Surprising Subscriptions: How Electronic Journal Publishing Has Affected the Partnership Among Subscription Agents, Publishers and Librarians. Nov. 9, 2006, Charleston conference, Lively Lunch

Assembled and submitted by Heather S. Miller, Assistant Director, Division of Library Systems and Technical Services, University at Albany Libraries

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The following text is a mixture of papers submitted by speakers and text derived from notes taken by the moderator and Mary Hawks of the University of Arkansas for Medical Sciences Library and has been reviewed by the participants.

Program:

Welcome! I am Heather Miller from SUNY Albany and I am delighted to see you all here.

This program grew out of a conversation between Tina Feick of Swets, Dena Schoen of Harrassowitz and EBSCO's Leslie Lloyd that took place a year ago. I want to thank them for making this session a reality. Tina was not able to attend the conference this year, but I want to acknowledge her role in creating this program. Leslie was instrumental in shaping the form and content of what we will do today. I want to acknowledge and thank her very much for her work.

Traditionally, a partnership among agents, libraries and publishers has resulted in the common good: all parties have realized benefits.

Libraries have realized greater efficiencies in processing serial/periodical orders and processing/receiving/managing their serials and periodicals. Agents have realized financial growth in assisting the library market and publishers have realized the efficiencies and economies of expedited payment and transactions from agents for their subscriptions.

A brave new world has dictated a great change -- a "swing" in the way all three partners transact their respective businesses. We will explore this in hopes of offering additional insight and information in terms of "needs" and "wants" of each of the partners.

Roles have changed as print journals evolve into electronic journals, yet the players remain the same. Are we all on the same wave length? Three subscription agents will provide insight on how their roles have changed due to the electronic publication of periodicals. Publisher representatives will present their own viewpoints as to the role of subscription agents and their policies toward them. Librarians will air their concerns, their expectations and disappointments, regarding subscription agents, publishers and e-journals. All are aimed at shedding light on the current status of subscription agents regarding e-journals as well as what the future might bring.

I will pose several questions to each group to get things started. Panelists may also have questions or comments for each others and we will hear from the audience at the end.

Questions for agents:

1)From the subscription agent's viewpoint, how have the needs and requirements of libraries changed from the days of print only to print plus electronic or electronic only? What remains the same?

2)How have electronic journals -- be they true electronic/online journals or the inclusion of this e-content in aggregated databases -- influenced (reduced or increased) your subscription business? What is your action/reaction to this reduction or increase in subscription business?

3)What do you foresee as the future role of subscription agents?

Questions for publishers:

1)How have your needs, as a publisher, changed with the onslaught of e-journals and e-publishing?

2)Please define the role of the subscription agent -- both in the print and in the electronic world -- and the partnership between publishers and subscription agents from a publisher's perspective.

3)What tools do you expect librarians will require in an e-journal world, and how prepared are you to offer these tools? Tools may refer to publisher access, platforms, customer service, reports, etc. Are these tools more comfortably developed and offered by subscription agents?

Questions for librarians:

1)How have your serial/periodical needs changed with the advent of e-journals, and what requirements do you have or foresee having regarding your information and assistance from your subscription agent?

2)Do you order e-journals directly or e-journal packages directly? If so, why? Should your agent handle these packages for you or not and why/why not?

3)What do you foresee as the future role of serials librarians? Subscription agents?

Ezra Ernst, Swets:

Some things have changed and others have not changed. Subscription agents must still provide the same "micro" services we always offered – processing orders, renewals, claims, currency exchange, publisher services, etc. And most librarians don't need to know or want to know what goes on behind the scenes to deliver those services. I liken it to making sausage – you love to eat it but you really don't want to know what goes into making it. Electronic journals complicate the processes with a huge layer of services – complications with pricing, negotiation, access and claiming. What we're seeing on the

positive side is that e-journal delivery is allowing small and medium publishers to rise to the top and gain more usage. I have spoken about this phenomenon in other talks – using the analogy of the "Long Tail" from Chris Anderson's book about it. We work with more than 65,000 publishers and in the past the 80/20 rule really applied – you ordered 80 percent of your content from 20 percent of the publishers. With e-journals, you have access to the remaining thousands of journals in the long tail. With tools that help you analyze usage statistics, librarians can now have transparency to really see which journals have the most usage, which was much more difficult to track in the print world. What many publishers don't realize is that agents can help publishers understand what librarians need. Several publishers have seen dramatic increases in revenue when they've worked with us.

