

# Electronic Publications and Library Cooperation: Bulgarian Experience

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## Abstract

The article considers the library cooperation problem and some aspects of the relationships 'library coalition - library - end users'. The authors describe the successful model of the first library coalition in Bulgaria - the *Bulgarian Information Consortium*. Problems of creation, management practice, activities and achievements are presented and discussed. The role of electronic resources is viewed and analyzed from the perspective of library collaboration. The usage of these resources is shown as a powerful driving factor for the development and cooperation of libraries. It allows them to overcome behavioural, organizational, and economic problems and to start their real modernization. The cooperation of libraries in Bulgaria begins with shared electronic publications and continues mainly on this basis. We believe that this is the right direction for the Bulgarian librarian society and we intend to follow its course.

Keywords: libraries consortia; electronic resources sharing; result-oriented management

## 1 Introduction

One of the main characteristics of modern knowledge is its virtual form. Popular encyclopaedias and advanced science theories, legislative and administrative services, university courses and teaching materials, geographical maps and the latest news, etc., are available in electronic version. They are widely accessible and easy to operate with. But the problem exists even so, especially for less developed and underprivileged societies. A price has to be paid. The "free lunch" period is over and the access to most of these sources is not gratis. The ones who lose something in this situation are public institutions, such as libraries.

The experience and practice all over the world show that common usage is the best solution. It provides cheap access for each participating library by sharing the costs. But surprisingly the process of library cooperation is slow and contradictory in the countries that need it mostly. Starting from the earliest attempts (ARL - USA, 1932) this process is considered as successful mainly in the contemporary modern societies. In the other parts of the world it is a story of failures and disappointments.

Bulgaria is a glaring example of the problem. There has been no successful attempt of library coalition during the first decade of the transition period of the country. The first working library consortium was established in 2002 after serious investigation, application of modern organizational approach and of course hard work. The purpose of this paper is firstly to present the unique decisions that made this consortium productive, and secondly to show the role of electronic resources in this process.

## 2 Bulgarian Librarian Society

Until 2002, Bulgaria was among a few countries in Europe which had no working library consortium. This fact was not accidental but a result of the situation in Bulgarian librarian society during that period. It could be characterized by:

- *Dominance of opportunistic behaviour.* Most of the biggest Bulgarian libraries were managed in an old-fashioned, rent-seeking way. The personal benefit is predominantly spread over among the librarian society and practice, instead of strategic organizational thinking. That is why many initiatives have failed, including such that have received international funding.
- *Free-riding problem.* The function of most library directors in Bulgaria was largely formal and administrative. They had neither the intention nor the knowledge to initiate and develop collective initiatives. No understanding for the necessity of own contribution existed. Many of our colleagues relied on the experience and efforts of someone else in order to achieve progress.

- *Bad informal institutional framework.* The law and private interest are not enough for the success of any society. A proper institutional environment is always needed. The different approach to moral values and issues and the misunderstanding of the unwritten rules was a very serious barrier in front of each common initiative. Moreover, it has to be taken into account in choosing the formal organization of such kind of initiatives.
- *Financial constraints.* The financial situation in the country did not allow the libraries to build up and explore their own individual fund-raising strategy and to be more independent in their decisions concerning development [1].

As a result, university libraries in Bulgaria at that period were traditionally oriented and not seeking modernization:

- They spent 95% of their budget for purchasing of printed materials (42% for books and 53% for periodicals);
- Their collections included mainly paper materials - books 81% and periodicals 16%;
- The main acquisition methods were i) for books: purchase - 51% and donations - 45%, ii) for periodicals: purchase - 73%;
- Well-established, from the time of Communism, trading chains determined the choice of new items - mainly in Bulgarian (74% of books and 41% of periodicals) and Russian (7% of books and 20% of periodicals) languages;
- Producing references and making paper copies were the only paid services provided;
- Participation in inter-library loan (national and international) was weak;
- The percentage of automatized services has been low;
- The only non-paper informational source were CD ROM-based old holdings of Western journals donated or purchased under international projects [2];
- No library cooperation existed [3].

