



## Interlending & Document Supply

Interlending and document supply: a review of the recent literature: No 88  
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### Article information:

To cite this document:

Mike McGrath , (2015),"Interlending and document supply: a review of the recent literature: No 88", Interlending & Document Supply, Vol. 43 Iss 1 pp. 53 - 58

Permanent link to this document:

<http://dx.doi.org/10.1108/ILDS-12-2014-0058>

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# Interlending and document supply: a review of the recent literature: No 88

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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 (OA) that have an impact upon the service.

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

**Findings** – Lorcan Dempsey from OCLC looks into the future. Patron-driven acquisition and pay per view continue to receive much attention. There is considerable debate on the development of OA as the pace increases; of particular interest is Schöpfel on the impact of OA on document supply.

**Originality/value** – This is the only regular literature review that focuses on interlending and document supply and related issues.

**Keywords** Collection management, Document delivery, Copyright law, Monographs, Consortia, Library and information networks

**Paper type** Literature review

## Introduction

I usually include articles published in *Interlending & Document Supply (ILDS)* in this review. The vast majority of readers will have access to these articles if they have access to the literature review. However, to exclude them would be perverse as they all should be very relevant to the concerns of those involved in resource sharing. I normally address this issue by being brief in my referencing with these articles. This will particularly be the case for this number of *ILDS* as I need to cover the complete 2014 volume of 33 articles, although I have decided to exclude the double issue of 42.2/3, which contains 17 articles based on presentations given at the *ILDS* conference held in Beijing in 2013. This is because a new agreement with IFLA ensures that all articles published that originate in a presentation at an IFLA conference will be made open access (OA) nine months after publication. By the time you read this review, it will only be a couple of months before you can see them freely at: <http://emeraldgroupublishing.com/products/journals/journals.htm?id=ILDS>. So suffice it to say that eight of the articles cover different aspects of resource sharing and inter-library loan (ILL) in China and you can see the abstracts at the above URL now.

## Future trends

Peering into the future has never been more difficult – certainly in libraries. However, the ever thoughtful Lorcan Dempsey – currently OCLC’s resident guru – joins with two others to look at how library collections and collecting will evolve. There are 30 pages of densely argued

discussion, but it is well worth persevering with them. Reduced transaction costs will drive “unbundling of functions and their consolidation in network platforms and with other external providers”. A central role is seen for the library as it moves to support the whole information chain in the research process “the continuous digital recording of the research process [. . .] (including) the collection of data, documents and other resources which will vary by discipline”. They have interesting things to say about books – “print continues to be central” – and journals – “libraries lack streamlined tools and processes to manage open-access materials as part of their collections”. Well worth reading for an authoritative and thoughtful global overview of the current situation in libraries (Dempsey *et al.*, 2014).

A major Swiss German report identifies technology trends and issues of staff development. It has rather too much opinion, which is perhaps inevitable given that it is based on panel discussions. However, there are references to more substantial evidenced-based studies (in fact, 297 references in a 56-page report!). There is a useful section on “Rethinking the Roles and Skills of Librarians: Solvable Challenge: Those that we understand and know how to solve”. Focussed on academic and research libraries, this is well worth a look[1].

A thoughtful article discusses trend analysis and its relevance both generally and specifically for ILL. Two recent trend reports are assessed. “Looking ahead five or more years into the future, the Horizon Library Report[2] identifies an increase in the volume and acceptance of multidisciplinary research” and the author discusses the consequences for ILL. Significant information technology (IT) developments will make demands on ILL staff, as will copyright changes. The second report from the American Library Association[3] also stresses IT changes, but fails to mention other trends which the author picks up on – mainly copyright both national and international, OA and increased user expectations. Coupled with a thoughtful conclusion, this is well worth reading (Posner, 2014).

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)



Interlending & Document Supply  
43/1 (2015) 53–58  
© Emerald Group Publishing Limited [ISSN 0264-1615]  
[DOI 10.1108/ILDS-12-2014-0058]

## Interlending and document supply

A well-known author to readers of this journal investigates OA and document supply (Schöpfel, 2014). He poses the question “Is open access an alternative to document supply?” He covers a lot of ground and notes that:

[...] document supply services, especially when sharing resources and working with a network of back-up libraries, are able to satisfy more than 90 per cent of incoming requests – not only articles but all kinds of documents. This is much more than the actual potential of open repositories and of what open-access journals can offer.

He also notes that:

Two aspects further limit the interest of open access for document supply. A growing number of items in open repositories are metadata without full text, while other documents are under embargo or available only on an intranet (on campus). In particular, embargo periods of 12-24 months or more, enforced by publishers, are embarrassing because a large part of document supply requests deals with recent papers.

