



## Interlending & Document Supply

Interlending and document supply: a review of the recent literature: No 89  
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# Interlending and document supply: a review of the recent literature: No 89

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## Abstract

**Purpose** – The purpose of this paper is to review the current LIS literature relating to *Interlending and Document Supply* and related issues such as open access.

**Design/methodology/approach** – This paper is based on a reading of about 150 journals together with reports, blogs, web sites, etc.

**Findings** – This paper argues that the tipping point for open access has already arrived and is now acknowledged widely. Now new tensions and complications are emerging to do with funding and control. Significant changes in UK copyright law, specifically contract no longer trumping copyright will have widespread ramifications.

**Originality/value** – This paper is the only review of the LIS literature that focuses on *Interlending and Document Supply* and related issues.

**Keywords** Open access, Copyright law, Higher education, British library, European union

**Paper type** Literature review

## Introduction

A fairly quiet quarter for *Interlending and Document Supply* (ILDS); also for pay per view, patron-driven acquisitions (PDA), big deals all of which are developments that impact on ILDS. However, open access continues to dominate the library literature and there have been important advances in copyright. Read on below!

## Document supply

Obtaining access to newspapers can be expensive and laborious. Mass digitisation projects have helped to some extent but vast amounts still need to be made accessible – and ideally at a modest price or free. The British Library (BL) has a newspaper collection of 750 million pages spanning 300 years, making it one of the largest in the world. A total of £33 million has been invested to guarantee long-term storage, preservation and access:

52,000 separate newspaper, journal, and periodical titles and consist of over 664,000 bound volumes and parcels occupying some 32 km of shelving) and over 370,000 reels of microfilm (on 13 km of shelf space). Titles held are primarily British and Irish, but with a significant number of overseas newspapers.

and:

Currently, the Newspaper Library receives around 1,934 newspaper and weekly/fortnightly periodical titles per year, of which 1,475 are British and Irish newspapers received under legal deposit. The newspaper collections are used by 30,000 researchers a year.

The vision developed in 2007 ensured that:

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The current issue and full text archive of this journal is available on Emerald Insight at: [www.emeraldinsight.com/0264-1615.htm](http://www.emeraldinsight.com/0264-1615.htm)



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The Library will offer an integrated newspaper service based on digital surrogates at St Pancras (the main library) with hard copy newspapers stored to help preserve them for future generations.

The development is described and includes a private partnership initiative with BrightSolid which involves commercial digitisation with limited free access. The construction of an advanced facility at the northern site of the BL at Boston Spa is also described – this joins another low oxygen dark storage facility for low use books at Boston Spa, (Stephens *et al.*, 2015). Staying with Boston Spa – home to the British Library Document Supply Service – the head of Document Supply describes how “Responding to the wholesale shift in scholarly communication from print to digital can be a challenging experience”. The service has declined from its peak of 4 million requests in 2000 to less than a million today, but costs have been contained and the service remains sustainable by improving on many fronts. Market research has led to the development of a strategy to satisfy users’ needs in a rapidly changing information environment. The article concludes:

The Library’s overarching ambition, to enable online access to the entirety of its collections and supplement them with seamless connections to content held by other providers, will take some time but nevertheless, is in its sights. Furthermore, as the national library of the UK, it has a unique role in supporting the UK research and making its outputs accessible.

A well-written and honest assessment of the role of what is still the largest document supplier in the world, (Appleyard, 2015). Articles on document supply in the Middle East are rare so one from Saudi Arabia on the experience at one research university is to be welcomed. Two surveys of users were carried out using identical questions in 2010 and 2013 and the results are analysed. Developments at the university are also described including an experiment with PDA, (Vijayakumar and Al Barayyan, 2015). From South Korea, we have an article that describes KERIS which:

[...] holds a unique position in library resource sharing in Korea. It is a government-funded agency aiming at promoting public education and enhancing the research competitiveness of the country. As part of its mission, among others, KERIS has fostered a large-scale cooperative network of

academic libraries by establishing the key infrastructure for resource sharing, including the first national union catalog of academic libraries.

