



# CCC Debuts as a Reseller to Cater to Biotech Start-Ups

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The lack of robust, systematic, and affordable research access leaves many emerging startup organizations with no option other than to beg, borrow, or steal. CCC's new subscription solution looks to solve this dilemma by offering an affordable solution that maintains the rights of publishers.

## What to Know and Why It Matters

Copyright Clearance Center (CCC) has announced a new partnership with Wiley to provide small and medium-sized enterprises (SMEs) with subscription access to research journals in Wiley's portfolio. As a part of CCC's RightFind suite of products, the subscription solution for emerging life sciences and biotech companies will be available to existing RightFind customers globally. While the primary target market is the emerging life sciences and biotech SME market, customers will have access to all of Wiley's portfolio, including society-owned journals, across all disciplines, directly within the RightFind platform.

The SME market has long been underserved by existing subscription license solutions, which can be too costly for small organizations, and document delivery models that are not cost-effective at scale.

Publishers of all calibers have struggled to find profitable and serviceable solutions for the SME market. Larger publishers find it impractical to divert resources from their key accounts, while smaller publishers lack the infrastructure to serve SMEs.

In rolling out RightFind for Emerging Life Sciences, CCC debuts as a content reseller in addition to its well-established role as a licensing expert, data integrator, and provider of content workflow and analytics solutions. It leverages its capabilities as a multi-faceted service provider with a robust infrastructure to develop this niche solution cost-effectively.

## Analyst Rating: Positive

The new service from CCC looks like a win-win all around. It meets market needs while keeping user budgets under control and providing publishers with an additional distribution channel. CCC's new role as a reseller of content offers the opportunity to uncover and serve pockets of demand, which it is uniquely positioned to serve at a competitive price point since no new infrastructure is needed. Outsell expects the stickiness of the new service to withstand the pressures from the growing volume of open access research in the long run due to the package nature of the solution.

## Winners and Losers

In the short term, CCC is building on the status quo for both its publisher partners and end-user clients, bringing incremental efficiencies for both parties. Wiley and any publishers joining the initiative in the future stand to grow their critical recurring revenue metric attributed to subscription. Recurring revenues have acted as a lifeboat for information providers during the pandemic, making this metric the one to watch for investors, in the case of Wiley. Emerging companies will gain a better handle on their information budget spending and insight into their information consumption habits.

There are also implications for the larger scholarly communications marketplace. By making a case for subscriptions, CCC puts the value of document delivery services under scrutiny while protecting its margins by redirecting the demand to a different channel. Its competitors in the document delivery business, such as Reprints Desk, will need to adjust their offerings and their communications to address the new option delivered by CCC. Unsub, a proponent of replacing subscriptions with open access supplemented by interlibrary loans and document delivery services, will also want to keep an eye on CCC's next moves since CCC is eroding Unsub's business case against subscriptions.

Finally, in Outsell's opinion, the leading resellers of standards — IHS Markit, Techstreet, and SAI Global — need to put the new CCC service on their radar since serving smaller companies with standards documents is a well-known pain point of the standards publishing market. CCC leads with copyright protection in all its offerings and brings a document management platform as part of the package, making for an attractive proposal for standards developing organizations looking for additional distribution channels.

## What's Next

CCC's initiative is both pertinent and timely.

According to the US Small Business Administration Office of Advocacy, businesses with fewer than 500 employees account for 48% of American jobs and 43.5% of GDP. The picture is similar in the rest of the developed world. While the full effect of the pandemic remains to be seen, it is obvious that this segment of the economy has been hit the hardest, is cash-strapped, and needs to rethink its budgets line by line.

Aside from the most recent events, small and medium-sized businesses have been the neglected plurality of every information provider, with sales too low per account to dedicate sales and marketing resources for a tailored approach. In many cases, individual document delivery was a compromise for both information providers and

users. Tailored collections of documents addressing the needs of a specific industry at an attractive price point are the next level up from purchasing individual documents. However, this approach still falls short of a subscription to a complete portfolio of content, limits discovery for the user, and increases overhead costs on the part of the publisher. Unfortunately, in some cases, underconsumption and illegal consumption of information has stemmed from the lack of an efficient channel serving small and medium-sized businesses.

Biotech companies chosen for the CCC/Wiley pilot also provide an accurate reflection of the increasingly fragmented demand of the data, information, and analytics marketplace. Emerging biotech companies typically have a very narrow scope of research, making traditional bundle subscriptions unattractive. Such users select information providers prepared to cater to their niche needs at the most comfortable price point. As a result, the market is migrating from bundle offers for the majority to offers meeting the niche requirements of smaller subsegments of users.

To fulfill the promise of its offering, make it resonate across the scholarly communications ecosystem, and prompt growth in small business subscription levels, CCC needs to promote it actively outside its current customer base.

The Wiley portfolio included in the pilot extends beyond the life sciences and biotech, and CCC's offer is open to any emerging company interested in signing up. Therefore, in addition to startups in biotech, CCC's focus needs to be on businesses with a high demand for scientific and technical literature, like engineering companies acting as Tier 2 and Tier 3 suppliers to the automotive or aviation industries.

CCC also needs to enroll publishers outside its customer base, looking to efficiently capture the mid-sized and small business audience while protecting their copyrights. CCC's reach is global, appealing to publishers like the American Association for Clinical Chemistry, Mary Ann Liebert, Springer Publishing, and Biochemical Society. These publishers may have their domestic markets under control, but they need support taking their business to the international arena.

Standards development organizations looking for additional distribution channels, such as the American Institute of Aeronautics and Astronautics, also qualify as CCC publisher partners, especially since there is minimal pressure to provide documents outside paywalls in this subsector of the publishing marketplace.

## Essential Actions

The diversification of delivery channels is the core of the value proposition of RightFind for Emerging Life Sciences. It is a key strategic imperative for most publishers, regardless of their size or discipline, especially as better data allows for ever finer

market segmentation. Here are a few points to keep in mind for executives defining their market and channel strategy.

### ✓ **Limit the Number of Market Segments**

Marketing analytics allows segmenting the market in an infinite number of ways. Information providers need to exercise caution when picking which segments to add to their marketing plans. Segmenting the market too finely will add to the marketing overhead without delivering any tangible ROI, especially when there are multiple user personas within one segment. Given the abundance of data, deciding which segments not to serve is as essential as it is challenging.

### ✓ **Offer a Package Deal**

RightFind for Emerging Life Sciences is bolted onto the existing RightFind suite. Therefore, it is not a subscription offered alone but a package of services available from a single platform, with discovery being a prominent feature.

For information providers, the approach of offering a subscription with additional value-added features is becoming common and needs to become the default. By delivering users a package deal, information providers add to the value proposition of any subscription they are selling, enhance discovery, and improve the stickiness of their products.

### ✓ **Take a Snapshot of User Data in the Fall of 2021**

Having heaps of user data is a goldmine when it comes to uncovering pockets of demand. Mid-2021 is the perfect point in time to tackle user data analysis — most knowledge workers have been working remotely for over 15 months. Information providers now have complete pictures of “before” and “after” when it comes to remote access, site-based vs. user-based access, and other changes in demand brought by a location-independent workforce. Outsell recommends taking a snapshot of user stats in September 2021 before the world moves to a hybrid office mode and the next layer of complexity enters the equation.

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