

## The Current State of European Studies in North America and of Scholarly Publishing in Western Europe

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Delivered for a WESS Preconference in San Francisco, June 26, 1997, by [Richard Hacken](#).\*

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There was a time when North Americans had a very definite idea about where the eastern fringe of Western Civilization ended, and that fringe was one that started unraveling at about Eastern Europe. For several decades before 1989, there were black-and-white notions about Communism versus the "Free World," with a line of demarcation that could be distinguished and measured down to the millimeter at the Iron Curtain. Today, less than a decade after the rise of new democracies, the segmentation into east and west is increasingly suspect. Today, even as the European Union is poised to widen its base of members, North American scholars studying Europe are widening *their* focus. In an article entitled *The Future of European History*, John Gillis tells us that the very definition of Europe, "previously largely Western, is bound to expand to embrace eastern and central Europe... When we speak of Europe today, we mean something both larger and more complex than the area we studied a decade ago."<sup>(1)</sup> As I think of Europe, there is even some question in my mind whether that includes Great Britain.

[Charles De Gaulle was asked in an interview once:] 'Are there three or four authors who are Europe to you?' He said immediately, without hesitating, 'Of course, Dante, Goethe, Chateaubriand.' The astonished interviewer said: 'What, Monsieur? No Shakespeare?' And the icy smile came: 'You asked me about Europe.'"<sup>(2)</sup>

Though regional boundaries may be in question or in flux, you have come to hear about, and we are here to tell about, scholarly publishing from those areas traditionally understood as Western Europe and how that publishing feeds into the North American scholarly scene.

### GLOBALIZATION, REGIONALISM, AND PARTICULARISM

As we look at European Studies as practiced in North America, we see that its aims and methods, as those of other disciplines, are becoming global. The American Council of Learned Societies noted two years ago that

Scholarly communities are becoming international in scale, not just local or national. Scholars in all fields can today find colleagues across the globe. The end of the cold war, with the consequent relaxation of some long-standing barriers to travel, access and collegueship, is one change that has helped this along. A second involves rapid advances in electronic scholarly communication which make possible the inexpensive, quick and reliable sharing of ideas, texts, and now even sound and visual images across very great distances. In many disciplines of the humanities and social sciences, new scholarly perspectives (post-modernism, cultural studies) are also encouraging exchanges across national borders.<sup>(3)</sup>

There exist moderated, and therefore moderate, electronic discussion groups that promote an ongoing dialogue between scholars from every continent, except perhaps Antarctica. A panoply of local perspectives builds toward a regional and then a global context. At least one American scholar has called ours the "last Eurocentric generation."<sup>(4)</sup>

At the same time that scholarship has widened to become international, many of the objects of study have narrowed to the specific. Not limited to European studies is the growing dichotomy between regionalism and particularism, the crosscurrent between integration and isolation, or as one scholar put it, "the dialectics of the global and the local that is occurring everywhere in the late 20th century."<sup>(5)</sup> This suspense between the macrocosm and the microcosm has flourished particularly well in studying the second smallest continent, the one that juts off of Asia. The trend toward regionalism is epitomized by, but certainly not limited to, the constant flood of serial and monograph publications on the European Union and its recent ancestors, the Common Market and the European Community. Particularism, on the other side of the dialectic, manifests itself in studies that put the magnifying glass to the finest of details, or as our WESS colleague Leena Siegelbaum called it in a recent presentation: "the flea on the tail of a gargoyle at Chartres." Some of the sharply focused topics I've come across of late are: the fate of Swiss citizens in Elbing, West Prussia in 1945<sup>(6)</sup>; regression and language change among the Albanian-Italians of Northern Calabria<sup>(7)</sup>; social integration of Black immigrants from Guinea Bissau in the city of Lisbon<sup>(8)</sup>; and household fishing words in Finnish dialects of Northern Norway<sup>(9)</sup>. At my own institution, one scholar is investigating the social and economic fabric of one eighteenth-century Austro-Hungarian village and requires any relevant quantitative data that can be located--from marriage and family records to the price of bread to the salary of textile workers. With each new generation of computer processing chips, the speed increases at which mountains of minute quantitative details can be manipulated and compared, be it for social statistics or for literary concordances.

### NEW PARADIGMS IN THE RESEARCH METHODOLOGY

If the objects and contents of European Studies are juxtaposing regionalistic and particularistic concerns, then the research methodology is following suit. This was already well underway in 1983 when Peter Gourevitch, in an address at an ACRL "Symposium on Western European Studies and North American Research Libraries" said the following:

Boundaries have eroded. Ideas devised for the Third World have been imported into European Studies; models formulated for Europe have spilled into Third World studies. The study of Europe has become more integrated into comparative studies.<sup>(10)</sup>

He remarked at another point that:

Anthropologists, economists, political scientists, sociologists and historians all borrow from each other. Topics have become more important than disciplines; models and approaches are used by several fields rather than promoted as the province of one or another.<sup>(11)</sup>

This is no less true in the humanities and in the ground between the humanities and social sciences, where post-structuralism, deconstructionism, multi-culturalism, migration and ethnic studies have legitimized a broader scholarscape.