The change in usage is described and particular attention is paid to the introduction of dCube – the unmediated delivery of material to users giving a much improved service “the majority of transactions processed within 24 hours but 40.8 per cent of dCube requests were delivered to the requesting libraries within 8 hours” (Oh and Lee, 2015).

### Resource sharing

A major resource sharing service in Florida named UBorrow involves 11 state university libraries. Because users still wish to read print as well as electronic material, the goal was “to provide researchers and students with access to the combined collections of the state universities via a unified and cost effective service”. Its progress is assessed and described after two years and matched against the original predictions for the service:

The development group predicted that the new UBorrow service, with unmediated request sending and automated availability checks, would be faster and create less work for library staff than the traditional interlibrary loan systems in place throughout the state. They also predicted that 30-40 per cent of total traditional interlibrary loan request traffic would be diverted to this unmediated local system, which would ease burden on staff and save money.

Book delivery times were faster – an average of 4.1 days compared to the previous average of 7.6 days. But the satisfaction rate was only 54 per cent owing to a “quarter consistently denied requests” and subsequently reached a high of only 64 per cent – well short of the recommended fill rate of 85-95 per cent. However, it is interesting that:

[ . . . ] the use of UBorrow added to total borrowing traffic at the University of South Florida [ . . . ]. This seems to suggest that the new environment and the marketing effects associated with the launch of the new service gathered new patrons instead of wooing patrons who already used inter library loan (ILL) through ILLiad.

This is a lengthy, detailed and honest description of the experience of a large-scale resource sharing initiative, (Schmidt and Smith, 2014).

### Open access

This quarter there has been a noticeable increase in studies that assess awareness of open access, in particular, universities – awareness and active participation varies widely – for example, one study showing 78 per cent awareness (Mammo and Ngulube, 2015), “most” (Lwoga and Questier, 2015) and another “most” (Rodriguez, 2014) and finally 30 per cent (Reed, 2014). One of the main issues facing ILL librarians currently is how to deal with the increasing number of requests that are available freely online. One study in this issue of ILDS shows in detail how this is addressed at one university and should be a great help in dealing with this issue systematically, (Baich, 2015). But a longer-term issue is not confined to ILL librarians but concerns all staff and that is to increase awareness of what is freely available, to encourage deposits in repositories and to make that process as easy as possible. One article chides librarians for not publishing a higher proportion of articles in open access – “Overall an open access rate of 60 per cent was found, which was lower than expected considering 94 per cent of these articles appeared to endorse open access”. The authors conclude that:

Although these results show a higher open access rate than previous studies, and a linear growth of open access publications over the years, there is still a large gap between theory and practice which needs to be addressed, (Grandbois and Beheshti, 2014).

Five articles all appear in the same issue of a journal and together make contributions to the state of open access in the UK and Europe. The first is from the influential David Sweeny who is Director (Research, Education and Knowledge Exchange) at the Higher Education Funding Council of England. He is a firm supporter of open access but hostile to “some players (for whom) open access is seen as a convenient opportunity to disturb and disrupt the current system of scholarly dissemination”, which seems a bit harsh on what I assume is his target – those who advocate a pure Green approach. “When faced with the prospect of real damage, publishers naturally take up defensive positions” – actually they are taking a rational stance (from their standpoint) in supporting Gold open access (OA) and developing Gold OA whilst maintaining the existing subscription model:

University libraries have told me that they cannot support a rapid push to gold open access unaided. Furthermore, models that emphasise that authors must pay to publish their work have frightened the academic community. It is for this reason that I believe that widespread open access is only possible if Gold and Green are allowed to operate together, and researchers and libraries are given time to get used to the idea of open access and feel its benefits.

