

*On the Circuit***NORTH AMERICAN SERIALS INTEREST GROUP (NASIG)**

17th Annual Conference, Williamsburg, VA, 20–23 June 2002

The College of William and Mary, Williamsburg, Virginia was the historic setting for NASIG's 17th Annual Conference. Founded in 1693, William and Mary is America's second oldest college and the 'best small public university in the nation'. It is situated in a fine leafy campus close to Colonial Williamsburg which is well-known for its restored and reconstructed historic buildings. The College itself also has some impressive architecture including the Sir Christopher Wren Building, which, dating from 1697, is the oldest academic building in continuous use in the USA. I was delighted to join the 700 delegates, mainly serials librarians, at the NASIG conference as part of the reciprocal arrangement between the UKSG and NASIG under which the chair of each group is invited to attend the other's conference. At the business meeting which opened the conference I was pleased to convey the greetings of the UKSG to our sister group, and to report on the highlights of our 25th year.

The busy NASIG programme offers delegates three plenary sessions (held in a section of the University's sports stadium), and a choice of four workshops and two concurrent sessions from a wide range of topics. There is also space in the programme for group meetings, 'networking nodes' based on library functional activities and poster sessions.

Social events included a dinner in the College garden and a trip to the local Busch Gardens theme park.

The opening plenary paper was delivered by Howard Strauss, Manager of Advanced Applications, Princeton University. Speaking on the theme of 'The Future of Information Access and Distribution', Strauss focused on the emerging role of portals to assist in the efficient navigation of many billions of web pages. Strauss described a change in our view of the web from institution-centred (which assumes that everyone in an institution needs the same information) to

user-centred, a view which acknowledges that people have different and changing information requirements. Building on the theme of customisation, Strauss argued that libraries should be a channel within the institution's portal. In the new world of personalised portals, which may be designed in a number of ways, users will be able to keep all their commonly used links in one place to make web use much more efficient.

Emily Mobley, Dean of Libraries, Purdue University, presented the second plenary on 'Serials Challenges and Solutions; the view from the Director's Chair'. Mobley's thoughtful paper considered the challenges for libraries as serials subscription prices continue to rise above the level of general inflation. This, she argued, is a constant state of affairs, not a temporary crisis. Mobley traced the proliferation in journal titles and their increasing specialisation to the years after the launch of the Sputnik programme which heralded a huge increase in research in 'big science'. The solutions to the challenge posed by increasing serials costs were seen by Mobley to lie in the hands of the universities, not just the libraries. Faculty should use their influence as editors, authors and members of tenure and promotion committees to break the cycle of 'publish and purchase'. University presses should take more of a lead in reducing prices. Finally Mobley turned to consideration of alternatives to commercial publishing as a solution for libraries. She praised the work of SPARC and highlighted many of the unsolved issues involved in institutions storing and distributing papers produced by their own faculty. Mobley concluded that many of the characteristics of the current system (for example, articles brought together in collections, and peer review) will need to be maintained, but that there will be a gradual move away from the dominance of the commercial publisher. The challenge for libraries is to survive during this transition.

The last day of a conference can sometimes feel a little flat as delegates' attention turns to thoughts of going home. Not so at NASIG where David Seaman, founding Director of the Electronic Text Center (ETC) at the University of Virginia (and now Director of the Digital Library Federation) produced a brilliant performance for the final plenary. The ETC focuses on owning rather than licensing digital content in the humanities and social sciences. At the inception of the Center in the 1990s, there was no choice other than digitising content. However, Seaman argued that although there are now many commercial products available, digitising texts is still valid because libraries can take the long view; they are not constrained by the need to produce a commercial payoff within a short time. In becoming a successful aggregator, the University of Virginia has learnt that data must be built to work with other content, not as a standalone product.

Demonstrating the impressive functionality and wide-ranging content of the ETC, Seaman drew out some fascinating insights into users and user behaviour. Although the ETC has a clear academic mission, its online users are drawn from a much wider audience, including many school students. As different users have different format needs, database features can be turned on and off for different groups. Users rarely require entire files; more commonly they want 'gobbets of information' drawn from multiple resources. The demand for cross-database searching is huge. Seaman gave several examples of the unanticipated demand for apparently obscure digital content on ETC. He concluded from this that if information is available at appropriate cost, there is a huge market for it.

The web has enabled us to 'build once and use many times'. However, Seaman detects a growing acceptance of e-books and e-book readers, although copyright and pricing problems remain for libraries. The web is not a good medium for reading and Seaman sees portable readers gaining in acceptance, a view confirmed by a recent e-book project at the ETC which demonstrated how easily XML content can be re-purposed for new output formats. It was inspiring to hear this success story described with such enthusiasm, and we very much look forward to welcoming David Seaman when he

delivers a keynote paper at the UKSG conference in 2003.

The concurrent sessions offered a choice of topics, including publishing models, open linking, managing e-serials and cataloguing. For the first of the two concurrents I chose a session on 'Scholarly Publication; business and public good' led by Steve Black, Serials, Reference and Instruction Librarian at the College of Saint Rose, Albany, New York and Keith Seitter, Deputy Executive Director, American Meteorological Society.