There is another direction that the dialectics of recent European Studies have taken, namely, differentiation between a discipline *en masse* and the increasingly petite sub-branches of study that have, bit by bit, become their own mini-proving grounds. Gillis, again from *The Future of European History*, has remarked that

European history is now being practiced under a number of rubrics--gender, social, cultural, family, labor, comparative and economic history--that have their own meetings, journals, and constituencies. Taken together, there is probably more activity in the European field than any one scholar can ever comprehend, much less participate in.<sup>(12)</sup>

Increasing numbers of sub-specialties, along with their embarrassment of published riches, produce a mixed blessing: according to one pessimistic estimate, the average scholar today can absorb at the most 5% of the literature relevant for any field of study.<sup>(13)</sup> Let me cite just one example of a research project that involves both transnational and cross-disciplinary studies. In March of this year, I received a posting from the electronic discussion group HABSURG introducing a new Austrian institute named *Internationales Forschungszentrum Kulturwissenschaften* with a matching English-language title, *International Research Center for Cultural Studies*. The "International Advisory Board" of this institute is chaired by a Professor Emeritus at Princeton University, and its first multi-year research program in comparative cultural studies is entitled "Imagined Communities." The phrase "Imagined Communities," in turn, is taken from the title of a book "increasingly cited across the whole spectrum of the social sciences as an authoritative text on nationalism..."<sup>(14)</sup> Its author, a British scholar, has constructed a conceptual framework from the ideas of two German literary scholars, Walter Benjamin and Erich Auerbach, and applied it to the realm of political philosophy. Such blurring of traditional boundaries between nations, between national approaches to scholarship, and between disciplines<sup>(15)</sup> will increasingly be a commonplace. It has been suggested that the study of Europe needs to "... rethink itself in unfamiliar terms such as diasporas, borderlands, and peripheries."<sup>(16)</sup> This is already underway, as evidenced by the 1996 Cambridge University Press monograph by Ivan Berend entitled *Central and Eastern Europe, 1944-1993: Detour from the Periphery to the Periphery*.<sup>(17)</sup> Scholars of Europe are also shifting away from an exclusive passion for east-west thinking and in the direction of north-south concepts. One prediction is that

The... Scandinavian countries, so marginalized up to now, will no doubt gain greater prominence as interest in the fate of the welfare state grows. Spain's democratization and Italy's economic revival may also turn attention to those countries.<sup>(18)</sup>

Given the types of research being done, it comes as no surprise that the publications our clientele in North American research libraries demand fall into two categories: studies of broad regions and disciplines such as *Imagined Communities* and highly specialized niche marketing such as "Fishing Household Words in the Finnish dialects of Northern Norway." It is in collecting the latter, the specialized studies and the grey literature, of course, that most bibliographic and financial difficulties arise.

### **BIBLIO-DARWINISM AND THE LANGUAGE OF THE IMPRINT**

Considerations of an imprint's language and country of origin are no small matter, either. Some observers of the book scene believe in Biblio-Darwinism, that is, survival of the fittest publishing languages. In general, according to this scenario:

...the industrialized nations that use a world language dominate the flow of books and, to considerable extent, the flow of knowledge and ideas as well... these countries, especially the United States, Britain, France and, to a lesser extent, Germany, Spain, and until recently, Russia--constitute the intellectual centers of the world. Most other nations... are the periphery and dependent to varying degrees on knowledge, and often books, produced at the center.<sup>(19)</sup>

"Some exceptions are the smaller, highly literate nations such as ...Sweden... [and] Holland."<sup>(20)</sup>

If countries that rely on books from abroad are relegated to provincial status, to a sort of information colonialism, then indigenous publishing, whether in the vernacular or in a current *lingua franca* such as French or English, is a precondition for the most vital of scholarly and literary activities.<sup>(21)</sup> At the same time, on a continent with as many scholarly traditions as Europe has had, the *modus operandi* of scholarly publishing varies from nation to nation. These variations can be partially explained by different academic infrastructures.

## DIFFERING ACADEMIC INFRASTRUCTURES OF EUROPE

German scholarship had its heyday in the nineteenth century, in large part due to reforms begun by Wilhelm von Humboldt at the University of Berlin, and for quite some time scholarly publishing in the German language enjoyed international predominance in a way that English is now only approaching.<sup>(22)</sup> Even so, the German model was by no means accepted everywhere. The traditional emphasis of character formation in Britain, for example, transmuted into the concept of "liberal education," where the student took precedence over the science. In the United States, the Humboldt heritage--by which teachers and students are at the university for the sake of science and scholarship, not the other way around--was preserved only in graduate schools for the arts and sciences. American undergraduate education has largely become a liberal education similar to the British model, and professional training takes place in specialized legal, medical, managerial and other graduate schools. The strictly hierarchical, state-run French system, often referred to as the Napoleonic model, focuses primarily on professional training. This means that much of the scholarly research in France, even today, occurs outside the university sector, particularly as supported by the *Centre national de la recherche scientifique* (CNRS--National Center for Scientific Research).<sup>(23)</sup> Not only does the CNRS subsidize scholarship, it also publishes some of the subsequent research results through its own CNRS press.<sup>(24)</sup>

Most Mediterranean countries have followed the French paradigm. The Soviet Union and its satellites before 1990 generally followed it as well, splitting research activities off from university training and housing them in specific academies. One of the largest and best known in the West was the Hungarian Academy of Sciences with its press, *Akadémiai Kiadó*. At the present time, a lot of radical *perestroika* is still going on in many of the formerly Communist countries, and much of the scholarship is returning to the universities as the academies shrink or collapse.<sup>(25)</sup>

The East German *Akademie der Wissenschaften* [Academy of Sciences] was one such academy that was ushered into oblivion by the terms of the German unification treaty of 1990. At its height in 1989, the academy had employed over 18,000 scholars distributed over 60 institutes in disciplines that included science, social science and the humanities. Dissolution of the *Akademie der Wissenschaften* resulted in just over half of its scholars being integrated into the research and scholarship of the unified German state, mostly in research institutes outside the universities.<sup>(26)</sup> Library materials available from Europe have reached unprecedented annual quantities. The explosion of information, as far as Western Europe is concerned, has been partially the result of explosive growth in college-level education. With a blossoming of alternative *Fachhochschulen* in Germany, polytechnics in Britain and IUT's (*Instituts Universitaires de Technologie*) in France came an increased number of scholarly presses. Where 5% of college-aged Western Europeans attended some sort of college in 1970, now between 20 and 30% do, a move away from university elitism of the past. Portugal seems to be the notable exception to this trend.<sup>(27)</sup> A comparison of UNESCO statistics shows that the ratio of college students to the general European population increased thirteen-fold from 1950 to 1990, while the comparable increase was five-fold in North America. The trend has been steady from the Marshall Plan to the present: American college attendance has grown, but West European attendance has grown even faster, from less than one fifth the American ratio in 1950 to better than one half today.<sup>(28)</sup>