Seeing this situation, a few international donors tried to support the process of modernization of Bulgarian university libraries. The Open Society Foundation paid the country's subscription for EBSCO on-line database, and offered it free of charge in the country for the first time in 2000. The interest was high. But when, in the next year, the Foundation tried to organize a consortium for paid subscription, they failed. The opposition of the biggest university libraries was strong, there was little understanding for the necessity of modern development, the willingness for cooperation and hard organisational work did not exist.

### 3 Bulgarian Information Consortium 3.1

#### Establishment

A few managers of Bulgarian university libraries started a process of cooperation in 2002. Under the head of the New Bulgarian University Library, jointly with the American University in Bulgaria, the Technical University Sofia, and the Economic Academy in Svishtov we received a one-year project funding from the Open Society Institute [4] within the frame of the Electronic Information for Libraries - eIFL.net [5] initiative. But, as it was shown above, the main problem was not financial. A proper organizational decision had to be made. A special organizational structure has been designed after a deep investigation and analyses of the current situation. The decision was an establishment of a library consortium, namely the Bulgarian Information Consortium (BIC), consisting of the following elements:

- **Legal body.** A legal Consortium is to be established in order to meet the requirements of Bulgarian legislation and banking practice. In the beginning the Consortium shall consist of four libraries, which share the same view of the need of cooperation and have similar ideas of its achievement. These shall be libraries that are dedicated to the idea and ready to invest their efforts and provide own resources. The small number of founders shall not encourage free-riding behaviour. The participation of followers of common idea will be a protection against opportunism. The functions of the Consortium will be a) to initiate various actions for the benefit of all Bulgarian libraries, and b) to present legally its members;
- **Operational units.** Steering committees (subsequently named teams) will be designed for the implementation of each initiative. Each library participating in a particular initiative will be presented in its committee and will be involved in the decision-making process. This is the best way for gradual building of a spirit of collaboration, creation of trust and confidence, and

development of skills for the accomplishment of joint actions. Steering committees will also insure the all-national character of the Consortium;

- Controlling procedures. Some of the Bulgarian libraries were highly interested in cancelling the practice of scattering and corruption, especially of donated resources, in common projects. Clear procedures for administrative and financial control and transparency as a fundamental element will be developed, according to the internal rules, and donors and business' environmental requirements. They will trace out the functioning of both Legal body (Consortium) and Operational units (Steering committees). Controlling procedures will decrease the level of uncertainty within the Consortium and in its external relations.

That is how BIC was created at the end of 2002. Its success is unique for Bulgarian academic society. At present it has 7 full-members (members of the legal body) and 33 associated members (members of the operational units). The cooperation among Bulgarian university libraries is a fact. Moreover BIC has already had public libraries, information departments of governmental agencies, and non-governmental organizations as members.

### 3.2 Development

BIC has designed its own way of development based on well know "result-oriented" approach [6-8]. It includes three main elements - strategy, tactics, and practice (fig 1).

