

The Evolving “Supply Chain” for Foreign Acquisitions

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The process of making research materials available for international studies begins with the producers or publishers of those materials, and ends with the researchers, or users of the materials. This “supply chain” has changed radically over the past twenty years, because of powerful new trends in the publishing industry and a revolution in communication technologies. For purposes of discussion here the four basic links in this supply chain are:

1. **Sources:** holders, producers and publishers of materials for international research
2. **Suppliers:** organizations that supply international materials to libraries
3. **Libraries:** organizations that acquire, hold and maintain materials for researchers
4. **Researchers:** scholars and other users of those materials

Libraries occupy an important place in this chain, but their role has changed fundamentally in recent years. In an attempt to shed light on the issues of library foreign acquisitions today, we have sketched here the supply chain from top to bottom. At the risk of oversimplifying the picture, we also suggest some major changes that are taking place at each point in the chain. To highlight those changes we describe practice at two moments in time, twenty years apart: 1992 and 2012.

This analysis does not cover all types of source materials relevant to international studies. Dissertations from non-U.S. universities, archives of original documents, and political ephemera, for example, are not discussed. However we hope that this exercise nonetheless provides useful background for original and productive conversation during the conference.

1. Sources

1a. Scholarly and Scientific Publishers: Over the years a number of major publishers specializing in foreign books and serials have served the U.S. academic research community. A few examples of these are:

- Brill – A Leiden-based publisher and distributor of English-language academic books and journals in the humanities, social sciences, law, and economics.
- Martinus Nijhoff Publishers -- An independent Dutch publisher, established in the nineteenth century, specializing in international law, human rights and humanitarian law, international diplomacy, and trade. Its annual publication program consists of over 20 journals, 20 annuals and some 120 new book titles.

- NISC – A South African-based publisher of databases and journals in the natural and social sciences, arts, and humanities, with coverage of Latin America, Sub-Saharan Africa, Southeast Asia.

1992: These specialty publishers sell books and serials (print and electronic) to research libraries directly and through jobbers, aggregators, and subscription agents. Books are sold on an approval basis, using “profiles” of a given library client’s interests to pre-select titles; en masse within a pre-defined scope on standing orders; and on an item-by-item basis. Serials are sold on a title-by-title basis or in pre-established “bundles,” renewed periodically.

2012: Books are produced increasingly for tablet and mobile devices, and e-books from all regions are now sold through a few large online vendors like Amazon, Harrassowitz, and Barnes & Noble. Consolidation in the industry is reducing the number of sources and the diversity of literature available even from the specialized publishers. Since 1992 Brill has acquired Martinus Nijhoff; Global Oriental Ltd., publishers of books and journals in the fields of Japanese, Korean, Chinese, and Central Asian studies; and KITLV Press, a Dutch publisher of Asian and Caribbean studies. NISC was acquired by EBSCO Publishing in 2008.

1b. Government Agencies and Intergovernmental Organizations: Agencies and offices of foreign governments at the national, regional, state, and local level produce reports, statutes, documents, and other materials that serve as primary sources for research in a range of humanities and social science fields. The years since World War II have given rise to a number of intergovernmental organizations, like the United Nations, World Bank, International Monetary Fund, World Health Organization, NATO, and others, which also generate important statistical, financial, and economic development-related literature.

1992: Materials produced by foreign governments and intergovernmental organizations like the UN and Inter-American Development Bank are largely published in print, microform and CD-ROM, and many are distributed gratis to repository libraries and national libraries, or acquired by those libraries through exchange agreements and purchases. Laws, statutes, treaties, and other legal materials published by foreign governments are also distributed widely to repository libraries and collected aggressively by many of the major law libraries in the U.S., as source materials for the study of international law.

2012: National and state governments in most countries, and many intergovernmental organizations, post their publications on the Web, making current materials available much more widely than in the past. In most instances, however, only current documents tend to be maintained on the government web sites. Content that is not current -- or politically correct -- but that may be important for historical purposes often disappears.

