

Lost in Translation: how today's trends will affect tomorrow's libraries

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My name is
Marshall Keys,
and
I am a librarian

Does this sounds like the beginning of a twelve-step process?
Librarianship is an addiction!

How do I know I am a librarian
when I haven't worked in a library for 17
years?

Because I'm at a conference on a Saturday morning!
But it's not Saturday, Marshall,
and we're in a seaside hotel,
just like doctors!

The news is in: medical librarians are professionals!

I think library,
therefore I am a librarian

- I follow library issues
- I think about library issues
- I train myself to look at the environment and ask "How would that affect libraries?"
- When I read that the FDA has licensed a company to implant RFID chips into people, I ask, "What does it mean for libraries?"

How I differ from librarians who work in libraries

- New Urbanist Andres Duany:
“You are the experts on the present. I am the expert on the future.”
- I’m no expert, but I have more time than most of you to think about broad issues
- Sometimes I get *paid* to think about them!

What working librarians are thinking about

- Insufficient funding/Insufficient staff
- Insufficient or ineffective space
- Staying current with technology
- Balancing workloads
- Retaining top performers
- Uninformed and unsupportive stakeholders

Outsell “Information about Information Briefing” 6:20 September 19, 2003.

What I am thinking about

- The way people are changing
- The way technology is changing and the way it isn’t
- The way work is changing
- The way the library business is changing
- How these are related
- What the implications of these things are for the future of libraries

A bit of theory: growth curves

A bit of theory: chaotic transitions

Chaotic transitions in practice: recorded music

- Cylinders
- 78 RPM
- 33 1/3 RPM
- 45 RPM
- 8 Track
- Cassette
- CD
- DVD
- MP3 etc

Tools for making sense of chaos

- Environmental scans: what's really happening out there?
- Historical studies: what were the results when this happened in the past?
- Scenario planning: what should we do if this trend continues?
- Lessons learned
- Benchmarking

Ten chaotic transitions:

- Demographic transitions
- The transition from an industrial to a knowledge economy
- The transition to a global environment
- The transition in library work
- Economic transitions
- The transition to digital documents
- Technology in transition
- Infrastructure in transition
- Paradigms in transition: culture wars
- Defending the brand

Why these issues matter

“Successful organizations share a powerful understanding of what rapid social and economic change mean for consumers needs and wants.”

Nancy Koehn, *Brand New*, 2002

Some things I'm trying to make sense of now

- *The Gray Album*
- Tommy Hilfiger knockoffs
- the RIAA, the MPAA the APA and their opponents
- Google and peer to peer sharing
- The phrase “marriage is a sacred union between one man and one woman”
- Canadian drug stores
- What do these have to do with each other?
- And what do they have to do with libraries?

Some common themes

- Globalization
- Personalization
- Demographics
- Portable technology
- Intellectual property

Chaos theory: almost poetry

“The flapping of a single butterfly's wing today produces a tiny change in the state of the atmosphere.

Over a period of time, what the atmosphere actually does diverges from what it would have done.

So, in a month's time, a tornado that would have devastated the Indonesian coast doesn't happen. Or maybe one that wasn't going to happen, does.

Ian Stewart, *Does God Play Dice? The Mathematics of Chaos*, pg. 141

Chaos theory: science

Small changes in inputs lead to large changes in results

Lost in translation, or "It's all ginza to me!"

Photos of chaotic Ginza environment and Bill Murray looking dazed

"What's a cassette?"

Young woman to young man on the MBTA subway, Boston,
January, 2002

Buzznet

Photos of cowboy boots and comments thereon

The blog mentality

- What *I* think is important
- What I think is important to other people
- Things are important *because I think they are important*: the "whatever" corollary:
- If *I* don't think it's important, it isn't important
- "Esse est percipi":
- 51% of Bloggers are between 13 and 19, 90% under 30
- Privacy is unimportant; community is important
- Bloggers are your users, your users-to-be, and the next generation of library staff!

Michael Gorman on the Web

"I don't always think people's opinions are worth reading," he says.

"They should not be published. I really like the filtering that publishers do. You don't publish maundering."

