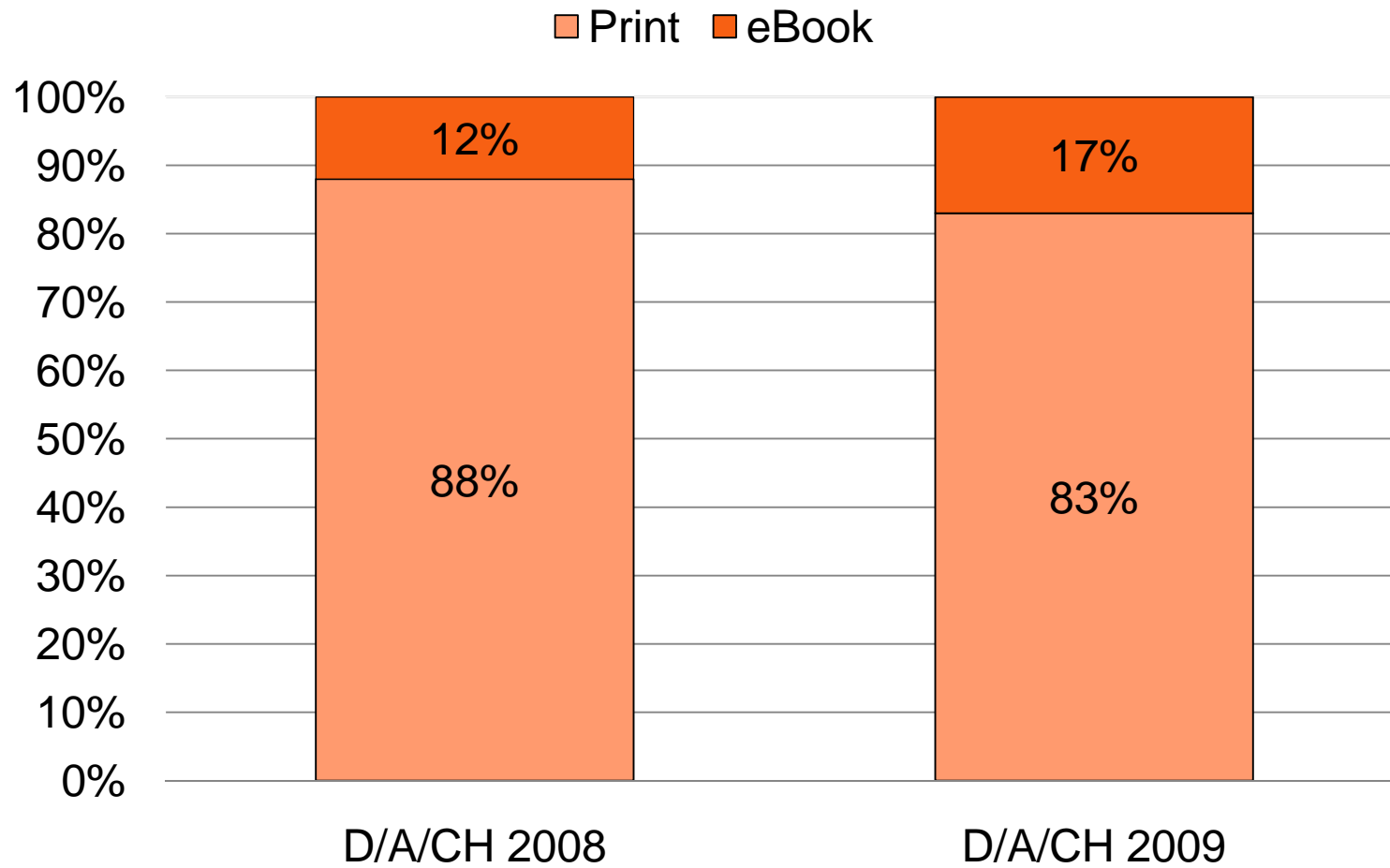
Print versus e-book sales