Moreover, globalization and the decline of the public sector have made information about foreign governments, and analysis of that information, a lucrative commodity. Commercial publishers like LexisNexis, Brill and Westlaw, and analytical firms like Bloomberg, McKinsey and the Economist Intelligence Unit now have made an industry of aggregating and synthesizing government information.

1c. Commercial News and Trade Publishers and Aggregators: Newspapers and news broadcasts, recorded and transcribed, have always been key sources of intelligence on the politics, culture and economics of world regions.

1992: The extensive holdings of foreign newspapers assembled by the major U.S. research libraries are built largely through subscription, to support awareness of current or recent events. Publishers and their agents, like micropublishers ProQuest and Heritage, make back file collections available to a wider population of libraries and researchers in microform. The CIA's Foreign Broadcast Information Service and the BBC monitor, transcribe, translate news broadcasts and a variety of other critical communications from over 130 countries worldwide. The collected transcripts are periodically published and sold to libraries, initially in print and then in microform, since the postwar years and into the late 1990s.

2012: With the ascent of digital media in the 1990s, the Web is now the primary venue for access to current foreign news. For a number of reasons, non-current news and broadcast content are now often archived by the news media organizations themselves, often behind pay walls or within proprietary content management systems.¹ Text reports and broadcast transcripts are now aggregated and available in the form of commercially produced subscription databases like LexisNexis, Factiva, and World News Connection, rather than in the form of library microforms. Many of these databases are too expensive for any but the largest research libraries.

Economic development has also had an impact. Rapid economic development has transformed the BRIC countries (Brazil, Russia, India and China), which now have thriving publishing and media industries that generate vast amounts of information and content. The growth of the Web and satellite broadcasting has lowered the bar to news producers worldwide.

¹ For an analysis of the changes in the sourcing, production, and distribution of news brought about by the digital revolution, see *Preserving News in the Digital Environment: Mapping the Newspaper Industry in Transition*, a report produced by CRL for the Library of Congress, April 2011, at http://www.digitalpreservation.gov/documents/CRL_digiNews_report_110502.pdf

1d. Citizen Journalists and Independent Media: The Web and online digital media platforms like YouTube, FaceBook, Twitter, WordPress, and others now provide distribution channels for public communications and for other materials produced by individuals and non-media organizations.

1992: These producers do not yet exist.

2012: Videos posted on YouTube and messages on Twitter now play an indisputable role in documenting events like genocide in the Sudan, the fall of Qaddafi in Libya, and unrest among the ethnic populations in western China and Tibet. Blogs and Twitter feeds also afford unique insights on political, economic, and social trends and developments. Because of the economics of social media, i.e., the value of user information to the service providers, the platforms are now the repositories of vast troves of these communications. Twitter feeds, YouTube videos, and FaceBook content is hosted and maintained not by libraries but by the large commercial providers of storage and content management platforms and other “cloud” services.

2. Suppliers

Dealers, distributors, and micropublishers: These organizations deal with individual scholarly and commercial publishers, distributing those publishers’ products to academic and research libraries. Some of these actors are:

- Casalini Libri – Italy-based aggregators of scholarly books and journals from Italy, Latin America, and Europe.
- IDC, formerly the Inter Documentation Company -- focuses on primary sources and cultural heritage materials; publishers and distributor of databases and microform publications for national libraries of Iceland, South Africa, etc., and publishers of Middle East, Persian Gulf, Caribbean, and Slavic materials.
- East View Press – Minneapolis-based re-publisher of news and government-produced information from Slavic and Eastern Europe, China, and Latin America.
- Harrassowitz -- Dealer and subscription agents in e-books, e-journals, scholarly monographs, research materials, and literary texts published throughout Europe.
- China International Book Trading Company – Beijing-based micropublishers and publishers of Chinese reprints and government-produced census data, yearbooks, and gazetteers.

