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Interlending and document supply: a review of the recent literature: 90

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Interlending and document supply: a review of the recent literature: 90

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Abstract

Purpose – This paper aims to review the current LIS literature for document supply, resource sharing and other issues such as open access that have an impact on the service.

Design/methodology/approach – The approach is based on the scanning of about 150 journals, reports, websites and blogs.

Findings – Important changes are taking place at the British Library. The new (4th) edition of the STM report is well worth reading. Much again, on open access, particularly the high costs of Gold. Elsevier comes in for some more bad press.

Originality/value – The only regular literature review that focuses on interlending, document supply and related issues.

Keywords Copyright law, Open access, British library, Scholarly communications, CHORUS, STM report 4th edition

Paper type Literature review

Introduction

Interlending and document supply (ILDS) continues to have its ups and downs, but the global trend is downwards. Still, it is a good example of the dangers of extrapolation because the long tail will always be with us and indeed grows longer and thicker. There will always be assiduous users who will want that hard to get material. Material that has not been digitised (more than you might think) and material hidden behind paywalls which are becoming less formidable as open access (OA) grows. Little used current material and material which is simply hard to find. Jobs for a while yet for ILL librarians. Once again, in this review, we have much on OA but also on scholarly communications in LIS. Missing is more research on the current state of OA, downloads, impact of Gold OA, impact of embargoes, growth in repositories, etc.

Document supply

Document supply is declining in many areas of the world and with austerity gripping globally ILL librarians need to develop their skills. Finding publications is a strength of ILL librarians and is needed more and more as we move rapidly into a hybrid environment of OA and conventional paid for material. An impressive description, analysis and exploration of the future of resource discovery by a leading expert is worth looking at. Written by Marshall Breeding for NISO (National Information Standards Organization), it covers a general introduction to the field, the “Integration of Discovery Services with Resource Management Systems” and a gap analysis which covers *inter alia* OA material and

known item searching. Well worth looking at and freely available on the web, (Breeding, 2015). Another related report is also useful – Roger Schonfeld – a well-known figure looks at making it easier for researchers to find material – it does what it says on the tin, (Schonfeld, 2015). A study on the impact of journal cancellations on ILL requests is particularly useful given the high price of Big Deals combined with the low usage of much material:

This study examines how serials cancellations [277 titles] affect ILL usage and how reliance on ILL affects patrons’ access to content. By analysing the number of ILL requests from cancelled titles, the authors found that cancellations have a very small effect upon overall ILL usage.

And then, goes on to state that – “Analysis of collected data, including ILLiad records, shows that after patrons identify desired articles that require ILL, they only submit ILL requests 31 per cent of the time”. In overall terms, there was a very small impact on ILL requesting and a marked reluctance to proceed with an ILL request (Knowlton *et al.*, 2015).

And now, a brief mention of the articles in the last issue of *ILDS*, brief because if you read this then you will have presumably already had sight of the last issue. Important changes have been taking place at the British Library Document Supply Centre. The Head of Document Supply identifies these including the fact that Outsell, the market research company, only describes three suppliers down from the usual 12 – indicating the “contraction of the traditional document supply market”. He describes its new strategy and its long-term vision. Still the largest supplier in the world, there is clearly plenty of life left in what is also the oldest! (Confession – I worked at the British Library and before its inception the British Museum for 32 happy years), (Appleyard, 2015). Copyright reform in the UK has had a significant and positive impact on the document supply of articles and other non-returnables. An important administrative issue that speeds, up the whole process is the

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ability to comply with copyright law electronically – the so-called electronic signatures facility. But a far more important provision is succinctly described:

The law now specifically states that any clause in a contract or licence that imposes these restrictions will be considered invalid. For example, libraries can now transmit an article directly from a licensed journal data base to another library rather than being compelled to print, scan and then transmit the printed copy (Cornish, 2015).

A rare example of comparing the ILL service across libraries – an Association of Research Libraries (ARL) campus, a small private liberal arts campus and a large state public library – produced some interesting results, for example:

Comparing all three organizations, the value of ILL services, according to patron perceptions, ranks overwhelmingly very important with 79 per cent, 93 per cent and 82 per cent for the public library, small liberal arts college and a research university, respectively. The four most important features in all three result sets were: speed, access, people and quality, (Little and Leon, 2015).