The coverage of OA is not as great as might at first sight appear:

UK PubMed Central was launched by the UK's eight principal funding bodies of biomedical and health research to provide free, open access to research results. In fact, less than 10 per cent of the 20 million records are linked to free, available full text, and this is generally older material

To which one might also add that of the 28 million records in European PubMed Central, only 1.9 per cent represent freely available full text articles *MM*. He also notes that ILL customers often need the Version of Record, which is not often available from a repository. Many other interesting points and arguments are made and developed. He makes the really important point that:

The real challenge for document supply management is not strategic management, to decide whether or not to continue, but to change management, to integrate open access as an opportunity for service development.

In addition, he describes two ways in which this can be done. There is much food for thought here for ILL librarians – both threats and opportunities – and is strongly recommended.

A novel approach that involves digitising ILL requests for out-of-copyright books has led to “the Document Supply Service contributing about half of the in-house digitised collection images as a by-product of its ILL/DD services” at the National Library of Australia (excluding newspaper digitisation). About 44 per cent of requests to the National Library are for out-of-copyright books as compared to 10 per cent for other libraries. A detailed description of the processes involved with the role of Relais being of particular interest to ILL librarians is given, and the development of the National Library over that period is interesting in itself (Moreno and Xu, 2014).

The development of resource sharing has led to the situation where “For many communities, more bibliographic information is available via one search than ever before”. It is argued that this has led to increases in “interlibrary loan volume”. This is a very useful snapshot of where we are in the ILL landscape globally and the article concludes:

Discovery systems, best practices, and new collaborative partnerships are all logical ways to improve services, but they are not inevitable. Indeed, they require concerted time, budgetary support, and effort to build and maintain (Bailey-Hainer *et al.*, 2014).

The experience of a leading research university in the supplying of article copies and e-books is a useful insight into

the state of play in the UK – the author highlights the significant constraint that “licences override copyright legislation”, but that this might change as a result of proposed changes to copyright law (Kluzek, 2014). These changes have now taken place and contracts can no longer override copyright law, which allows for much easier electronic transmission, at least in the UK. Much time is now saved by not having to check publisher licences. Let us hope the European Union will soon follow, along with other countries. A valuable article describes two ILL benchmarking exercises undertaken in 2010 and 2013, which enabled comparisons to be made and changes to be identified in a period of rapid change. The exercises were carried out in a large research library consortium in the USA – the Association of SouthEastern Research Libraries. Filled lending requests remained constant between 2007 and 2012, and filled borrowing request increased by 11 per cent. Once again, US exceptionalism holds compared with the decline we see in the rest of the world in this period. However, the number of staff declined in the same period. Nearly all respondents continued to provide a campus document delivery service from their own collections, and ArticleExchange experienced a very rapid take up. More such surveys would be very useful (Atkins *et al.*, 2014). A well conducted survey of four major academic Omani libraries found much support for collaboration but identified a number of challenges “such as:

- limited library collections at many academic libraries;
- the lack of a national information policy;
- the lack of comprehensive internal policies at many academic libraries; and
- a need for project management training for library staff members.”

Much work to be done in Oman! (Harrasi and Jabur, 2014).

Collaboration between public libraries and schools is rarely covered in the literature, which may well be because it rarely happens. So an article examining “youth service librarians’ use of collaborative collection development (CCD) behaviours and interlibrary loan (ILL) to collaborate with school librarians” is to be welcomed. In total, 1,500 US public librarians serving youth were targeted and 265 usable responses were received. Eighty nine per cent agreed or strongly agreed that they should collaborate with schools; however, in practice collaboration was not as high as this percentage might have suggested. A useful study that demonstrates the practical difficulties in such collaboration (Smith and Shea, 2014).

A revision of a presentation at the NASIG conference – referenced in the last issue – addresses the problem – “that the costs of traditional collection management through journal subscriptions and particularly the ‘Big Deal’ are not only burdensome but unsustainable”. A pilot study at the University of Utah with ReadCube Access in 2012-2013 found that it was good value:

ReadCube Access is a patron driven acquisition (PDA) system that is built into ReadCube. Although PDA is not a new concept in collection management, ReadCube Access is unique in that new, lower price points for the acquisition of individual journal articles can be achieved in exchange for content use restrictions.

The study showed that ReadCube Access is more cost effective than ILL or a subscription for low-use, high-cost

journals. This conclusion is in the context of the copyright fees charged on article supply in the USA; other countries may well have very different results in terms of costings and method of delivery, (England and Jones, 2014).