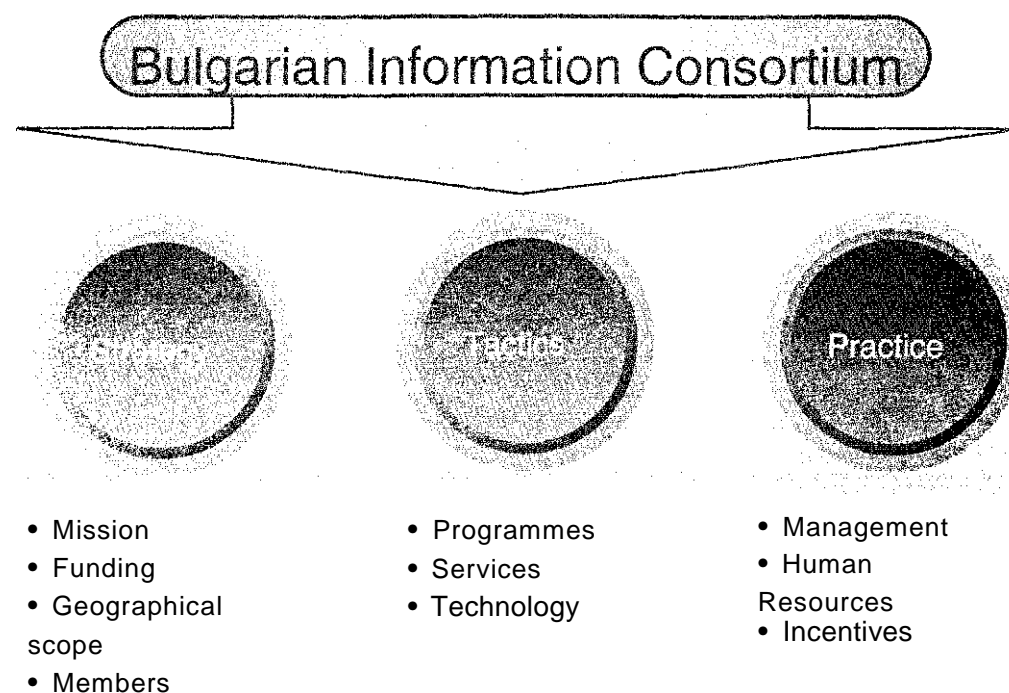


Figure 1: BIC - Result-ORIENTED management approach

#### 3.2.1 Strategy - mission statement, consortia funding, geographic scope and members

The mission of BIC is to provide the best information resources at the best possible price to Bulgarian libraries and their users, applying high professional selection criteria and offering the best services. Its main goals are to support and encourage the usage of electronic scholarly resources and to foster the cooperation, resource sharing and exchange of experience between the members. BIC financed its activities by two sources: i) members fees, and ii) paid services for members and external clients. BIC is a national coalition. The number of its members has increased from 4 in 2002 to 19 in 2003, 34 in 2004, and 40 in 2005. The membership is based on the voluntary principle. The members are legal entities that share and follow common goals.

### 3.2.2 *Tactics - programmes, services, technology*

In order to perform the consortia's goals the Executive Board of BIC initiates four programme areas which shall cover different aspects of libraries cooperation and collaboration:

- *PUBLIC RELATIONS AND FUND-RAISING.* The programme team works for building the positive image of the organization as a trustful and respected partner in the Bulgarian information market, provided with scholar electronic resources. This is achieved by carrying out various activities and events and promotion of the services and products which the organization provides.
- *ELECTRONIC RESOURCES AND TRAINING.* The programme team serves to optimize the access to electronic resources among the scholar community by the use of marketing, promotion and training. Main activities include carrying out events in the field of resource sharing, training for improving the skills for information retrieval from different electronic resources, and publication of yearbook.
- *COMMON SUBSCRIPTION.* The objective of this programme is to allow Bulgarian libraries ultimate access to a vast collection of printed periodicals and their electronic version. The main activities of the programme team are common subscription for the consortium members, popularizations of its benefits, and initiating a document delivery service.
- *BIC WEB SITE.* The last programme team covers designing and maintaining the consortia web site [www.bic.bg](http://www.bic.bg)

These programme areas are implemented by different services and technologies:

- BIC organizes, coordinates and performs all activities covered by the subscription to five databases (EBSCO, InfoTrac Custom Journals, Emerald Fulltext, Gale Virtual Libraries and Oxford Reference Online) for Bulgarian libraries on a resource-sharing base. In order to provide the best services, BIC invents and successfully implements a unique price model for databases' subscription fee division between the participating libraries. The services include contracting and invoicing;
- BIC organizes a public tender according to the Bulgarian legislation for subscription to foreign scientific and scholarly journals on behalf of the consortium members;
- BIC has carried out a range of seminars entitled "Technology Days" and "Good Librarian Practice" in the field of modern library technologies, open access, electronic publishing and database access, digitalization, document delivery, etc.;
- BIC publishes an electronic newsletter entitled "New Library" and the consortia's yearbook in print version. The newsletter covers mainly facts, reviews, news in the field of electronic publishing and access. The annual BIC edition includes all seminars reports and presentations. Both editions are distributed free of charge;
- BIC informs its members daily by email about news, conferences, seminars, grants, etc.;
- BIC provides its members with access to the "Pulsar Online Services" technology - advanced platform "A-Z" list for access to the electronic version of print journals' titles of the common subscription, EBSCO databases journals and Directory of Open Access Journals.