The role of document supply at a new Saudi Arabian university is described together with a market research project to understand users' perceptions of the service. This perception was found to be high and the article is useful in shining a light on a little known country – at least for library matters, (Vijayakumar and Al Barayyan, 2015).

Resource sharing

Canadian resource sharing is viewed through the prism of the Canadian Association Research Libraries and a case study of ILL at the University of Alberta. The crucial role of the Canadian National Site Licensing Project in the decline of ILL requesting in 2005 is identified and there is much of interest – especially perhaps in comparing and contrasting the experience of its big neighbour – the USA, (de Jong and Frederiksen, 2015).

Scholarly communications

Good surveys of the future of the STM market are worth their weight in gold – not quite true in this case – the report is US\$4,995 for 33 pages. Thirty-three pages of 80 gsm paper weighs about 160 g. A total of 160 g of gold currently costs US\$6,000 so the report is slightly cheaper! (Auclair and Erickson, 2015). Outsell gave a presentation of this gold bar at the STM Annual USA Conference 2015 in Washington, DC. The price does rather underline the fact that academic publishing is not a quaint little corner inhabited by nerds who know everything about the smallest thing you've never heard of (just look at the Table of Contents of most STM journals); it is in fact a multi-billion £, \$, € industry run by some highly paid and ruthless people – men mainly – smartly dressed women tend to be the public face at conferences. Another rather cheaper report, in fact free on the web, is now in its 4th edition and worth every virtual penny (Ware and Mabe, 2015). It was in fact financed by the conference organisers – STM. Am I being paranoid to think that there is an element of hubris here in their appropriating the well-known acronym used to describe publishing that focuses on Science Technical and Medical subjects? From its website, we have this description:

It has over 120 members in 21 countries who each year collectively publish nearly 66 per cent of all journal articles and tens of thousands of

monographs and reference works. STM members include learned societies, university presses, private companies, new starts and established players[1].

In Wikipedia, it is still referred to as the “International Association of Scientific, Technical, and Medical Publishers” well known for its vigorous opposition to OA until they saw the way the wind was blowing and very swiftly moved into Gold OA, thus generating a very substantial second revenue stream. Here are some highlights from the report:

- There were about 28,100 active scholarly peer-reviewed journals in 2012.
- These journals collectively publish about 1.8-1.9 million articles each year.
- The USA is the country with the largest share of global output, producing some 21 per cent of articles annually, followed by China in second place with 10 per cent.
- The number of articles published grows each year by 3-3.5 per cent, and the number of journals by about 3.5 per cent.
- The reason for the growth in numbers of journal articles is the growth in the number of active researchers, which in turn is driven by research & development budgets, and is currently estimated at between 6.5 and 9 million globally.
- The number of STM journal publishers is estimated to be around 5,000-10,000, with a core of 5,000 covered by the main industry databases, and a long tail of single-journal small organizations (most of whom would not regard themselves primarily as publishers).
- The annual revenues generated from English-language STM journal publishing are estimated at about \$9.4 billion in 2011.
- About 52 per cent of global STM revenues (including non-journal STM products) come from the USA, 32 per cent from Europe/Middle East, 12 per cent from Asia/Pacific and 4 per cent from the rest of the world.
- The full cost of publishing a journal article (with print and electronic versions) is about £3,000.
- The industry employs an estimated 110,000 people globally, and in addition an estimated 20-30,000 are indirectly supported.

This gives a powerful impression of the size of the industry. The bias is apparent in Point 9 – where the cost of publishing an article is stated as a fact as £3,000. Publishers do not disclose their costs in sufficient detail to substantiate, but how is it then that many self-sustaining publishers charge much less than this for publishing an article. However, so long as the reader is aware of the agenda and does not leave their critical faculty at the door this is, as always, a highly valuable report – I would say indispensable to anyone concerned with the state of academic publishing today.

