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Interlending and document supply: a review of the recent literature; 91
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Interlending and document supply: a review of the recent literature; 91

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Abstract

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

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

Findings – Nearly all material reviewed is freely available, continuing the trend of increasing OA. As always, these days, much is happening on the OA front. Big deals and Scholarly Communications are reviewed along with ebooks, users and of course ILL.

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

Keywords Collection development, Big deals, Higher education, Open access, End users, Ebooks

Paper type Literature review

Introduction

For reasons too complicated to explain, the Literature Review did not appear in the last issue. It is back again, but perhaps I should give notice that I will be retiring both as editor and as the writer of the Review, after 12 years in the saddle as editor and 14 years writing the review. I will finish after Vol 44, No 3, and the last issue in 2016 will likely be a special issue to be followed by a re-scoped journal with a new editor.

You will note that virtually all the material referenced here is freely available – unfortunately, it cannot be inferred from this that open access (OA) has emerged as the dominant publishing option. Most (not all) commercial library and information science (LIS) journals are published by a handful of companies – it may seem surprising, but very few of these cover material relevant to this review. The only commercially published journal that overlaps with interlending and document supply (ILDS) is *The Journal of Interlibrary Loan, Document Delivery and Electronic Reserve*, which focuses mainly on the USA and is published by Taylor and Francis; however, at the time of writing (Nov 26 2015), it has not produced an issue since mid-2014.

Self-referral must always be done with caution, but readers of this review may like to look at my “meta” Literature Review which covers the last 48 issues over a period of 12 years and assesses the changes that have taken place in interlending and document supply (McGrath, 2015).

ILL

It continues to be the case that few journals publish articles on ILL and only one this quarter and then only indirectly. “Perhaps there is no single model that has grown, come under scrutiny, and then declined as quickly as short-term loan (STL)”. This bold statement comes from EBSCO’s CEO who explains their understanding of publishers withdrawing from the STL market on the grounds of cost and from libraries who do not own the book on the business models on offer. Will this cause a resurgence of ILL? Only time and study will tell (Collins, 2015).

Collection management and usage

Improving the acquisition of material can be greatly assisted by new methods of collecting usage data:

As various library systems now have increasingly sophisticated data-mining capabilities, a wealth of management data surrounding purchasing records, circulation transactions, and interlibrary loan (ILL) requests has accumulated that has often remained untapped and unrealized for meaningful analytics.

The authors of this article describe in detail how they approached this issue at The College of New Jersey Library:

Three basic initial assumptions underlaid our current study: Effective collection development can be measured by the extent to which our collection is used. Any circulation of titles means that user needs are being met. User needs can be represented by the circulation of titles owned and by the provision of titles not owned but borrowed through ILL.

A lengthy and useful discussion and conclusion make this essential reading for libraries wanting to develop collections that best meet the needs of their users (Link *et al.*, 2015).

Serendipity

I cannot resist drawing attention to a thoughtful article on the serendipitous discovery of material of all sorts (Carr, 2015). It

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is irresistible because I worked for 25 years at the British Library Document Supply Centre at Boston Spa in the UK. There, books are shelved numerically by year of acquisition for ease of retrieval by staff in response to ILL requests as well as being space saving. Serials are arranged alphabetically by title. So one can find a book on quantum physics next to one on the Habsberg Empire. I found this serendipitous arrangement occasionally useful for my own research – the problem is that encountering useful discoveries when browsing millions of books doesn't happen very often! Of course, in an increasingly electronic environment, the usefulness of the hard copy stock declines along with the value of serendipity. These issues and more are discussed in Carr's thoughtful and useful article.

Open access

It is important for ILL librarians to understand what is going on in the rapidly changing world of OA. Increasing amounts of what is requested by users is freely available, but some of this comes from “predatory” publishers who publish virtually anything in return for a low Article Processing Charge. A good piece of research on these publishers concludes that:

We found that the problems caused by predatory journals are rather limited and regional, and believe that the publishing volumes in such journals will cease growing in the near future. Open access publishing is rapidly gaining momentum, in particular through the actions of major research funders and policy makers. This should create better opportunities for researchers from countries where predatory publishing is currently popular; to get published in journals of higher quality, in particular since most journals have a policy to waive the APCs for authors from developing countries.

Well worth reading and freely available (Shen and Björk, 2015), it's also a useful counter balance to the evangelism of Geoffrey Beall and the counter evangelism of Walt Crawford both of whom have been referenced in previous *ILDS* Literature Reviews.

Open Access Infrastructure for Research in Europe (OpenAIRE) does what it says on the tin. A useful article describes its development and current position as well as plans for the future (Rettberg and Schmidt, 2015). And another article does what it says on the tin and has sensible advice to libraries to benefit their researchers (Bonn, 2015).