"What's the Difference Gorman vs. Stripling?" by John N. Berry III – LJ 3/15/2004

"Back in the 1980's, when I attended high school, there were

- No cellphones

- No answering machines
- No “texting”
- No MP3’s
- No JPEG’s
- No digital cameras
- No file sharing software
- No Worldwide Web”

“My so-called Blog”, Emily Nussbaum, *NYT Magazine* Jan 11, 2004

Buzznet depends on personal and personalized communication

The phone up close: personalization

- Download ring tones that sound like the real thing
- Personalize your phone by saving your own pictures as Wallpaper
- Jazz up your phone with full color pictures and Wallpaper
- Interchangeable faceplates let you personalize your phone to suit your style
- *You are unique even though you are just like everyone else*

The phone up close: information appliance

- Send and receive e-mail
- Send quick notes to your friends using text messaging, AOL text messages
- Look up your horoscope or local information on movies, the music scene or whatever!
- *You are no longer tied to boring old stuff like computers*

The phone up close: the phone ‘n’ more

- Use your phone as a modem
- Take pictures with the camera and send them to any e-mail address or T-mobile phone
- *Nowhere does the advertisement mention using the phone to talk to people!*

Trends: camera phones

75% in Japan, 6% in US in 2003

Geoffrey Moore's Model Technology
adoption

(*Crossing the Chasm*, 1991)

From early adopters to laggards

Metcalfe's Law

$N(N-1)$

The value of a communication system grows as the
approximate square of the number of participants

Robert Metcalfe, inventor of Ethernet

And leads to

A world of ubiquitous, multi-media communication: Japanese girls
with camera phones

Trends: social networking

Friendster

And leads to changing models of acquiring
information

- Solitary activity
- Formal resources
- Authority
- Peer to peer
- Social networks
- Being in touch all the time everywhere

But wait, there's more!

“The mobile phone has become a remote control for life, . . . 'the device formerly known as the cellphone,” says Geoffrey Frost, of Motorola,

Panasonic has a webcam controlled and viewed from a mobile phone. “Set up one in your home, and you can check in remotely, panning around and zooming in....”

Clive Thompson “Remote Possibilities” *NYT Magazine*, 11/16/03

More phones plus

Movie phones, game phones, music phones, video recorder phones

The predictions business

"Video won't be able to hold on to any market it captures after the first six months. People will soon get tired of staring at a plywood box every night."

- Daryl F. Zanuck, 20th Century Fox, commenting on television in 1946

What does it mean to libraries?

- Users for whom the phone is a/the primary information device
- Phone interface to local systems
- Phone interface for web accessible information resources
- Reference through text messaging
- Reference through camera phones and web cams
- Bandwidth and graphical interface issues

What does it mean to society?

“Camera phones mean we're living in a world with a million prying eyes.

'We're going to be living in the panopticon,' says Gordon Gould, ... 'If you want to do something bad, you'll have a million eyes on you. You'd better get used to it.'

Clive Thompson “Remote Possibilities” *NYT Magazine*, 11/16/03

Suddenly, last summer

“Camera phones roiling gyms”

The Wellbridge Health and Fitness Center chain in Boston slapped a ban on wireless camera phones this summer, as has San Francisco's 24 Hour Fitness. Town Sports International restricts use of any cellphones to lobbies and stairwells. Peter J. Howe, *Boston Globe*, 11/8/2003

What does it mean to the information industry?

“In Japan, bookstores complain of "digital shoplifting"; instead of buying magazines, readers snap pictures of stories and bulk-forward them to friends: ‘It's like a Napster thing -- anything you see in the environment becomes something you can easily capture and share.’”

Thompson; see also “Cell phone cams spreading mischief”, Yuri Kageyama, Associated Press, July 10, 2003

Chaotic transitions in intellectual property

‘It's like a Napster thing -- anything you see in the environment becomes something you can easily capture and share.’

Industry responds with lawsuits And users counter Earth Station 5 ES5's competitive advantage ES5 controversy

Posted: Mon Feb 23, 2004 9:00 pm

Post subject: -----the article says the downloaders aint safe i really dont care if they see my ip from downloading it is sharing that i use proxies for and they say they

can easily target es5 then why havent they so what if es5 lied and they aren't in Palestine *i dont care if they are located in my backyard as long as i get my files* -- bennyboy 2

If not Jenin, then Vanuatu “Canadian court prevents suits against music sharers”

Justice Konrad von Finckenstein ruled that downloading a song or making files available in shared directories, as facilitated by the popular "peer-to-peer" service Kazaa, does not constitute copyright infringement under Canadian law.

