Strategies for supporting UK Research Communities through hard economic times

British Library Update May 2010

A presentation by

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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

• A glimpse of the future…
How the document supply model will change over the next 3 years
Annual demand
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

We send
Where your documents will come from tomorrow

Benefits to the BL
• We don’t have to buy to supply
• Minimal failures (which cost us over £5 each)

Delivered through Total Library Service
20%

Benefits to the BL
• Savings in Processing, Operations, Acquisitions
• Potentially more flexible licensing terms

Delivered electronically with top 50 publishers
53%

Benefits to the customer
• Quicker, cheaper
• Full colour, native PDF

Delivered from our paper based collection
27%
What this means to you

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

![Graph showing price vs cost of copies to UKHE from 2003/4 to 2009/10]

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Fileopen is Here!
The BL DRM options

BL about a year ago

SED

Ariel

BL today

SED - Adobe

Ariel

SED - Fileopen

Unencrypted supply for electronic coursepacks (HESS)
72% of our document delivery is now electronic

Electronic delivery routes – June 2009

Electronic delivery routes – Feb 2010
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, the UKHE subscription service offers a range of premium document supply services and a guarantee of frozen transaction charges for 2 years.
- 48 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

Transactional model
Only: £4.95 copies, £9.00 loans

Or

Or

Transactional model:
£5.40 copies, £9.90 loans

Transactional model:
£5.85 copies, £10.80 loans

48 institutions signed up in 2008/09
The hybrid subscription – what it includes

Subscription of £500-£5k includes:  From Aug 2010

- 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

£4.95 copies, £9.00 loans
To obtain your University’s personalised illustration for 2010/11, include your BL Account Number(s) in your email enquiry to:

Pavan Ramrakha
Business Development Manager for UK Higher Education
pavan.ramrakha@bl.uk
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).
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%

No. of orders for each year from 1970 to 2009.
ETHOS – Who has registered since Jan 09?

- UK: 22524
- Non-UK: 3527

- 69% of registrations are from the UK
- 31% of registrations are from Non-UK countries

Countries with the highest number of registrations include:
- UK: 22524
- US: 2066
- Australia: 828
- Germany: 501
- Ireland: 500
- Canada: 498
- France: 320
- India: 306
- Croatia: 285
- Malaysia: 253
- New Zealand: 253
- Egypt: 240
- Japan: 239
- Spain: 239
- Italy: 191
- Other: 3527
ETHOS – Where have the orders come from since Jan 09?

- **UK**: 72%
- **Non-UK**: 28%

Bar chart showing the number of orders from different countries:
- **UK**: 83,712
- **US**: 7,110
- **Australia**: 1,860
- **Germany**: 1,759
- **Canada**: 1,582
- **Ireland**: 1,421
- **Malaysia**: 1,115
- **Russia**: 1,057
- **China**: 1,007
- **France**: 963
- **Greece**: 826
- **India**: 716
- **Spain**: 637
- **Mexico**: 620
- **Japan**: 598
- **Others**: 11,616
ETHOS – the situation today (the customer)

• 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 investigating cost-cutting exercises

• Most universities participating in ETHOS have stopped lending theses

• ETHOS is becoming a luxury for many HEIs as they frequently have to pay to digitise theses not accessed by their own institution

• 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 co-ordinated approach between Higher Education Libraries and the British Library to manage the long-term sustainability of retaining low-use print journals.
UKRR – Its key aims

1. To protect research information infrastructure
2. To release 100km of shelf space in HE libraries by 2014, allowing them to re-use 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
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.
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This site is best viewed in Internet Explorer 6.0 and above.
In Summary…

• It’s been a really tough year

• The next few years are probably going to get tougher

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

Stay with us!
barry.smith@bl.uk