At the same time that more students are studying on the continent and more professors are professing, there is a commonality with the U.S. system of scholarship: while heartfelt gratitude is given for effective academic teaching, the factors that almost always lead to appointment and promotion are, in fact, research and publication. With monetary incentives for publishing being held out as enticements to increasing numbers of European academics, there can be no wonderment at the growth in sheer numbers of scholarly monographs and journals.

## THE BOOMING SCHOLARLY TITLE PRODUCTION

One way to put a spotlight on European overachieving is to note that in 1991, according to UNESCO, Europe had less than 10% of the world's population while producing well over 40% of the world's books. That set an all-time high, a world record, at 802 new book titles per million inhabitants. The next closest competitor, Australia and Oceania, printed a mere 442 new titles per million inhabitants.<sup>(29)</sup>

As noted in a 1996 publication sponsored by the Association of Research Libraries entitled *Scholarship, Research Libraries, and Global Publishing*,

Europe includes five of the ten largest language groups in the world and is responsible for almost 44 percent of world book production. A look at book production in the major European countries documents significant growth in the past decade.<sup>(30)</sup>

Knut Dorn predicted in a paper given in Chicago in 1992, entitled "Champagne Taste and a Beer Budget," that due to profound political and economic changes:

... we have to expect a further sizable increase in the volume of European publishing, very likely for the next couple of decades and not only in the countries of Germany and Great Britain, where the national book production is already at an all time high. Publishing activities have also been on the increase, and very impressively so, in France, Italy, and Spain.<sup>(31)</sup>

Comparative statistics on global publishing are often derived from the *UNESCO Statistical Yearbook*. Despite the need to compare apples to pomegranates at times, despite the blanks, asterisks, and question marks endemic to UNESCO figures, they still provide the most comprehensive and accurate data available to us on world publishing.<sup>(32)</sup>

Fortunately, it is the Western European sector that is most reliable within the *UNESCO Statistical Yearbook*, and even if individual data are missing here and there, tendencies are traceable.<sup>(33)</sup> The following are rough averages of annual title output for the first half of the 1990's, proceeding from the greatest to the smallest publishing powers of Western Europe:

United Kingdom: 90,000 titles

Germany: 70,000

France: 45,000

Spain: 40,000

Italy: 30,000

Switzerland: 15,000

Belgium: 13,000

Netherlands: 13,000

Sweden: 13,000

Denmark: 11,000

Finland: 11,000

Portugal: 6,000

Austria: 6,000

Norway: 5,000

Greece: 4,000

Iceland: 1,500

Luxembourg: 400

Vatican City: 200<sup>(34)</sup>

The total of just under 370,000 annual titles works out to just over 1,000 titles launched every day of the year in Western Europe, not including--of course--Central or Eastern Europe. That means, on average, a new title is published every 85 seconds. If there were a transatlantic conveyor belt delivering new books at a normalized, steady rate, 24 hours a day, each new title would appear more often than every minute and a half. That is more rapid than in 1980, when one Western European title was published every 105 seconds, and considerably more rapid than in 1970, when one title came out every 137 seconds.<sup>(35)</sup>

We can distill these figures down still further to identify the scholarly subset we're interested in. To estimate what proportion of reported book titles are first editions, I looked at the UNESCO yearbook for 1996, where first editions reported from European countries averaged roughly 80% of all editions. There is no index of scholarly first editions versus all first editions that I could find, but even if we made a conservative estimate that scholarly works comprise no more than 10% of the first editions, it would mean that the transatlantic conveyor belt specializing in scholarly first editions would deliver a new specimen only every 12 minutes. But that would still add up to over 43,000 titles a year.

Nor do most of us in academic libraries draw the line at scholarly monographs alone: mirroring the particularistic requirements of today's ever more refined sub-disciplines, we need primary source materials for literature, journalism, sociology, anthropology, ethnology and popular culture that fall squarely outside the traditional definition of "scholarly."

When we consider a title for purchase, our first concern is for quality and relevance. In a recent "Reputational Study of Academic Publishers," in which attitudes of North American librarians toward publishing quality were measured, five of the top ten and six of the top fifteen rated publishers were based in Western Europe. For publishing relevance, similarly, five of the top ten and seven of the top fifteen rated publishers were European-based.<sup>(37)</sup>

### COMMERCIAL, UNIVERSITY, AND SOCIETY PRESSES

Across the continent, the most lucrative segment of scholarly publishing, the so-called "STM" sector (science, technology and medicine) is dominated by commercial publishers. As the economics of short print runs and low profits have worsened in the humanities, social sciences and arts, many commercial publishers have abandoned those fields as unprofitable. The gap is then filled, if at all, by university, society and not-for-profit presses. The contributions of learned and professional societies to publishing should not be underestimated, either. Only in a few countries, Italy and Germany being prime examples, do commercial publishers continue to dominate the entire spectrum of the scholarly book market. One very unique case is the *Wissenschaftliche Buchgesellschaft* (Scientific Book Society), "founded in 1949 by German academics to publish new and reprinted scholarly titles as replacements for the millions of books destroyed during World War II."<sup>(38)</sup>

I now call your attention to the handout entitled "Major Scholarly Presses of Western Europe as Held in One Medium-Sized North American University Library." In order to be able to tell you who the major scholarly publishers of Western Europe are, and to attempt to distinguish commercial publishers from the academic and society presses, I did a survey of the holdings in my own library. The results are not as conclusive as if I had searched the 260 field in a national utility, but you may find it similar to publisher holdings in your own library, especially for the larger countries, such as Germany and France.