"I cannot see a real difference between a library that places a photocopier machine in a room full of copyrighted material and a computer user that places a personal copy on a shared directory linked to a P2P service," he said.

Associated Press, 4/1/2004

“US court: Software can't commit piracy”

- “Truly decentralised peer-to-peer (P2P) software can't be held accountable for its misuse, according to a US federal appeals court.

The decision, by the 9th US Circuit Court in Los Angeles, threw a major brick in the path of entertainment companies which have been trying to have the courts shut down companies running the P2P networks.”

National Business Review Online 8/22/04

RIAA responds with technology: “Recording industry discloses methods to track downloaders”

“The industry disclosed its use of digital fingerprints that can identify MP3 music files on Napster as far back as May 2000.

The recording industry is [also] examining so-called "metadata" tags, hidden snippets of information embedded within many MP3 music files.”

Boston Globe, Aug 28, 2003

Publishers respond with technology: DOI

MPAA responds with technology:
broadcast flags

“flags are not intended as an anti-piracy method. It's a technology to prevent "casual" file traders from parsing the flag out of the content. [An expert] user could hack into their broadcast receiver and take the flag component out of the box, allowing for distribution. However, the MPAA is confident "most consumers will not hack their devices.”

“Broadcast Flags Scorned by Silicon Valley”, Jim Wagner, March 15, 2004, Internetnews.com/xSP/article.php/3326341

But the cat is out of the bag
The Gray Album

Chaotic transitions in the content business
Elsevier's stock performance

Chaotic transitions in business models
“CORNELL BUCKS THE BIG DEAL, WILL NOT RENEW ELSEVIER PACKAGE”
“Triangle Research Libraries Network to Forgo the Big Deal”
“WISCONSIN DOING WITHOUT THE BIG DEAL BY DOING WHAT LIBRARIANS DO BEST”

The publishing industry responds: changes in
business models

“SEVEN VIRGINIA LIBRARIES INK NEW ELSEVIER DEAL”

The deal is a five-year contract that will provide access to more than 1,800 scholarly publications. Although no specific price was released, the new deal increases by 50 percent the number of titles available, for roughly a five-percent increase in cost. The deal also caps inflation over the next four years and offers an exit clause for each individual library in the case of future "financial emergencies."

LJ Academic Newswire, March 30, 2004

California Digital Library buys

And then, the big chill

“Google and Research Libraries Launch Massive Digitization Project”

by Barbara Quint

Information Today 12/20/04

The publishing industry responds to
economic conditions: consolidation

Example: “Taylor and Francis Buys Marcel Dekker for \$138,600,000”
in November, 2003

The library system marketplace: More
consolidation

How venture capitalists work

“British Private Equity firms Cinven and Candover buy Kluwer
Academic for €600,000,000”

“Bertelsmann sells Springer to Cinven and Candover for
€1,100,000,000”

“Cinven Candover plan to sell Springer, Kluwer in three years” May, 2003

Venture capitalists expect a 20% annualized return on money
invested in an established business

The library industry: consolidation

- **B&T Sold to Willis Stein & Partners; Richard Willis Named
CEO**

LJ 7/7/2003

- **Newly Acquired Baker & Taylor Lays Off 150**

LJ 10/3/2003

Pogo Cartoon:

“We have met the enemy and he is us”

The Big Box Economy

The library marketplace: untenable business models

- Market dominance strategy
- “We’ll sell at a loss and make it up on the volume!”
- “When we have ‘em hooked, we can charge what we want!”

Well, untenable business models

Plus greed, stupidity, or (Photo of Dick Rowe)

Price drives manufacturing offshore

Price drives service work offshore

“A credit card call center in Moombai generates the same revenue as a call center in Austin, Texas, at a fraction of the cost.”

Warren McFarlan, Harvard Business School, June 2001

Or to Colorado Springs

“Pull off Interstate 55 near Cape Girardeau, Mo., and into the drive-through lane of a McDonald's next to the highway and you'll get fast, friendly service, even though the person taking your order is not in the restaurant -- or even in Missouri.”