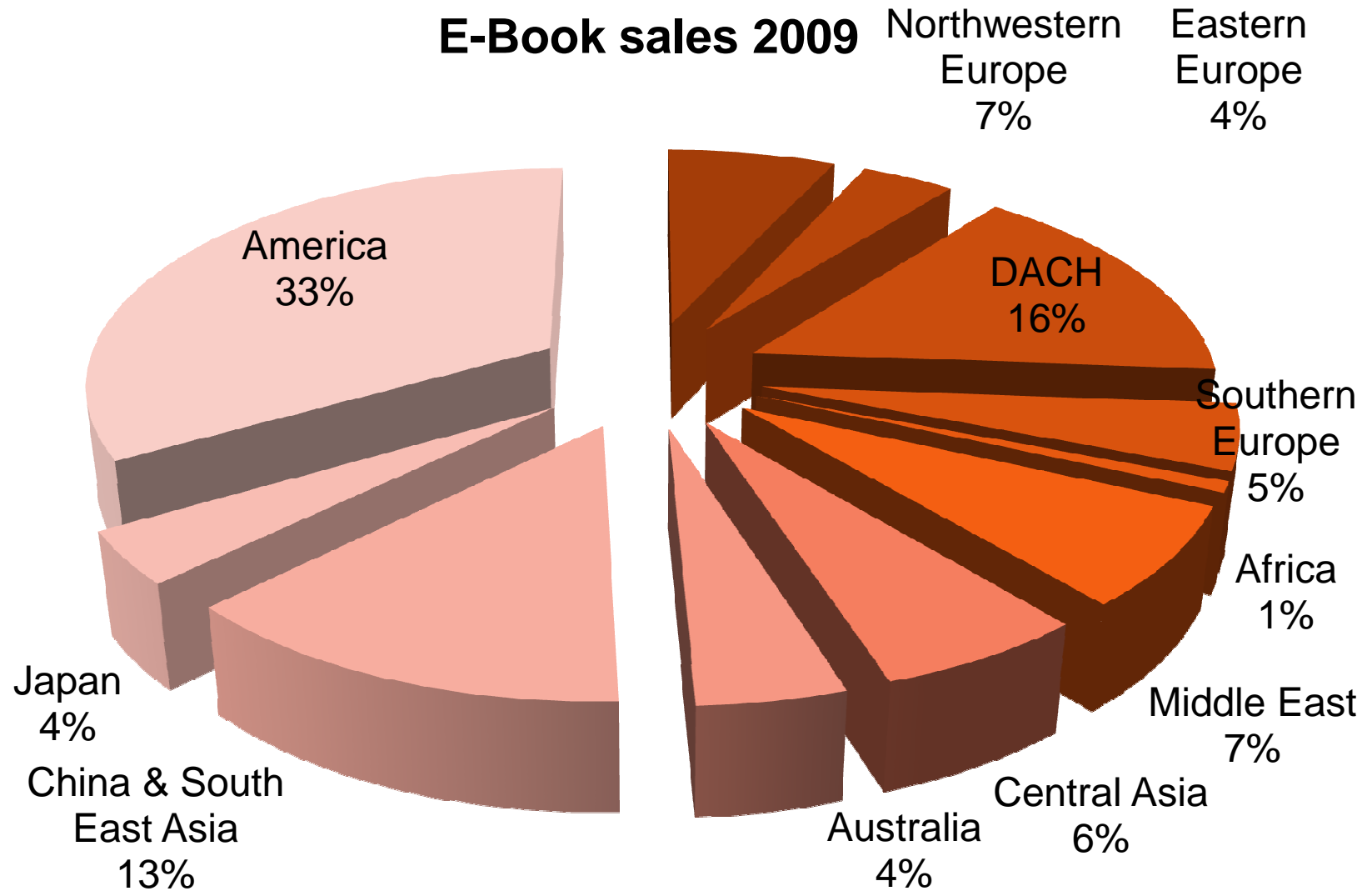
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