Strategies for supporting UK Research Communities through hard economic times

Update for FIL Meeting – March 2010

Barry Smith
Head of Sales and Marketing
Agenda

• Document supply update – today and the future
  • The changing document supply model
  • Fileopen
  • The HE Subscription Model
  • HESS

• ETHOS – 12 months on and what happens next

• UKRR

• New services for 2011 - British Library Direct +
How the document supply model will change over the next 3 years
Where your documents come from today

Delivered through Total Library Pilot
1%

Delivered from electronic store
11%

Delivered from our paper based collection
88%

We buy
We catalogue
We shelve
We retrieve
We copy/scan
We send
Where your documents comes from tomorrow

**I’m the BL**
- We don’t have to buy to supply.
- Failures cost us over £5 each.
- Totally scalable

**Delivered through Total Library Service**
- 20%

**Delivered from our paper based collection**
- 27%

**Delivered electronically with top 50 publishers**
- 53%

**I’m the customer**
- Quicker delivery
- Full colour, native PDF
- Cheaper

**I’m the BL**
- Savings in CA&D, Operations, Acquisitions.
- Potentially more flexible licensing terms
What this means to you

Fig. 1 - Price vs cost of COPIES to UKHE - 2003-10

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Fileopen is Here!
The BL DRM options

**BL about a year ago**

- SED
- Ariel

**BL today**

- SED
- Ariel
- Fileopen
- Unencrypted supply for electronic coursepacks

Electronic Delivery Options
How customers are receiving electronic documents

Electronic delivery routes – June 2009

- Unencrypted: 10%
- Fileopen: 4%
- ADE: 86%

Electronic delivery routes – Feb 2010

- Unencrypted: 9%
- ADE: 55%
- Fileopen: 36%
Why Fileopen and not Adobe Digital Editions?

• You only need to download it once for all users.
• There are no forced upgrades.
• It works.

“Here at UEA we've been involved in the testing of FileOpen from the start and I would say it is a great improvement on Digital Editions; easier to network and no problems with upgrades. There was one early bug involving (I believe) double layers of security, but this was quickly sorted out and BL were very helpful all along.”

Michael Robbins,
Senior Assistant - ILL,
University of East Anglia,
Coming soon? – Fileopen Viewer

• New DRM option that can be used in conjunction with Fileopen plug in.

• Does not require user to download any software (although Flash needs to be installed).

• Online viewing only and document disabled once printed.
The HE Subscription Model – 12 months on
HE Subscription – what it is?

• Introduced in August 2009, service offered a range of premium document supply services and a guarantee of frozen transactional charges for 2 years.

• 47 institutions signed up in year 1.

• Benefits really step up in year 2 (August 2010).

• Subscription fee determined by volume of business with university.
The new hybrid subscription model

Today

From Aug 2009

From Aug 2010

Subscription model:
Subscription = £500-£5k
£4.95 copies, £9.00 loans

Or

Transactional model:
Only: £4.95 copies, £9.00 loans

Or

Transactional model:
£5.40 copies, £9.90 loans

Or

Transactional model:
£5.85 copies, £10.80 loans

47 institutions signed up in 2008/09

Subscription model:
Subscription = £500-£5k + inflation
£4.95 copies, £9.00 loans

Subscription model:
Subscription = £500-£5k + inflation
£4.95 copies, £9.00 loans
The hybrid subscription – what does it include

Subscription of £500-£5k includes:

- Continuation of their reduced rate.
- All Banker Transactions.
- 2hr service for £15 (usually £26).
- 24hr service for £10 (usually £16).
- Guarantee of no increases to transactional rate until at least Aug 2011.
- Guarantee of <inflation rise to subscription price until at least Aug 2011.
- Branded SED.

Institution X

From Aug 2010

- £4.95 copies, £9.00 loans
ETHOS
Review of the service 12 months on
Agenda

• Where we are now
  • Demand and usage of ETHOS
  • Uptake and usage by HEIs
  • BL Operations and Finances

• Where are we going (or could go).
ETHOS
Review of the service 12 months on

A) DEMAND AND USE OF ETHOS
The demand exceeded expectations averaging 7600/m downloads compared to 400/m items supplied from the previous microfilm service.
Ethos Service – Backlog

Ethos Digitisation Output

- Theses Digitised
- Theses requested from HE
- Theses received from HE
Age of theses ordered through ETHOS since launch

Pre 1995: 27%
Post 1995: 73%

Number of orders over the years from 1970 to 2009.
ETHOS – Who has registered since Jan 09?