Dena Schoen, Harrasowitz:

Ms. Schoen disagreed with Ezra's long tail analogy and feels that even e-journals are dominated by the largest players. She stated that the agent's role will or should be embellished by e-journals because the licensing is complex, access is difficult and agents can help with the intellectual decision making regarding the value of the content. Agents are at a junction, still answering claims for print titles, especially for humanities titles. Agents need to be quite nimble in order to deal with both traditional models and the new complications of e-resources. One major change is that in the case of a print journal, once an issue is shelved by the library, the agent has no further responsibility for it, but in the electronic world the agent has ongoing involvement. This requires a level of intelligence that was not required before. She noted that some publishers, driven by user demands for

immediate access, seek partnership with the end user and are uncomfortable working

with a subscription agent. However, publishers should not be blamed for doing what they

are supposed to do in a market economy, but they need to understand that libraries are not

market driven. Libraries operate on a service model and an agent can serve as an

intermediary between the two. She noted that publishers would not have to mount

expensive, time consuming projects for interfacing directly with customers, such as EDI,

if they made use of the experience and services already available from subscription

agents.

An Agent's Perspective, by Dan Tonkery, Ebsco.

Everyone in the information chain has benefited from the growth of electronic

journal publishing but from different vantage points. The actual end users are the clear

winners here as never before has so much valuable information been provided to support

the teaching, research, and educational functions of our great universities. With the

sudden volume of electronic information there is now a great equality at least in the

amount of information that is available to end users. Youngstown State University

through the OhioLink deal has the same information resources at least with journals as

the great Ohio State University. So the shift to electronic has been a great advantage for

researchers all over the world.

Libraries have also won in that they have been able to purchase far more content

that their budgets could ever support. In whole numbers with the consortium deals, small

to medium libraries have access to much of the same resources as the very large

institutions. Consider the medium size library that could only afford to purchase 200 or

300 hundred Elsevier titles or Blackwell or any major publisher and now they have the potential to access 1200 or more titles depending on the deal. Libraries with a historical subscription base of 2500 titles, now have access to 20,000 or more.

Publishers now have end user access to many more titles as well and that helps the research community achieve their need to communicate research results and actually increases the number of papers submitted to the publisher's journals. Usage statistics indicate a rise in usage of many of the lesser known titles which is a positive factor for publishers to see titles opened up and used for the first time.

If one can get over the cost issues with maintaining both print and electronic workflows, publishers have indeed seen increased readership, improved the dissemination of research results and improved scholarship and teaching with the wide spread availability of research results. Libraries may still argue that the cost is too high or that everything should be or follow an open access model but no one can argue that the shift from print to electronic has a negative impact on the educational institutions primary mission.

The subscription agents have also won in this shift as our role in providing access and management of the e-resources has opened new doors for service offerings and increased our sales, our expertise, and value to libraries. At first when the shift began and there were two or three hundred titles in electronic form from two of three of the major publishers, there was talk that the shift to electronic would destroy the agents' business and we should be looking for something else to do as all the work would magically be done between the library and the publisher and agents would be looking for things to do.

Well, that view of dismediation was certainly short lived in our community. With e-journal offerings from over four hundred publishers, supplying in excess of 20,000 titles we now find that agents are working double shifts to keep up with the workload. Libraries with limited staff still need to outsource the heavy volume of work in ordering, accessing, and managing e-journals for their institution. Just knowing each year what you are buying and from what source is problematic. Add to this equation, the shift of titles from one publisher to another, the special rates negotiated on the library's behalf, maintaining access all year long, managing the renewal, trouble shooting when access is gone, and it is easy to see why a library with limited staff turns to agents for support.

Take an every day example: a library buys one of the custom deals from let say big "E," at first you might think that all a library has to do is just send the invoice for payment and access would be turned on and the library does not have to worry until the renewal time. But in reality just processing that invoice is a challenge. Agents are helpful in auditing the list to make sure that what you negotiated is carried out in the invoice. Publishers' sales staff are great at working up deals, but what we have found is that the back room offices have difficultly delivering what the publisher sales team has promised. Often we have caught sufficient mistakes to pay for our service charge. It is a common fact that invoices have titles missing, titles added that are not part of the deal, confusion on coverage dates, and my favorite is getting invoices for titles that the publisher sold the year before. The agent has a better title file and access notes to insure that the library is getting what was contracted for. Getting an invoice out of many publishers quickly can be a real challenge.