Next is an excellent empirically based article on strategic planning in academic libraries in the USA. This writer spent an enjoyable 12 years (1989-2001) marketing the document supply services of the British Library – then processing at its peak four million requests a year. Planning was always an issue – and I found that there are dangers in two ends of the planning spectrum – at one end, the “get on with the job” person who is hyperactive going from one project to another, reflecting little and in the end

accomplishing very little. At the other end, “the paralysis of analysis” person who spends so much time planning that they have little time for actually going out into the field and meeting customers. Fortunately, few in practice fit those extreme ends but also few manage to get the balance right between planning and implementation. Even one of my favourite gurus – Henry Mintzberg went through a period of arguing that planning was useless as the world was moving too fast. The article being reviewed looked at 63 strategic plans and important trends identified – the research design is particularly useful. An excellent literature review looks at “Trends and Challenges” and “Strategic Plans Analysis”, and the review is reflected in a comprehensive bibliography. The study focussed on two questions:

- Q1. What are the most important or most highly prioritized issues for academic libraries right now, according to their strategic plans?
- Q2. To what extent do these issues align with the top trends identified by ACRL and other professional and research organizations?

A fascinating figure shows the “percentage of plans including each identified issue and trend”. This shows that:

[. . .] collections, physical space, collaboration, and instruction are the top priorities, with each of these areas being integrated into over three-quarters of the strategic plans. Collections topped the list for academic libraries, with a full 100 per cent of libraries including collections in their strategic plans.

Focussing down – “51 plans (81.0 per cent) named access to the collections as a priority, with many including the implementation of discovery platforms to improve searching and location” – a matter of central concern to ILL librarians. Readers of this Literature Review will know the attention that is paid to OA, so it is interesting that “36 documents (57.1 per cent) indicated plans to implement or expand an institutional repository” perhaps many of the remaining 43 per cent libraries already have an IR and are content for it to continue its job and thus do not appear. The conclusion is rather sharp (or blunt as the author describes it!):

[. . .] to put it bluntly, these plans seem to reflect the notion that what is reported as strategic planning in many libraries is less strategic and more “a reactive form of long range resource allocation planning”, that lacks leader-defined vision, [and] does not apply competitive environmental analysis, (Saunders, 2015).

Those ILL librarians who feel daunted by introducing a new ILL system – and few are not when it is added to already busy schedules – may take heart from a description of introducing such a system on a tight schedule (Irwin and Favaro, 2015).

Big deals

Another study comes down in favour of Big Deals:

Our results showed an average cost of \$6.04 for articles in Big Deal packages to which our library subscribes, \$17.19 for articles in the Biomedical Library’s journal subscriptions, and \$15.35 for articles obtained via Interlibrary Loan.

An average pay-per-view cost of \$37.72 was calculated by consulting publisher websites. We conclude that:

“Big Deal” journal subscription packages are cost-effective; however, because of their high cost, they consume a large portion of a library’s budget and thus limit a library’s flexibility to purchase other resources (Lemley and Li, 2015).

It is a good summing up of their research but the authors fail to take into account that a number of publishers design their download processes in such a way that over counting occurs – Elsevier as high as 40 per cent as a result primarily of the desire of users to move from the default of .html to .pdf; this results in a double counting. It is also the case that the impact on ILL is usually minimal when Big Deals are cancelled and complaints few; without research, it is impossible to say why this is the case.

Open access

Much of the current literature on OA focuses on the nuts and bolts of repository management with which I imagine most of our readers are not greatly concerned – at least directly. However, the concern that libraries have with the rapidly rising cost of Gold OA has led to some intense negotiations at least in the UK. Publishers are putting in place procedures to offer discounts or voucher to libraries that both subscribe to and pay Article Processing Charges (APCs). It is early days but hopefully we will start to see some studies emerge before the end of 2015 on the impact these are having. For the moment, we have some details provided by Jisc on offsetting agreements and other related matters[2] and a short but interesting piece giving some assessment of the costs of Gold OA in UK universities:

According to conservative estimates, the UK’s higher education institutions are paying £160 m per year for subscriptions to peer-reviewed academic journals; Research Libraries UK (RLUK) puts the figure even higher, at £192m

and a startling example which will become more and more common:

In one recent year, one institution we spoke to spent more than £28,000 in subscriptions with just one publisher, and also published 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 from that publisher (Estelle, 2015).