### 3.2.3 *Practice - management, human resources, incentives*

- *Management.* BIC continues to follow the original idea, which was the reason for its creation. Its legal body is governed by the General Meeting and the Executive Board. Temporary teams have been created for each programme. All BIC routine activities are maintained by part time personal. The programme teams are to be worked out on a voluntary base. The teams are very flexible and the members could be changed according to the tasks;
- *Human resources.* BIC pays special attention to the development of the human resources of its members. Seventeen seminars with more than a thousand participants have been organized since 2003;
- *Incentives.* BIC provides services and products to its members as club goods, i.e., stimulation for paying the annual fee and the service fee. This approach attracts them to use intensively these products and services, which results in the lowering of single costs (Table 2).

| Event                   | Number of issue | Number of participants |
|-------------------------|-----------------|------------------------|
| Technology Day          | 7               | 475                    |
| Good Librarian Practice | 4               | 255                    |
| Training session        | 1               | 15                     |
| National meeting        | 5               | 270                    |
| <b>Total:</b>           | <b>17</b>       | <b>1015</b>            |

Table 1: BIC - human resources development

| Year | PDF<br>Full<br>Text | HTML<br>Full<br>Text | Image/<br>Video | Smart<br>Link | Custom<br>Link | Abstract | Total  | Cost per<br>item |
|------|---------------------|----------------------|-----------------|---------------|----------------|----------|--------|------------------|
| 2003 | 30627               | 38085                | 32              | 0             | 0              | 65659    | 134403 | 0,32             |
| 2004 | 46126               | 31904                | 196             | 2291          | 67             | 64407    | 144991 | 0,31             |
| 2005 | 53463               | 28694                | 2219            | 2433          | 896            | 65314    | 153019 | 0,30             |

Table 2. BIC - electronic resources usage and costs

BIC's legal and associated members are stimulated by membership and service fee payment for benefits such as:

- decrease of expenditure;
- cost savings by resource sharing and participation in common subscription;
- information about availability of open source and free resources;
- acquiring of useful skills and knowledge from participation in seminars and training sessions;
- readers' satisfaction improves the image of the library profession.

The potential BIC members receive considerable benefits too. By paying low seminar fees they obtain information about availability of open access resources. Practical skills and shared experience are very useful for them. As a result, vendors and companies are motivated by benefits from the big deals, savings of money, time and efforts.

### 3.3 Achievements

At the beginning of 2006, three complete years having passed since its establishment and activity, BIC conducted the first survey among its members. It shows clearly the following achievements:

- Library cooperation, considered as an impossible mission three years ago, is a real fact today. BIC became a national consortium including various kinds of libraries (Fig. 2). The geographical location of its members is of great significance. The data shows that 47.5% are allocated in the capital city of Sofia, the same percentage is valid for the big towns and only 5% are in other smaller regions.