What we have done based on experience is to work with the publisher to give us a "proforma invoice" which we use to work with the library to audit the list of titles. Once we have agreement, we alert the publisher to produce an invoice which we pay in a very short time. In the past we would send the invoice for approval only to find that the invoice was not correct and the publisher would have to start over and cancel the invoice which was a lot of extra work on everyone's part. There is a basic law that we have seen in the e-journal world, the larger the list the greater number of mistakes. And the second and third year renewals are just as much fun.

Agents are a critical part of the information supply chain and we had developed a set of value added services in the print world that were well understood. In the e-journal world there is also a value added set of services and agents have been developing and enhancing these services as this new world has evolved. Agents are good at publisher package management, paying for and monitoring custom deals, and providing a comprehensive bibliographic database with license, hosting, trouble shooting, and ownership information. We have an extensive reporting service that provides a current and historical view of what the library is buying and spending. Agents are an essential partner and work both with libraries and publishers on workflow, e-journal access and management issues.

Some agents including EBSCO, have expanded the range of services for publishers that includes actual hosting services, publisher fulfillment, publisher portals so that the publisher can monitor the ordering activity with our libraries and even help in setting up and selling to consortium. We have strong publisher partner relationships and offer a wide range of services for publishers. As an international company with thirty-two

offices, we are able to assist publishers in local markets that have language or custom ways of operating. In some regions we are actually the sales agent for the publisher with our publisher facing staff.

In summary, agents have made the transition to the e-journal publishing world by creating a wide range of valued added services that meet the needs of both the libraries that we serve and the publishers we partner with. The shift to e-journals has enabled agents to invest in new technology, retrain many of our staff, and grow with the marketplace. Agents continue to provide a valuable service to libraries and are continuing their long term role in providing services to libraries. The format is not as important as the range of services. We still provide print and the services surrounding this format, but in addition we have built a new or expanded set of services to help with ordering, access, and management of e-journals. Over 50% of our business involves an electronic component.

So, yes, the needs of libraries have changed and agents have recognized the shift in the marketplace and built the services to help manage the new formats. We are working with libraries and publishers to reduce the workloads and to find ways to streamline the process. There is no question that managing e-journals by a library requires more work that print journals and the agent is working to develop systems that can automate more of the functions and reduce the workload for everyone in the chain. Agents are also working to develop standards for the industry to follow which should help the process.

If anything, our partnerships with most publishers are stronger now than in the print world. Our work is not done but continues to evolve as the e-journal continues to

grow and develop. We look forward to providing a wide range of value added services to both the libraries that we serve and the publishers we partner with. Our role is still very much in demand and growing.

Publisher comments:

Tom Taylor, Sage:

The old print world was much more straightforward and less complicated. Renewals and cancellations were somewhat predictable. Each library made buying decisions for each journal title. Publishers did not know who their customers were in any detailed sense, and it really did not matter in order to run a healthy business. The main promotional activity for publishers was direct mail; there was very little need to engage a sales force. That world was so much simpler than it is now that had we had this panel discussion fifteen years ago, all of the panelists would have had close to a full understanding of the journal business. That is not the case today as the new layers of complexity make it difficult for any one person to completely understand all aspects of the journal world.

The new electronic world allows for a variety of product bundles and aggregated content. Users are demanding more complete and sophisticated searching capabilities which will only add momentum to large bundle products coming from publishers. Publishers' customers have responded by forming into buying consortia to purchase the new product offerings. The new varieties of bundled content and new types of customers have created the need for publishers to form their own sales forces, or engage a third

party one, in order to negotiate deals with the consortia who have formed around the globe. Publishers have to make larger investments in this new world in order to have continuous improvement in their platforms (or pay someone else to do so), conduct market research in an ever changing world (which was slow to change in the print world), measure usage statistics, and pay for ever more sophisticated fulfillment systems. Finally, the new types of customers substituting new product types for old ones has created complicated layers of product migration. For example, a library can move from a print subscription to an electronic one (or print/electronic combined), from the electronic one to a collection of journals that includes the electronic one, and from the collection to a consortial arrangement. In order for publishers to forecast their revenue over a multi-year period, they will need to engage in some fairly sophisticated modeling to predict the various migration paths.