1992: Many of these organizations focus on particular regions of the world. East View Press, for example, was founded in the 1980s to distribute microform and reprints of newspapers, archives, and

other primary source materials from the Soviet Union and former Soviet bloc nations to libraries and academic institutions in the West. Micropublishers like Norman Ross specialize in difficult-to-obtain materials from relatively inaccessible regions. The China International Book Trading Company is the principal purveyor of microforms and reprints of early Chinese publications.

2012: There are now fewer of these providers and the scope of many of those remaining has broadened. IDC was acquired by Brill in 2006. Norman Ross was acquired (and dissolved) by ProQuest in 2003. East View now sells collections not only in print and microform, but databases and datasets from Mexico, China, and Southeast Asia. And the China International Book Trading Company now represents a multitude of publishers and re-publishers in a rapidly growing and highly opaque Chinese commercial database industry.

3. Libraries

U.S. libraries, operating alone and in cooperation with other libraries over the years, have built and maintain extensive collections of materials for international studies for use by academic researchers. There have been some key cooperative efforts over the years, with considerable support from the national libraries and other major U.S. research libraries, and some outstanding intensive collecting by individual libraries.

3a. Cooperative Library Foreign Acquisition Programs: These programs pool funds and expertise to acquire and supply major US academic libraries with documents and publications from various world regions. Some materials are purchased or acquired through donation; others are digitized or microfilmed.

1992: Major cooperative programs include:

- *Library of Congress Cooperative Acquisition Project* acquires and microfilms current books, serials, reports, newspapers, and other materials published by governments, NGOs, and private and commercial publishers through its offices in several world regions: Nairobi (Sub-Saharan Africa), Cairo (Middle East, North Africa), Rio de Janeiro (Latin America), Jakarta (Southeast Asia), and Islamabad and New Delhi (South Asia, Afghanistan). The program acquires materials to support the research needs of Congress, the judiciary, and other federal agencies, and twenty to forty participating U.S. research libraries. <http://www.loc.gov/acq/ovop/>
- *Library of Congress Public Law 83-480 (PL-480)* program is an acquisitions program begun in 1962, created by the federal government to use surplus foreign currencies accumulated by the U.S. to purchase current materials published in India, Pakistan and the United Arab Republic. Between 1967 and 1972 the program was expanded to obtain materials from Southeast Asia, Yugoslavia and Poland. The program acquired books, serials, government documents, maps, recordings, and other materials in the humanities and social sciences, with some coverage in law, medicine and the hard sciences. In the early 1970s the PL 480 program was providing over

7,500 volumes, 3,500 serial titles, and 100 newspapers in 23 South Asian languages and nearly 3,000 volumes in Serbian, Croatian, Slovenian, and Macedonian to each of its participating libraries.

- *The Area Microform Projects* are a set of autonomous programs, based at the Center for Research Libraries and supported and governed largely by major U.S. research libraries. The AMPs preserve, acquire, digitize, and reformat unique, uncommon, and endangered research materials from six major world regions: Africa, Latin America, the Middle East, South Asia, Southeast Asia and Slavic and Eastern Europe.

2012: The Public Law 480 program was discontinued in 1998. Several other cooperative foreign collection development programs continue:

- *The Library of Congress Cooperative Acquisition Project* continues to acquire and microfilm current books, serials, reports, newspapers, and other materials published by governments, NGOs, and private and commercial publishers through its overseas offices. Because of copyright restrictions, however, its newspaper microforms are in effect available only to researchers at the Library of Congress.
- A Library of Congress pilot project to collect materials in West Africa was initiated in 2011 by three non-governmental organizations: the Council of American Overseas Research Centers (CAORC), the West African Research Association (WARA), and the West African Research Center (WARC) in Dakar, Senegal.
- *The Area Microform Projects* continue to preserve endangered materials through microfilming, and now also digitize materials for scholarly access. <http://www.crl.edu/area-studies>
- *The Global Resources Program*, a set of cooperative projects now based at the Center for Research Libraries, was established in 1996 to “improve access to international research materials through cooperative structures, the use of new technologies, and information sharing.” Project activities range from digital library production (Digital South Asia Library, <http://dsal.uchicago.edu/>), to the acquisition and licensing of foreign-language databases (German North American Research Partnership, <http://www.crl.edu/grn/gnarp>), to maintaining portals to electronic grey literature in the social sciences (*Latin American Open Archives Portal*, <http://lanic.utexas.edu/project/laop/>).

3b. Individual Library Foreign Acquisition Programs: The Library of Congress, National Agriculture Library, the libraries at major U.S. research universities, such as Harvard, Duke, Texas, UCLA, and Chicago, and certain independent research libraries have long been major actors in the acquisition and preservation of primary source and heritage materials from abroad, particularly from developing world regions. Area studies specialists and bibliographers at these institutions, in many instances supported by Title VI NRC funds, have built major collections of published and unpublished materials from Latin America, Sub-Saharan Africa, the Indian subcontinent, and East Asia. These collections were built largely through periodic acquisition trips, exchange agreements with institutions in the regions, and through contacts with local dealers, archivists, and scholars.

1992: National and academic libraries are the principal repositories of source materials for advanced research. Their collections consist largely of “tangible” materials in legacy formats (print and microform), which are made available through interlibrary loan service by custodial libraries to researchers at other institutions. The major research libraries continue to develop substantial local collections systematically, and with an eye toward comprehensiveness in some fields, and toward what they expect to have long-term research value.

- The Library of Congress acquisition policy for foreign government documents defines the scope of their collecting broadly: “all [publications] issued under authority of any legislative body, executive or judicial department, ministry, bureau, agency, independent office, court, commission, or officer of any government.”

2012: According to a recent ARL study, the percentage of total university spending devoted to libraries decreased by 28% between 1992 and 2009. Federal funding for foreign acquisitions from the Department of Education has drastically declined. Increasingly, library acquisitions are driven by the immediate needs of researchers and scholars, rather than systematically built with an eye toward comprehensiveness.

- The National Agricultural Library discontinued acquisition of materials through the LC Cooperative Acquisitions Program in 2011, and announced that it will cease purchasing printed monographs in FY 2013.

A large and growing share of library acquisitions budgets are now consumed by expensive, commercially produced electronic journals in the sciences, forcing many libraries to limit humanities and social science acquisitions to core, English-language materials. The sharing of materials in the licensed, proprietary databases is limited because they are not normally subject to interlibrary loan rights, thereby undermining the traditional role of major research libraries as centers of excellence.

The production of much current material in electronic form, rather than in tangible formats, changes the role of the major individual collecting institutions. Open access web platforms and electronic publishers now function as both distributors and repositories of most scholarly content.

- Because many foreign government and NGO publications are now available online many, if not most, international exchange arrangements are no longer active.

4. Researchers

1992: Researchers rely upon libraries to collect, preserve and make available most foreign-sourced materials for study. Most of those researchers are in the humanities and related social sciences. Those materials are primarily in physical formats: in paper and microform. To a large extent researchers also depend upon libraries to support discovery of research materials, through cataloging and indexing.

2012: Researchers now access most materials in electronic form, in databases that are more often than not managed and maintained by publishers, aggregators and “cloud” services like Google Books, YouTube, and Wikipedia, or are available on the open Web. Often, researchers use sophisticated computer programs and software to sift through, mine and analyze digital source materials, such as large bodies of text and big data sets. Those tools are either “home-grown” or obtained from commercial providers.

With the globalization of business and trade, there are a growing number of researchers using foreign-sourced materials in the fields of economics, agriculture, engineering, finance, public policy, and national security.