Black first put forward the case that scholarly publication is a 'public good' in the sense understood by economists. Journals meet this definition in that use by one person does not exclude use by another, making material available to one person makes it available to all in a defined group and journals are a consumer good consumed unequally (in so far as a researcher uses a journal article differently from a member of the public). Black then went on to consider the inefficiencies and inequities in the journal market. In the light of these, he proposed a system of journal production which would result in content being made freely available to all users. This would involve library consortia, government bodies and foundations paying for the peer review process, the first copy costs and the infrastructure for access and storage. Such a system would overcome several limitations in the current system: the barriers to entry to e-publication for small publishers, the difficulties for libraries in providing a wide enough range of content, the problem of unstable revenues for publishers. Black concluded his presentation with a warning that current trends in journal content aggregation and the development of consortium arrangements may create oligopolies which fail to serve the needs of any of the players in the market. In response, Seitter reinforced the benefits of the current scholarly information system. He asserted that the notion of free access to information is unrealistic. Institutions need publishers to grade the work of their faculty through acceptance rates; this is all the more important as the number of high quality papers produced for publication continues to grow. Seitter felt that the public good model would reduce the incentive for improvement which the conventional subscription model provided. In a

market economy, subscribers simply walk away if the quality of content is inadequate or if new features do not add value; publishers must give users what they want if they are to survive. Stable funding, while desirable in some respects, would not be in the best interests of the community.

'Historical messages in the digital medium' considered the ways in which digitisation makes more content available, but may distort the historical message. Roger Matuz, Product Manager, Historical Periodicals, Proquest, opened the session by describing the benefits of digitising periodical archives, including the ability to search the content, wider access and preservation of fragile originals. He then went on to describe the actual process of digitisation in some detail. Against this background, Nancy Godleski, Kaplanoff Librarian for American History, Yale University, set out some of the criteria for selecting and evaluating digital resources. She emphasised that a digital database is never 'the real thing'; decisions made in the digitising process may result in unintended changes to the content. Historians do not want mis-spellings corrected in indexing or modern terms replacing originals. Librarians need to evaluate the content and consider accessibility, usability, indexing, full-text searching and price; they do not want products to be so highly featured that they are priced out of our league. Both presenters impressed on the audience the importance of librarians and vendors working together in the development of historical periodical databases to ensure that library users get the research tools they need.

Twenty-seven workshops were offered in two repeated sets, allowing delegates to attend four in total. Choosing was tough! Topics included e-journal management systems, serials surveys, e-journals and citation patterns, recovering from a disaster and several aspects of cataloguing serials.

'ILS Conversions and the Prediction Pattern Conundrum; What do you do on Day 1?', led by Michael Kaplan from Ex Libris (USA) and Kim Maxwell, Serials Acquisitions Librarian, Massachusetts Institute of Technology, addressed the question of how serials predictions patterns and check-in data can be migrated to a new library management system. This has traditionally been one of the trickiest aspect of data transfer as this information is not generally

held in standard formats. In response to this situation, CONSER have developed the Publication Pattern Initiative to determine the feasibility of sharing the creation and distribution of pattern and holdings data in CONSER records; 3000 patterns have been added to CONSER records during the pilot project. Kaplan described the development of the Ex Libris Aleph 500 conversion pattern database in which patterns are stored in separate files by institution; there are currently 12000 current patterns in the database. This information is searchable by a number of keys by libraries migrating to Ex Libris. Hit rates will vary depending on the type of collection and the size of library.

Maxwell continued the account, describing the process followed by MIT when they migrated to Ex Libris. They achieved a hit rate of 55% when they matched their serials against the Ex Libris database by OCLC number and ISSN. This saved much time in creating new patterns. However, there were disadvantages; some problems were caused by the different ways in which libraries had implemented the MARC holdings standards and in knowing when a pattern had been created or modified.

'Print journals: off site? Out of sight? Out of mind?', the second workshop I attended, was a case study based on the experience of building a new library at Appalachian State University. John Abbott, Coordinator of Collection Development, described how stakeholder expectations relating to the library differed. In surveys, students wanted a comfortable library with places for group and quiet study, more ICT and e-journals. Academics, however, wanted open stacks, wired carrels and more print journals. Just-in-time versus just-in-case! In the context of limited space in the new building, the library considered storage systems including automated bin systems and off-site facilities. In the end, it was decided to use compact shelving to store all print journals, eliminating both the current periodical display and the reading room. This had the effect of de-emphasising the print collection and placing greater importance on electronic access and document delivery services. Amy Weiss, Co-ordinator of Cataloguing, then discussed the technical services issues for stored materials. She highlighted the paradox that for the user, it is often easier and cheaper to use low-use materials

than the main collections because items in storage have to be fully described in the catalogue and delivery options (often free copies or faxes) need to be offered. Weiss described the advantages and disadvantages of various shelf arrangements for material on closed and open access compact shelving, indicating the considerable overhead in terms of catalogue amendment, weeding and discarding. She concluded by stressing the need for libraries to decide the role and importance of print collections in relation to the different workflows and new activities required to manage e-journals.