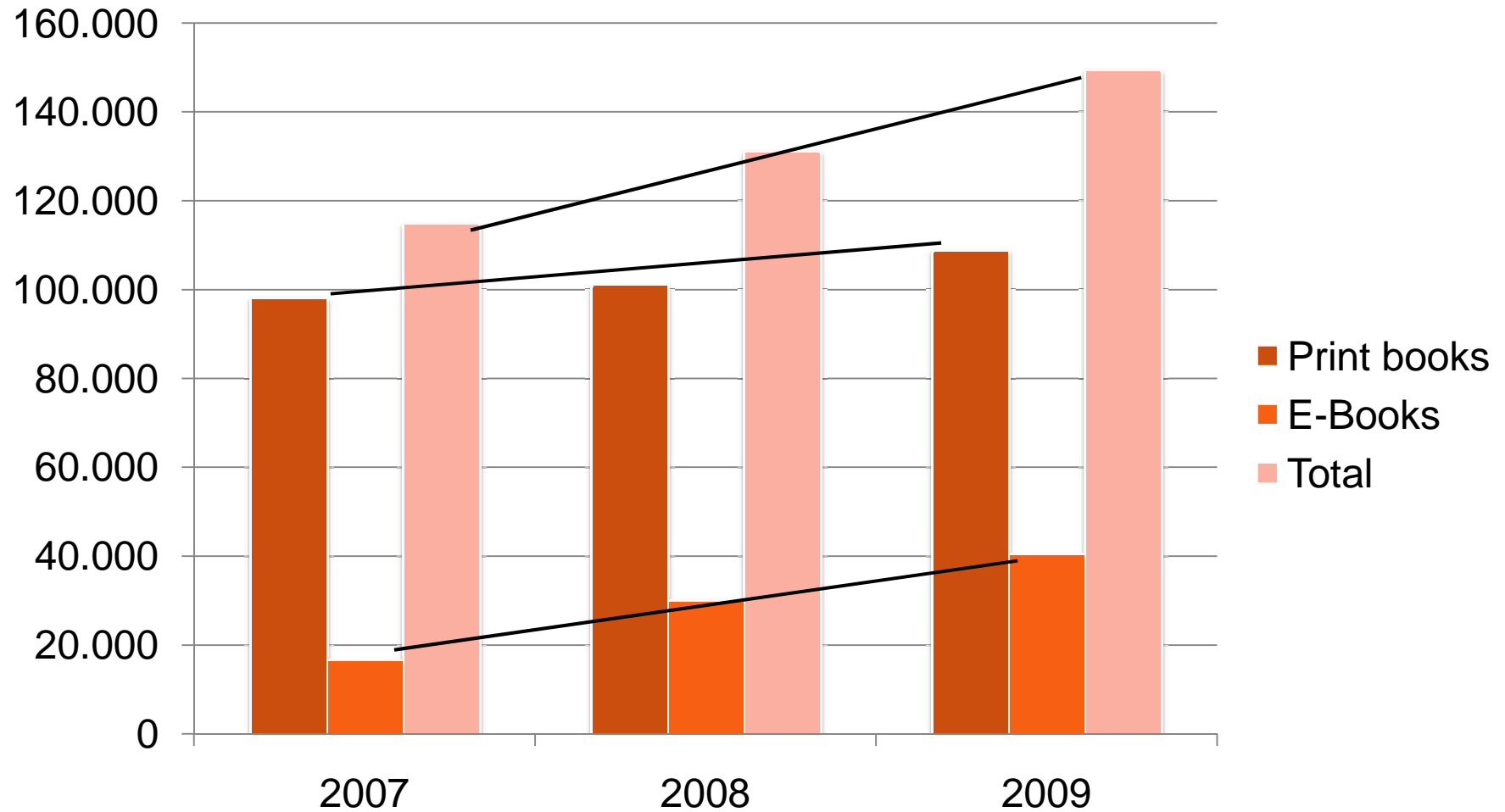
Print versus e-book sales



