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# Thriving in Chaos: Intermediaries Delivering Value in a Changing Landscape

by **Ann Lawson** (EU Publisher Sales and Marketing Director, EBSCO Information Services) <alawson@ebSCO.com>

The supply chain between authors and readers is complex. It includes libraries, publishers, consortia, database providers, tool providers, data hosts, industry bodies, and government agencies, all of whom are competing and collaborating as they find different ways of navigating through an ever-changing landscape. As the supply chain evolves, its changing needs drive intermediaries to redesign their activities and deliver greater value.

The current challenges in the supply chain — budget cuts, an abundance of content, a huge rise in international research, the influence of Google, libraries being held accountable in proving their value — are creating chaos that is driving the need for intermediaries to add value, particularly in the area of discoverability.

More research is being carried out and is being published. Latest figures from the **International Association of Scientific, Technical, and Medical Publishers** in 2009 show growth rates of 3.5% per annum, comprising 25,400 scholarly journals and at least 1.5 million articles set to increase with a dramatic rise in so-called “big bucket” journals. As a result of this abundance, it is harder for users to find the right content in the right context. Researchers are reading more but spending less time per article, leading to the importance of accurate filtering within discovery tools. This paper takes a look at two key areas where intermediaries can add value: discovery and usage.

## Discovery

Search used to be limited to the OPAC. Metadata would be searched for print books and journals with information about circulation figures; paper indexes would be checked to locate articles within journal issues. In time, search became increasingly fragmented because of multiple platforms — and the role of the librarian became that of Search and Rescue expert! In the midst of this chaos, Google arrived, setting new standards in search options and user expectation. In sharp contrast, library gateways, to the user at least, appeared unnecessarily complex. Discovery tools, such as those pioneered by EBSCO, introduced a single search box, enabling libraries to simplify portals and stamp their own brand on them to make them easier to use and more attractive to users. A range of discovery tools are available on the market, some of which integrate with other e-resource management tools to unite a library’s entire collection of online data resources with the catalogue, giving the user a seamless, uninterrupted research flow.

Intermediaries can add value to publishers and librarians by helping to ensure an accurate match between user requirements and availability of the right content. Chugging away in

the background is what the user should be blissfully unaware of — and what the intermediary has spent years developing — a discovery tool with robust links and streamlined processing of thin/thick metadata, all to help ensure that the user’s work is structured and academically relevant and ensuring that the right content is discovered quickly and easily.

## Usage Analysis to Help Prove that a Library’s Collection Delivers Return on Investment

Intermediaries know that what keeps librarians awake at night is understanding usage in terms of value for money and return on investment. Usage stats can provide a detailed



and reliable usage overview to help determine what is valuable within a collection. Apart from the fact that demonstrating value is often mandated by their funding bodies, decreasing budgets relative to previous years (and relative to overall university spend) means that ROI and accountability are more important than ever for the library.

In an EBSCO survey carried out in February 2010, “Times of Crisis Accelerate Inevitable Change,” an overwhelming 81% of librarians cited evaluation of usage statistics as being a very important factor in making content selection/de-selection decisions. Usage stats can provide a detailed and reliable analysis to help justify funding to the university or research institution. More sophisticated analysis can support internal justifications for purchases. Libraries want not just raw data, but metrics, harvested in an easy and straightforward way to produce “Journal Report No. 1.”



Usage stats may affect current business models in a number of ways, and intermediaries are working with publishers and libraries to explore some adventurous options.

## The Big Deal

The Big Deal is a relatively simple “one size fits all” — but can soak up a lot of budget (in some cases up to 80%) and is often complex to administer. A 2009 survey by **Jill Taylor-Roe**, Head of Liaison and Academic Services, Newcastle University, showed that 41.9% of libraries claim that big deals consumed 26-50% of their library serials budget, and 38.7% of libraries said big deals consumed over 50% of their serials budget. Such deals are often complex to administer, but intermediaries can add value by providing solutions.

A study presented in February 2010 at the **Electronic Resources & Libraries (ER&L) Conference** in Austin, Texas by **Nisa Bakkabasi**, Head, Electronic Collections at **Yale University Library**, showed that 80% of use was attributable to only 24% of titles in packages and 90% of use was associated with 40% of titles in packages (Bakkabasi 2010). Statistics such as these understandably lead to questions regarding the future viability of Big Deals. Mentioned in the same breath is that Big Deals are being cancelled or downgraded to smaller subsets of content. However, EBSCO’s research indicates that, in spite of this, the global trend is for Big Deals to continue. It appears that the Big Deal is still a relatively Good Deal after all. Nevertheless, the uncertainty is driving a need to find other process and pricing models, such as PDA and PPV. These are being widely explored in the eBook arena, where intermediaries can add value by identifying opportunities for smaller publishers, where more complex, bespoke deals may be more appropriate. Gold/green open access and self-archiving have to fit in here as well. Creative package combinations and bespoke pricing models are not easy to administer, but here again the intermediary can help.

Change can be as unpredictable as the English weather, and during the next few years the supply chain will face the challenge of managing big deals and bespoke deals, as well as various hybrids.