He then argues strongly for the green option noting that publishers overestimate the danger of cancellations with short or no embargo period, but Sweeny cites the case of the physics repository, arXiv.org in which papers have been deposited immediately for many years without harming subscriptions. It is a good “reformist” argument – mixing green and gold as is in line with the Finch recommendations. His case is weakened by ignoring the 30-40 per cent profit margin generated by the high prices charged by the large commercials; this fact makes their claim that “it is not the fault of publishers that library budgets are strained” hardly credible. In addition, nowhere does he acknowledge the problem of who pays when an author is not research funded – i.e. most humanities and social science scholars and many scientists. The author’s views are important, as he plays an influential role in the field of scholarly communications in England and the UK. (Sweeney, 2014). The next article in the issue is from the State Secretary for Education, Culture and Science in The Netherlands. Like Sweeny, he presents the view that open access is here to stay – “Information and communication technologies, and open access in particular, is also set to revolutionise the scientific world. It is simply a question of when and how” and asserts that Gold is the only way without seriously addressing any of the difficulties, (Dekker, 2014). Next up is Michael Jubb – another important player and Director of the influential UK-based research information network. He spells out in detail progress that has been made since the UK Finch report in 2012. There is a very useful link that takes you to the Finch report and related documents ([www.researchinfonet.org/finch/quick-links/](http://www.researchinfonet.org/finch/quick-links/)). The main message seems to be how complex it is to monitor progress in the three key areas of accessibility, usage and financial sustainability with usage being particularly intractable to measure – “The RIN working party concluded, reluctantly, that there was no straightforward way to build indicators and collect data to answer such questions on a regular basis” (Jubb, 2014). So the trend

towards open access is now inexorable, but how it will play out in practice is still hidden in the dense fog of the future. Interesting times indeed! The fourth article describes CHORUS – the Clearinghouse for the Open Research of the USA and is written by its Executive Director. This is a publisher-driven initiative to ensure that publishers remain in the driving seat of the open access juggernaut. Reading the article it does appear to be neutral between green and gold OA but drives searches to the publisher website, marginalising repositories and still leaving the fox in charge of the henhouse. Two key sentences are: “[. . .] free public access to the article metadata immediately and to a full-text version after an appropriate embargo period, which in some cases will be zero” and:

CHORUS manages free access and the embargo period. On the Internet, anyone using a CHORUS powered search portal will be able to find any public access article and its digital object identifier. The user selects the article they want to view, and is directed to the article on the publisher’s site. The publisher will provide free access to the article – either upon publication if the article is open access or after a determined embargo period., (Dylla, 2014).

What happens in the USA is of course of greater impact than in the UK where the emphasis is currently on gold but where there is a strong reaction to the enormous costs. The last in this quintet of articles covers the open access position in the European Union (EU). The short summary is that the situation is a mess: more politely and longer:

Contrary to what the European Commission might expect further to its communication and its recommendation concerning open access [. . .] its implementation by national governments and EU research funders have not led to a standardization of open access policies.

In detail, this means that there is no national open access mandate and policy in “Romania, Cyprus, Greece, Estonia, Bulgaria, Malta, Slovakia, Lithuania, Czech Republic, Luxembourg”. There is consultation on implementing a national policy in Poland, Slovenia, Netherlands and France although “26 research institutions signed a partnership agreement to encourage researchers to deposit their publications in HAL, (the French national open archive)”. Countries with funders, mandates and policy are the UK, with a mix of green and gold, Denmark and Sweden – green with a 6 to 12 month embargo. Spain has a new law – for which the URL link is broken, Germany has a 12 month mandate, Italy 18 months for Science, Technical, Medical (STM) and 24 months for Humanities and Social Science. So the long answer is messy as well! But there is some useful information marred by the almost complete lack of copy editing, (Lomazzi and Chartron, 2014).

University College London (UCL) is a well-known advocate for open access – in particular, Paul Ayris, its Director of Library Services. He and others describe open access at UCL covering the repository which has shown impressive growth from 3,000 in 2008 to 15,000 in 2014 (although the authors do not explain the sudden levelling off in 2013–2014). Tensions are honestly described:

The UK Government strongly favours the Gold route for Open Access, whilst research universities favour Green and HEFCE is more open in its assessment of both routes. Certainly, for research-intensive universities in the UK, Open Access compliance is a challenge.