These 12 articles are free immediately for everyone in the world but that one university has to pay the price – it is equivalent to 3,000 electronic ILLs from the British Library – it is just a thought. And a study for Research Councils UK shows that Elsevier and Wiley have each received about £2 million in APCs from 55 institutions[3].

It is perhaps not surprising that the STM conference referred to above had a keynote address from Geoffrey Beall – the scourge of predatory OA publishers. He has come in for some criticism, most comprehensively by Walt Crawford in his self-published journal *Cites and Insights* and referred to in my previous Literature Reviews. A more succinct assessment, than Crawford’s of predatory OA publishers is given in (Berger and Cirasella, 2015). Only Beall’s .ppt is available[4] but the tone is very polemically hostile to OA generally, his case is not helped by one of only four references is a letter to a professional journal the DOI of which is wrong. Nonetheless, he does highlight important issues often glossed over in the literature. Many authors and readers are actually disadvantaged by the development of Gold OA – generally all those authors who do not receive

funding for their writing which includes most H and SS writers and many in STM as well as most writers outside the developed world in any discipline. OA advocates will point to the lower priced OA journals and indeed “platinum” OA journals that do not charge for publication but their economics are often fragile. Additionally, funds for Gold OA are available from various bodies and exceptions are made even by commercial publishers – the situation is complex and more nuance is needed if solutions are to be found in this period of radical change.

Another group who feel challenged by OA are professional societies and their concerns are identified in a survey by Taylor and Francis who also presented at the STM conference referred to above[5]. Their concerns focus on the dependency they have on the revenue generated by their journal income which is used to subsidise other activities. But as I have said before, in this review, why should librarians –and indirectly their users pay this subsidy in the form of high prices? If professional societies colluded less on pricing with the commercials, it would force a downward trend at last in serial prices.

Returning to Walt Crawford again – he is quite indefatigable – anyone who is very or even slightly confused by the costs of OA publishing and the high charges for Gold OA should take a look at his recent issue of *Cites & Insights* where he takes a critical look at Kent Anderson’s justification of these costs and hence charges. He then engages in a wide ranging, well-informed, well-written survey of the current situation with a clear and explicit bias towards non-commercial OA. The trouble is for time-poor readers that he covers this important subject in 38 pages – and if you read Kent Anderson’s piece as well, then it is a serious time allocation. Perhaps something for the daily commute or lunch time reading? (Crawford, 2015a).

The issue of the costs of OA is tackled in another paper:

This study analyses data from 23 UK institutions covering the period 2007 to 2014 modelling the total cost of publication (TCP). It shows a clear rise in centrally-managed APC payments from 2012 onwards, with payments projected to increase further.

The cost of APCs varies widely and the average is high although at present stable:

Whilst the mean cost of APCs paid by institutions has remained relatively stable since 2008, with an overall mean being approximately £1,682, there has been considerable variation in APC prices over the period, prices ranging from £82 to £5,280.

Reprising my earlier ILL cost comparison – that’s nearly a thousand ILL requests for the cost of one article – an article that may not even be read. It is difficult to see how the economics of Gold OA are sustainable at such high prices (Pinfield *et al.*, 2015).

A thoughtful piece takes a critical look at Gold OA and notes that there are:

[...] two key flawed assumptions that are particularly acute in the humanities disciplines. The first of these assumptions is that a market will emerge in which rational actors (researchers) will develop price sensitivity in the selection of their publication venue. This is the line of the UK government. However, as we see in the market for shoes, for example, various manufacturers of trainers manage to sell the same essential product, often made by the same workers from the same material, with wild price differentiation. In other words, in markets that deal with symbolic capital (prestige or reputation), perceived value is little to do with the services or goods provided, but instead wholly concerned with the brand that is valued by one’s peers.

