

CONSORTIUM AND SITE LICENSING: THE ROLE OF AGGREGATORS

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Which organisations are currently involved in aggregating full text electronic journals? What type of service do they offer? What distinguishes one aggregator from another and what is their current involvement in consortium-based purchasing of electronic and print titles?

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Types of full text aggregators

There is a range of commercial and non-profit organisations offering access to electronic full text articles from primary journals. Some examples of the services and organisations involved include:

Bibliographical database/secondary publishers

Examples here include companies such as UMI, Information Access Company, Ovid, Silver Platter and the Dialog Corporation. These are companies which have been active in areas such as online databases and CD-ROM publishing.

Library cooperatives

Then there are library cooperatives or networks of academic libraries, including OCLC in the USA, which has recently launched its FirstSearch Electronic Collection Online service. PICA, the library cooperative in The Netherlands offers a service called WebDoc, which includes a central catalogue of documents held on member libraries' servers and also includes journal full texts from publishers such as Kluwer and Academic Press

University based services

Universities themselves have also entered this field and a notable example here is the HighWire Press, based at Stanford University. HighWire offers a service to university presses and society publishers and attempts to provide an alternative to the traditional methods of commercial publishing.

BIDS, well known in UK Higher Education community in providing access to databases, now offers full text journals, initially as the host for the publishers in the UK Pilot Site Licenses Initiative, but now broadening the service to include other publishers' titles in its Journals Online service.

Subscription agents

The leading subscription agents have been developing 'one stop shopping' services for electronic journals, as a natural corollary to the position they have played in the area of print journal supply.

Publishers themselves

Some publishers feel that the way to provide access by readers to a range of publishers titles is by cooperation between individual publishers. Elsevier Science announced the launch of their new service, ScienceDirect, which includes the facility for other publishers to participate. Adonis is probably the longest standing aggregator of electronic journals and an example of a cooperative approach by the participating publishers.

Publisher service companies

Then there are organisations which provide an electronic journal publishing service on behalf of a range of publisher clients. CatchWord in the UK is such an example and now provides a service on behalf of over 14 publishers. In the USA, Cadmus is also a player in this field.

Value added 'background'

A further way in which the various aggregators can be viewed is from their service background, ie, the nature of the service in which they have traditionally specialised. These include:

- common interface and access technology/software; for example: Ovid and Silver Platter;
- indexing and resource discovery, such as ISI;
- subscription and acquisitions management, as in the case of the subscription agents;
- electronic archiving; for example: the JSTOR Project based at the University of Michigan which aims to provide electronic access to some 100 journals in 10-15 subject areas over the next three years. OCLC in the USA has also made a commitment to provide long term access to electronic journals, through its agreements with individual publishers;

- electronic publishing service, such as Catchword, and HighWire Press.

Providing access to full text electronic journals enhances these companies' existing products, creates completely new services and is a next logical step for these organisations.

Full text aggregators - what they offer

Apart from simply aggregating titles, the service from these companies and organisations offer a variety of functions and benefits. The following are some of the features offered by some or all of the suppliers:

- one stop shopping/aggregation of titles, across a range of publishers' titles;
- subject based, or general collections;
- single interface and search engine;
- constantly growing numbers of journal titles;
- a variety of library management functions as well as usage data;
- simplification of user procedures;
- improved access, for example by mirror servers;
- delivery and formats such as Web, CD-ROM, Intranet.

Aggregators and consortia

Aggregators are increasingly signing license-based deals with consortia, which give access either to content they own themselves, for example their own databases, or content licensed from publishers/information partners.

Such business deals are either arranged directly with individual consortia such as Ovid's agreement with Boston Library Consortium for BIOSIS databases, or, as agreements become more commonplace, increasingly through subscription agents. As numbers grow and procedures become more routine, libraries increasingly wish to use their traditional purchasing suppliers and partners in any consortia arrangements.

Subscription agents

The growth of electronic journals, as well as the increase in consortium-based purchasing both

of print and electronic titles have significant implications for subscription agents.