This is a valuable article on how to manage and develop an open access strategy at a research-intensive university, (Ayris

*et al.*, 2014). Heather Morrison is a long time passionate supporter of open access and she accumulates a treasure trove of figures and visuals – just take a look! (<http://poeticeconomics.blogspot.ca/2014/12/2014-dramatic-growth-of-open-access-30.html>).

The ever prolific Walt Crawford reviews with strong approval the new requirements for being listed in the Directory of Open Access Journals (DOAJ): It is worth giving his key points here – but you can read the journal freely at <http://citesandinsights.info/civ15i1.pdf>:

Some of the strong points: Information on a journal’s digital archiving policy and the policy in use/ Text-crawling permission/ Download statistics and where they are/Explicit requirement of an editorial board with at least five “clearly identifiable members and affiliation” or an editor/ Form of peer review (drop-down menu)/ Plagiarism screening (and where described)/ Average weeks between submission and publication/ Whether CC licenses are embedded – and what CC license is the default/ Deposit policy directory used/ Who holds copyright/ Author publishing rights/ An explicit statement of whether there’s an author processing charge and, if so, how much. This appears to disallow the awful practice of saying “we’ll let you know how much you must pay” or simply being silent on the issue of APCs.

Crawford also levels another blast at Jeffrey Beall’s list of OA journals (Beall’s List), which is “a list of questionable, scholarly open-access publishers”, <http://scholarlyoa.com/publishers/>. He certainly has it in for Jeffrey Beall – and his blasts are usually backed up with well-researched data; making your own mind up could take more time than you have available but Crawford’s advice is sensible – “I recommend that authors and librarians ignore Beall’s lists and use DOAJ and their own common sense to determine which journals deserve support.” He has, and is continuing to produce an enormous amount of quantitative research on open access. His journal is worth scanning (it is monthly) and reading from cover to cover if you are considering a PhD in OA, (Crawford, 2015).

I have often pointed out in this review that publishers have vociferously and consistently opposed open access publishing over many years. When they realised they could plug the dyke no longer they lobbied successfully for gold open access and were successful in the UK – *a la* the Finch report. Predictably, they seized the chance to “double dip” – charging the same high and non-transparent prices for subscriptions and in addition charging high and non-transparent article processing charges – often thousands of pounds per article published. Now, some details are emerging:

[. . .] one institution we spoke to spent more than £28,000 in subscriptions with just one publisher, and also (paid for) the publication of 12 journal articles with the same company. Those 12 APCs amounted to an extra £21,000 paid by the university – a 71 per cent increase in charges [. . .]!

UK universities should have seen this coming. Publishers cannot lose with gold OA. Because their costs are not transparent and because large commercial publishers exert a quasi-monopolistic influence in the market place (soon to be made worse by the proposed Spring/Macmillan merger), there is no way of knowing how much they are overcharging for this double dipping – and whatever compromise is made can only be to their benefit to the detriment of universities and ultimately the taxpayer. Victory snatched from the jaws of defeat indeed (Estelle, 2014). However, the solution is in the hands of university libraries – do not pay the fees unless they are specifically provided by a research funder. Where funders wont pay for the mandate they impose then authors can



publish as they normally do in conventional journals, or even better in OA journals with low or no fees (e.g. *eLife*) and deposit in a suitable repository – the green route. An alternative shown to be attractive in another article in the same magazine on the costs of making the transition to open access:

The study also found that the directly attributable cost to research organisations of the “gold” route to open access is £81 per article excluding article processing charges (APCs), while the cost of the “green” route is around £33 per article.

which involves:

[. . .] half an hour spent by the author, and a further hour and a half spent by administrative staff for each article, gold OA is currently a time-consuming and costly route to open access, even before the additional cost of APCs is considered. Self-archiving in a repository via the green route, by contrast, takes just over 45 minutes, and only 15 minutes for authors. (Johnson, 2014).