In the print world, subscription agents offered publishers their services, but publishers did not really see the need for them. Subscription agents appropriately saw libraries as their main customer and concentrated on investing in the delivery of services for them instead of publishers. The fact that subscription agents took most of the orders from libraries and consolidated them for publishers did make the work of libraries and publishers easier.

The consequences of the new products and customer types (consortia) created by the new electronic world have made the apparent need for subscription agents less necessary. Some subscription agents have responded by creating fairly sophisticated web based service applications for libraries. But the irony is that the electronic world perhaps

has made the need for subscription agents more important to publishers. Subscription agents can:

- Provide early visibility into renewals.

- Maintain a record for libraries and publishers of historical subscriptions once libraries begin migrating to new products or participating in consortial arrangements.

- Explain the different product offerings and associated price models to librarians.

- Help with the renewals of the various products.

- Work as a sales force and marketing department to sell and promote the new products to libraries and consortia (SAGE has engaged EMpact, the sales arm of EBSCO, to represent it in various territories in the world where we do not have our own sales force).

- Work collaboratively with a publisher's sales force to negotiate deals with consortia using their territory and customer knowledge.

Of the tools mentioned above, SAGE provides most of them either directly or through third parties. We have our own platform (empowered by HighWire), COUNTER compliant usage statistics through HighWire and MPS, and our own customer service. We have recently reorganized customer service by adding account reps and technology reps to more proactively ensure that our customers are getting what they need.

We realize that many subscription agents offer the same services and we are, in fact, fairly agnostic about where libraries receive these services. If librarians decide in the future that they prefer to engage the services of subscription agents for these tools, then we will work with subscription agents to make sure our customers are satisfied in that regard. We are already doing so to some extent.

In the future, subscription agents might provide the following information (some might do so already):

- List of non activated subscriptions for libraries and publishers.

- Downloadable lists of all product type subscriptions.

- List of new and dropped titles of publishers.

- Libraries managing their own renewals and subscription business on line with some (appropriate) visibility for publishers.

Chrysanne Lowe, Elsevier:

Libraries have historically used agents to manage their print subscriptions across publishers. Doing so allowed these libraries a single point of contact for journal title selection and order placement, order fulfillment, invoicing, payment, and reporting for hundreds—or even thousands—of journal subscriptions across 2,000 or more publishers. With the advent of electronic products, such as ScienceDirect and others, the role of each participant in the supply chain—publisher, agent, and library alike—is changed. Some customers are comfortable dealing with a limited number of publishers directly for e-subscription products. Others prefer transferring the historic system of print subscription

management to an electronic one. We realize that not all publishers may have the capacity to provide direct services, but as a leading publisher, customers demand these services from Elsevier and we aim to meet that demand. Three areas most often brought to our attention are 1.) title communication, 2.) negotiation, pricing, and invoicing, and 3.) access issues.

1. Title Communication

Communicating about electronic title holdings is probably the number one area where we get customer queries. Online, Elsevier tries to make information as accessible as possible. First, we post all title changes as soon as they are made known. Second, we provide alerting services for each of our products that feed information directly to libraries. Third, with the launch of the Admin Tool on ScienceDirect in 2005, we give libraries control over a myriad of options for managing their accounts online, including access to an institution's holdings reports as well as their usage. This November 2006, we are launching a quarterly **Customized Title Change Notification** communications that will identify changes that impact the institution's holdings. This service was developed in response to customer feedback. The reports will be e-mailed directly to the institution's designated administrator. These communications are examples of the benefits libraries have in a direct relationship with the publisher.

2. Access Issues

In the print world, librarians send claims for missing print issues to their agent, who in turn process these claims to publishers. When access problems occur in the

electronic world, claims have more immediacy. Agents do not have the ability to log into a publisher's entitlement system, so they can only forward the issue to us via our E-Helpdesk. The most efficient way for library staff to resolve access issues is by direct interface with the publisher. For seven consecutive quarters, we have implemented actions to improve customer service and are measuring customer satisfaction. As of the third quarter in 2006, approximately 91% of customers rate our E-Helpdesk the same or better (43%) than other publishers, and 90% rate our E-Helpdesk the same or better (40%) than agents. Overall, the best customer service is when customers do not have electronic access problems. Elsevier continually strives to achieve this goal. We have a 90% satisfaction rating on electronic journal delivery.