I'm going to take a fast tour through the countries, though you'll learn much more in detail tomorrow in the individual country presentations.

With [Austria](#), BYU has a fairly active music program, so *Universal Edition* and *Doblinger*, both music publishers, come high on the list. Fifth place is taken by the *Austrian Academy of Sciences*,

but it is also evident that the next two following it are dependent on universities in Graz and Innsbruck.

Two of the non-commercial publishers from [Belgium](#) that supply scholarly works are the *University Press of Brussels* and *NATO*. For European Union depository libraries, the *European Commission* will supply a good number of titles.

For [Denmark](#), you can see that university presses take positions four, five and ten, though the commercial presses certainly also have their connections with the Danish halls of ivy.

[Finland](#), at least for BYU holdings, presents the smallest concentration of commercial publishers, with academies or societies taking up positions one through three and academic presses at six and eight.

A look at [French](#) totals will show that *PUF*, the nation-wide university press, is a strong contender. *CNRS* comes in only 17<sup>th</sup>, but even the 17<sup>th</sup> most prolific publisher has supplied us with nearly 500 titles. Note that French publishing is centered in Paris, while that of Germany and Italy is distributed at a number of centers.

[Germany](#) is strongly dominated, even in the scholarly publishing field, by commercial publishers, though it's clear with a name like *Akademie Verlag* in Berlin and with publishing venues in towns like Göttingen and Tübingen that there are close connections with the academic world. The *Wissenschaftliche Buchgesellschaft* of which I spoke earlier comes in at 12<sup>th</sup> place, and the publishing wing of *Harrassowitz* is at 17<sup>th</sup> for BYU holdings. As with France, there are a great number of important publishers not listed here, since it required a bibliographic deposit of over 1100 titles just to hit the top ten list.

[Greece](#) I'm a little more rusty on. But it is apparent that the *Institute for Balkan Studies*, *Greek Ministry of Culture* and other associations are important at least for a library of our size.

The [Icelandic](#) book picture may leave you cold, but our interest is strong in saga literature, and the #8 publisher, for instance, *Islendingasagnauðgáfan*, translates as "the Icelandic Saga Publisher." Many of the others deal in sagas as well, but one of the best for scholarly editions of Icelandic sagas is *Reitzel* in Copenhagen.

As with Germany, [Italy's](#) scholarly publishing is strongest with commercial publishers, and is decentralized with centers mainly at Florence and Milan.

[Liechtenstein](#) for me means *Kraus Reprints*, though other libraries that have been established longer may have purchased the originals and not need reprints. This tiny postage-stamp republic also has society and government presses, but the numbers don't come to much.

[Luxembourg](#), like Belgium, is a source for European Union materials, as well as publications of the *European Investment Bank* and the *European Parliament*.

[Monaco](#) is not a great publishing power.

The [Netherlands](#), on the other hand, may be in the lowlands, but have high output from publishers like *Elsevier*, *North-Holland*, *Brill*, *Kluwer*, and *Nijhoff*. Note that the top two, *Elsevier* and *North-Holland* are essentially the same company and their total together, at well over 8,000 titles, would represent the single highest supplier of scholarly monographs from Europe, at least to the BYU library. There is great Dutch decentralization, with the top ten publishers located in six different cities.

For [Norway](#), the *Scandinavian University Press* tops the list if we include the university presses outside of Oslo. Besides that and *Eide* in Bergen, all other top presses are in the capital city.

[Portugal's](#) top-producing publisher for us is the national printing house *Casa da Moeda* in Lisbon, and other academic publishers are the universities of Coimbra and Lisbon.

[Spain](#) seems to be two separate countries when it comes to the book market: the geographically, linguistically and culturally distinct centers of Madrid and Barcelona.

As we move on to [Sweden](#), university presses come in at positions 3, 5, 6, and 9, and for the commercial publishers there are intertwining alliances not visible right away: for example, some *Esselte* (#10) reference works are published by *Norstedt* (#4) while other *Esselte* (#10) scholarly works are published by *Almqvist & Wiksell* (#1). A number of *Uppsala University Press* titles (#3) are sold through the distribution arm of *Almqvist & Wiksell* (#1). To complicate matters even more, *Almqvist & Wiksell* itself was recently purchased by *Academica*, which doesn't show up on the list.

The publishing picture in [Switzerland](#) is as decentralized as the Swiss populace itself, with linguistically diverse commercial publishers specializing variously in science, medicine, the

humanities, social sciences, and music, with a publisher at the #1 position trying to recover from a reputation as a vanity publisher, and with international societies in Geneva such as the *World Health Organization* and the *International Labour Office*.

At the other end of the spectrum, the [Vatican City](#) publishers are so centralized that every publisher has a maximum geographic separation from the others of 200 meters.

[This completes our guided mini-tour of European publishers.]

If libraries are dependent on scholarly books from Europe, the reverse is also true. "Without library sales, it would be virtually impossible to publish scholarly books,"<sup>(39)</sup> says Philip Altbach, editor of a recent encyclopedia of *International Book Publishing*. In developed countries like the United States and most of Western Europe, library sales account for around 11 percent of the total book business. Yet for university press and learned society publications, libraries can account for up to 80 percent. From the publisher's vantage point the key to profits is not number of titles but number of copies sold, obviously, and so the profitability of textbooks outstrips income from libraries by a ratio of around three to one.<sup>(40)</sup> Still, scholarly publishing enjoys advantages of perceived authority and prestige. Some book people take on certain scholarly titles as much from a wish to subsidize culture and sustain ideas as to make a profit.<sup>(41)</sup> For many scholarly publishers of Western Europe, we could use the phrase "more books, smaller printings."<sup>(42)</sup> There are tax advantages built into the European book tradition, as Knut Dorn pointed out in his talk on "Champagne Taste and a Beer Budget," incentives that encourage publishers to maintain adequate stocks of proliferating numbers of highly specialized titles.<sup>(43)</sup> But this alone is no guarantee that the very title you want won't be sold out within a year.