Price drives consumers offshore

Canadian drugstores

Price drives consumers offshore

Richard Sarkis and David Kinsley, surfing the net for cheap economics textbooks, discovered that the same textbooks used in the United States sell for half price or less in England.

Like prescription drugs, textbooks cost far less overseas. Publishers defend their pricing, saying that foreign sales would be impossible if prices were not pegged to local market conditions.

Thanks to the Internet, individual students and college bookstores are starting to order textbooks from abroad — and a few entrepreneurs, including Mr. Sarkis and his friends, have begun arbitrage businesses to exploit the price differentials.

- "Students Find \$100 Textbooks Cost \$50, Purchased Overseas" Tamar Lewin *NYT* October 21, 2003

The global market reality

The market price of any item today is the lowest price for which it can be obtained anywhere in the world

Price drives knowledge work offshore

Oracle plans to double its Indian workforce to 6,000.

Oracle's announcement comes as technology workers in the US step up opposition to what they describe as "a mass exodus of white collar jobs".

Keith Budge, Oracle's regional managing director, dismissed claims that Oracle was trying to cut costs.

"India has a tremendous amount of highly skilled software engineers and it's crazy not to take advantage of the quality of these people," he said.

© Financial Times 7/10/2003

Note: quality is as important as price

Indian Institute of Technology, Delhi (one of many)

How does it affect libraries?

Remember Ranganathan!

- Library services:
 - Technical services
 - Technology services
 - Reference services
- What is library service worth in a world market?
- Faster, better, cheaper: the moral issues

Issues that matter:

- You can't act locally without thinking globally: the dollar we save at Walmart is coming out of the pocket of an American worker
- Political boundaries are artificial, competition and markets are global; governments, organizations, and most individuals are completely clueless about this
- Few industries are exempt
- You have a duty to negotiate the lowest possible price; but will your vendor be there to serve you? How well?

Globalization:

the world comes here

- 28.4 million US residents (10%) in 2000 were immigrants:
 - 50% from Latin America
 - 26% from Asia
- Immigration: the average daily wage worldwide is \$2 per day.

Ethnicity and culture:

“May I help you, Señor/a Martinez?”

- Leo Martinez
- Lydia Martinez/Lidia Martinez
- Maria Martinez

Accommodation or assimilation?

Woman in hijab, girl in hijab being turned away from French school,
women in burka, many, many women in burka

“Marriage is the sacred union between one
man and one woman”

Men holding hands in church

“Marriage is the sacred union between one man and one woman”

Mormon plural marriage with many wives and children

Library issues

The library profession is committed to diversity, but how do we deal with

- Diverse holidays?
- Diverse work weeks? Weekend differentials?
- Diverse manners and mores?
- Ethnic conflict?
- Service issues?

Service issues: Somerville, MA

- Staff speak Chinese, French, Italian, Portuguese, and Spanish.
- Story time in English, Russian, German, French, and Spanish.
- Children’s materials in English, Chinese, Portuguese, Spanish and Vietnamese.
- Adult books in English, Chinese, Portuguese, French and Spanish.
- 18 foreign language periodicals
- Adult beginning reading materials, ESL materials, and ESL classes

But good news for the local system business!
Your next local system will routinely support multiple languages, just like ATM’s

Chaotic transitions in information technology

- Wireless networks are the current standard in library technology
- Ubiquitous computing is the next
- Where is the rest of the world going?

The predictions business
"There is no reason anyone would want a computer in their home."

- Ken Olson, president of Digital Equipment Corp., 1977.

A history of computing in 3 slides: Many people, one machine
A history of computing in three slides: One person, one machine

A history of computing in three slides:
One person, many machines

Charles Lax, a 44-year-old venture capitalist, is sitting in a conference at a hotel near LA, but he is not all here. Out of one ear, he listens to a live presentation while he surfs the Net on a wireless laptop, occasionally checking his Blackberry for e-mail.

Mr. Lax flew from Boston and paid \$2,000 to attend the conference. But he cannot unwire himself long enough to give the presenters his complete focus.

If he did, he would face a fate worse than lack of productivity: he would become bored.