E-Book sales 2009



Booksales in total



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Via Aggregators

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A Christmas Carol

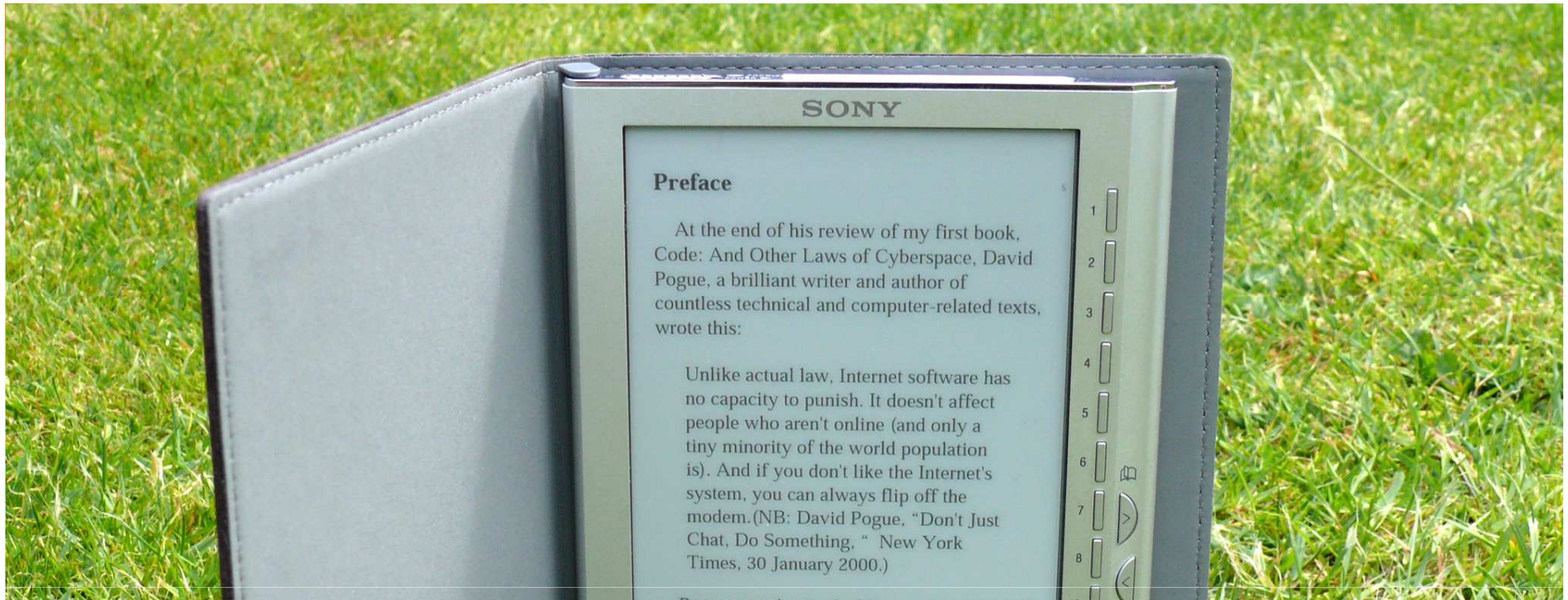
"Let me hear another sound from you," said Scrooge, "and you'll keep your Christmas by losing your situation! You're quite a powerful speaker", sir," he added, turning to his nephew. "I wonder you don't go into Parliament."

"Don't be angry, uncle. Come! Dine with us to-morrow."

Scrooge said that he would see him—yes, indeed he did. He went the whole length of the expression, and said that he would see him in that extremity first.

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Dagmar Laging

Vice President Sales D/A/CH

dagmar.laging@springer.com