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Sailing the stormy sea - interlending and document supply in 2016

It is a great honour to be asked to speak to you here today in Rome and I'd like to thank the organisers for inviting me. It is a particularly important day for me as this will be the last public presentation that I will give after 40 years working in document supply. I moved from the British Library in London to its Document Supply Centre at Boston Spa Yorkshire in 1976 rather reluctantly but gradually warmed to the challenges presented and to the wonderful staff. After retirement at aged 60, I edited the journal «Interlending and Document Supply» from which I retire as editor in August. Time to read all those books that I have never had the time to read.

My presentation will be much influenced by a saying of that great Italian Marxist Antonio Gramsci: «We must have optimism of the will but pessimism of the intellect» and you don't have to be a Marxist to see the sense in that.

And the timing is appropriate as we are only now beginning to experience the full impact of open access, the most important change in our work since the advent of electronic journals over 25 years ago. Both these changes have had and are having important impacts on document supply and resource sharing.

I will cover the fundamental conflict in which we are engaged, then two key factors and their impact on document supply and then take a look into the future.

Firstly electronic journals

To understand our world of resource sharing and document supply we must stand back from the churn of the day to day and look at the underlying forces. The key one is global capitalism, specifically the global network of public limited companies. Their goal is to maximise profits. The individual firm achieves this in a number of ways all of which seek to dominate their particular market. Product innovation, price management and cost reductions are the main weapons. This drive to maximise profit never stops and new ways are always being sought to achieve this goal. This is very crude but it is an essential truth which helps us to understand the forces operating in the world of scholarly communications.

Today there is a titanic battle being waged for the control of the world's knowledge output. On the one side publishers, on the other librarians and their various supporters.

Let's go back in time for a moment...

In the 1950s Robert Maxwell found a way of generating vast profits from convincing university publishers that their business was best left to the commercial publishers, hence Pergamon Press and the growth of Elsevier, Springer and many others. Today the market is dominated by five mega publishers which accounted for more than 50% of all papers published in 2013. With control of the market came control of prices. The failure of the library profession to confront this threat vigorously led to the so-called 'serials crisis'. Publishers can charge prices based on the old print model which is both anachronistic and absurd but provides them with a high baseline on which to generate increases that are usually multiples of the rate of inflation. The logical conclusion of this model led to the Big Deals which dominate and distort the budgets of academic and research libraries but are very convenient and loved by your users. I was involved in a fairly successful campaign in the UK in 2011 to confront the Big Deals of Elsevier

and Wiley which saved some millions of euros and I gave a presentation in Padua to Italian librarians on its impact in 2013. It was a memorable event for me because I was saved from choking to death at the seminar dinner when my life was saved by an Italian medical librarian who gave me the Heimlich manoeuvre, a technique which we should all learn. No meatballs for me at the conference dinner!

Publishers have been incredibly successful in maximising their profits: Elsevier regularly achieves 35% year in year out, that is 35 euros in every 100 you spend goes straight to the shareholders. Compare this to a large supermarket with maybe 5% and even banks with between 5 and 10%. Only arms manufacturers and pharmaceuticals do as well. Society publishers should provide competition but do not, they coat tail on the commercials and justify their own high prices by the need to subsidise their professional activities. As one leading university librarian in the UK said to me bitterly «Why should I subsidise from my budget society members at this university to go on trips to their conferences?». This control of pricing is married with a lack of transparency over costs which are of course lower than in the print era so negotiations have an element of farce about them.

The pricing of Big Deals has ensured that the overall amount charged by any one publisher continues to increase but there is also a big increase in the journals made available. This has of course led to a big decrease in document supply.

However an important, and for the publishers, an unintended consequence of their market domination has been the development of the Open Access movement followed by the explosion in peer to peer exchanges via ResearchGate and others this being simply an advanced variant on the old practice of researchers sending their papers to each other by post. I have deposited some of my own articles and book chapters on ResearchGate and have received over 600 downloads, so clearly peer to peer services like this have a considerable impact.

