Fiesole Collection Development Retreat 2005

The Fiesole Collection Development Retreat series broke with tradition this year and convened outside Europe for the first time since its inception in 1999. Publishing and information industry representatives from around the world travelled to Melbourne for three days of workshops and presentations, 28–30 April. Sponsored by the Charleston Company and Against the Grain and hosted by CAVAL Collaborative Solutions and the University of Melbourne, Fiesole 2005 attracted over 70 participants, many from Asia.

This year's theme, *Publishing, Collecting and Collaborating Globally: Crossing Present and Future Boundaries*, focused attention on the shifting geography of publishing — from somewhere over the mid-Atlantic to the new and emerging markets of Asia. The Fiesole Retreat series has always presented participants with a uniquely international perspective on collection development and this trend was again evident in Melbourne. Papers from China, Hong Kong, India, Japan, Thailand, Sweden, the United States and the United Kingdom provided a range of thought-provoking perspectives on the challenges of building library collections for the future.

Key themes of Fiesole 2005 reflected its physical location away from the publishing mainstream. Presentations and discussion revolved around the impacts of open access and disaggregated scholarly publishing, institutional repositories, the need for new pricing models, and the increasing volume of research output from countries outside Western Europe and the United States. For countries in the Asian region particularly, the rapid rise of science as the engine room of economic growth has significant demand and supply implications for publishers, vendors and libraries.

The first panel session of the retreat set the tone by posing the question: Is the geography of journal publishing actually changing? Speakers representing libraries, publishers and vendors all agreed without hesitation that it was — and quite profoundly! Recent studies suggest that research publishing output from Asia could shortly overtake Europe and the United States. Of the total number of articles in ISI Web of Knowledge in 1983, 75 per cent originated in North America and Western Europe. By 2003, that figure was barely 50 per cent, with the greater proportion of the remainder coming from countries in Asia and Oceania — principally Japan, China, Australia, India and South Korea.

Other statistics compiled by Thomson Scientific have also revealed some interesting trends. In terms of absolute research output (articles published), the top three countries in this region are Japan by a large margin, China some way behind, and Australia a distant third. In percentage terms, however, the most significant growth in scholarly output has come from China, Taiwan and South Korea, with Hong Kong, Singapore and Thailand identified as 'up and coming'. For publishers, the challenge is to harvest the best of that output and make it available to the world. In practice this means that the majority of science research coming out of Asian countries is still published in non-Asian journals. In fact, the proportion of research published in Asian journals has fallen considerably in the period 1983 to 2003.

A related theme of this Fiesole was the emergence of institutional respositories and the effects these university and consortium-based digital collections are likely to have on both the open access movement and commercial publishing and collecting models. Proponents say they will significantly enhance access to research output, enable the scholarly community to regain control over its publishing, and effectively blunt the monopolies enjoyed by many prestigious commercial journals. Although the emergence of institutional repositories is potentially attractive to a library community struggling with static or declining budgets, speakers cautioned against viewing them as low-cost alternatives to commercial publishing and access models. They can be labour-intensive and far from cheap to run.

Another emerging concern was the effect of the Google Print partnership with the University of Michigan, Harvard University, Stanford University, New York Public Library and Oxford University. Several presenters noted that, although the partnership has brought Google publicity and recognition, it has not yet actually had to deliver much of what it has promised. Despite the hype, content is more virtual than real. Claiming the digitisation high ground and its attendant publicity opportunities appears to have been sufficient effort for now. The real labour of finding sustainable and legal means of digitising a critical (read 'useful') mass of material still remains.

Professor Neil McLean of IMS Australia summarised some of the key issues facing publishers, vendors and libraries. He noted that commercial publishers appear to have reached an impasse in terms of pricing models. Meanwhile, the open access movement gathers momentum by promoting unproven business models that are attractive to budget-stressed libraries and their increasingly 'promiscuous' users. Participants were highly amused by the idea of a promiscuous user — someone who cares little where they source their information, so long as it is free. Sadly, the internet is assisting this promiscuity and often at the cost of quality research and publishing.

The end result of open access may be to undermine the publishing efforts of learned societies and create in effect a two-tier publishing system. McLean described the movement as 'a good idea but still full of innocence'. Whatever its relative merits, all agreed that open access lacks sustainable business models and reality checks.

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