### MULTINATIONAL PUBLISHING

In the world of commercial publishing, with increasing numbers of multinational publishing corporations, it is becoming increasingly difficult to put one national label on a book producer. Bertelsmann, for example, whose home country is Germany and whose 1995/96 turnover was over 14 billion dollars, second in the world only to Time-Warner, owns Bantam Doubleday Dell in the United States; book clubs all over Western and Eastern Europe, and 300 more or less decentralized media, entertainment and printing companies in 40 countries.<sup>(44)</sup> Bonnier of Sweden has other Scandinavian interests in Norway and Denmark. Reed Elsevier, with a double home in the U.K. and Holland, owns Bowker, K.G. Saur, Pergamon, Greenwood and a dozen other publishers. Wolters Kluwer of the Netherlands owns Lippincott and a number of other concerns.<sup>(45)</sup> Germany's Verlagsgruppe Georg von Holtzbrinck owns Henry Holt, which it purchased from CBS back in the 1980's.<sup>(46)</sup> For 11 years it has also owned the paradoxically-named "*Scientific American*."<sup>(47)</sup> Champion-Slatkine has dual nationality, French and Swiss.<sup>(48)</sup>

One long-time observer of the European book scene, Gordon Graham, notes that "...a lot of owners are absentee landlords. This is called multi-nationalism when you do it, and foreign takeovers when it is done to you."<sup>(49)</sup>

A book published in Mexico in 1993, *México barroco*, lists as its publisher "Hachette Latinoamerica, Salvat, Grolier;" Hachette, the multinational owner, is physically located in France with ownership of a printing press and publishing house in Spain and 10% of Rizzoli in Italy; of its further acquisitions, Salvat is located in Latin America and Grolier is in the U. S.<sup>(50)</sup> Together they've produced a book on the Mexican Baroque.

The actual business of books makes up a small percentage of most multinationals' portfolios. Books are only 23% of Bonnier's business in Scandinavia, and the main business of Reed Elsevier is magazines and journals. Books for these multinationals are, in one sense, just an economic hedge against the volatility of their television, radio, newspapers and popular magazines, all of which require them to sell advertising.<sup>(51)</sup>

Even within a country, as you might guess, a small number of large publishers dominate the market. In France there are two "leviathans" (Hachette and Presses de la Cité) that own 50% of the national book market,<sup>(52)</sup> while eight of Italy's well over 2,000 publishers "corner 50% of the weekly best-seller list."<sup>(53)</sup>

### NORTH AMERICAN LIBRARIES RELATING WITH EUROPEAN PUBLISHERS AND VENDORS

Let me say a word at this point about the relationship between West European publishers, vendors and North American libraries. There are a number of reasons why dealing directly with publishers has proven to be incomplete, inefficient and infuriating. I quote from our WESS colleague, Jim Campbell, whose article "Publishing and Export Bookselling in Western Europe" appeared in a 1990 ALA publication entitled *Understanding the Business of Library Acquisitions* and is highly recommended as reading supplementary to this preconference.

Only seldom will American libraries find it useful to send orders directly to a European commercial publisher... Most scholarly and virtually all trade publishers... prefer not to deal with individual or institutional customers. In many cases orders and even inquiries sent to a publisher will be passed on to a bookstore for fulfillment. Even if a publisher does provide the item, several problems may occur... correspondence and invoices are unlikely to be in English; and prepayment may be required or additional charges for shipping or check conversion may be imposed.<sup>(54)</sup>

Even though most library orders will go to a vendor, Jim reminds us that we cannot understand or negotiate with our suppliers without some knowledge of *their* suppliers, the publishers.<sup>(55)</sup> There are a number of publications that can help you keep up with the European publishing scene. I would recommend as a preliminary reference work the chapters on Europe in *International Book Publishing: An Encyclopedia*, edited by Philip G. Altbach and Edith S. Hoshino (New York: Garland, 1995). Then, on an ongoing basis for English-language readers, the *Publisher's Weekly* and *British Book News* often give the latest on the European book trade. For those who read the respective languages, national book trade journals are the surest sources: *Livres Hebdo* for France, *Börsenblatt für den deutschen Buchhandel* for Germany, *Giornale della Libreria* for Italy, *Boekblad* for the Netherlands, and so forth. Feel free to contact myself or one of the national presenters tomorrow for more bibliographic information.

### **DOLLARS FOR EUROPEAN MATERIALS**

Tonight I don't have the time to discuss in any detail the financial hurdles to acquiring printed materials, a topic we could all expound on at length. Another of our WESS colleagues, Roger Brisson, this year made an informal study of his budget for German humanities monographs at Penn State after years of cost increases due to inflation. This led him to estimate that he now has around one-half the book buying power he had in 1990.<sup>(56)</sup> And so the cosmos of desirable and relevant European materials is an ever-expanding universe while budgetary power for acquiring even the most crucial items seems to stagnate, if not to head for a black hole.