Which is a neat way of exposing the neoliberal myth that market forces will solve all problems. The second assumption again assumes a perfect market but the costs of Gold OA payments is dependent on the number of authors being paid for which hits research-intensive universities far harder than those with little or no research investment and, thus, no payments to make – in effect the latter become free riders. The creation of the Open Library for Humanities[6] is then described:

The first component, the OLH Megajournal, is a multi-disciplinary space for any researcher who identifies his or her practice as falling within “the humanities”. Although not a “megajournal” in the PLOS-ONE sense of “peer-review light” (in which “technical soundness” becomes the core determinant for admission), this broad space is an area where the approximately 150 researchers who have pledged us articles can submit their new work. Of course, we cannot guarantee that all 150 pledges will be received. We can guarantee that not all of these will pass peer review. The end result, though, at launch, should be a sizeable tranche of initial material across a wide disciplinary spread.

and:

The second component is the provision of a space for individual journals to share in our economy of scale. These existing publications can transfer onto the OLH and we will provide, through our partnership with Ubiquity Press, a dedicated editorial manager, a hosting platform, a submission management system, XML typesetting, digital preservation, COPE membership and CrossRef DOI assignment.

A laudable project and one comment on the site is probably typical – “I count myself among those wishing the OLH the fairest of winds on its maiden voyage”. Too little attention has been paid to the issue of non-funded, mainly Humanities and Social Science authors who have little or no access to funds, and this article goes some way to redress that, (Eve, 2015). The author has also written a book exploring these issues in greater detail, (Eve, 2014).

The Clearinghouse for the Open Research of the USA (CHORUS) continues to make a lot of noise:

It is a suite of services and best practices that provides a sustainable solution for agencies and publishers to deliver public access to published articles reporting on funded research in the USA.

It stresses it is charitable and not for profit status but is in fact an initiative of commercial publishers that aims to retain control of the publishing and disclosure process. The benefits are that it is funded by publishers so no cost to libraries or the tax payer – but as ultimately academic publisher revenues derive almost entirely from taxes that is not so big a benefit. The other being that articles published using public funds will be disclosed efficiently and effectively. At present, they promote the fact that they have made 25,000 articles freely accessible which is a tiny fraction of the over 400,000 articles published a year in the USA. Still, if they play their cards right, CHORUS could severely inhibit the growth of institutional and subject repositories and success in the USA will surely lead to CHORUS UK, CHORUS EU, etc. Worth keeping an eye on what they are doing on their website[7]. OA in Europe is developing but at very different speeds country by country and was detailed in an article in the last review (Lomazzi and Chartron, 2014). The best way to keep up to date on efforts to harmonise developments across the European Union and the developments themselves is to subscribe to the newsletter of PASTEUR4OA at <http://us9.campaign-archive1.com/?u=5fbf4a76563e0df5ac5e3eef0&id=e396d>

8f8c3 where you will also find the latest newsletter packed with information.

A fascinating and enormous (30,466 responses) study shows author attitudes to OA. One of the surprising results – at least to this writer – was that as many as 31 per cent of HSS authors had funding for Gold OA and only 61 per cent of Science. Well worth reading and freely available[8].

I spend a lot of time reading and then writing this Literature Review, but I must bow the indefatigable Walt Crawford who is a veritable one man publishing house producing vast amounts of OA material. Twenty-four pages in the latest issue of his journal *Cites & Insights* cover anti-OA writings in an amusing and dry way (Crawford, 2015b) – it is impossible to even give a flavour of it in a short review but well worth reading.

Elsevier is once again in the (bad) news with their new policy on the management of embargoes – it is worth quoting at length the statement from the ARL:

On 30 April 2015, Elsevier announced a new sharing and hosting policy for Elsevier journal articles". This policy represents a significant obstacle to the dissemination and use of research knowledge, and creates unnecessary barriers for Elsevier published authors in complying with funders' open access policies. In addition, the policy has been adopted without any evidence that immediate sharing of articles has a negative impact on publishers subscriptions.

Despite the claim by Elsevier that the policy advances sharing, it actually does the opposite. The policy imposes unacceptably long embargo periods of up to 48 months for some journals. It also requires authors to apply a "non-commercial and no derivative works" license for each article deposited into a repository, greatly inhibiting the re-use value of these articles.

Any delay in the open availability of research articles curtails scientific progress and places unnecessary constraints on delivering the benefits of research back to the public.