I couldn't resist a workshop with the title 'How I learned to stop worrying and give up periodical check-in... or, How to horrify your staff without really trying' led by Rick Anderson, Director Resource Acquisition, and Steven Zink, Vice-President for Information Resources and Technologies & Dean of Libraries, both from the University of Nevada, Reno – and they didn't disappoint. Zink first described the context at Nevada. Their converged structure, he felt, led to a focus on technology and a holistic approach to improving library services to meet users' needs. There is significant pressure on staffing budgets. Improving the ways in which print journals were handled was seen as a good starting point. Anderson then took up the tale to describe how they had arrived at a decision to stop checking in most print journals. Check-in information, Anderson argued, is only useful if the journal collection is primarily print and if the focus is on close management of information that relatively few users require or care about. Nevada had concluded that, in their environment, where only 20% of the journal collection is in print and e-journals are accepted and well-used, check-in is not worthwhile. Systematic claiming, he asserted, is a waste of time as many issues that get claimed would have come anyway, while others will never come whatever you do. Binding is also unnecessary, as bound print journals are infrequently used, and the binding process itself makes material inaccessible for several weeks. Check-in data information does not in any case guarantee that the issue is on the shelf. So, instead of check-in, most incoming issues are stamped and placed directly on the shelves. Low use journals are claimed as shelve notice gaps; high use/high cost journals continue to be

checked in. Older issues are stored in pamphlet boxes; only high-use and heavily illustrated titles are bound (producing a saving of \$16,000). Funds are available for document delivery to provide copies of missing materials. The project has worked well. Most library users do not even know that journals are not checked in. Print journals get to the shelves faster and never leave the building for binding. Boxing print issues instead of binding has not caused problems as print is little used. Most importantly, staff time has been freed up for managing e-journals. Anderson described the importance of ensuring that library staff had an opportunity to discuss all the implications of this change (he displayed a slide showing staff lining up to pelt him with custard pies!). The impact on all departments of the library was monitored to pick up any unexpected displaced work. Generally staff have welcomed the new approach; reference staff say that they have a need for check-in information about once a week while increased use of inter-library loan is not a problem. This was a thought-provoking session which generated heated debate; surprisingly, perhaps, there was a lot of support for Nevada's initiative and admiration for their courage!

The workshop on 'E-Journal management systems and beyond' described the approach of York College, Pennsylvania, to the challenge of managing the large numbers of titles which become available to libraries through aggregator databases. It was no longer feasible to amend the library catalogue for each individual title. Louise Pierce, Serials Specialist, and Greg Szczyrbak, Reference Librarian, indicated that e-journal management systems track and report on full-text journals in aggregator databases, individual subscriptions and the library's non-electronic collection. They also provide usage statistics and identify journal overlaps and duplication. Dates of coverage, title additions and deletions are examples of the data tracked. Pierce and Szczyrbak described the various attributes of the three systems they considered for York College, Serials Solutions, Journal WebCite and TDNet; the selected system was TDNet. Pierce and Szczyrbak noted that electronic journal management systems reduce the burden of managing e-journals, but they also add new complexity. In addition to staff

training, they produce an additional point of access for the end user who may expect such information to be available through the catalogue. Additional promotion and user education is required if these products are to be fully utilised.

NASIG is a friendly and stimulating conference, aimed primarily at librarians. It is

good to see that NASIG officers are seeking the opinions of their members on whether the Group should do more to encourage other players in the serials industry to become involved. From the experience of the UKSG, this would certainly strengthen an already high-quality event.

Christine Fyfe, UKSG Chair and University Librarian, University of Leicester

THE CONSORTIUM SITE LICENCE – IS IT A SUSTAINABLE MODEL?

Reports on the Ingenta Institute's 2002 research studies

On 24 September 2002, the Ingenta Institute held a seminar to disseminate the results of its current research programme which focuses on the impact site licensing and consortia developments have had on the scholarly information community, and the implications of these changes. Ingenta has funded four independent, international surveys, being run over two years. These studies are intended to assist with identifying the real impact of site licensing and consortia developments on business models and collection management strategies.

"Early results indicate that consortia site licensing is in a state of flux," says David Brown, Co-ordinator of the Ingenta Institute, "and that its future is dependent upon a number of factors." Analysing the impact of consortia dealing on libraries and publishers in the USA and Europe in two separate studies, renowned information expert Donald W. King, Professor at The School of Information Sciences, Pittsburgh University, and UK-based research consultancy Key Perspectives Ltd identified similar trends despite the relatively recent creation of consortia in Europe. Headline findings include:

- Both publishers and librarians see the current consortia negotiation system as transitory. And there are insufficient funds to pay for future renewals and new signatures to consortia deals.
- Libraries have commonly raided book budgets and found new, one-off funds to pay for consortia deals.
- The recent stimulus to library consortia has

been the desire to generate access to a greater amount of electronic information for a relatively small amount of additional cost.