"The Lure of Data," Matt Richtel, *NYT*, July 7, 2003

Changing technology
New information devices

The predictions business
• **"640K ought to be enough for anybody."**
- Bill Gates, 1981

[Apple Newton] An idea whose time
had not come
New ways 2002

- Ovid in Hand
- Innovative's AirPac

The tyranny of computing models

- Input
- Storage
- Processor
- Display
- Output

**All unified in a single device:
desktop, laptop, PDA, whatever!**

New ways: 2003
Distributed computing
Input

Laptops add at least four pounds to a backpack. So students take notes on hand-held computers with foldout keyboards. At Yale Divinity School, Kristen Dunn uses a Palm VX and a foldout keyboard. "It was the best money I ever spent in preparing for school."

"Existential Essentials" by Melanie D.G. Kaplan, *NYT*, 8/1/04

Distributed computing
Input [Virtual Keyboard]

Distributed computing
Storage [memory stick]

Distributed computing
Storage [Ipod]

Technology: Belkin microphone adapter

"Our customers wanted a better way to record lectures and interviews," notes Joe Jaconi, Sr. Business Unit Manager. "This gives iPod users a superb way to record and play these back."

You can use the iPod's abundant storage capacity to store hundreds of hours of audio and easily review your audio notes using the built-in jack with headphones or your computer.

Technology: iPod media storage

The Belkin Media Reader lets you back up digital images to your iPod.

iPod's storage handles thousands of digital photos and frees up your camera's disk space for more pictures.

Connect the Media Reader to your iPod, and insert any of six media types. Using software already built into your iPod, transfer the pictures quickly via FireWire. When you get home, connect your iPod to your computer to retrieve the images.

Technology: Linux for iPod iPod ebooks

Distributed computing

Processing [IBM Linux watch]

Distributed computing

Display [electronic paper, webwalls, video glasses]

Distributed computing

Output [Project Oxygen MIT]

Changing technology

New ways to find information

Old ways: portals

New ways: personalized portals

At RIT every student [can] create a Web portal that presents a personalized version of the university's Web site, similar to a My Yahoo page. During customization, students decide which information they would like to have regularly updated. That tells an RSS reader built into the software which feeds to collect. About half the institution's students have created personalized versions of the Web site [to] get updates on campus news and events.

'Students live on the Web today,' [web manager Jeremy] Trumble says. 'They don't look for a paper. They don't go looking to find information. They want information brought to them.' *Shifted Librarian Feb 12, 2004*

Personalization

Mass customizers need to be user-focused.

I don't have a user account at [X Corp]. The concept doesn't exist on the site.

This means there's nowhere I can go to see [what] I ordered before, what . . . options I chose, or how much I paid. I can't simply request the company [give me the same thing again]. "Personalization, Meet Mass Customization", Jack Aaronson, October 16, 2003
www.clickz.com/experts/crm/crm_strat/article.php/3091931

The Amazon experience

- What I looked at before
- What other people looking at the same topic have looked at
- What they think about what they looked at
- What I might like to look at based on what I looked at this time
- But what about privacy?
- What would ALA say?

Old ways: search engines

Search engine with social networking

The problem with peer-to-peer

- What if all your friends are stupid or uninformed?
- What about Google and its algorithm?
- GIGO?

New ways: knowledge maps

Grokker

Anacubis

New ways: classification browsers

- Antartica
- Belmont Abbey College
- Visual interface for all holdings in LC order
- Mapped to a stylized bookshelf
- All formats appear in the same place for browsing
- Newest first

New ways: classification browser [Sirsi's Rooms]

New ways: context management

The issue: size vs content

- Rich graphical interfaces versus miniaturization
- Bandwidth versus portability
- Personalized, personalized, personalized

Beyond browsers

"At barnesandnoble.com, at least eight companies pitched creating a virtual 3-D bookstore where customers could browse, walk around, interact with others, and purchase merchandise.

In 1999 this made no sense. People using the Internet through a Web browser would rather just use the two-dimensional store. The browser was a two-dimensional medium. It still is.

But the world of gamers is generally 3-D. All of a sudden, a 3-D store doesn't seem like science fiction if the medium isn't the browser and the hardware isn't a PC."

- "2004: Beyond the Browser?" Jack Aaronson January 8, 2004
www.clickz.com/experts/crm/crm_strat/article.php/3296541

What does the library look like if

- the medium isn't a browser and the hardware isn't a PC?

Community technology: Playstation 2

To be everyone's pal, show up at American University with a Sony PlayStation 2, pop in a game, open your door and voila! "It's the one thing that made my social life significantly easier," says Steven White. "Crazy Taxi was the game to have, or any sports game, things multiple people can play."

