

THE SHIFTING SANDS OF TECHNOLOGICAL CHANGE: THE MIDDLE MAN AS NAVIGATOR

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Since the mid-1980s the journal world has been increasingly beset by change and uncertainty. As the job of maintaining serial collections becomes more difficult in the face of static budgets, burgeoning journal publishing, and above inflation price increases, librarians are seeking alternatives.

The ongoing debate within the library community has been described, perhaps simplistically, as one about "access versus ownership". Librarians no longer accept the need to own a comprehensive serials collection. They increasingly see themselves as facilitators, providing access to information, rather than as passive owners and archivists.

At the same time, the emergence of relatively commonplace consumer technologies like the fax and the compact disc, also in the mid-1980s, provide alternative means of publishing information, particularly at the individual article level. High capacity broad-band electronic networks linking universities and research institutes - and the commercial world - internationally will become available in the mid-1990s. Publishers, subscription agents and librarians inevitably are concerned about the impact of these changes on the traditional subscription journal, as emerging technologies



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and market expectations converge. Some facts about the current situation bear repeating:

1. The proportion of the university library budget devoted to serials is as high as 70%;
2. Book collections have been seriously eroded, to the great disadvantage of the humanities, for which the monograph is the principal publishing medium;
3. Inter-library loan traffic has increased dramatically as expenditure on books and serials has, in real terms, declined. Much of this traffic is in the form of photocopies of journal articles. It can be no coincidence that this dramatic growth dates from the first availability of bibliographic databases on CD-ROM.
4. Perhaps, worst of all, library expenditure as a proportion of total university expenditure has declined throughout the western world. In the UK, library expenditure declined from 4% of the university budget in 1980 to 3% in 1990. This pattern is repeated throughout the western world.

Subscription agents are in the business of selling information, traditionally in the form of journals. The journal market is worth £1.35 billion (\$2.5bn) per year, and comprises, according to Ulrich, 120,000 titles in print from 12,000 publishers. 80% of 'libraries' subscriptions pass through subscription agents. They exist because libraries need a service that consolidates, organises and reports on all their serials acquisitions. The subscription agent is at the hub of the distribution wheel and its spokes are the routes by which publishers sell and librarians acquire a huge and complex range of scholarly information. The agent's skill lies in managing the wheel so that the traffic flows freely.

For the library, the subscription agent maintains accurate and acceptable records. One annual invoice is provided, generally in the library's local currency, for the renewal of the

entire holdings list. The agent handles claims for missing issues, simplifies foreign currency payments and acts as an interface between publisher and librarian. Increasingly, these services are provided easily and quickly through electronic communications.

So far as the publisher is concerned, the agent comprises one reliable source for a large number of subscriptions from a large number of libraries. Agents collect new orders and renewals eliminating the need for the publisher to send out reminders. They take responsibility for collecting payment, and for the risk inherent in buying and selling in a multiplicity of different currencies. Finally, subscription agents handle claims and enquiries, so that the unnecessary are eliminated.

In short, the subscription agent is the middle-man the value of whose service depends on the librarians' need for one-stop shopping. It is in proportion to the difficulty librarians face in dealing with thousands of publishers, and that publishers face in having to cater for the individual requirements of each library customer. Subscription agents often give thanks for the unending eccentricities of publishers and the ability of customers to request obscure titles from unknown publishers in remote parts of the globe.

Many librarians see the solution to the economic problems they face, which technology can facilitate, in the delivery of individual articles, so that they pay only for that which is requested and used. There is a growing consensus that the future lies with much reduced serials collections, supplemented by information services products on journal contents, and the delivery of individual articles from remote suppliers. Those remote suppliers could be the original publisher, another library, or an intermediary holding that article for distribution with the permission of the publisher.

It seems that the role of the middle-man will be no less important in an era when the supply of other artefacts like CD-ROM, or of individual articles, whether on paper or electronically, assumes much greater importance in the dissemination of scholarly and research information. With an increasing diversity of supply, the need for the intermediary is enhanced.