3. Negotiation, Pricing, and Invoicing

Elsevier requires direct contractual agreements with authorized licensing parties. Librarians are now often engaged in licensing negotiations with several different publishers and this can sometimes be a resource burden to the library. In my personal view, the lack of standardization in pricing and business models brings both advantages and disadvantages. In the print world, a subscription is a subscription. But, in an electronic world, libraries have more licensing options. Institutions can expand their content for a fraction of the list price. Institutions can go e-only, get DDP (deeply discounted print), and negotiate price caps. Libraries may get better terms directly with Elsevier than on a license with another publisher, but doing so eliminates the ability to estimate next year's total cost with the press of a button or by making one phone call to an agent. Where we can, Elsevier tries to be transparent. Our print price list is posted on Elsevier.com. Our average price increase is announced in July for the next calendar year.

Elsevier is also actively improving our direct services to libraries, especially in the areas of invoicing and sales operations. If a customer requires billing via an agent, Elsevier will comply but we do not compensate the agent for these services. Agents may therefore look to pass the costs of these services on to libraries. All parties: Librarians, Agents, and Publishers are in the process of evaluating services and rethinking value and compensation.

Right now, Elsevier is actively engaged in various partnerships with many agents. We are working with agents in developing business areas and particular geographic regions of the world. We are already working with third party platforms on e-books and exploring potential new opportunities with e-book monographs. We are also in discussions with traditional subscription agencies to explore new roles as well as specific solutions for individual customers. Elsevier values the services and expertise that agents bring to table. We look forward to working with both customers and agents in new creative ways to add value to our changing industry.

Kim Steinle, Duke University Press:

Ms. Steinle disagreed with her colleague at Elsevier, stating that when e-journals were beginning, Duke went to subscription agents for help. Librarians can choose to switch agents, but going direct cuts them out. Now subscription agents are looking more at publishers as customers and publishers are more willing to ask and listen to subscription agents. She agreed that electronic journals have made life more complex. Print claims were simple compared to dealing with the problems associated with e-journals. Time is an issue because users demand immediate access and will not wait

weeks for a solution and that this may relate to one title or to all titles offered by a publisher. She also noted that consortial purchasing of e-journals has added another layer of complexity to the equation and that this discussion lacked consortial representation.

Librarians' comments:

Susan Zappen, Skidmore:

Subscription agents have created a win-win situation for libraries and publishers. For libraries the subscription agents consolidate the ordering, the renewals, the payments, and the claiming. And for publishers the subscription agents consolidate the orders, the renewals, the payments, and the claiming. Without subscription agents, both libraries and publishers would probably have to devote additional staff to working with each other. And both groups would probably consume great quantities of aspirin!

Subscription agents have weathered well the move to e-journals. Publishers have displayed creativity in the packaging and pricing options. This creativity is not just for their benefit but also for libraries that want options. Initially, the e-journal was free with some print subscriptions. Then the e-journal could be added on to the print subscription for an additional amount based upon a percentage of the print subscription cost. Pricing structures continued to mutate from print free with e-journal subscription to flip pricing or print added to e-journal subscription for an additional amount based upon a percentage of the e-journal subscription price. Then there is print only or electronic only. Confusing? Yes!

Through it all, subscription agents have sorted out the options and prices for libraries. My library relies upon this vendor-supplied subscription information for both print and e-journals. I prefer a streamlined approach of providing the subscription agent with the college's IP address range and a contact person's email that can be forwarded to the publisher. It is something that should remain in effect and not have to be redone with each renewal. Initially, the publisher can send out the same message with some tweaking to all subscribing institutions with any information for the subscriber or requests for additional information from the subscriber. Many, if not most, publishers do this already.

Most of our e-journals are obtained through consortium-negotiated packages (some packages are referred to as "the big deals") or through third party databases. As a small undergraduate college library, we do not have the resources to subscribe on our own. The negotiated packages and databases have given our students access to more full text journals than we could ever have imagined. As far as I can determine 2,081 is the greatest number of print subscriptions we have ever had. With our e-journal packages, databases, and open access journals, our students have full-text access to approximately 35,000 titles. I would like to see publishers offer subscription agents "consortia pricing" that they could in turn offer to individual libraries.