WESS has been active in seeking ways to address this problem. Studies on percentages of European titles not held in North American libraries were spearheaded by Barbara Walden for political science in general and by Michael Olson and Jim Spohrer for German political science. The latter, the Olson/Spohrer study, found that only about 75% of the materials identified as being valuable enough to be held by at least one U.S. research library could actually be found on any North American library shelf. An ad hoc WESS body, the *German Social Sciences Working Group*, was created to continue the work and to advise the *AAU/ARL Task Force on Acquisition and Distribution of Foreign Language and Area Studies*. The work of cooperative acquisitions has often been unrewarding and slow, but small successes are coming. One of these successes in progress is the development of a pilot database to be launched by Otto Harrassowitz sometime next year in which those German-language materials not selected by a North American library after a specified time period will be listed. In addition to being a cooperative acquisitions tool, the database will be used to monitor what types of materials are not being selected by North American libraries. In any case, the need for national cooperation will presumably rise at the same rate book prices do.

As we look at inflation, it is a totally separate issue from currency exchange rates. The mantra "weak dollar, weak dollar" is a thing of the past. I believe the dollar will hold its own in comparison to the European currencies at least into the next millennium. (On the other hand, I was firmly convinced ten years ago that Germany would never be unified in my lifetime.) My fallible dollar reasoning is based on some jitters in the financial world about the advent of a single

European currency. These insecurities may be helping the American dollar already. One journalist claims that Luxembourg, with its 400,000 citizens, is presently the only national economy in the European Union that meets the stringent financial requirements to qualify as a true patron of the Euro Dollar.<sup>(57)</sup> Whether the total is now one qualified country or five, the European Union's imminent decision making is crucial. When, if ever, will it integrate some of its low-performing currencies such as the drachma or the escudo? Will it leave certain countries outside the currency union, or will it relax the requirements? Will it include former Soviet satellites whose political cachet is much rosier than their present financial one? In any case, believes Fred Bergsten of the Institute for International Economics, "The majority European view is that the Euro is going to be a weak currency."<sup>(58)</sup> One European, Charles Germain, speaking at the 1993 Charleston Conference on Book Acquisitions, already saw the signs back then: "...the Exchange Rate Mechanism... collapsed in August 1993... Basically, from a European point of view, we are back to 30 years ago. The consequence for U.S. libraries is that European publications are going to be cheaper."<sup>(59)</sup> Since, on the other hand, we have no idea what Alan Greenspan's Federal Reserve Board will do with interest rates, which directly affect the U.S. currency, the jury is still out on the "strong dollar" notion. But inflationary book price increases are sufficient unto themselves.

### DOLLARS FOR EUROPEAN JOURNALS

When we speak of price increases, one of the first things to leap to mind is the scholarly journal. One European observer of the publishing scene, Bernhard Fabian, noted:

... the information age began with a profound crisis in scholarly literature. The seventies will be recognized as the stage in the history of scholarly literature in which the traditional forms of book and journal became problematical and in which the tradition of these forms... begins to unravel in a worrisome manner. Higher production costs, recession, lower library budgets, incredible increases in numbers of journals and then in prices of journals...<sup>(60)</sup>

Fabian went on to say that the crisis had more than just an economic aspect to it, referring to the increase in serial titles since 1960 as "exorbitant:"

The total number of scholarly serial titles can now be conservatively estimated at 50,000, more generously at 90,000. The periodical, once a stopgap measure between the letter and the book, has become the central medium of scholarly communication. It has pushed the book into the background, despite the plethora of monographs that appear year by year.<sup>(61)</sup>

This statement was made a decade and a half ago. The number of journal titles and the level of prices have continued to climb, if not geometrically then at least in a steadily upward order of magnitude. Journals from the continent have played their own significant part in this. The UNESCO figures for journals are even less reliable than those for books. There is no way of separating out the scholarly from the popular journals, so that items such as comic books, children's magazine, school papers and "house organs" may be included in the totals. Around a third of the countries had to be left out of the summary due to reporting gaps and internal inconsistencies.<sup>(62)</sup> Still, the overall picture is one of tremendous increases in the numbers of journal titles published in the mid-1990's as contrasted to the mid-60's. If the available numbers can be believed, then only two very different West European countries, Denmark and Greece, actually decreased their journal repertoires over the past three decades. Another country, Austria, has shown a very modest total increase of six and a half percent in thirty years. All the other West European countries for which data appear to be reliable have experienced significant growth in numbers of journal titles. (Total *circulation* of journals is another question beyond the scope of my remarks). Percentage wise, Europe as a whole cannot quite match the feat of postage stamp republic, San Marino, whose journals have tripled over the past quarter century--from 6 to 18 titles, but the sheer avalanche of continental serials is intimidating. Even excluding some of the largest journal-publishing lands such as Britain, France, the Netherlands and Spain, the current number of West European journals exceeds 40,000, nearly double the total from the mid 1960's.<sup>(63)</sup>

It seems clear that even Fabian's 1983 generous estimate of 90,000 scholarly journal titles worldwide has been well exceeded and superseded by 1997.

### SALVATION IN CYBERSPACE?

Even as books and journals have grown in number and in price tag, some look to cyberspace for salvation. The Internet and other electronic means of information dissemination are beginning to affect scholarly research to some extent. But the nature of technological, economic, regulatory and demographic conditions show that the future has not yet arrived. Over 80% of Internet users in Europe are still under the age of 40. In the U.S., well over 70% are 39 or younger.<sup>(64)</sup> This means that many senior researchers are sticking to traditional media like the book. What's more, no reliable method of putting the imprimatur of academic excellence on a World Wide Web home page yet compares with a title page bearing the imprint of Olschki, Brill, Niemeyer, or Oxford University Press. Even though some are asking the question: "Do we really need the scholarly book?" the answer is clear for the foreseeable future: Yes, we do!

My experience with electronic discussion groups tells me that their main uses are for fairly superficial discussions, as their title would indicate, and for the cyber-equivalents of newsletters, book reviews, short bibliographies and sounding boards for individual reference questions. That's not to say they're not valuable in their way, but that their scope is still quite limited. It's not so much that we need multi-media, video, animation, surround sound, as that we are still lacking the full panoply of black-and-white information that over five centuries of print media have developed.