In response to these changes, the major subscription agents and some of the A&I services are venturing into document delivery. One

example of several is Blackwell's joint venture with CARL Systems to market and develop the UnCover document delivery service.

Within the academic community document delivery is an issue of immediate importance. The economic situation is driving librarians to seek ways of spreading their resources more evenly across the disciplines and to meet the requirements of all their patrons more effectively. Within the corporate market demand for document delivery is driven as much by the need to provide a reliable and immediate response to requests for research literature within the organisation as by budgets. Corporate libraries have no loyalty to the traditional journal, view information as a commodity, and look for value for money. The only reason many corporate libraries purchase the full subscription is packaging.

Those subscription agents that do not meet market demand, as and where it arises, and do not develop products and services to match librarians' changing expectations, will undoubtedly wither away. We have to develop products that envisage different delivery methods for different market segments, be that on-line access, or CD-ROM, or products that can be downloaded on to a customer's internal systems. Eventually, this business will be handled fully electronically, simply because the establishment of reliable networks within university, government and commercial organisations, and the development of reliable international networks, will fuel the demand for speedy and automatic delivery of information direct to the user's desk.

Within this changing world, the subscription agent is better placed than most to merchandise this information to the library community, and indeed to individuals, be they university faculty or industrial researchers. The agent will add value to the process:

1. The subscription agent is in a prime position to create a comprehensive current awareness service, covering the most important journal literature, and tailored to the specific requirements of each customer.
2. The agent can facilitate the provision of individual articles requested through such services. This could involve obtaining the article from one of the established document

supply centres, or from another library, or direct from the publisher. Agents may act as suppliers in their own right, under contract to the original publisher. As with journal subscriptions, the agent acts as a clearing house for such requests, providing the management reports and controlling the library needs. He also collects the copyright fees that are due to the copyright owner, and makes sure that they are paid.

3. Subscription agents have trading relationships with publishers and libraries, and are in a position to manage the process of change we are already in. This requires market sensitivity and flexibility.
4. An agent can also provide a comprehensive reporting package to each publisher, which will not merely cover usage and account for the copyright fees that are due, but also provide a wealth of market information on the use of that publisher's product at the individual article and at the customer level. Most agents already have complex systems for monitoring and reporting on subscription transactions, and this can be extended to article delivery without undue difficulty.

There are already few subscription agents. Subscription selling has always had low margins, and needs high volume to make it worthwhile. As sophisticated technology and communications play a more important role in the agent's services, and become an integral part of his fixed costs, the minimum volume needed to sustain the business has increased. The process of concentration, involving fewer, larger subscription agents, can only accelerate as scholarly publishing becomes more complex. Only the large companies that are market driven, able to invest and prepared to respond quickly and positively to customers' needs will survive. Those who do not will lose credibility as first division global service organisations, and will eventually disappear.

In this process of change, we all face a problem in being certain how the law applies to the distribution of copyright material such as journal articles through delivery by fax or over the networks to the p.c. in the library or faculty office. So far as scholarly publishing is concerned, copyright is essentially not a legal issue, but a matter of economics. As the printed journal no longer has the field to itself, the issue really comprises the conditions upon which publishers, as copyright owners, will allow their material to be used in diverse ways.

Our understanding of the implications of copyright will be made easier if the community adopts three basic principles:

1. Copyright owners are entitled to reasonable remuneration for the use of their material, whether in the form of journal prices or fees for individual articles.
2. Researchers and scholars, and the libraries that serve them, should have easy access to the information that is, after all, the currency of scholarship and research.
3. The concept of "fair dealing" and equivalent notions in other legal systems should not be abandoned if they are kept within reasonable limits; but they must not be allowed to threaten the economic basis of the publishing process.

The peer-reviewed paper remains central to the process of scientific research and report. The journal will play a central role for many years to come. What is clear is that it will not have the field to itself in the future. As a result, neither the publisher nor the subscription agent can remain wedded to paper-based publishing to the exclusion of other forms. The impact of electronics has yet to be measured in full. How we survive depends upon our ability to listen to, and to respond to, the legitimate expectations of our evolving market place.