### Pay per view

I have written before that pay per view (PPV) could be a useful channel for obtaining quickly articles in journals to which the library does not subscribe – the failure for this to take off in the past has been because of the punitive pricing imposed, and still imposed, by publishers. However they are easing themselves cautiously into this market with offers that give discounted prices for multiple usages. A well researched and written article describes the experience of The University of Tennessee Health Science Center, (Fought, 2014). The Center serves about 3,000 full-time equivalents, and from 2008 to 2011 it was forced to cancel 30 per cent of its journal collection. To regain access to at least part of the collection gap, the library chose Wiley's token-based PPV service called ArticleSelect with a large selection of biomedical journal titles. "Token prices began at \$33.25 when purchasing the minimum of 100 tokens and were discounted more than 63 per cent down to \$12.25 when purchasing over 1,500 tokens" – the article is only available for 24 hours and all tokens must be used within a year. The library dealt with this potential problem by cancelling 24 Wiley journals with a cost per use of less than \$30 and using the saving to purchase 12,081 tokens – which may seem a lot but the tokens gave access to all Wiley's titles on an unmediated basis. Close monitoring and appropriate promotion ensured that the number used only slightly exceeded the number budgeted for. "The HSL was able to add access to over 700 in-scope journals to its collections, and the entire PPV service remained essentially budget neutral". The only drawback not mentioned by the author is that libraries that have committed to a Big Deal purchase may find it difficult to achieve cost neutrality – cancelling serial titles will not necessarily lead to a reduction in the Big Deal price – publishers are very adept at extracting their pound of flesh. However, there is a very thoughtful discussion of the result and is an article well worth reading and it is freely available!

### Patron-driven acquisition or demand-driven acquisition

Patron-driven acquisition (PDA) has become widespread after its very positive reception and it is "estimated that there are around 400-600 institutions worldwide with active PDA programs" (Esposito *et al.*, 2012) quoted in (Tyler *et al.*, 2014). The latter article is exceptionally well researched with 60 references, many of which further containing over a dozen references. The pros and cons of PDA are noted, but "there appear to be few research projects reported on in the library literature that address whether patron-acquired and librarian-acquired collections differ [. . .]". The article is dense and very detailed and impossible to adequately summarise in a few lines. However, *inter alia*, it concludes that:

The first study<sup>[4]</sup> of the issue concluded that PDA patrons at academic libraries produced collections that were no more unbalanced or skewed than did librarians. The authors of this study would concur.

A must read for anyone wishing to make an informed judgement on the merits of PDA.

Three programmes for the demand-driven acquisition of ebooks at the Hong Kong University of Science and technology (HKUST) are evaluated with positive results. So much so that "DDA has become the new normal at HKUST Library. The Library strategically uses DDA to supplement conventional modes of collection development". A wealth of statistics is provided and anyone about to investigate DDA or PDA will find HKUST's experience useful. (Kwok *et al.*, 2014). An interesting piece takes PDA a step further than most by looking at how searchers could be targeted with focussed recommendations based on "you requested this you may like this" Google-type prompts, which then could be aggregated across researchers leading to a patron-driven library. A very stimulating piece written by a marketing team leader at Swets (Galligan, 2014).

Not a lot has been written about DDA of printed books and this is rectified in an interesting piece with good costing information. ILL is fine for older less used books, but "becomes problematic" for more recent heavily used books. After a pilot study, Brigham Young University purchased 129 additional copies of 70 titles between 2007 and 2009. The average cost per use for titles purchased was \$2.00. The total cost to purchase all 129 copies was \$3,177. The equivalent cost of ILL was \$2,876. Although superficially cheaper, it is argued that it is actually more cost effective to purchase using DDA – better service, etc. They have settled on making a new purchase when they reach four requests. A well-written article and well worth reading for those concerned with this issue (Van Dyk, 2014).

### Scholarly communications

Do you ever wonder what users actually do with the material they access – e-books, non-e-books, journal articles, etc. I certainly do and have occasionally expressed scepticism in this literature review about the significance of the astronomical number of downloads of e-articles. Common sense alone suggests that it is inconceivable that they can all be read; a cursory scan at most for the majority I would guess. The numbers do however provide attractive statistics for publishers for the cost per download. Those who share my interest might like to scan, but preferably read a short piece that looks at reader behaviour. This references studies to suggest that study time has dropped from about 24 hours a week in 1961 to 16 hours in 1981 and to 14 hours in 2003. My enjoyment of the piece was enhanced by my having been at university in 1961, but I wonder if these times of austerity have reversed the trend? (McMullen, 2014).