"Existential Essentials" by Melanie D.G. Kaplan, *NYT*, 8/1/04

Technology community:

Linux for PlayStation 2

Technology: PS2 supercomputer

- National Center for Supercomputer Applications
- The folks who brought you MOSAIC, father of Netscape, grandfather of Internet Explorer

The predictions business

"Who the hell wants to hear actors talk?"

- Harry M. Warner, Warner Bros Pictures, 1927

Where does this leave libraries?

Well you might ask, because your stakeholders sure don't know!

"You know, when it comes down to it, I'm not sure I *know* the role of an academic library in an electronic environment."

College president interviewed during a consulting assignment

"My wife and kids use the library, but I can't remember when I've used it myself." Trustee, wealthy suburban library

Our content providers are caught between

- Complete disregard of any concept of intellectual property among the young (file sharing)
- Growing refusal of content creators to work within the established model (PLOS, preprint servers, blogs, CD's)
- Refusal of major customers to accept the existing business model

We librarians haven't got any money

All kinds of things are appearing on the horizon that will cost money,

And our vendors cannot, will not, and should not provide products or services at unsustainable prices or they will go out of business.

We have new populations to serve
Some of whom don't know about what we do
Some of whom don't care about what we do
Some of whom cannot access what we do

We have a huge investment in the status
quo

We have huge investments – human and financial – in
technologies that are not at the cutting edge
We are rule-bound organizations in a society with little
respect for limits
We are professionally committed to an ethical posture
(privacy) that is diametrically opposed to the present social
and commercial environment

We are committed to a medium, not a
message

We are committed to print when the world can

- view dvd's in their cars
- carry their music collection in their pockets
- and view movies on their cell phones

*Does the American Medical Association have a "Center for
the Stethoscope" the way we have a "Center for the
Book"?*

What is to be done?

We need a new mix

- Something old, something new
- We must talk to customers constantly in order to build
relationships with them
- We can't expect them to follow us

- We must find out where they are going, and be there when they arrive

Dilemma: the economics of attention

- A wealth of information creates a poverty of attention
- Responses
 - Personalization by profiling
 - Customization
 - Delivering the way they want it

“

Oh, Yeah, He Also Sells Computers”

“[In creating the iPod, Steve Jobs] has shifted the emphasis of Apple from what made it famous – hip, even lovable computers – to what he hopes will keep it relevant and profitable in the future: *products for a digital way of life.*”

John Markoff, *NYT*, April 25, 2004

“Products for a digital way of life”

- Convergent devices
- All functions in one appliance
- Personalized
- Portable
- Changing (if not advancing) rapidly
- Right smack in the middle of a chaotic transition!

The future of technology in libraries

- Not library technology but user technology
- *Melissa White at Michigan Library Conference: “School libraries have all this stuff; teachers and kids know how to use it!”*
- Customer focus, not organizational focus
- *What they have, not what we have*

Use their technology to offer access:

- Library resources accessible to PDAs and telephones
- Local systems, indexes, full-text, video, audio
- *Can't find that call number? Download our RFID reader software and "beep" for it!*
- Longer term: Linux based library resources accessible to all Linux devices including iPods, game players

Use their technology to offer rich program content:

- Virtual reference is not a failure: "Treat all students like distance education students" Ann Marie Casey, Central Michigan University
- telephone, camera phone, instant messaging, SMS, chat, blog
- Broadcast SMS?

Personalized portals:

mystuff@yourlibrary.edu

- RSS (Rich Site Services or Really Simple Syndication) feeds (opt out)
- Library news
- Library new stuff
- Library advertising/promotion
- Library research hints/how to get help
- Flash? Popup? Spam?

Use the technology the user uses to offer rich program content: P2P

Library resource guides and instruction modules as downloadable MP3 audio or as video files for use anywhere

Research from the dorm is the norm!

Blogs

- Class-based for students, interest based for labs, departments or other users
- General Research conversations
- Suggestions and clarifications

“The future is here, it’s just not evenly distributed”

William Gibson

We’re here to even the distribution!

Our challenge?

Shifting the emphasis from what made us famous to create library services for a digital way of life

Can we do it? I’m not worried!