- Intermediaries, such as subscription agents, have not been active in negotiating consortia deals on behalf of their library customers.
- Instead, large commercial publishers have negotiated directly with consortia, necessitating operational changes within the publishing organisation.
- In 2002, many large and medium-sized serials publishers rely on library consortia for between 25% and 60% of their total revenues.
- Late entrants are finding the lion's share of consortia budgets have already been allocated to the first movers, but smaller publishers recognise their need to be involved in consortia dealings for fear of being locked out of future budget allocations.

"The early trends suggest that the consortia deal is not the long-term answer to finding an efficient process of negotiation between publishers and libraries," says Brown. Discussions at the autumn event focused on new business models for future development of the consortia site licence.

Keynote paper: An appraisal of the consortium licensing model

Professor Donald W. King, School of Information Sciences, University of Pittsburgh

Don King provided an introduction to the day by setting library consortia in context, and drawing

comparisons between consortia in the USA and elsewhere. His definition of a consortium uses eight criteria, which are listed in the full report.

- Preconditions to make library consortia sustainable: journals must continue to be the primary channel of scholarly communication; libraries must continue to play a major role; consortia must serve a diverse community and be flexible in dealing with the potential membership
- Journals continue to be: extensively read and regarded as valuable (see work by Donald King and Carol Tenopir at <http://web.utk.edu/~tenopir/research/ejresearch.html> and <http://www2.sis.pitt.edu/~dwking/dwkpubs.pdf>). However, prices continue to rise, journals are increasing the number of articles published, and the number of titles available electronically has increased dramatically
- Library consortia in the USA have existed for over 100 years, grew dramatically through the 1960s to the 1980s, but decreased in number in the 1990s. Electronic journal services were a natural extension of previous services.
- Consortia electronic services include: negotiation of group and site licences; volume discount rates; centralised services; consultation, advice, support; invoice processing; e-document delivery services; providing use and other statistics; authentication of users.
- Benefits to member libraries: direct and indirect benefits; a good negotiator at consortium level is critical to save individual libraries time and effort; use costs go down with electronic resources but training and user help costs go up
- Benefits to publishers and others: benefits to publishers include stabilising revenue, greater exposure of titles, which is more attractive to authors, and reducing costs. Authors, readers, and library funding bodies also benefit.
- Differences between USA and non-USA consortia: USA consortia tend to be older and larger; non-USA consortia are more likely to increase in size over time, provide e-journal services, and serve special libraries. They are similar in: having high academic membership, offering multi-type membership, and offering

e-journal services; revenue sources; staff time spent working on e-services; and considering e-journals to be a successful area of their operation

Don King was very concerned that publishers may reach the point – due to budget cuts – where agreements are not sustainable so prices will have to go up. As the cost-per-use of old bound journals is very high (because of space requirements and low use), consortia may have to think of a central way to handle older material. This is of course related to the archiving of e-journals.

Results and analysis from a study of the impact of the consortium site licence on academic libraries

Dr Hazel Woodward, University Librarian, Cranfield University

Hazel presented the results of survey work conducted by Key Perspectives Ltd, and then gave her own observations and speculation on the results. The aim of the study of the impact of consortium site licences on academic libraries was to identify the main operational and strategic issues relating to library consortia licensing of e-journals; the methodology was through face-to-face interviews and focus groups.

The study presented:

- The perceived advantages of being a member of a consortium: particularly in relation to cost and access
- Negotiating deals with publishers: a growth area, on average each consortium has signed up with 12 publishers with access to around 5000 journals; interviewees expect renewals to take place but these will not necessarily be “big deals”
- Licences: model licences simplify the process
- Pricing models: librarians are convinced there is more scope for negotiation on pricing but publishers not as flexible as libraries would like; librarians feel they need to be “tougher” in negotiations; little transparency on pricing, though some information is shared within ICOLC; libraries are seeking to move to e-only (inhibiting factors: academic conservatism and concerns about long-term access)
- Funding consortia deals: various models, but recognise that often it involves diverting funding from elsewhere; all consortia

members see problems ahead as none believe the "big deal" is sustainable and see moves towards selective purchasing (title-by-title or subject area)

- Decision-making within consortia: various models, approval of stakeholders is critical
- The role of subscription agents: strong feeling that subscription agents have "missed the boat" and that they could carry out work that libraries do not have time to do themselves
- Archiving of e-journals: still unresolved in practice in most cases but publishers signing up to archiving clauses and "doing their best" to find solutions

Hazel's commentary on the study results touched on:

- The study: of short duration with limited number of interviewees; no representation from large USA consortia; consortial activity is still evolving in relation to e-journals
- Pricing and budgets: findings indicate that the major perceived advantage is financial; librarians subscribed to 6% fewer journal titles in 1999 than 1986; new deals and renewals will be subject to hard bargaining
- Not underestimating other advantages: other significant activities take place under consortial umbrellas (linked systems and virtual catalogues, ILL and document delivery, shared services and mass shared storage, and creation of digital collections). There is political pressure on UK academic libraries to undertake more collaborative activities
- Strategic/political advantages: consortia are becoming an important power base to influence pricing and other supplier policies; ICOLC now has a wide remit
- The big deal has facilitated culture change and made the move to a digital library acceptable to faculty, but warning bells are ringing (irrelevant content, duplication of resources); libraries are increasingly cancelling important books and journal titles from small publishers to fund big deals
- Use and usage statistics (see Peter Shepherd's presentation): The Outsell survey (<http://chronicle.com/free/2002/10/2002100301t.htm>) says that students are turning to Google because library databases are "too complex", and this is borne out by UK

JUSTEIS research (<http://www.dil.aber.ac.uk/dils/research/justeis/jisctop.htm>)

Conclusions: consortia will thrive, and most librarians conclude that it is better to be in a consortium than outside one.

Results and analysis from a study of the impact of the consortium site licence on publishers

Bill Russell, Sales & Marketing Director, Emerald

This presentation summarised the results of the parallel Key Perspectives Ltd Study which focused on the impact of the consortium site licence on publishers. The presentation looked at the general findings and the perspective of Emerald.

- Organisations involved in the study included the American Institute of Physics, Blackwell Science, Elsevier, Emerald, Wiley, OUP, and Springer
- The strategic move by publishers to consortia licensing was seen as a means of combatting the attrition of subscriptions during the 1990s
- Consortia licensing was regarded as potentially a win-win for publishers (who wanted revenue stability) and libraries (who wanted pricing stability)
- The benefits of the web for publishers included increased visibility of the publisher's portfolio, increased journal visibility, and cheaper distribution for electronic journals
- A key benefit for both communities was seen to be the increased dialogue between publishers and libraries, leading to deeper mutual understanding
- The move to consortia site licences has demanded cultural, structural, and skills changes for publishers
- At this stage few publishers are tracking or analysing usage but this is likely to change. (Some publishers see usage statistics as a threat, but Emerald is monitoring and analysing them to gain a competitive advantage)
- Large to medium publishers rely on library consortia for between 25% and 60% of their revenue
- Perpetual access was briefly mentioned as being usually provided by medium to large publishers "and if they're not, they should be"

- The consortia licence was believed to have unlocked new sources of funding by providing access to a lot more content for a relatively modest additional cost
- None of the publishers expect prices to go down but there is an awareness of budget pressures, particularly in the USA
- It appears inevitable that the gap between publisher expectations and the reality of finite budgets will begin to widen again.
- Small publishers are beginning to feel squeezed out by “the big boys”
- Safer opportunities for small publishers were seen to be joint ventures with large and medium sized publishers specialising in publishing for third parties. The developments of niche markets was also seen to be important
- Looking forward from the study, the consensus is that big deals may need to be modified to offer fixed and variable components, e.g. access to a core collection and access to other materials on a transactional basis
- Reliable usage statistics will be critically important (Project Counter was referred to in several presentations)
- The possibility of developing pricing strategies based on usage
- There is also a move to better, widely adopted data standards to prevent waste involved in conversion and re-conversion
- Potential threats for publishers include consortia exploiting usage statistics to drive harder bargains, OAI (longer term), declining library budgets, with libraries stepping back from “big deals”
- Commercial publishers, with greater resources, are taking a disproportionate share of library budgets
- There is a general trend towards cancellation of print subscriptions in favour of e-only, which is reducing revenue
- Predictions on the impact on usage on pricing included the possibility that STM publishers could well be the losers, since 60% of students within the G8 countries are studying humanities and social sciences and there is doubt that this is matched by library budgets dedicated to these areas
- What are the implications of a heavy emphasis on use to the tradition of supporting

low-use but high-quality journals? Bill Russell suggested there would be a need for the development of niche journals to provide solutions to specific enquiries and that the model would need to be more sophisticated than just keeping high-use titles

- The overall message for publishers was the need to be flexible, to recognise the realities of flat budgets, and that there will need to be a change in approach to avoid losing the momentum generated by the big deal.

Results and analysis from a pilot quantitative analysis of web log data

Professor David Nicholas, Department of Information Science, City University and CiBER

The findings are very preliminary as the evaluation had begun only six weeks earlier. However, there is the potential to learn more than simple usage statistics by mapping the digital fingerprints of consumers. Emerald and Blackwell have been selected for the analysis in order to test whether there are any discernible differences in terms of content, discipline, publisher profile, etc. To date, the Emerald database has been analysed. Three categories of user have been identified, non subscriber (including trialists), big deal subscribers, and non big deal subscribers. The research will analyse variables such as patterns of use, whether requests differ between subscribers and non subscribers, big deal and non big deal subscribers, the average number of requests in a session by type of subscriber, preferred format, etc. They will also analyse use of the journal archive to determine the relationship between use and age of material.