It's hard to say how quickly and how much the regionalistic and the particularistic needs of European Studies will be met electronically. Jean-Frédéric Jauslin, the Director of the Swiss National Library, announced two years ago that the Swiss Government was funding his institution one-hundred million Swiss Franks to build its full-text electronic capabilities.<sup>(65)</sup> But what was most striking about his announcement, in an age when a new technology seems to be announced every two weeks, was that only 10 percent of the total, 10 million Franks, was designated to be spent on hardware and software needs. The rest, 90 million Franks, was earmarked for the encoding of data itself. This is a ratio between outer, physical media and inner, intellectual content that, in my mind, has needed to find a better balance.

If we can't predict what will happen in America with electronic publishing, the same has to be said of Europe. It is true that most publishers in Europe do not own their printing facilities, but rather they subcontract the process. Their commitment is to the information itself, not to the media.<sup>(66)</sup> That may make it financially easier to switch from print to non-print when the financial conditions are right. But only when the financial conditions are right.

This entire topic will be handled again in greater depth and detail by my future colleague at the ACRL preconference to be held in the year 2020. By then, our hindsight should be 20-20 as well.

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#### NOTES on

#### "The Current State of European Studies in North America and of Scholarly Publishing in Western Europe"

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1. John R. Gillis, "The Future of European History," *Perspectives. American Historical Association Newsletter* 34, no. 4 (April 1996), p. 4.

2. As quoted by George Steiner, "Culture, the Price You Pay," in Richard Kearney, *States of Mind. Dialogues with Contemporary Thinkers* (New York: New York University Press, 1995), p. 82.

3. *The Internationalization of Scholarship and Scholarly Societies* (New York: American Council of Learned Societies, 1995), p. v.

4. Caroline W. Bynum, "The Last Eurocentric Generation," *Perspectives. American Historical Association Newsletter* 34, no. 2 (February 1996), pp. 3-4.
5. Gillis, "The Future of European History," p. 6.
6. Marek Andrzejewski, "Schweizer in Elbing, das Schicksal der schweizerischen Bürger in Elbing im Jahr 1945," *Westpreußen-Jahrbuch* 44 (1993), pp. 5-36.
7. Gabriele Birken-Silverman, "Sprachregression und Sprachwechsel bei den Italoalbanern Nordkalabriens," in: Dieter Kattenbusch, ed., *Minderheiten in der Romania* (Wilhelmsfeld: Egert, 1995), pp. 331-50.
8. Pedro Quade, "Imigrantes guineenses em Lisboa," *Boletim de Informação Sócio-Económica* 7 (March-June 1991), pp. 3-7.
9. Irene Andreassen, "Fishing Household Words in Dialects Spoken by People of Finnish Origin in Northern Norway; "Ei se naly jolla on kallaa." Om fiskerihusholdsord i kvendialekter," *Nordlyd* 20 (1994), pp. 121-132.
10. Peter A. Gourevitch, "Research Trends in Western Europe: The Collapse of Boundaries," in: A.M. Angiletta, et al., eds., *The State of Western European Studies: Implications for Collection Development* (New York: Haworth Press, 1984), p. 14.
11. Gourevitch, "Research Trends in Western Europe," p. 15.
12. Gillis, "Future of European History," p. 4.
13. Helmut Arntz, "Die Zukunft des wissenschaftlichen Buches," in: Peter Meyer-Dohm, ed., *Das wissenschaftliche Buch* (Hamburg: Verlag für Buchmarkt-Forschung, 1969), pp. 147-149. As cited by Bernhard Fabian, "Wissenschaftliche Literatur heute," in: B.F. and Paul Raabe, eds., *Gelehrte Bücher vom Humanismus bis zur Gegenwart* (Wiesbaden: O. Harrassowitz, 1983), p. 181.
14. Michael Holquist, "A Report from the Field" in *The Internationalization of Scholarship and Scholarly Societies*, p. 50.
15. Cf. Gourevitch, "Research Trends in Western Europe," p. 22.
16. Gillis, "Future of European History," p. 5.
17. Ivan T. Berend. *Central and Eastern Europe, 1944-1993: Detour from the Periphery to the Periphery*. Cambridge: Cambridge University Press, 1996.
18. Gillis, "Future of European History," p. 5.
19. Philip G. Altbach, "Publishing and the Intellectual System," in: Altbach and Edith S. Hoshino, eds. *International Book Publishing: An Encyclopedia* (New York: Garland, 1995): 273-74, adopting ideas suggested by Edward Shils, "Metropolis and Province in the Intellectual Community," in Shils, *The Intellectuals and the Powers and Other Essays* (Chicago: University of Chicago Press, 1972): 355-71.
20. Altbach, "Publishing and the Intellectual System," p. 274.