Another brief-ish piece describes the toils and tribulations of two librarian authors in trying to obtain a Creative Commons licence from an un-named, – an experience probably familiar to many (Chilton and Thomas, 2014).

### Big Deals

The hyperactive Walt Crawford has produced an impressive critique of the Big Deals; it has been issued as a book and also in a special issue of *Library Technology Reports*. Over 50 pages (in the journal), he analyses them in great detail. Although he



writes with a US emphasis, there is much here for both ILL librarians and serials librarians (Crawford, 2014). Buying the paperback with the same title would be good value and can be circulated free of DRM! Another study:

[...] presents and analyses the findings of a 2012 survey of member libraries belonging to the Association of Research Libraries (ARL) about publishers' large journal bundles and compares the results to earlier surveys. The data illuminate five research questions: market penetration, journal bundle construction, collection format shifts, pricing models, and license terms.

It is another long article with 30 pages and 18 tables but essential reading for anyone concerned with Big Deal developments – Just one quote will have to suffice here but it identifies an key problem:

Initial optimism that a new pricing model tailored to the opportunities and characteristics of digital journal publishing would emerge has not panned out. Neither the early market studies of the 1990s nor market forces acting over multiple negotiating cycles have produced a sustainable new strategy for pricing and selling the largest publisher packages of e-journals. Clearly, pricing based on the historical print subscriptions of decades past is not sustainable, but both librarians and publishers have work to do in finding viable new alternatives.

It appears in a normally closed access journal but this article is freely available (see Strieb and Blixrud, 2014). A further article in the same issue, but not freely accessible, looks at the experience of Canadian research libraries and the impact of subscribing to and withdrawing from Big Deals – however, there is a freely available power point with useful notes so worth looking at (Jurczyk and Jacobs, 2014).

## Open access

I feel that sometimes I am in danger of straying too far from the interest of *ILDS* librarians in my treatment of OA. Perhaps what follows is one example – but if we are interested in the impact of OA on our work, then the speed at which it is occurring needs to be considered. One of the issues not much discussed in the literature but of vital importance is the sheer complexity of managing the inputs and the access to material in institutional repositories (IRs). The UK appears to be well in advance of the rest of the world, driven by the mandate from the powerful Higher Education Funding Council that to be eligible for the next Research Excellence Framework, the full text of articles must be deposited in an IR. This is reinforced by mandates from other funding bodies and the Research Councils UK, as well as university mandates.

The issues faced by a fairly well-resourced IR are described in a very useful article and the gratifying increase in the rate of increase in deposits going from 500 in 2009 to 4,000 deposits today – although it would have been good to see the number of downloads. Unfortunately, one of the most common complaints, at least at a recent seminar I attended in the UK, was the under-resourcing for OA; so perhaps, St Andrews University is in the vanguard in the UK and needs to be seen as an exemplar (Acock, 2014).

Another article in a similar vein describes the process of paying article processing charges (APCs) at the University of Glasgow. Some of the complications are daunting. However, they have set themselves an ambitious and entirely laudable target by saying to authors:

[...] send us your acceptance e-mail and attach the accepted final version of your paper – we'll do the rest' (i.e. look at the paper to see if there are funders acknowledged, advise if payment of an APC is appropriate, apply

the relevant embargo period, update the repository when the paper is published).

Similar to St Andrews, deposits are rising rapidly, 453 in 2013/2014 and 327 in the first five months of 2014/2015 FY – that's a 73 per cent annualised increase. Another article well worth reading (Ashworth *et al.*, 2014).

From two countries, we have an article that looks at OA publishing in Spain and Brazil – which highlights the great success of SciELO in the latter country, where 97 per cent of journal titles are OA as compared to Spain with a still creditable 55 per cent. There is much useful information here from those interested in material from those countries – Brazil is of course Portuguese speaking (Rodrigues and Abadal, 2014).

Advocates of the Green road to OA rely upon there being well populated and easily accessible repositories. However:

Institutional repositories, green road and backbone of the open access movement, contain a growing number of items that are metadata without full text, metadata with full text only for authorized users, and items that are under embargo or that are restricted to on-campus access.

This shows there is much work to be done to ensure that repositories are well populated. The article “provides a short overview of relevant literature and presents empirical results from a survey of 25 institutional repositories that contain more than 2 million items”. These IRs are global – ten from Europe, five from Australia, four from Asia and three from the USA. Fifty-three per cent were articles and 24 per cent conferences. It was found that 31 per cent of articles were freely accessible and 17 per cent of book chapters. It concludes:

Is this lack of openness a transitory effect, a kind of collateral damage of institutional decisions, individual choices, political strategies and intellectual property laws that will disappear with the advent of full open access? Or is it (and will it remain) a basic feature of the new and complex cohabitation of institutional repositories and commercial publishing? The future will tell.