Skidmore doesn't have a "Serials Librarian." The current generation of integrated library systems performs many of the time-consuming tasks of the kardex era. Our Acquisitions Librarian and our Cataloging Librarian have trained staff to use the resources provided by the ILS and the subscription agents. Staff members consult librarians to handle difficult publishing patterns or tough cataloging decisions. What I see for the future is a need for higher performing support staff.

Subscription agents will continue to play a role with e-journals. The open access journals movement will seriously impact both subscription agents and publishers. Because subscription agents have succeeded so well at providing value-added services to libraries, I anticipate that they will reinvent themselves in an open access environment. Open access journals have evolved from being just a good idea to an absolute necessity for libraries. We can't continue paying outrageous prices for STM journals year after year. At this time we have no other hope but a successful open access movement.

Lila A. Ohler, University of Oklahoma Libraries

As many have noted, the tasks involved in managing e-journal content are far more labor intensive than traditional serials. Because content can no longer be simply ordered, received and the placed "on the shelf," the relationship between the library and our serials agents has changed dramatically. One significant change in our relationship with serial subscription agents is the amount of research we rely on them to do even before an order is placed. We rely on serial subscription agents to gather the necessary details as to complex tiered pricing, licensing requirements, levels of access per type of subscription. Traditionally serial subscription agents have always performed the service of customized invoicing, and, in the e-journal world, we rely on them even more to track much more complex funding accounts so that we can more accurately measure not only what titles we purchase per subject area, but in what format, and with what degree of online content purchased.

But more importantly, the most significant change is the degree to which serial subscription agents play a part in enabling the library to manage e-journal content after the purchase. The task of tracking the information necessary to keep our electronic serials up and running is the most difficult part of this process, and in this we rely heavily on our serial subscription agent to aid in gathering the information necessary for the management of electronic resources and to provide effective resolution of e-access issues. With or without a working ERM, libraries are still faced with the management of the details necessary to register access for online materials, and to keep them running, which is enormously daunting. We take advantage of our subscription agents' services to provide e-access alerts per title when a publisher has provided access, to gather the details necessary to register materials for access, and also provide us with a place to track these title by title. Publishers and hosting sites use a variety of ways to transmit information related to access, and very little of that information is standardized, nor transmitted electronically. As a result, libraries are simply unable to gather, synthesize, and troubleshoot that data ourselves. Due to the inadequacies of traditional ILS systems, the type of information we could not track on our own is invaluable information for us, such as codes needed to access administrative sites or register titles for access, how many times we have had to re-register a title with a publisher, what levels of coverage we should have, whether or not licensing is possible because the publisher does not support IP authentication, as well as new pricing structures that might impact our archival access when a title transfers between publishers. In our experience, the majority of access problems seem to be when a publisher has not verified our correct level of access with their hosting site of choice, or has switched their content to a different site and did not

"turn on" the same access as before. We rely on the subscription agent to verify our payments and resolve the matter directly with the publisher or the hosting site.

One of the advantages of e-journals touted in recent years is the publisher big deal. While this does present the library with a significant advantage in cost savings vs. content acquired, the "hidden costs" libraries must face with these deals are spent proofing title lists for subscriptions, discounts, added access content changes, and licensing changes. While smaller libraries with a limited number of subscriptions might find it advantageous to go direct to the publisher, large libraries will likely find it more cost effective to insist that our subscription agent of choice handle our e-journal packages. Typically, libraries have one librarian handling all electronic journals for the library, and the task of tracking down and verifying titles that are moving from one publisher to the next is impossible in a traditional ILS because it cannot track titles by current publisher. We work with our serials agents to help us identify known subscriptions and new or transferring titles from a particular publisher when negotiating a publisher big deal. Additionally, because many publishers will not itemize billing on such deals, we rely on our subscription agents to verify the discount pricing we have negotiated, and track costs in special accounts, making it easier for us to see the bottom line of these packages. Given the troubles that publishers readily admit they have with itemized billing and tracking their own e-journal title transfers or content changes, I would ask why a library would not use a serial subscription agent.

