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TAKING THE PLUNGE: MOVING FROM PRINT TO ELECTRONIC JOURNALS

Graham Stone

An overview of the UKSG seminar held at the Scientific Societies Lecture Theatre, London,
Wednesday 22 May 2002

Introduction

Many of us are beginning to move to electronic rather than printed journal holdings. There are many perceived advantages for libraries in 'taking the plunge', and these include: 24 hour access; no shelf space or reshelving required; no 'at binding' volumes or missing issues (well, maybe not as many!); searchable content and linking to other value-added services. However, what is the impact on the scholarly community and the industry as a whole?

The UKSG decided to explore these issues in a seminar originally titled 'skip management' by bringing together an international panel of experts to investigate these issues and many more in the excellent facilities of the Scientific Societies Lecture Theatre. The seminar was chaired by Jill Taylor-Roe of the University of Newcastle.

Two of the papers summarised here are published in full in this issue, and another is expected in the March 2003 issue of *Serials*.

How has electronic publishing transformed the life of the scholarly publisher? Where have we been – and where do we go next?

Christopher McKenzie, John Wiley & Sons

A late replacement for Wiley's Reed Elfebein, Christopher, Director of Electronic Licensing for John Wiley & Sons, opened the seminar with a view from the sales and marketing perspective.

Christopher outlined the old world model of journal publishing (a happy place to be?) where the customer, rather than the product was the unit of business but success was harder to measure as it did not equal the quantity sold or renewed. He described electronic publishing as "an entirely new way to publish and sell what we publish" where the customer has changed from a mailing address to a licensing entity.

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The way in which publishers talk to customers has also changed. Marketing at end user level, e.g. academic staff, has replaced marketing to libraries or consortia. This has led to relationship marketing on a global scale, requiring:

- sophisticated sales and support staff
- a large investment in technology
- increased demand to do things faster
- technical staff with global 24/7 support
- legal staff with a knowledge of international law
- financial/tax expertise, e.g. VAT

Christopher implied that customers now lead the development of products, citing requests for remote access, archiving, such as MELON, CrossRef, and an end to username and password access as examples.

The future according to Wiley boasts a world of less print, successful archiving (as soon as we sort out what exactly it is that we want!), less selling of discrete units as we grapple with the 'value' of content, and faster publication.

Christopher rounded up by saying the new world enabled authors and editors to get faster publications, this leads to happy authors who make better authors, this leads to higher prestige, which in turn leads to higher value of content which finally leads to happy customers.

An interesting insight into the world of sales and marketing – I am not sure I see myself as a licensing entity though?

The King is dead, Long live the King. From NESLI to ...?

Tom Graham, University of Newcastle

Tom's paper provided us with an insight into the new phase of e-journal provision in the UK to which we have now moved.

He started by evaluating the National Electronic Site Licensing Initiative (NESLI), a single negotiation body that has received wide support, with the model licence being a great success. However, the speed, timescales and complexity of deals proved to be a problem for everyone, and the single offer certainly does not meet everyone's needs. NESLI has also been closely monitored in other countries.

NESLI has produced a cultural change but has not unbundled print and electronic journals within deals. The method of management has served quite well but may benefit from a different

approach. Although scale of take-up has been reasonable, NESLI has not been as successful in talking to the library community.

Tom went on to look at the work of the Journals Working Group (<http://www.jisc.ac.uk/dner/journals/selection.html>) including selection criteria and the future of agreements. From 2003 there will be a move away from one managing agent to an in-house team and a commitment to look for more, possibly smaller, publishers.

The Journals Working Group has gone back to first principles and is looking at added value, a variety of business models (including the 'big deal', pay-as-you-go and core subscription plus article selection), and a selection of financial models from pay-by-title and pay-by-usage to author/institute funded models.

Plans are also on the table to unbundle electronic and print deals and finally to eliminate 'no cancellation' deals and to seek cross-sectoral deals, e.g. NHS/HE/FE.

Tom concluded by saying that the key to the success of NESLI's heir is to live up to user satisfaction.

Digital dilemmas for intermediaries: factors that impact

Liz McNaughton, divine Information Services

Liz began by commenting that unbundling has created a great deal of work for the subscription agent, but it is important to understand client needs.

Libraries have asked for assistance on setting up electronic access, the major factors being the hunt for the subscription number, understanding various terms and conditions, which have led to a database of e-journal licences being held by many subscription agents, and the provision of e-journal reports. Liz also noted that dealing direct has led to a loss of revenue for the subscription agent, while dealing with e-journals through the subscription agent leads to increased service costs for the agent.

E-journals have impacted on staffing, people factors include training and the acquisition of new skills such as understanding VAT. Agencies have been put under added pressure as they must produce the same levels of service for print plus electronic subscriptions, which creates extra work at no additional charge to the library. Web technology, security and links to library management systems all contribute to higher

costs for the subscription agent. Time factors must also be taken into account, and subscription agents need time to set up access and to resolve problems. The renewals procedure is made more complicated by the possibility of loss of access; however, the adoption of a code of practice suggested by the Association of Subscription Agents (ASA) giving a two months grace period each year would alleviate this issue.

In Christopher McKenzie's presentation he forecast a complicated future for the subscription agent. However, Liz concluded by saying that subscription agents were in an ideal position to collect and make available e-journal information; they could offer a variety of levels of services, where clients could decide which level of service they preferred and what it was worth to them.