It would have been useful to know the sample size but an interesting take on the real openness of IRs (Prost and Schöpfel, 2014).

The situation in the USA has gone a bit quiet in the past few months, but an interview with Howard Ratner, the executive Director of CHOR Inc., which runs CHORUS in the USA, is illuminating. Among other things, he says that CHORUS will “surface the best available version of articles”. Whether Green or Gold “it will be hosted on the publisher's site. The publisher site is the best place to steward an article” (Ratner, 2014). In addition, he might have added to maintain control over the scholarly communications process. As always, the debate is robust on the Scholarly Kitchen, which has a piece on CHORUS[5].

*Research Information* is an excellent magazine (as distinct from an academic journal) which is well worth getting – print copies are free. The website is not intuitive for accessing each issue – you have to click on “Features” on the top bar. OA is covered in a number of short but very informative pieces in the August/September issue[6], including an interview with Robert Kiley of the Wellcome Trust, which was an early adopter of author pays Gold OA.

A well researched report from Taylor and Francis[7] is a follow-up to their 2013 report on author reactions to OA publishing. For an electronic survey using Survey Monkey, they achieved very good responses, which adds to the credibility of the conclusions ranging up to an incredible

31 per cent in the USA. There were significant improvements in author attitudes to OA but sample sizes were different and so were response rates; therefore, caution is needed in interpretation. Of even greater importance is that T and F authors are skewed heavily towards humanities and social sciences, disciplines which tend to be more critical of OA publishing – *inter alia* because funding for publication is much less than for STEM subjects. The report is well laid out with colourful bar charts and will repay close attention by those interested in the views of the authors – without whose cooperation OA will not succeed.

An interesting article from India investigates the impact of OA on Big Deals. The author analyses the number of journals in both publisher packages and in DOAJ (The Directory of Open Access Journals) and links them to the percentage of journals having an impact factor (IF).

He notes that “The results of this study clearly indicate that OA journals with good IFs are not widely available in engineering subjects”. There is a good discussion of this result. He concludes that:

In the present situation, commercial publishers’ journals make big-deal subscriptions necessary because they have a better reputation and higher prestige within the scholarly community than OA journals in engineering and technology (Aragudige and Vasanthakumar, 2014).

A spin-off from the Finch report in the UK has led to the setting up of a service that has exposed about 10,000 academic journal to the general public – an audience that tends to be ignored in all the debates. However, it is likely to cause as much frustration as pleasure because it requires “walk-in” to selected public libraries and is “view only” – no saving and no print out. The background to the project and the details of development and implementation are well covered by two authors from the Publishers Licensing Society. However, it is early days, as they acknowledge, so statistics of use are very small. This journal hopes to publish an article in 2015, which will give more details of the impact (Faulder and Cha, 2014). Green and Gold both continue to have their advocates. The case for Gold is made persuasively, although some of the referenced works are rather out of date; for example, to state that “[...] ‘only 7.7 per cent of the scholarly articles published’ in 2009 used the Gold OA model” ignores the enormous changes that have taken place in the past five years. In addition, although acknowledged, it can be argued that insufficient weight is given to transferring the serials pricing crisis from librarians to funders and the problem of non-funded authors publishing in OA journals. However, they do effectively skewer the publisher drive to protect their profits. They conclude that “Clearly OA has so far only achieved mixed success”. Gold OA is doing what it says on the tin, but Green OA is “not faring so well” (Rizor and Holley, 2014).

## Notes

- 1 <http://cdn.nmc.org/media/2014-nmc-horizon-report-library-EN.pdf>
- 2 [www.nmc.org/publications/2014-horizon-report-library](http://www.nmc.org/publications/2014-horizon-report-library)
- 3 [www.districtdispatch.org/wp-content/uploads/2014/08/LA\\_Trends\\_Report\\_Policy\\_Revolution\\_Aug19\\_2014.pdf](http://www.districtdispatch.org/wp-content/uploads/2014/08/LA_Trends_Report_Policy_Revolution_Aug19_2014.pdf)

- 4 <http://docs.lib.purdue.edu/cgi/viewcontent.cgi?article=1027&context=charleston>
- 5 <http://scholarlykitchen.sspnet.org/2014/07/09/implementing-chorus-big-decisions-loom-for-publishers/>
- 6 [www.researchinformation.info/](http://www.researchinformation.info/)
- 7 [www.tandf.co.uk/journals/explore/open-access-survey-june2014.pdf](http://www.tandf.co.uk/journals/explore/open-access-survey-june2014.pdf)

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