A laudable scheme provides not OA but free access for many, and very cheap for other. “Institutions in 71 of the world's poorest countries receive free access to journal and book content via Research4Life” and “Institutions in a further 44 countries pay US\$1,500 per year for a subscription to the Research4Life content – an effective discount of over 99.9 per cent”. Material covered is substantial – “16,000 journals, 46,000 books, and 140 other information resources” and 8,000 institutions are registered. Clearly this has a big impact on paid for ILL in these countries. A truly worthy service; however, cynics might interpret this as a service which provides good public relations for commercial publishers without damaging the bottom line, indeed enhancing it slightly (Gedye, 2015).

Walt Crawford is far and away the most prolific writer on OA and much of it is important. You can read his monthly journal *Cites and Insights* which is freely available on the Web[1]. He has also written the whole issue of another journal, the first chapter of which is free but the next seven are only available to subscribers – a certain irony there. He discusses Gold OA and takes (another) swipe at Geoffrey

Beall's list of “predatory journals” (Crawford, 2015). Another article addresses this thorny issue of quality journals but oddly does not refer to Beall's list (Van Gerestein, 2015). Stevan Harnad – long-standing campaigner for OA publishing – writes another well-argued piece on the transition to Green OA which will, when completed, allow funders to finance Gold OA journals with the savings they achieve from the current subscription model. He notes eight conditions needed for the speedy and effective transition to full Green OA including the all-important “All repositories should implement the automated “email eprint request Button for embargoed [non-OA] deposits)”. He doesn't however comment on the costs particularly to institutions of funding Gold OA in a transition that will take many years even on the most optimist assessments. Nonetheless, an excellent and well-argued piece by the doyen of OA (Harnad, 2015). The German Chemical Society (GDCh) is:

[...] by far the largest chemical society in continental Europe with close to 31,000 members from academia, industry and other areas. The GDCh is the owner or co-owner of about 20 internationally renowned scientific journals.

They have recently adopted the green OA route noting the UK's Finch Committee recommendation for Gold that requires additional transitional funding (Koch, 2015). There are a number of other interesting articles on academic publishing in this issue of the subscription based journal *Information Services & Use* which are all OA.

The UK led on agreeing a national strategy for OA via the Finch report in 2012 – if not necessarily in the right direction. An important study:

[...] was commissioned in response to a recommendation of the Finch Group in its second report in 2013 that reliable indicators should be gathered on key features of the transition to open access (OA) in the UK. The findings presented here are thus a first attempt at generating such indicators covering five sets of issues.

These issues cover OA options to authors/author's take up of OA options/usage/financial sustainability for universities and separately for learned societies. The 99-page study is packed with useful data particularly for the UK but is also of interest internationally given that all the issues discussed are of global relevance (Jubb, 2015).

One consequence of OA is the need to establish effective institutional repositories, and a substantial research project investigates the current state of play. The rate at which institutional repositories have grown in number has been very fast in recent years, but the populating of repositories with material has been relatively slow. The research identified a number of reasons why the populating of repositories was likely to accelerate in the future and have a more significant impact on scholarly communication:

The main catalysts are: strengthening of national and funder policies that serve to both mandate open access (green or gold) and raise awareness of open access amongst faculty; the alignment of repositories with current research information systems within universities; and the development of metadata and open archives initiative harvesting that will improve discoverability and usage data.

The “very impressive” growth is noted from 128 in 2006 to 1,608 in 2012 and 2,453 in 2013” (2,989 by December 2015 *MM*). Eleven universities globally agreed to be interviewed for the research all of which expressed great optimism about the future of repositories. This is a well-researched and

fascinating insight into the current and future development of repositories – well worth reading (Marsh, 2015). A less positive view of the future of OA publishing concludes that:

The debate on Open Access has put its emphasis in the wrong place. Rather than easier access to more scholarship, increased resource devoted to pre-publication review, revision and editing is the most important development to ensure the greatest advances in research and scholarship.

A weakness in this otherwise excellent and thought-provoking paper is the assumption that high journal prices would cause “academic consumers vote with their feet” if they were not value for money. The author is an academic, so it is odd that he seems not to realize that the “academic consumer” does not pay for the journal – the library does – which is one of the two fundamental flaws in the market model of academic journals – the other being the oligopolistic nature of publishers which gives a few large companies significant control over pricing. Nonetheless, an important discussion which looks deeply at the actual publishing process and the benefits to researchers (Osborne, 2015). Martin Eve has become a prominent exponent of OA publishing in the Humanities and Social Sciences (H and SS). He has written a book on the subject (Eve, 2014) and is the prime mover in establishing the Open Library of the Humanities (OLH)[2] which is a new way of financing OA journals via a library subscription model. Clearly H and SS disciplines are much less well funded than STEM, with consequent problems for authors in paying Article Processing Charges. There are also other distinctive issues in H and SS, and Eve (2015) adumbrates these in an excellent article that is impossible to summarize without diminishing its importance – if you subscribe you can read it. There is also a recent article that describes the OLH – (Matthews, 2015). Yet another excellent article comes from the pen of Stephen Pinfield – another leading player in the OA scene. He provides:

[. . .] an overview of one of the most important and controversial areas of scholarly communication: Open Access publishing and dissemination of research outputs. It identifies and discusses recent trends and future challenges for various stakeholders in delivering Open Access (OA) to the scholarly literature.