Managing without print: progress and plans

Christine Fyfe, University of Warwick (now at the University of Leicester)

After lunch Christine Fyfe gave us a valuable insight into a library that actively pursues an e-only policy. The University of Warwick has 2500 print journals subscriptions, 1000 electronic plus print journals and 7500 electronic journals. E-journal holdings have doubled in four years and now account for 70% of total journal holdings.

Christine explained that the accepted policy is to purchase e-only titles where feasible. Individual departments who want to keep the print version are required to pay the additional cost. So far this policy has attracted no adverse comments; in fact, there have been no comments at all. The University of Warwick is fortunate in that it is not a library of record, and in fact there is an insatiable desire for new titles. Another advantage is that the library is a company and can therefore offset the cost of VAT and make savings. Interdisciplinary content is top-sliced, and e-only titles are moved from departmental allocations to a central fund.

Change has been affected by a 'drugs in the playground strategy' where e-journals have been 'pushed' as much as possible without threatening print. Small-scale projects have followed, in which print copies were removed when an electronic version was available. This has been proven, as desktop access is the preferred medium to access library material, although

senior staff have not reacted as well as younger users. Subject teams have also undertaken huge promotions of electronic material.

Christine went on to discuss the feasibility of an e-only strategy. Although the ability of end users to exploit material has increased, many titles are still not available in electronic format. The subject approach was also found less appropriate for electronic deals. A cross-departmental group has been launched, involving the serials team, Information Services, the Business Librarian and the Electronic Resources Librarian to provide a consistent approach and to assess new opportunities as they arise.

E-journals have proved better value for money with high access all year round on a 24/7 basis and every title being used. Workflow within the library has had to be restructured with less demand for clerical work and more demand for upkeep. ILLs, photocopying and library entrance figures have all seen a reduction in numbers; however, staff have been allocated to help off-campus access.

Christine described missing content as frustrating. She also noted that users were less tolerant of delays in e-journal content and that there was a need to manage user expectation.

Looking to the future, Christine commented that although library space would be reclaimed there was still a need for some print backfiles to be retained in addition to magazine-type titles and small-scale journals.

Electronic journals – the Danish model

Ingbritt Butina, The Danish National Library of Science and Medicine, Copenhagen University Library

After what Ingbritt described as a slow start in 1996, the Danish Electronic Research Library (DEF) now takes over 7200 full text electronic titles as well as subscriptions to services such as ISI. The DEF promotes access to e-only titles and decides which licences to subscribe to as a consortium, although not as a national consortium. The DEF pays part of the cost to cover a critical mass of content, with libraries paying the remainder. If a library drops out of the consortium then it loses all access. A licence committee was established five years ago, with most deals lasting for one year.

Ingbritt went on to describe some of the challenges facing the DEF. These appeared to be

similar to many of the challenges facing UK universities including statistics, which are seen as a major problem. Missing supplements were also seen as an issue. Ingbritt made an interesting point about e-journal enhancements. She would much prefer cheaper financial models and links to library OPACs rather than flashy web pages – an opinion that was well received around the room.

Problems in the consortium included discrepancies between small and large institutions. Smaller institutions were thought to get more titles for less money whereas larger institutions could not afford the higher prices. Another issue was that although print titles were taken by individual libraries through subscription agents, electronic subscriptions went through the DEF, thus using DEF funds that could potentially be used elsewhere.

Ingbritt concluded with some interesting statistics; in 2000 there were 80,000 full text downloads, but in 2001 the number of downloads reached 280,000, the same figure as that for print usage.

The use of electronic journals in a document delivery service

Andrew Braid, The British Library

For over 40 years the British Library has used print journals to satisfy requests from its document supply service and in this time it has received over 100 million requests. Some 25 years ago the British Library investigated the use of electronic journals with the Adonis Project. In 1998 it began to use around 1000 electronic titles from Elsevier Science. ESTAR (Electronic Storage And Retrieval system) now incorporates five publishers covering 2491 titles.

Requests are processed at article level (journal title, volume, part, pages). If a match is found ESTAR prints off an article. For those requests not matched at article level a manual interface is used. Delivery, however, is in print, although some permission exists for electronic delivery.

Five more publishers will be added to the system shortly increasing the number of titles to 4000 by March 2003.

Andrew described a number of publisher concerns such as security as, for example, publishers like to see the end user. Watermarking

was suggested as one solution. He also noted that publishers are not keen on the use of Ariel software.

Planning the digital library: a virtual impossibility?

Andrew McDonald, University of Sunderland

The final paper of the day was a highly visual and entertaining presentation to which this author's words cannot do justice.

Andrew looked at what we should do with all the space we have freed up by digitising our collections. As university life is about people, he questioned whether electronic libraries were also about people.

During his presentation Andrew drew the following conclusions:

- Space is functional, it works well, looks great and lasts well, and it is also adaptable and flexible. User areas can easily be changed – networked PCs could be installed everywhere in the building.
- Social space is also important, it can be made inviting and easy to use, it can promote independence leading to a diversity in learning styles reflecting the growth of group study and the implications of SENDA.
- If space is well organised it can promote interaction, providing a balance of books, services, IT and readers. Environmental conditions can affect the quality of space, PCs increase temperature, and adequate lighting, both artificial and natural, needs to be considered.
- Space must offer safety and security to people, collections and IT, it must also be economically efficient to run.
- ICT should be used to make flexible provision for staff and users. Networking and operations must form part of the planning team. Networked PCs, wireless PCs and docking stations should all be provided – along with adequate space to use PCs.

Andrew finished by outlining current design trends including provision of daylight; natural ventilation; artwork; noise management; security; disabled access; ICT; 24/7 access, but above all *oomph*, the combination of quality with balance and flair.