I believe the future relationship between serial librarians and serial subscription agents is likely to become a steady partnership. Serial librarians will become an even more vital part of their organizations, because the same skills they cultivate in managing

e-journal content will become even more vital as e-content becomes unbundled in the open access movement. In the past, articles have been written calling on serials acquisitions librarians to act as change agents, brokering their unique knowledge of the serials marketplace and business acumen in the face of fears that acquisitions departments would no longer be useful in the acquisition and management of electronic resources. But rather than becoming redundant, the complexity of the e-journal environment has proven the skills of the serials librarian invaluable. Acquisitions, and more specifically serials acquisitions, is still important because the traditional business paradigm of serials persists, and I believe will continue to persist, as both publishers and vendors create new ways to increase their involvement and profitability in the new online journal and online content environment. By default, the traditional expertise of the serial acquisitions librarian has become critical to continuing business in the online environment. As open access initiatives and institutional repositories expand the market to include the new business paradigms and as more small publishers move into the market with complex online pricing and licensing structures, it becomes a question of proportion. The age of alternative publishing models means more complexity, not less, and addressing the needs of information acquisition, management, and organization in the open web will only increase the library's need for highly skilled serials librarians who can manage and track data across multiple systems, daily deciphering and reconciling the multiple interfaces of the library's systems, the publishers' and content providers' systems, and the vendors' systems. But in order to do this well, serial librarians will continue to rely on the skills of the serials vendor, including subscription agents.

Serial subscription agents have a record of willingness to work with the unique workflow of libraries, traditionally relieving libraries of workflow constraints by managing the time consuming details of serial subscriptions, and will likely continue to fill this role even more so with electronic subscriptions, especially if libraries must move more toward new workflow strategies for managing unbundled electronic content. One area I see as a possibility of growth is the help a serial subscription agent can provide with negotiating and transmitting licensing terms of agreement on behalf of the library. The current model of complex and time consuming license negotiation between libraries and publishers is not sustainable. While libraries have done well to negotiate licenses with the largest publishers in the market, this process is likely to overwhelm us as more small publishers move into the electronic content market, not to mention the issues that will come up as libraries become content providers themselves with the development of open access repositories. At this stage, libraries have a better sense of what terms of use they will or will not accept. And if the industry could move more toward accepted terms of use agreements, with formal license negotiation in the event that standard terms cannot be agreed, then the serial subscription agent could easily transmit a library's terms of use to the publisher at the same time as our subscription validation, IP ranges, hosting platform preferences, and contact information.

One word of caution remains for this growing relationship between the workflow of libraries and that of serial subscription vendors. While I believe the world of electronic content will undoubtedly mean more integration of services between libraries and library vendors, and there will be no escaping this, one of the concerns that libraries face is tying their services more closely to a particular vendor by integrating that vendor's

unique services into the library's workflows. This concern is even greater for the relationships libraries have to electronic resource and serials vendors. The fact is that we rely more intimately on serial subscription vendors to acquire electronic resources for us, track data on both traditional print and now electronic subscription orders for us, and make arrangements with the publisher for access, and intermediate when access problems occur. As long as the vendor continues to provide good service, this is not a problem, but if service deteriorates, this greater investment can cause significant disruptions if the library has to change vendors. In this respect, I believe it is vital and healthy to periodically consider the implications of such relationships by reviewing the service an agent provides, considering the full range of the interconnections of those services to other areas of electronic resource management, and evaluating and communicating that feedback to both internal and external stakeholders.

Stephen Clark, William & Mary:

Electronic journals have added tremendously to my workload in complexity as well as amount of work. There is the added time that it takes to process a subscription, and get it up and running so that there is access to my library's users. There is also the element of working out the license agreement – in my case, it is often mediating between the publisher and my procurement office – as well as maintaining consistent access to the journals. All of this has really added to the process of serials management. Making use of the services of a subscription agent can help in taming this madness just as it does with centralized management of the serials that my library has on order. Since most

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publishers do not offer the services that a subscription agent does, my preference is to avail myself of those services, whenever it is possible.

I am mildly surprised that publishers do not have a better handle on pricing for electronic publishing than they do. Granted, e-publishing is still pretty new, in the grand scheme of this business, and it is difficult to determine the economics of it versus that of print publishing. I do not really feel that many publishers have developed a "feel" for pricing electronic products versus print products and determining what their margin for profitability will be. This will change as time goes on, models for pushing material out to the public, and the trend for more e-publishing of journals outweighs that of print.

Although I still rely on my subscription agent for assistance with much of my print and electronic subscriptions, all three players in this game – publishers, agents, and librarians – need to work closely together. There are a few elements that we all should possess and use in order to survive not only this period of adjustment, but also to maintain a good, solid working relationship. These attributes are: cooperation, flexibility, communication (open and honest communication), and openness to work with one another.