- Increasingly selling license based e-journals. As a growing number of e-journals are being launched by publishers, agents are adapting their systems and procedures to handle new requirements such as publishers' licenses, increasing numbers of price options, as well as password and access administration.
- Creation of own e-journal aggregated services. Agents are also developing their own electronic gateway, or journal aggregation, services. The leading international agents have launched services this year with names such as Electronic Journal Navigator from Blackwell, IQ from Dawson, EBSCO Online and SwetsNet. Agents have strong links with publishers and a wide network of offices to serve their international customers, so are in a strong position to offer electronic journal services.
- Consortia - print:
Whilst consortium-based purchasing of print titles is not a new concept, in the last year or so it has grown rapidly in the UK Higher Education community. Most universities are now members of one or more consortia and have been, or will be, involved in negotiating with subscription agents in the area of journals supply. Such major contracts have economic implications for agents. Consortia are naturally looking for the very best financial terms from the agents but this, along with the reduction of publishers' discounts over the years, means that agents are working with very reduced operating margins in consortia arrangements. It is hoped that in selecting suppliers, the consortia do take into consideration the broader aspects of long term quality of service, and not only pricing or financial issues.
- Consortia - electronic journals:
In terms of the agreements between publishers and consortia for electronic journals, this is a fairly new area for agents and one in which they are little involved at present. However, it is becoming clear that

libraries welcome the involvement of agents to assist with the purchasing and administrative procedures, as they traditionally have in the print environment. Similarly the major publishers active in this area are confirming that they recognise the wish by many consortia to work through agents. Indeed, some publishers welcome the involvement of the agents as numbers of consortia grow and in cases where consortia are in far flung countries. They also recognise that the libraries may wish to use agents' own electronic gateway services, rather than accessing e-journals direct with publishers. There are issues still to be considered in this area, such as the extent that multiple agents could be involved in a single consortium deal, and the degree to which the agents are actually involved in the negotiations with publishers, including in the area of license fees.

Aggregators - issues and challenges

There are a number of issues facing intermediaries and aggregators as they develop their services for full text journals and as consortium based purchasing grows.

Consortia and site licensing - growing complexity

Consortium based purchasing is becoming more complex in terms of definitions of sites and the nature of users within consortia. For example:

- the extension of the types of users to be catered for in a consortium, eg: off-site users, general public, affiliated hospitals;
- the factors used to arrive at the license fee, eg: numbers of member users, library budgets, expenditure, numbers of hospital beds;
- the general types of organisations which may become consortia and establish deals with publishers and intermediaries, eg: corporates, societies, national HE communities (eg: Denmark).

It will be interesting to see how quickly consortia will grow, in terms of numbers of consortia, as well as the publishers participating.

Growth in services and products

It has been said that there will be too many aggregators and 'one stop shopping' services, all providing different interfaces and systems. Which value added services will dominate in due course? Which services will fall by the wayside?

Negotiations

Aggregators have found that negotiations with publishers can be time consuming, as publishers are approached by more and more companies seeking agreements, and that considerable resources are needed for what is a new area for many companies. Publishers are approached not only for agreements on current electronic journals, but also for permissions for digitisation of older material.

Standardisation

Aggregators would like to see more standardisation in areas such as licensing, authentication systems and formats, allowing each to compete on content, prices, functions and service.

Control of content selection

There have been comments that libraries should not leave selection of electronic titles in the hands of aggregators, ie, that it is the intermediary who decides what is made available. These concerns will recede, however, as more content becomes available electronically and more choice is offered by the various suppliers.

Electronic archiving

Aggregators will be offering online access to a number of years of material in their various

services, and each company may have different policies in this area. What role will each play, however, in longer term archiving and what are libraries' views of archiving by the intermediaries? Who will be the preferred archiving agencies? Will there be collaboration with publishers, with other intermediaries and with libraries or library consortia to offer access?

Collaboration and cooperation

It is likely that cooperation between intermediaries, service providers and publishers will grow. This will enable companies to enhance their own products as well as broaden access for users, whilst still remaining competitive. For example:

- database aggregators are working with subscription agents to extend their distribution and marketing possibilities;
- subscription agents will link to abstracts at secondary publishers;
- aggregators will work with library automation vendors to integrate services into OPACs;
- subscription agents are working with OCLC's Electronic Collections Online to facilitate electronic access to full texts by their subscribers;
- full text aggregators are linking to document delivery organisations, for access to broader collections of articles;
- Internet service companies such as CatchWord are cooperating with subscription agents and document delivery services, to offer access to the electronic journals they manage.