THE WAY FORWARD: ISSUES TO BE ADDRESSED IN MOVING TOWARDS MORE EFFICIENT MODELS OF PROVISION, ACCESS AND PRICING

The Consortium site licence: Unfinished business?

Dr Pieter Bolman, Director of STM Relations, Elsevier Science

- Brief historical overview, with key milestones in the advent of the site licence
 - early Academic Press (AP) licence
 - early unsuccessful attempt between Elsevier and CERN to centrally purchase journals

- the Follett Report in 1993, which unlocked funds to experiment with different models.
- Other key factors were:
 - the increasing ubiquity of the Internet and WWW
 - PDF becoming freely available
 - the marginal costs of providing e-access to additional users being virtually zero.
- Opportunities in 1995 for AP were seen as using a central website which allows e-access control under licence, using contract as opposed to copyright law.
- The main motivation for AP was to maximise their distribution.
- The amount of money available for libraries has not kept pace with the growth of research.
- The Pilot Site Licence Initiative (PSLI) in the UK was the first national consortium
- The three very different models used by the PSLI participating publishers were described, AP being the only one to offer e-access by all higher education institutions to all AP journals.
- It was proposed that the consortium model can only provide a win-win situation if the AP model is used, and there is a large enough consortium with central purchasing power.
- The pricing model dependent on paper holdings was regarded as a temporary arrangement which must change
- Heavy users, such as CURL libraries, have less advantage from a bulk deal than smaller libraries.
- After top-slicing ceased, the situation reverted to the pick and choose model, with heavy users demanding the greatest advantage.
- In looking to the future, it was felt that the end user has gained most, by having access opened up, so there can be no going back.
- New initiatives, such as CrossRef, will continue to increase user expectations.
- Vast savings have been made on ILL because of greater e-access (estimated \$1.6billion).
- A mixed model, which offered access to core journals and ILL agreements for non core, could be the way forward
- It was asserted that ILL can be more efficiently handled by the publishers rather than libraries

(the BL was specifically mentioned and there was some discussion on this point).

- The archival issue was described as important but solvable, with the recent agreement between Elsevier and the Koninklijke Bibliotheek used as an example. Elsevier are negotiating similar deals with the Library of Congress and other national libraries in the belief that there needs to be global distribution to ensure that material remains after the publisher no longer wishes to retain online access. This point was picked up during the Peter Shepherd presentation, when it was suggested that for some disciplines at least, the historical archive will be too valuable for the publisher to wish to hand it over to another archival repository.

The way forward: an overall perspective

Professor Carol Tenopir, School of Information Sciences, University of Tennessee

- Consortia have existed for a long time and serve many purposes, site licensing being a relatively recent role.
- In addition to site licence negotiation, consortia for e-journals can potentially undertake other roles such as provision of volume discounts, demonstration of new products, housing a central server, technical consultation, processing invoices, providing user statistics, and user authentication.
- There is a distinction between big deals in terms of consortia purchasing and “the big deal” in terms of one size fits all.
- Concerns about the big deals threatened to shift the balance between advantages and disadvantages of consortia.
- The big deal is good for publishers, particularly large ones, and, in times of steady or rising budgets, is also good for libraries.
- Problems arise when the budgets need to be cut, and the immediate impact of these cuts tend to come from monographs and smaller publishers.
- The trend is probably going towards the “nothing” part of the “all or nothing” characteristics of big deals.
- There will always be some libraries where the big deal continues to be of interest but a

growing number of libraries are going to want to opt out and publishers are going to have to provide for that.

- Need different site licences for different types of libraries, e.g. by subject, by size of library etc.
- Recent conflicting research into usage statistics from Ohiolink, which indicated that more reading is focussed on non-subscribed titles, and NERL, which found the opposite, i.e. that there was more reading in subscribed titles.
- In essence, it is clear that there is reading of peripheral titles but the issue is, how much?
- Research indicates that scientists are reading a greater variety of journals but only 50% of these uses resulted in five or more readings and only one journal had 25 or more readings.
- This supports the view that scientists are reading a lot from a small number of journals.
- Two-thirds of the readings were for the latest year, but the older material was nevertheless reported to be of higher value.
- The Tenopir and King table illustrated the break-even points at which it is more cost effective to opt for pay-per-view rather than subscription.
 - These range from 9.5 for a \$100 journal to 65.5 for a \$1000 journal – higher usage than those figures suggests subscription being more cost effective and lower suggests pay-per-view.
 - Results also indicated that in terms of older material, readings also varied a great deal between different faculty members
 - Once again, the importance of reliable usage statistics was reinforced as a tool to assist librarians in making decisions.
- Is the consortium site licence a sustainable model? Yes, but changes need to be made.
- The forced “all or nothing” approach cannot survive.
- Different site licences are needed for different types of libraries and greater flexibility and variety is needed. Specialist materials will never have the same usage in all libraries.
- The great benefit of consortia is the ability to bring together a wide variety of libraries, saving publishers from having to deal with individual libraries and libraries from having

to deal with individual publishers.

- By knowing their members, consortia can negotiate deals for a wide range of materials.