And he concludes:

The developments analyzed in this paper all seem to tend towards the conclusion that the main challenge associated with scholarly communication is no longer whether OA should be at the centre of the system but how.

And identifies 18 issues which encapsulate the current situation in mid-2015 (Pinfield, 2015).

I recently discovered an excellent blog[3] at which I learnt of the Dutch national boycott of Elsevier (ironic given that The Netherlands is the home country of Elsevier) and the related move to 100 per cent Gold OA by 2024 for publicly funded research outputs. Interesting times indeed [. . .] [. . .] OA issues are covered extensively in an issue of the ever readable *Research Information* – a free print and online magazine which is often referenced in this Review. The tensions between Green and Gold are well brought out succinctly – Green embargoes clashing with the aim of immediate access which can be bought via Gold OA but at a very high price as publishers continue to double dip (Pool, 2015).

Users

A very useful overview of the 2015 NFAIS conference highlights begins with the question “Who owns the user today?” with the confident answer:

No doubt in my mind that it is Google. When attendees of this conference were asked what has the greatest impact on user expectations of research information services, sixty-eight per cent said the products and services released by Google, Apple, Amazon or Microsoft.

The overview includes – Who pays for information?/workflow tools/and the changing landscape of scholarly information. Well worth reading as a (short-ish) summary of what leading players are thinking in 2015 (Lawlor, 2015). A painless piece to read is a record of a panel discussion at this NFAIS conference which discusses the user’s expectations and the way in which libraries can meet them but with no real mention of ILL or patron driven acquisition (PDA) – surprising given the acknowledged budgetary constraints but well worth reading, (Kenneally *et al.*, 2015).

Ebooks

The development of ebooks has, and will continue to have, an impact on the ILL of physical books, but the constraints on use continue to inhibit their use via ILL. This state of affairs is underlined by an article on ebook packages which notes that – “This study examines eBook offerings from six major publishers and reveals specific digital rights management (DRM) standards, usage allowances and title-by-title purchasing availability”. There is a thorough and useful literature review and a detailed assessment of the ebook packages. It is clear that publishers are aligning themselves more and more with the journal packages that have been available for many years. The article concludes that:

This research has provided librarians and collection developers with concrete information about six eBook publishers specializing in STEM content with which to make purchasing decisions. While not every library has the resources Table VII Usage allowances to purchase these collections, understanding the restrictions or freedoms commonly associated with each publisher also will assist in title-by-title purchasing decisions (Kerby and Trei, 2015).

With maturity of the product, the shape of the ebook market is becoming clearer. For the general public, it is brilliant for fiction, especially for holidays but not so good for non-fiction. Academically, a more complex picture has emerged shown by an analysis of 600,000 e-books’ usage globally from ProQuest’s Ebook Library. It is an up-to-date study covering usage of titles in 2013 and 2014 and some interesting conclusions include:

Users in the developing world are more likely to download e-books than to read them online, with the opposite pattern occurring in the developed world. Readers in Australia/New Zealand, Europe, North America, and United Kingdom/Ireland look at more pages and spend more time in the book online than those in the rest of the world.

[. . .] it is clear that social sciences titles are more likely to be used, and are used at a greater rate, than would be expected given their availability. STEM titles are used less than would be expected”.

Well worth reading with lots of figures and visuals (Levine-Clarke, 2015).

Big Deals

The literature on Big Deals appears to have diminished over the past year. However, it remains the case that insufficient

data and cost-benefit analysis has been carried out on this controversial business model. The perception of librarian generally appears to be that users want immediate access to the largest number of journals and the money to pay simply has to be found. However some studies – referred to in earlier literature reviews – have demonstrated that withdrawing from particular Big Deals has caused little problem and has saved money. Interest in journal costs generally and Big Deals in particular is likely to see a resurgence of interest, especially given the growth of Gold OA Article Processing Charges that has led to dramatically increased costs for research-intensive universities, especially in the UK. This is because Gold OA articles are freely available worldwide, but the UK accounts for only about 7 per cent of published research papers; thus, as Lorraine Estelle writes:

Although publishers reduce the global price of their journals in proportion to the amount of open access articles they publish, this does not address the specific problem of research-intensive UK institutions, committed to publishing in open access. Publishing a significant proportion of the open access articles in these journals, they would be paying high volumes of APCs while receiving a very small share of the global reduction in subscription costs (Estelle, 2014).