It has been stated rather misleadingly that “almost a quarter of libraries are now covering the costs of articles processing charges (APCs) for authors at their institutions” (CILIP Update, 2015). As this appeared in the UK journal for librarians, you might think that it referred to UK libraries. In fact, this statement, which would be dramatic if true, is based on the result of a survey of 3,000 librarians with only 149 responses from 30 countries. So the 23 per cent of libraries who fund APCs actually number 34 – globally – so are not very representative. The report is freely available ([www.pcgplus.com/wp-content/uploads/2014/09/PCG-Open-Access-Library-Survey-2014.pdf](http://www.pcgplus.com/wp-content/uploads/2014/09/PCG-Open-Access-Library-Survey-2014.pdf)).

A thoughtful piece concludes that libraries:

By shifting our *modus operandi* from being consumers of information to becoming disseminators of scholarship, we can skillfully navigate the changing landscape in which OA will become the default method for distributing the outputs of research. In the process, we will provide our faculty and other scholars with publishing services that fully support OA in ways that are economically feasible for the academy.

The (US) authors argue strongly that the information landscape will change dramatically over the next 20 years as authors become used to, and see the advantages of, using repositories to store and disseminate their work. They perhaps underestimate the tenacity of the big commercial publishers who now control a significant amount of OA publishing in the UK via the Finch report and via CHORUS in the USA when they write that “Low APCs will have resulted from authors and research funders insisting over time that these charges be manageable” – well that approach did not work with the big deals. Nonetheless, well worth reading (Chadwell and Sutton, 2014). A welcome article discusses a difficult and less recognised issue – that is, funding for humanities open access publishing. It covers the issues described in the title and is well worth reading – particularly for the valuable costings data included, (Eve, 2014a). The author is also interviewed on the same subject and is also worth reading and is freely available (Eve, 2015). The author is a busy man having just published a book on open access in the humanities which I am just reading and will review in the next issue (Eve, 2014b).

## Institutional repositories

Institutional repositories are likely to grow in importance very rapidly over the next few years along with subject repositories, although many publishers restrict depositing in the latter, rightly seeing them as a threat. A very readable article in the

excellent and free *Research Information* look at the experience of Stanford University in the USA working with Hull University in the UK, the University of Wollongong in Australia and the University of Bristol in the UK, many useful insights, (Anscombe, 2015).

## Copyright and fair use

“It has been a very good year and a half for fair use” is a good start to a piece on recent developments in the USA. It continues “[. . .] courts drew a clear line allowing broad and free re-use of copyrighted works for a variety of socially beneficial purposes”. The “Authors Guild v. HathiTrust” favourable settlement is of particular interest. This is a short but important article that should be read by all ILL librarians – not just in the USA – indeed, especially by librarians outside the USA to see how these cases can be used to extend fair use in other countries. (Butler, 2015). Another article in the same issue analyses the saga of “Authors Guild v. HathiTrust” in more detail:

The decision clearly indicates that the acts of a library digitizing the works in its collection, and the library’s storage of the resulting digital files, are fair uses under section 107 of the Copyright Act. The decision, however, provides less certainty concerning the permissible access to those digital files.

Except for disabled users – an important group, (Band, 2015). A third article in this most useful issue covers international developments and, in particular, the consequences of the EU blocking moves on library exceptions and limitations at the World Intellectual Property Organization negotiations in 2014. Even more important, it looks at the secret negotiations being conducted – The Trans-Pacific Partnership Agreement (TPP) and the Trans-Atlantic Trade and Investment Partnership (TTIP). TPP negotiations have been extensively leaked and risk imposing international copyright terms of life plus 70 years which would then make it impossible to change at a national level. The highly controversial TTIP negotiations do not appear to have gone so far – yet. This is a very useful and readable article on subjects which most of us need to know about but find hard to evaluate, (Cox, 2015). UK copyright law has seen some dramatic changes, not the least of which concern fair use provision and electronic document delivery. A key change is to prevent publishers overriding copyright law with contracts that they impose on customers. One benefit of this is that libraries can now supply document supply requests directly to the customer from electronic databases of articles, thus avoiding the artificially imposed obstacles of “print, scan and then deliver”. It is also no longer required to charge a customer for supplying a copy nor is a signature required on a declaration form. These changes and others are described in an authoritative article by one of the UK’s experts in copyright law, who concludes that:

The changes introduced by the UK Government represent a seismic shift in the way copyright affects libraries and similar institutions. Many more organisations can now enjoy these privileges, and the administration of them has been considerably simplified, (Cornish, 2015).