The boundaries of bundling

*Dr David Pullinger, Publishing Director,
UK Office of Statistics*

David's paper drew on his extensive understanding of the usage and economics of electronic information, including the SuperJournal project, and much other research and practical experience before and since.

He felt it important to distinguish between various types and levels of usage, and tailor consortia deals accordingly. Like every other speaker, he emphasised the importance of usage statistics, although he reminded us of differences, and the need for equity, across different disciplines (taking account, for example, of the number of researchers in different disciplines, and frequency of publication). He was concerned that usage should measure abstract and table-of-contents use, as well as full-text articles, feeling that the former were also valid indicators of research interest in certain circumstances (although often available free, as opposed to the charged-for full text).

SuperJournal, and other experience, had suggested that researchers tend to have about 5-10 journals as their core 'personal cluster', with an additional 50-100 relevant to their speciality, plus 'the rest' of STM publishing as a periphery seldom (but not never) consulted. He felt that, ideally, researchers should be able to search seamlessly across these categories (the contents of which will of course vary researcher by researcher, or at least research topic by research topic), including a Xgrain-type search across different databases. But there were opportunities for different charging models, which did not really accord with the much-discussed 'big deal'.

David suggested three categories of use (as in the previous paragraph), and therefore charging, ranging from the 'core', which would be supplied as reasonably traditional journal subscriptions, through 'non-core', which would include current awareness plus some journals/journal articles, down to 'periphery', in effect an article database. This corresponds to some extent perhaps to the Blackwell model, at least for the first and third of

his categories, although it was not quite clear exactly how a suitable model might be developed for the secondary category of use.

Finally, although advocating a greater reliance on usage statistics and analysis, he did not feel that usage should be the sole criterion for charging, fearing that this might lead to discouragement of use by library staff, and/or uncertainty for budgeting (and possibly the encouragement by publishers of 'esoteric' article titles, just to encourage curiosity use – the most often visited articles on SuperJournal were those with intriguing, non-specific, titles).

Library consortia: Part of the solution

Dr Peter Shepherd, Director, Counter

Peter reviewed the research carried out for the Ingenta Institute, noting the King and Tenopir findings that scientists do read a great deal, that 'journals are more valuable than we thought', and that 'information' accounts for 1-3% of R&D expenditure (veering towards the often-expressed publisher view that libraries should concentrate on getting more funding from their parent institutions, and not worry so much about rising journal prices – though he did recognise that the reality was that budgets would not in fact increase in real terms).

Peter also felt that what cannot be measured cannot be managed, and naturally spent a little time talking about Counter (<http://www.projectCounter.org/>), confirming that Release 1 of the Code of Practice should be issued before the end of 2002, with sections on

usage statistics report format and content, data elements and definitions, data processing, and auditing/compliance monitoring.

He looked at consortia in general, and the 'big deal' in particular, analysing their advantages and disadvantages from the point of view of authors, readers, libraries and publishers. He felt that consortia were generally helpful in increasing access, although there was a potential (increasingly actual) problem for small publishers under threat of being squeezed out (exacerbated by any growth in the number of big deals). Big deals were not helpful to libraries seeking flexibility in their budgeting arrangements, and some subject-specific or client-specific customisation.

Peter's conclusions, looking at the research but from a publishing background, were:

- Consortium licences need to be more flexible;
- Model licences themselves may need more flexibility (though "everyone is in favour of model licences");
- Licence negotiations are likely increasingly to be based on usage rather than historical holdings;
- The value of online journals should be highlighted;
- A growing e-archive, increasing in value, is likely to be exploited by publishers;
- There are still tensions between librarians and publishers relating to expectations.

Maggie Jones, Tony Kidd and Alison McNab

SERIALS RESOURCE MANAGEMENT FOR THE 21ST CENTURY: AN INTRODUCTION

UKSG Seminar held at the Society of Chemical Industry, London, October 2002

I am relatively new to the world of electronic journals. My background is in English language book sales. Prior to a recent promotion, which has seen me thrown in at the deep end of electronic journal licensing, my only experience of journals, other than as a reader, was selling the odd subscription at an academic conference or exhibition. So I was delighted that, not long after I assumed responsibility for our subscription to

UKSG, a flier landed on my desk asking 'Are you new to serials? ... Do e-journals give you a headache?' (They don't just give me a headache, they make my ears bleed.) The flier, rather than just sympathising with one of my many current predicaments, was of course encouraging attendance at the latest UKSG one-day serials seminar, entitled Serials Resource Management for the 21st Century: An Introduction. So off I set

on a bright early autumn morning to the Society of Chemical Industry for a day of journal enlightenment.