A small-scale Big Deal involving 36 journals from the American Chemical Society was analyzed at the University of Saskatchewan using three techniques – full-text downloads, citation analysis of faculty publications and user feedback. The methodology is very labor-intensive and, as the author notes, only suitable for small bundles of journals. However, it is a fascinating study well worth looking at for all those librarians challenged by the continued high cost of journals (Dawson Diane (DeDe), 2015).

Another study in the biomedical sciences from the University of South Alabama:

[...] assessed the cost-effectiveness of “Big Deal” journal subscription packages by making four cost-per-article-use analyses. 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.

Some interesting data and the conclusion “that ‘Big Deal’ journal subscription packages are cost-effective” flows from the figures – at least for South Alabama. Unfortunately, no information is given on how ILL costs were calculated, the authors simply note that – “The average cost-per-article obtained via interlibrary Loan (ILL) for the three-year period 2010–2012 was also collected”. This limits the value of the exercise as these crucial costs vary – especially in the international arena – for example the cost of a born digital ILL from the British Library to a British user is currently £5.25 (about US\$8) half the cost of the Alabama ILL (Lemley and Li, 2015).

Scholarly communications and trends

The LIS community is much given to crystal-ball gazing, but a recent study is firmly rooted in an evidence-based approach and amongst many other interesting predictions has this to say:

The long history of collaborative work between libraries continues, although the digital world allows networks to be much bigger and to spread over wider geographical areas. Digital networks are also being used to preserve traditional print artefacts, it is unlikely that an undertaking such as the UK

Research Reserve would have happened without digital networks (UKRR seeks to manage the long-term sustainability of retaining low-use print journals).

This should be encouraging for ILL librarians who are increasingly concerned with resource sharing in its wider sense “Well worth reading and freely available, (Gwyer, 2015). I often review the ever stimulating Rick Anderson. Here he looks sensitively at the tensions between the local and global responsibilities of librarians precipitated by the electronic revolution in access to material. He identifies four strands:

A shift from object-gathering to access brokerage/A shift from institutional to global -access/ A shift from simple issues to complex ones – characterized by licensed access to externally hosted content provided within the context of rights-management systems/ “A shift from toll access to open access”.

He then deploys his concept of librarians as “soldiers and revolutionaries” to show how librarians orientate themselves to these tensions. Not only does ILL get a mention but the article is freely available from the excellent journal of UKSG – *Insights* (Anderson, 2015). Another article from *Insights* poses juxtaposition – “Libraries are at a crossroads. Will they continue in their current role of money collectors for publishers or revert to their original profession: independent quality control?”. The writer argues that OA publishing has the potential for being genuinely market based – the snag is that authors do not consider price when deciding where to publish when in fact it would be rational (i.e. market driven) to do so as free journals can be as high quality as those that charge. Authors do not act rationally because they do not pay, the funder does. This uncannily mirrors the subscription-based model in which the author also doesn’t pay, the library does. The author sees little chance of a market developing unless the authors pay themselves – a scenario vanishingly unlikely! (Waijers, 2015) A useful article describes current trends – for example, the growth in literature – “114 million English-language scholarly papers were available on the Web” in 2014; the diversification of publication methods and content; and a question – why with more “stuff” why is there not more competition? Their discussion on this question is interesting and comprehensive and goes well beyond the normal off the cuff answers (Altman and Avery, 2015).

Collaboration

Collaboration between libraries and collaboration between collaborators led to the formation of the International Coalition of Library Consortia in the mid-1990s. This has become a body managed by volunteers and is highly respected in the community. A useful history notes the many retirements from amongst the founders including Tom Sanville who readers of this journal will recognize from his work in developing OhioLINK (Feather, 2015). Science Technical Medical (STM) is the body that defends the interests of commercial publishers in the STM disciplines, so initiatives from them need careful perusal by librarians. It has published the results of a study which looked at article sharing on scholarly collaboration networks (SCNs) such as Researchgate and Mendeley and is freely available on the STM Web site (STM, 2015). Worth reading in its entirety – the language is polite and seemingly neutral, but STM must be concerned with the popularity of SCNs. The associated “Voluntary principles for

article sharing on scholarly collaboration networks” should be read in conjunction.

Notes

- 1 Web addresses: <http://citesandinsights.info/>
- 2 www.openlibhums.org/
- 3 <https://unlockingresearch.blog.lib.cam.ac.uk/>

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