- UK: 22524
- US: 3527
- Australia: 828
- Germany: 500
- Ireland: 501
- Canada: 498
- France: 320
- India: 306
- Croatia: 285
- Malaysia: 253
- New Zealand: 253
- Egypt: 240
- Japan: 239
- Spain: 239
- Italy: 191
- Other: 3527

- UK: 69%
- Non-UK: 31%

Countries with the highest number of registrations.
ETHOS – Where have the orders come from since Jan 09?

- **UK**: 83712 (72%)
- **Non-UK**: 28%

Country Orders
- UK: 83712
- US: 7110
- Australia: 11616
- Germany: 1860
- Canada: 1759
- Ireland: 1582
- Malaysia: 1421
- Russia: 1115
- China: 1057
- France: 1007
- Greece: 963
- India: 826
- Spain: 716
- Mexico: 637
- Japan: 620
- Other: 598

Total Orders: 91,208
ETHOS – How it is becoming increasingly less open access

Participation options by institution – Jan 09

- Institution pays, 94
- User pays, 11
- Non participant, 4

Participation options by institution – Jan 10

- Institution pays, 72
- User pays, 34
- Non participant, 5
• 109 UK HEIs are now participating with 72 paying for digitisation (94 in Feb 2009).

• 27 institutions have reverted to user pays models (from 11 in Feb 09)

• University libraries are expecting budget reductions over the next four years and are actively looking at cost cutting exercises.

• Most universities participating in ETHOS have stopped lending theses.

• ETHOS is becoming a luxury for many HEIs, as they are frequently paying for the digitisation of theses that are not for the use of their core audiences.

• The beta tag will be removed in May 2010 and we expect traffic to increase substantially as a result, accelerating all of the customer issues listed above.
The UK Research Reserve (UKRR)
UKRR – What is it?

UKRR is a collaborative and coordinated approach between Higher Education Libraries and the British Library to manage the long-term sustainability of retaining low-use print journals.
1. protect research information infrastructure
2. release 100km of shelf space in HE libraries by 2014, allowing them to reuse the space in response to changing institutional priorities
1. Protecting research information:

- 3 copies of holdings offered by members are held within the UKRR community
- 1 copy held at the BL – access copy
- 2 copies within UKRR members’ collections
UKRR – Its key aims

2. 100 km shelf space to be released:

- Collaborative collection management
- Allows members to dispose of material whilst retaining access
Where we are..

• 29 members
• 15km of material processed
• c3% of material transferred to the BL

• Members benefitting from:
  • HEFCE de-duplication funding
  • 24 hour DSC service
  • Opportunity to repurpose space
UKRR Membership grows to 29 institutions

- University of Aberdeen
- Aberystwyth University
- University of Birmingham
- Cambridge University Library
- Cardiff University
- Durham University
- University of Edinburgh
- University of Glasgow
- Imperial College London
- Kings College London
- Kingston University
- University of Leeds
- University of Liverpool
- London School of Economics
- University of Manchester
- Newcastle University
- Northumbria University
- University of Nottingham
- Open University
- Oxford University
- Queen Mary, University of London
- University of Reading
- Royal Holloway, University of London
- University of St Andrews
- University of Sheffield
- University of Southampton
- University of Sussex
- University College London
- University of London Research Library Services
New services for 2011 – BL Resource Navigator
What is BL Resource Navigator?

• A collaboration between the BL and TDnet

• Designed to provide a full suite of Information Management tools including A-Z eJournals & eBooks, Federated Search, OpenURL Resolver, eResource Management

• Established workflow to BL DSC with document supply provided under Library Privilege rules for non-commercial entities.

• Non-commercial rates for non-commercial entities.
Decision Making in Eating Behavior: State of the Science and Recommendations for Future Research

Database: British Library ETOC
ANNALES BEHAVIORAL MEDICINE
ANNALES BEHAVIORAL MEDICINE 2000 VOL 38, SUPP page 88-92

Free radicals in biology and medicine
Database: Google Scholar
2007 - obv.de
E Hallwell, JIC Guttridge...

Ultrasound-guided therapeutic procedures in the neck region
Database: PubMed
Arriaga F., et al. Sravnitelno-akademska akademija medicinskih znanosti
Brzic MT.
Journals

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Journal Title: [ ]
Partial Words: [ ]
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Search

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Quick search a journal title
Browse journals A-Z
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In Summary

• It's been a really tough year.

• The next few years is probably going to get tougher.

• The BL are working on propositions to streamline existing services and offer new services that provide efficiencies in our core markets.