

SQUEEZED FROM BOTH SIDES: FUTURES FOR SUBSCRIPTION AGENCIES

Caroline Sylge

What do subscription agents have to say about their future as technology forces them to redefine their role?

A bookseller working in 1901 in Amsterdam indulges in time travel. He reads John Naughton, reviewing a computer book in *The Observer*, describe the printing process as 'squirting dye onto dead trees'¹. He gawps. Without his tardis, the bookseller could not have conceived that ninety odd years on such a dismissive description could have been conceived, let alone written. The fact that the phrase is tinged with irony may give us pause for thought - I for one do not believe that print on paper will ever die, and parallel publishing (print and electronic versions) will be around for some time. But new formats are here now, not waiting to arrive, and they are changing working practice in many spheres, including that of subscription agents.

The bookseller in question was Mr Heinrich Zeitlinger, who with Mr Adrian Swets at the turn of this century started up a publishing programme of which Swets Subscription Service soon became a part. Subscription companies have always been in the middle of a human chain, relying on both publishers and libraries. With the rapidly growing technological advancements, that relationship is now changing, and the part of each player is gradually being redefined. What do subscription companies themselves think about the future of their role?

Electronic futures

To find out, I interviewed various players in the field, including Paul Harwood, the director of Swets UK, at his office in Abingdon, Oxfordshire. When he was asked about the move towards electronic access of information his response was refreshingly honest. He is more than aware that the industry is changing, but what this change means for subscription agents is not as certain. 'It's not really clear how this is going to affect us,' said Paul. 'I don't think people have really got a grip on how quickly a migration towards electronic access is going to take place. In some areas, notably physics and mathematics, there is quite dramatic change now. We're moving away from the journal in its own right to individual articles being produced on demand'.

Individual article delivery has become a feasible direction to take, but as yet, it is conducted mainly by fax or post. The prospect of a publisher electronically delivering full text or individual articles direct to the desk of the librarian, or eventually the end user,

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remains remote in agents' minds, but things are changing fast. Hazel Woodward, Information Services librarian at Loughborough University and a committee member of the UK Serials Group, points out: 'Electronic delivery would be so easy for the publisher to do that agents would have to find a way of making their services a value added one'.

Paul does see a future in CD-ROMs, and Swets is investing a lot more this year in a new CD-ROM service. The other main agents also have various investment plans - Dawsons have an electronic publishing programme under development at the moment. EBSCO currently make articles available on CD-ROM and these will be available on their online host in a client/server environment this year. EBSCO Publishing have also recently entered an agreement with OCLC to develop article images, to progress from the keyword searchable ASCII format. Chris Beckett, Business Development Manager at Blackwell's, was similarly confident of the future for the most high profile of the delivery services, Uncover. 'Document deliverers are well placed to migrate their paper-based services into electronic delivery. Most publishers and other potential players in this service are waiting to see what standards, if any, may emerge.' Where full text is concerned, he thought it likely that this would become available on a site licence/subscription basis.

Chris also pointed out growing interest in technology such as Adobe Acrobat and the WorldWideWeb environment. Paul is also more impressed with the Internet now that the WWW is in place. 'A lot of things are going to be driven by developments on the Internet,' he said. 'I think it will become commonplace for everybody. As the telecoms companies and the software companies get involved the whole traditional role of scholarly information could change.' Before this happens of course, issues such as copyright and control of intellectual property will have to be overcome.

As yet, Swets' document delivery service has been slow getting off the ground. Paul suggests this is because people are unused to paying the sums required. 'We need to sell huge numbers of documents to be able to compete with a subscription. Publishers have a royalty, we need

to put on a charge and so on'. Indeed there is a cut off point between when it becomes more cost effective to get articles and when to subscribe, and the cost of the journal is an important part of the decision. 'Publishers have put a restraint on document delivery, because of copyright, and because of the conflict it has with their journal subscriptions' explained Paul.

This conflict has led to pressure from publishers for agents to consult and work with them, and indeed, agents have little interest in disrupting the way things currently work. Rethinking their role seems to entail waiting for someone else to make the first move. 'It's difficult for agents to be leaders in any of this,' said Paul. 'I've no doubt in my mind that there will be areas for us to fit in, but we've got to wait and see how publishers and libraries move before we decide.'

Ultimately though, Paul has faith in the agent as intermediary. 'The agent's role really is as a hub. You're going to need somebody, no matter how the information's produced, to administer it and hold it together.' The methods change but the role remains the same. Is it good to stick with what you know or does securing a future demand a more radical move?

The other main subscription agencies seem to agree with Paul. Chris Beckett emphasizes the content of the information over format to explain his belief in the future of the go-between. 'Changing the format in itself does not threaten our position, since the value that libraries and their users attach to information purchased on a subscription basis derives not primarily from its format, but from its content... As formats migrate from paper to a variety of electronic alternatives, the subscription agent's role is, if anything, enhanced, since the net effect of that migration is to complicate the interface between the libraries and the publishers.' Similarly, Carryl Allardice from EBSCO thinks that the essential role of agents will always have a place, but that the services provided will alter in response to changes in technology and information use. 'All participants in the library community will have to be flexible and remember the true nature of their existence,' she said.