## Value

Value is a recurring theme in the publisher/intermediary/library relationship. The era of the old-fashioned “subscription agent” has come to an end. Intermediaries of the future survive *because* there is chaos; they add value by simplifying complexity in the supply chain in the following ways:

1. **Removing cost** through economies of scale, application of ICEDIS standards, offering customer services such as processing claims, providing historical pricing information, etc.
2. **Outsourcing** hosting, sales and marketing, usage analytics, dis-

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covery, management of OA fees, identifying operational efficiencies, and by applying PDA/PPV solutions and standards such as Transfer and COUNTER. By outsourcing these services to intermediaries, libraries and publishers can focus on core activities.

**3. Harnessing technology** — this takes insight, experience, expertise and substantial investment to make processes more efficient and to keep pace with new mobile technologies, including social media.

### Review Your Current Practices!

We all need to continuously review the real needs of the supply chain. Tinkering won't work. Financial stability is needed to invest in research; thought leadership is required to innovate; and drive, insight and expertise are essential to thrive in this chaos. Legacy systems, a lack of budget, and a shortage of time can be difficult factors to overcome — but inertia poses a greater risk.

Our advice is for libraries and publishers alike to consult with a range of intermediaries, to compare and explore new solutions, and to find exciting opportunities for intermediaries to add real value. Together we can challenge conventional thinking and help to stimulate change for the better.

### Author's Biography

**Ann Lawson** is European Publisher Sales and Marketing Director with **EBSCO Information Services**, a position which involves liaison with **EBSCO's** major publisher partners across Europe. After an academic career in linguistics in UK and German institutions in her twenties, **Ann** worked for **HarperCollins** and **Oxford University Press** in electronic business development. **Ann** joined **EBSCO** in September 2006 to explore the world of electronic subscriptions. **Ann** sits on the UKSG committee, heads the ALPSP seminar programme committee, and is a member of the ASA Executive Committee.

### Company Profile

**EBSCO** is the world's premier full-service provider of information, offering a portfolio of services that spans the realm of print and electronic subscription access and management, research databases, and more. The company's e-resource renewal and management tools help librarians accomplish in hours what once took weeks. For more information, please visit [www.ebsco.com](http://www.ebsco.com).

If you would like to request **EBSCO's** series of papers "The Future Role of the Academic Information Supply Chain," visit [www.ebsco.com/papers2012](http://www.ebsco.com/papers2012).



## against the grain people profile

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**BORN AND LIVED:** Born in Glasgow, Scotland, lived there until I left home to go to university on the day of my 18th birthday. I studied in Birmingham (UK) and Trier (Germany) for a total of eight years, and after that lived and worked in the UK and Germany.

**EARLY LIFE:** I am the daughter of two University lecturers in geology, so spent my happy childhood often in quarries and cuttings around Europe. My parents instilled in me my love of the great outdoors, animals, travelling, reading, and walking, all of which stay with me until today.

**PROFESSIONAL CAREER AND ACTIVITIES:** After an academic life in my twenties, I was introduced to the world of publishing through dictionaries and lexicography, when I joined **HarperCollins** to license their reference content to third parties. That in turn led me to **Oxford University Press**, where I gained great experience in licensing and business development, travelled the world, and made great friends. I have been with **EBSCO** for over six years now, continue to learn a lot, and work with a great team.

**FAMILY:** Married to a wonderful Dutchman, living in Oxford with a small garden full of fruit, flowers, and vegetables and three friendly moggies.

**IN MY SPARE TIME:** I go to the theatre and live music events several times a month, am an active member of two book groups, do some local volunteering, and love being outside for walking, horse-riding, kayaking, and exploring.

**FAVORITE BOOKS:** Too many to name!

**PET PEEVES:** Unkindness in all its forms — cruelty, impatience, intolerance, rudeness — and the scarcity of power sockets in airport departure lounges. :-)

**PHILOSOPHY:** I think it was **Lucille Ball** who said "it is better to regret the things in life which you have done, rather than those you have not." Fear of failure can restrict our dreams and opportunities, but I try to live life to the fullest.

**GOAL I HOPE TO ACHIEVE FIVE YEARS FROM NOW:** Remain happy and healthy, enjoying my life and my work as much as I currently do.

**HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS:** That's a big question! This is a great industry full of interesting, intelligent, and imaginative people. I don't see that changing in a hurry, although the nuts and bolts of how content is created and made available may change dramatically. This industry supports and helps to drive research, progress, and creativity, and it is wonderful to be involved as those changes occur. Sadly, I don't have a crystal ball, but I can see that discovery will remain key, as will social networking tools and a continuing blurring of lines between content formats. Open Access is currently looking like a game-changer, at least in the UK context with current mandates. 🐼



### Rumors from page 6

entitled "Print-on-Demand and the Law of Unintended Consequences" (February 21, 2013). **Rick** focuses on the iPod and its disruption of the music industry and moves to the eBook and the upcoming disruption in the book industry. How are libraries to deal with it or will we?

<http://lj.libraryjournal.com/2013/02/opinion/peer-to-peer-review/print-on-demand-and-the-law-of-unintended-consequences-peer-to-peer-review/>

<http://bit.ly/Zuqdcg>

Speaking of awards, **Wolper Information Services** of Easton, PA, was named a finalist in the **Front-Line Customer Service Team of the Year** category in the Seventh annual Stevie Awards for Sales & Customer Service. This is the second year that **Wolper** has been recognized. And there's more — **LM Information Delivery Group** and **Wolper Information Services** have merged to create a global company in the information management industry. Both **LM** and **Wolper** were established in the early to mid-1970s and have significantly expanded their customer bases and breadth of services over the past 5 years. Both organizations are

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