After coffee and a warm welcome by Caroline Moss-Gibbons, Manager, Library and Information Services, Royal College of Physicians, the morning programme was split into four 30-minute presentations. Each presentation was concerned with a different element of the serials chain; publishing, selling, purchasing and managing collections. On a slightly niggling note the sessions were presented out of logical order – i.e. we started with purchasing rather than publishing – but that may have been to appease the predominantly library audience. Whatever the reason, let's not allow this point to detract from the quality and informative nature of the first presentation, which was given by Finola Osborn, Serials Librarian from the University of Warwick. Finola detailed her experiences at Warwick University, including staffing levels, annual budget, current subscriptions, ordering procedures and supply problems, licensing issues, cataloguing and archiving, library management systems, serials promotion to library users, and future policy. As a publishing representative, I was particularly interested to hear of Finola's supply problems (delayed/difficult activation of electronic subscriptions and IP addresses versus passwords for activation) and licensing issues (negotiating alterations to suit day-to-day practicalities of library operating procedures). Finally, as generally accepted by most STM publishers of their institutional customers, Finola confirmed that Warwick University's future policy is to cut down on print subscriptions and move towards electronic-only serial (and eventually book) subscriptions.

The second presentation was equally informative and was given by Michael Mabe, who is currently Director of Academic Relations at Elsevier Science. On a side note, having studied and researched archaeology for seven years myself before moving to publishing, I was interested to see that Michael conducted research into radiocarbon dating before embarking on his publishing career. Hopefully, my family will be reassured that mine is not such a unique career path after all but in fact quite the norm. Michael discussed start-up procedures for new serials, including publishers'

considerations when accepting or rejecting proposals, breakeven time, setting up an editorial office, establishing the editorial board, calling for papers, marketing, and publishing printed and electronic serials. He also explained the role of the serial editor, peer review processes and the role of the publisher in editorial management, monitoring research trends and serial business management. It is the publisher who controls production costs and sets financial goals, reviews subscription development, sets pricing and makes the difficult decision of when to close a failing serial. He explored the various business models associated with differing serial content type and the detailed economics of serial publishing. Michael finished his presentation with a consideration of the running of the Ohio Science electronic serial hosting facility, which has 40 hosting units and uses enough water in its cooling facility to fill an average swimming pool every eight minutes!

After a short break Richard Steeden, Regional Sales Manager, Ebsco Information Services considered the role of the subscription agent. Richard discussed the changing role of the agent from a traditional supplier of print to providing a growing range of electronic access services. He discussed the supply chain complexity and explained that globally Ebsco deals with over 55,000 publishers, 265,000 titles and unquantifiable numbers of librarians and end users. He explained that agents exist to simplify the relationships between publishers and libraries/end users. He also stated that in recent years agents have needed to re-think their intermediary role and as a result have taken the initiative in aggregation of electronic content through developing gateways, content hosting and developing model licenses.

The final morning session was presented by Simon Inger, Consultant, Simon Inger and Associates and previously co-founder and Managing Director of CatchWord Ltd. Simon's presentation was concerned with linking and the management of electronic serial subscriptions. Simon explained how by necessity linking has developed and become more complex in line with the development of e-journal subscription patterns. We learnt that initial links simply located journal content from indexes or

gateways. Reference links were then developed and CrossRef was conceived to optimise these links. Up to 90% of most reference links are bilateral, i.e. organised between publishers, and only 10% are arranged through third parties such as CrossRef. Librarians aren't able to control where such reference links take their users – often they take users to the article via a link not subscribed to by the library and thus incurring costs rather than to the article via an existing subscription route – and so SFX has been developed to guide users through the library's own e-journal collection. I had not encountered SFX before but was very impressed with its functionality and capabilities. Simon's clear and concise presentation of such complex electronic linking rounded off a very enlightening morning.

We broke for a rather spectacular lunch including a choice of hot dishes, side salads, an array of irresistible cakes, fruit, cheese and biscuits and coffee and a chance to mix with other delegates.

The afternoon session took a different course to previous similar seminars and a breakout session with group discussions was introduced. The 50 or so delegates and speakers were split into five groups, each of which was presented with two scenarios to discuss with regard to the likelihood of the scenario happening and how much they would like it to happen. Brief summaries of discussions were then reported back to the whole audience. The scenarios ranged from propositions such as two leading subscription agents merging in 2004 to Microsoft entering the STM field with a

product designed to help libraries archive electronic journals.

The breakout groups were formed by splitting the delegates into groups based on where they were sitting. This meant that groups of people from the same organisation who had sat together to listen to the morning presentations tended to be together for the afternoon discussions and this may have led to one-sided discussions. More varied discussions may have been provoked if someone had considered the delegate list and allocated individuals from differing backgrounds to differing groups. For my part I was in a group dominated by librarians and would have liked at least one other publisher on my side! I also would have preferred to see the four speakers visiting each group and putting over the opposite side of the argument to that being agreed. There was also some confusion over what certain points in some of the scenarios meant, for example few appeared to know what 'SPARC' or 'Open Archiving' is, and so a little more background introduction was needed.

There was the usual timidity amongst breakout group members to volunteer to report back to the group as a whole but once this had been overcome a lively debate ensued.

It was a very enjoyable and informative day and a chance for me to mix with representatives from differing areas of the e-journal world and listen to their concerns.

Jane Mulholland
Licensing and Contracts Manager
Pharmaceutical Press