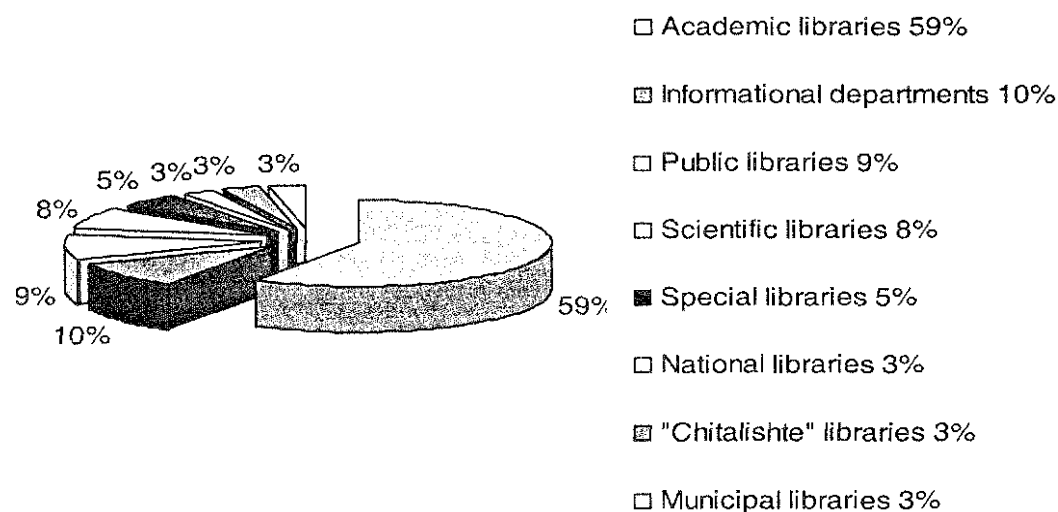


Figure 2: BIG members' profile

- Libraries' modernization is a fact. BIC members are equipped with 378 workstations. Each member library has 8.7 workstations on the average [9]. All of them participated in sharing of EBSCO databases. In addition to that the participants subscribed to 516 other databases. Each member has subscribed for 12.9 different electronic resources on average. The academic libraries cover 60% of all electronic resources subscriptions or in numbers 309 products. The positive result is that 94% of the resources subscribed are online and only 6% seemed to be offline resources.
- Users' satisfaction has increased. During 2005 the readers of the libraries and end users of electronic resources are 150 632.
- The attitudes of the librarians have changed. They have already seen the benefits of the cooperation and have rated the BIC activities highly (Fig. 3).

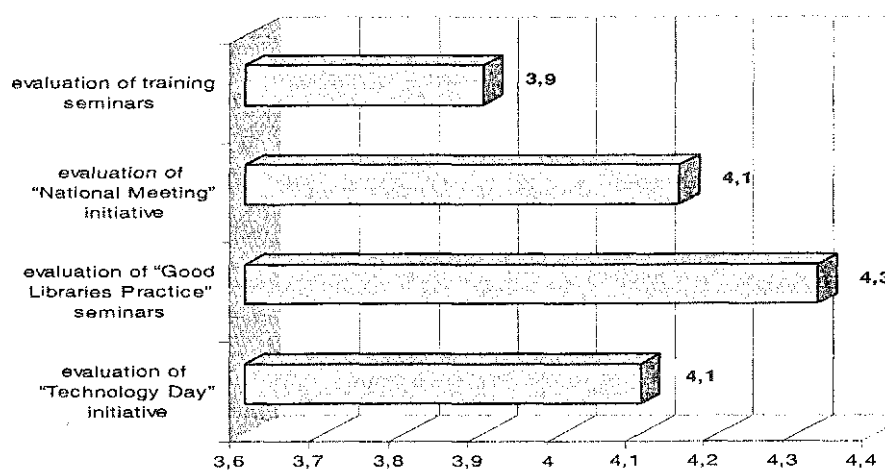


Figure 3: BIC - MEASUREMENT attitudes [in 5 stage scale]

- Librarians' satisfaction has also increased. More than 80% of them describe BIC activities as extremely important or very important, while only 2.5% define them as not important;

- Creation of an active, knowledge-seeking librarian society. The survey included a question on the wishes of the librarian for future BIC activities. The answers show a modern and dynamic way of thinking. Librarians today expect advance training and support in areas such as:
  - o problems concerning copyright law and intellectual properties;
  - o digitalization of cultural heritage and scanning techniques for digital documents;
  - o practical skills for different databases accessing;
- o problems of cataloguing standards in Bulgaria and broadening of librarians practical knowledge.