This last would seem to be a contradiction in terms - are agents strong enough to bend? 'If I were in the business of crystal-ball gazing and

were asked who would disappear first - librarians, publishers or subscription agents - my bet would be agents. Unless they find new roles for themselves,' said Hazel Woodward. Although confident that the big agencies will be around for some time yet, she went on to stress that they would have to move quickly. 'They moved rapidly into contents page services and perhaps that is where one solution may be - in the provision of articles rather than full journals. Another possible role might be to move towards acting as facilitators between publishers and libraries in providing easy access to electronic journals. At present various systems are being used to publish e-journals and they can be very confusing.'

The idea of agents providing a common platform is something which Paul Harwood entertains. 'Swets deals with some 40,000 publishers, few of whom are big enough to have the technology to deliver full text or individual articles electronically,' he said. 'Libraries wanting to subscribe to lots of different products could be helped by agents, who could provide products using a common interface.'

Squeezed from both sides

But the predominant word here again is could. In the here and now the middleman is being squeezed, on the one side by decreasing discounts from publishers, and on the other by libraries who are increasingly looking at tendering to save money. 'The agent is in the middle and under quite severe pressure from both parties,' said Paul. Will one result be an increase in charges to the client? 'That in the end will have to be done,' said Diane Kerr, general manager for Dawsons. Obviously none of the agents is happy with this. 'It will be counter-productive to all concerned' said Chris Beckett. 'The publishers because it could lead to a significant increase in direct subscriptions with the attendant customer service, account management and administrative costs; for agents since clearly it impairs their ability to perform their function; and for libraries because it would mean they would have to deal on a direct basis with thousands of publishers with all the attendant extra costs involved.'

Agents are however keen to back any increased charges with better and additional services. Paul

sees the consolidation services offered by agents continuing to expand. Such services would seem to offer the answer to libraries, many of which have been badly hit by staff cutbacks because of the recession - agents as librarians doing the most boring and time-consuming jobs.

Paul is constantly eager to emphasize customer service. He is fully aware that the bigger you get, the harder it is to maintain it. 'When two of the five people who comprised Faxon UK joined us in August last year, becoming part of a company of fifty five, they reinforced some of the ideals we should be aiming at. What we're trying to do is combine the latest technology with a high level of personal service.'

This service is now perhaps more important than ever - competition persists and person to person contact will be put in jeopardy as technology advances. 'Failed contact is how we still win and lose business - if we've got a letter coming in from a customer addressed 'Dear Sir/Madam' we know we've probably failed, because they haven't got the name of a personal contact. The services offered by the agents are similar, so at the end of the day it comes down to the individual contact in the office.'

Tendering is one of the main problems Paul sees for subscription agents now and in the future. In the past an agent could sell itself to a library, the library would try a few journals with it, and, if happy, the number of journals the agent handled for the library would increase. 'Those ebbs and flows have become peaks and troughs' said Paul. 'Now you may have a big contract for three years which three years later you lose. Amongst other things, this has implications for staffing levels.' Service does not come cheap, and Paul does not think tendering methods reflect the balance for which he strives. 'Libraries are being dominated and pushed into tendering by finance people who don't really understand our industry, and basically are making decisions not based on the full picture but based on the bottom line - whoever comes in with the cheapest bid.'

Outer influences

Amidst all this debate, there would seem to be a conflict of interest between the two groups of people either end of the chain - the author at the start, and the reader or end user at the end. Both

ends are going to influence the change subscription agents make. 'We all need to realize that this is fundamentally an author driven system and that authors see far more benefits, and are generally very enthusiastic about the possibilities of electronic publishing' said Chris Beckett. 'There is a possibility that this enthusiasm may translate into alternative publishing mechanisms, in a purely electronic environment, which better meet the needs of the authors and end users.'

What these mechanisms are remains to be seen. It is likely, too, that the authors to which Chris refers are mainly writing within a scientific sphere, which produces far more journals than the arts. As Paul Harwood explains: 'It's the scientific community which depends more on journal literature rather than the monographs of the arts and humanities. The sciences are leading the migration into electronic formats - in the arts there isn't that need for information to be disseminated quite so quickly.' To take this further, is it really feasible that the journal's end is nigh? To suggest so demeans the role of an editor or editorial body. Screening of articles and papers is no easy job. As Bernard Donovan pointed out in a recent paper, the advantages of factors such as quality control and the ability to provide a collection of articles based on a particular topic in one publication are not easily overridden: 'The reputation of a serial publication, or journal, provides a mark of customer approval that a miscellaneous collection of articles in a database never can.'²

The reader or end user seems to agree with this view. 'There is a convenience and practicality of carrying a bit of paper around with you' said Paul. 'The academic community, the scientific

community, are largely conservative, and like this idea of browsing and serendipity. Until you can really replicate that on a PC, it's going to be difficult.' Even libraries want to see hard copy of contents pages in Paul's experience.

More than this is the practical question of archiving, and perhaps an aesthetic one too - do we really want to see a day when the only record we have of say ten years hard work is a collection of discs? The March issue of *Serials* featured a look at the obscure periodical *Time and Tide*, begun in 1920 by a suffragette, with a copy of its first front page.³ With document imaging the typography, pencil sketchings and layout could of course be reproduced, but you still wouldn't be able to hold a copy in your hand, so holding history. For a lot of people, and despite the importance of the content, part of the charm of a journal is still its format. But whatever this is, the change in publishers' and librarians' roles will force change for subscription agents. All we can do is hold on to what dye on dead trees we already have and see what happens.

References

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