Furthermore, the policy applies to "all articles previously published and those published in the future", making it even more punitive for both authors and institutions. This may also lead to articles that are currently available being suddenly embargoed and inaccessible to readers (Adler, 2015). No comment required from me.

Patron-driven acquisition

The University of Huddersfield in the UK is a strongly innovative institution – no more so than at its library. After experimenting with purchase-driven acquisition for some years, it embarked on a large-scale project with EBookLibrary (EBL) to the tune of £100,000. The pilot was judged a success and:

PDA books have become embedded in the collection – the 2010 titles have been used consistently since purchase and appear in the top 20 downloads every year. Titles from other years also continue to be used and compare well even against the very heavily used reading list titles. In addition, the EBL data shows that use is predominantly by third-year undergraduate students (Stone and Heyhoe-Pullar, 2015).

Prices

We know that one of the drivers, if not the main one, for the growth of OA is the serials pricing crisis, whereby real prices have risen dramatically over the past 30 years for academic serials, generating vast profits for a handful of large commercial companies – and on the back of that large

surpluses for professional societies that subsidises their activities. A recent study:

[...] based on requests under the Freedom Of Information Act in the UK to more than 100 universities asked how much each had spent on subscribing to journals from seven of the largest publishers.

It was found that prices have risen by almost 50 per cent in those seven years; surprisingly the lowest rise was 17.4 per cent to Elsevier journals – perhaps partly due to some successful negotiations on the current package deal for UK universities. (Jump, 2014).

Theses

Access to theses until recently was laborious and expensive. In recent years, this situation has been transformed. Increasing numbers of current theses are instantly and freely available online. Programmes of retrospective digitization are eating into the vast numbers of older theses – led by ProQuest but also by not for profits such as the British Library via the ETHoS service. However, the picture is complex and the situation in France and Germany is investigated, (Schöpfel *et al.*, 2015). The accessibility and regulations associated with theses in these two countries was researched using a sample of representative universities. "The digital PhD theses in OA represent 32 per cent of all reported theses, but they represent 84 per cent of all digital theses (ETDs)' in the period 2009-2012". The authors conclude that:

The EDAR (E-Dissertations: Access and Restrictions) survey confirms former empirical evidence on restricted access to ETDs, especially due to embargo periods and on-campus-only availability. Obviously, there is no need for new facilities and infrastructures on local, national or European levels. Today, the problem of OA to ETDs lies upstream, in local contexts that facilitate decisions in favour of embargoes or restricted access (on-campus-only access, Intranet). To put it in a simple way, pipes exist, but there is a lack of both fuel and pressure for ETDs and OA.

Although the sample size was fairly small and the response rate 52 per cent, this is nonetheless a very useful piece of work which should encourage faster moves to make theses more widely accessible.

Miscellaneous

Research that shows the propensity to read in print rather than onscreen has been referred to in this review before. Some more research confirms this and is quoted in the Washington Post – "A University of Washington pilot study of digital textbooks found that a quarter of students still bought print versions of e-textbooks that they were given for free"[9]. And now, a book has been written investigating this phenomenon (Baron, 2015).

This comes as no surprise to me given my experience of writing this quarterly review – The STM report referred to above is 180 pages of densely packed and valuable information; I hit print and wince at the ink and paper usage – a full cartridge (budget) at £7.00 and £2 for paper – plus some depreciation say £10 (Baron's book costs £17 - undiscounted). But the readability justifies the cost. I wonder if any research has been done on printing costs by end users in academic institutions – very high I suspect.

Notes

- 1 www.stm-assoc.org/about-stm/about-the-association/
- 2 www.rcuk.ac.uk/RCUK-prod/assets/documents/documents/Openaccessreport.pdf
- 3 www.jisc.ac.uk/blog/offsetting-agreements-for-open-access-publishing-13-apr-2015
- 4 www.stm-assoc.org/2015_04_22_Annual_Conference_Beall_Scholarly_Publishing.pdf
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- 6 www.jisc-collections.ac.uk/Catalogue/Overview/Index/2120
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- 8 http://figshare.com/articles/MSS_Author_Insights_2014/1204999
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