### 3.4 Future Plans

Working for the benefit of its members, BIC has developed new programmes for the next period according to the members' needs. These programmes have been offered and tested during the survey (Table 3). Our activities in the coming years shall be oriented to covering these needs.

| Programmes  | Ranking | Position |
|---|---------|----------|
| Education and Training on Electronic Resources                | 4,425   | 1        |
| Introduction of Digital Services                              | 4,400   | 2        |
| Technical Expertise Providing and Consulting Services         | 4,275   | 3        |
| Union Catalogue and Cooperative Cataloguing                   | 4,125   | 4        |
| Marketing   | 4,025   | 5        |
| Licensing of Electronic Resources                             | 3,850   | 6        |
| Management of Consortia Library-information System            | 3,675   | 7        |
| Additional Services in Purchasing Library Automation Software | 3,650   | 8        |

Table 3: BIC - future programmes

## 4 Electronic Recourses and Library Cooperation

Modern librarianship is not possible without cooperation between libraries. This is not an easy initiative and a wide range of pre-conditions are needed. In the case of Bulgaria these were: existence of a small group of strong followers of the idea; development of proper organizational decisions; external support by eIFL.net; enthusiasm of the key persons; etc. One of the main factors was the opportunities provided by electronic resources. Their advantages as a driving force in the process of library cooperation are:

- Users prefer electronic resources and require their presence in the libraries. Which means new workstations, new technologies, new organization, i.e. modernization [12];
- The positive economic effect comes after intensive usage of electronic resources. It turns libraries into active providers, from passive storages of knowledge [13];
- When the process of modernization and activation has started, it hardly could be stopped. That is how the libraries come closer to other modern ideas such as cooperation and joined work, for example [14];
- The positive economic effect after intensive usage of electronic resources is a factor for solving the free-riding problem. Everything depends on the efforts involved and the willingness to work [15];
- Electronic resources usage is easily measured. It helps librarians to overcome the opportunistic behaviour;
- Electronic resources are expensive. The experience shows that by means of shared usage the financial constraints are eliminated. That is how a new culture for collaborated activities could be built.

## 5 Conclusion

This conference is dedicated mainly to the technical aspects of electronic publishing. A wide number of problems still exist in this area - copyrights and security, standards and formats, general models and practical tools, etc. Our point of view is somewhat different. We are trying to see the role of electronic resources in the process of libraries' development and modernization. Our experience clearly establishes electronic resources as a powerful factor in this field. Negative attitudes could be overcome, users' satisfaction could be achieved, cost effectiveness could be reached, and other positive results, including productive cooperation, could be obtained. We do believe that the Bulgarian librarian society is already on the way of its modernization and there is no way back.

## Notes and References

- [1] The situation has not sufficiently changed even today. Bulgaria still has only one library consortium, working mainly because of the efforts of its creators and a few active members.
- [2] All data and conclusions in this section were taken from: *A Chance for Bulgarian Libraries in XXI Century*. Edit, by A. Dimchev. Sofia : OSF, 1999.
- [3] The exceptions of the presented picture were the libraries of the American University in Bulgaria and a few of the non-governmental/private universities. But all of them tried to find and follow their own individual way of development without any form of cooperation.
- [4] The Open Society Institute (OSI), a private operating and grant making foundation, aims to shape public policy to promote democratic governance, human rights, and economic, legal, and social reform. On local level, OSI implements a range of initiatives to support the rule of law, education, public health, and independent media.
- [5] The main goal of eIFL.net is to unite the purchasing power of a large numbers of libraries in poor and developing countries in a global network of national library consortia, and to represent their needs to vendors and producers of information. For more on eIFL.net and its role for libraries cooperation in the country see [6] and [7].
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- [8] Proposed in general management by John Mee [10] and later adopted by Thomas Waldhart [11] for the needs of academic libraries management.
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