## Scholarly publishing and communications

*The Scholarly Kitchen* is always worth a look for thoughtful short and sometimes longer pieces on the state of academic publishing. A post in January 2015 (<http://scholarlykitchen.com>).

sspnet.org/2015/01/29/ask-the-chefs-what-do-you-think-will-have-the-biggest-impact-on-scholarly-publishing-in-2015/) posed the question: “What do you think will have the biggest impact on scholarly publishing in 2015?” and summarised the answers of a number of contributors (chefs) with:

According to the Chefs, we’re looking at a year of mergers and acquisitions, the continuing growth of open access both in number of opportunities and in scale, the publication of data and objects (like multimedia, application code, etc.), and more start-ups.

The new Elsevier open access mega journal, *Helixyon* is mentioned with an article processing charge of USA\$1250, which is competitive with the \$1350 charged by that other mega journal PLOS One and significantly cheaper than PLOS’s other six journals. PLOS will have to get speedier and friendlier with processing if it is to compete. Two other answers should be of particular interest to readers of ILDS – Rick Anderson’s:

I suspect that two important things will happen this year, both of which will have a significant impact on scholarly publishing. First, in the USA: as of March 24, 2014, all agencies affected by the provisions of the White House OSTP memo on public access to data and publications resulting from publicly-funded research had reportedly submitted their draft policies for review, those policies had been returned to them with comments, and the agencies were revising them. I expect that we’ll see the final versions of those plans sometime this year. Second, in the UK: discontent (from all points on the advocacy spectrum) over the RCUK’s OA policy seems to be growing

and from Alice Meadows:

OA will inevitably continue to dominate much scholarly publishing debate in 2015. There must be a strong possibility of a new mandate or policy this year that could have a major impact on our business – perhaps from a major market such as Japan – though again, this would likely be felt more in years to come than now. Maybe this will be the year in which we start to see the long-anticipated impact of the overall downward trend in embargo periods (12 months for STM and SSH alike seems to be the new norm, and some funders – including the EC – are mandating 6/12 months). Or perhaps the tide will finally start to turn towards Gold OA as both the UK and, more recently, the Dutch governments hope. If so, however, the Dutch model may come at too high a price for some publishers – the right for all future articles whose corresponding author has a Dutch affiliation to be published on an open access basis for no extra charge.

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### About the author

**Mike McGrath** started work in Brymbo steelworks in 1961 in operational research. Then worked as a bricklayer before joining the Department of Egyptian Antiquities in the British Museum in 1969, where he worked on the 1972 Tutankhamun exhibition and catalogued the department's collection of 70,000 objects. Transferring to the British Library on its creation in 1974, he worked in many roles as well as being the Chair of the Trade Union Side for 14 years. He retired in 2001 as Head of UK Marketing having also worked for some years internationally. He worked on the review of remote services including document supply which led to the implementation of the current investment strategy. In retirement, he edited *Interlending and Document Supply* and remains active in document supply matters. He has spoken at many conferences over the past 10 years including the Nordic ILL conference in 2010, FIL and IFLA. He, was the marketing officer for the Forum for Interlending until 2008 and ran a workshop at the UKSG conference for three years on document supply. Most recently, he was the project manager for the successful campaign on winning price reductions on the Big Deals from Elsevier and Wiley. Mike McGrath can be contacted at: [mike@mikemcgrath.org.uk](mailto:mike@mikemcgrath.org.uk)