21. *Ibid.*
22. Cf. Claudius Gellert, ed. *Diversification of European Systems of Higher Education*. (Frankfurt a.M.: Lang, 1995), p. 68.
23. *Ibid.*, pp. 68-69.
24. Tonnes Bekker-Nielsen, "International Scholarly Publishing," in: Altbach and Hoshino, *International Book Publishing*, p. 211.
25. Gellert, *Diversification of European Systems of Higher Education*, p. 70.
26. Cf. Renate Mayntz, "Academy of Sciences in Crisis: A Case Study of a Fruitless Struggle for Survival" in Uwe Schimank & Andreas Stucke, eds., *Coping with Trouble. How Science Reacts to Political Disturbances of Research Conditions* (New York: St. Martin's Press, 1994), pp. 163-188; as well as Hans-Georg Wolf, "German Unification as a Steamroller? The Institutes of the Academy of Sciences of the GDR in the Period of Transformation" in Schimank and Stucke, *Coping with Trouble*, pp. 189-232.
27. Gellert, *Diversification of European Systems of Higher Education*, p. 70.
28. Calculated from *UNESCO Statistical Yearbooks* at five year intervals from 1965 to 1995, comparing population versus enrollment levels in tertiary education.
29. 1995 *UNESCO Statistical Yearbook*: 6-3.
30. Jutta Reed-Scott, principal author, *Scholarship, Research Libraries, and Global Publishing*. (Washington, D.C.: Association of Research Libraries, 1996), p. 30.
31. Knut Dorn, *Champagne Taste and a Beer Budget: The Problem of Increasing Scholarly Publishing in Europe and Decreasing Academic Library Budgets in North America*, talk presented at the annual meeting of the Center for Research Libraries, Chicago, April 24, 1992, and subsequently published as an offprint, p. 1.
32. For caveats on limitations of the UNESCO statistics, cf. Jutta Reed-Scott, *Scholarship, Research Libraries, and Global Publishing*, p. 29; Gretchen Whitney, "International Book Production Statistics," in Altbach and Hoshino, *International Book Publishing*, pp. 165-166, 183, 185; James Campbell, "Publishing and Export Bookselling in Western Europe," in: Karen A. Schmidt, ed., *Understanding the Business of Library Acquisitions* (Chicago: American Library Association, 1990), p. 60, footnote 2.
33. Gretchen Whitney, "International Book Production Statistics," in: Altbach and Hoshino, *International Book Publishing*, p. 185.
34. Compiled from 1993, 1994 and 1995 *UNESCO Statistical Yearbooks*, averages having been rounded to the nearest thousand in all but the last three cases.
35. Using data from Whitney, "International Book Production Statistics," p. 172, chart 5.
36. Figured from *Notiziario: ISTAT (Istituto Nazionale di Statistica)* serie 4, foglio 41, XV/12 (September 1994): 4; and from serie 4, foglio 41, XVI/6 (September 1996): 3-4.

37. Paul Metz and John Stemmer, "A Reputational Study of Academic Publishers," *College & Research Libraries* 57, no. 3 (May 1996), p. 289.
38. Bekker-Nielsen, "International Scholarly Publishing," p. 211.
39. Philip G. Altbach, "Publishing and the Intellectual System," p. 272.
40. *Ibid.*, pp. 271-272.
41. Irving L. Horowitz and Mary E. Curtis, "Scholarly Book Publishing in the 1990s," in Altbach and Hoshino, *International Book Publishing*, p. 303.
42. A phrase used by François Rouet, "France," in Altbach and Hoshino, *International Book Publishing*, p. 542.
43. Dorn, *Champagne Taste and a Beer Budget*, p. 2.
44. Information furnished by Bertelsmann itself on its Worldwide Web server at "<http://www.bertelsmann.com/bag/deutsch/portrait/>"
45. "Leading Multinational Publishing Corporations," appendix to: Altbach and Hoshino, *International Book Publishing*, pp. 250-251. Some multinational particulars on holdings derived from Lucy Latané Gordan, "Publishing in Europe: Recent Reports," *Wilson Library Bulletin* (June 1990), p. 61.
46. Robert A. Carter, "The History of International Book Publishing," in: Altbach and Hoshino, *International Book Publishing*, p. 163.
47. Albert N. Greco, appendix 3 to "Mergers and Acquisitions" article in Altbach and Hoshino, *International Book Publishing*, p. 242, table.
48. As noted by Gilles Rochefoucauld in an address on "Francophone Literature and Publishing in Switzerland and Belgium" at the ACRL - WESS Romance Discussion Group meeting in New York City, July 8, 1996. A copy of the address was distributed as "RL347 Romance Discussion Gr" via e-mail on July 31, 1996.
49. Gordon Graham, "Nationalism and the Book Business," *Publishers Weekly* 237 (March 16, 1990), p. S2.
50. Hachette holdings information derived from various appendices in Altbach and Hoshino, *International Book Publishing*.
51. Gordon Graham, "Multinational Publishing," in: Altbach and Hoshino, *International Book Publishing*, p. 246.
52. Herbert R. Lottman, "Publishing à la Française," *Publishers Weekly* 237 (June 1, 1990), p. S28.
53. Gordan, "Publishing in Europe: Recent Reports," p. 61.
54. James Campbell, "Publishing and Export Bookselling in Western Europe," p. 62.

55. *Ibid.*

56. German-E electronic discussion group contribution of February 5, 1997 as a response to the subject of "Carl Hauptmann Edition."

57. Robert Samuelson, "Europe's New Nutty Money," *Newsweek*, January 13, 1997, p. 55. "The single currency," Samuelson further suggests, "is an economic version of the Maginot line...."

58. As quoted by Samuelson, *ibid.*.

59. Charles Germain, "The European Publishing Community and the European Electronic Environment," *Collection Management* 19, no. 3/4 (1995), p. 132.

60. Bernhard Fabian, "Wissenschaftliche Literatur heute," p. 176 (my translation).

61. *Ibid.*, pp. 176-177 (my translation).

62. Unfortunately, these criteria exclude the British Isles, France, the Benelux countries, Sweden and Spain. For the United States, likewise, there are no consistently reliable UNESCO totals for journal titles.

63. Calculated from the tables for "Non-daily newspapers and periodicals: number and circulation" in the 1965 and 1995 *UNESCO Statistical Yearbooks*. An attempt was made to exclude weekly and all other newspapers from the periodical totals, but this may vary from country to country. Only total numbers of titles are calculated, not circulation.

64. Cf. Peter A. Bruck, "Brauchen wir das wissenschaftliche Buch?" in: *Börsenblatt für den deutschen Buchhandel* 8 (January 28, 1997), pp. 3-18.

65. Announced at the American Library Association conference in Chicago, June 24, 1995.

66. Charles Germain, "The European Publishing Community," p. 135.

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