Turning to Open Access...

Open Access presents both threats and opportunities to document supply librarians so let's take a closer look.

First, two brief definitions:

1. Gold open access is immediately and freely available on publication. There is often a fee paid by the author usually known as an Article Processing Charge or APC for short;
2. Green open access is publish conventionally but archive the agreed version in a repository.

In their arrogance and complacency, the publishers were blinded to the development of open access, alternately belittling it and ignoring it. As it grew they finally realised the danger to their profits and rapidly snatched victory from the jaws of defeat, most obviously in the UK in 2012 with the publication of the Finch report which was speedily supported by the government. This allowed for both Green and Gold open access publication for publicly funded research but with a preference for Gold. Publishers seized on this and are now promoting Gold OA vigorously, no wonder as they now have another revenue stream from author fees and as their costs are secret they can get away with offering only token reductions in subscriptions: a device known as 'double dipping'. Let me quote from the report by Adam Tickell to the UK government in February of this year which looks at the UK experience so far and recommends actions for the next five years. «By April 2017, almost all journal articles published by UK university academics will be available under Open Access routes. Of these, approaching 20% will be available on the date of publication and without any further restriction». But this comes at a heavy price as he goes on to say: «UK universities currently spend an estimated £33m on Open Access charges and, without mitigation, this is estimated to rise to between £40m and £83m by 2020». So high are the costs of Gold OA with commercial publishers that the policy preference

for Gold OA has now been weakened in the UK. Nonetheless in the last 10 years Gold OA articles have increased from about 3% to 13% of the total published each year.

And what happens in the US is of vital importance as their researchers produce about 20% of the world's published research. Here the US government has a preference for Green OA and in response publishers have set up CHORUS which will manage the scholarly communication and publication workflow and crucially allow publishers to control the process in such a way as to minimise the damage to their bottom line. Arguably a similar process is developing in the EU as a result of a closed conference held only last month where a strategy of flipping works in repositories back into the publisher's control was discussed. The Netherlands has already reached agreement with Wiley and Springer to continue with the Big Deals so long as their authors who publish with those firms will be made open access immediately without Gold payments. As Richard Poynder describes it in his excellent blog:

«This is surely the long game publishers are playing: appropriate gold OA in a way that preserves their profits, while simultaneously seek to appropriate green OA in order to control it, and then gradually phase it out, thus ensuring a transition to a pay-to-publish environment that best suits their needs, and at a cost based on their asking price».

So how important is OA in your working life?

Well we are in danger of drowning in statistics which I want to avoid in this overview. The STM 2015 report which I reference gives an up to date picture of the growth of Gold OA and the more complex Green OA, complex because of the difficulty of estimating the different types of content in repositories: personal, institutional and subject based. Suffice it to say that all types of OA are growing faster as funder mandates are implemented

and deposit becomes easier. I have also referenced Laakso and Bjork's work if you are interested in pursuing this issue further.

I can give a modest insight into the impact of OA with my own experience in writing a quarterly literature review for Interlending and Document Supply. The review is based on checking about 140 journals, reports, web-sites etc. for material relevant for those interested in ILL. Fig. 1 shows the number found for each issue – the number that were OA when checked and then the number when checked two years later. You will see a gradual if erratic increase in OA articles until today when they are running at over 60% of the total used.

| Date | No of refs | No of OAs then | % | No of OAs 2 years later | % 2 years later |
|-----------|------------|----------------|----|-------------------------|-----------------|
| 2011-39.4 | 43 | 12 | 28 | 23 | 53 |
| 2012-40.1 | 31 | 16 | 52 | 19 | 61 |
| 2012-40.2 | 31 | 6 | 13 | 25 | 81 |
| 2012-40.3 | 36 | 14 | 39 | 23 | 59 |
| 2012-40.4 | 23 | 9 | 40 | 11 | 48 |
| 2013-41.1 | 13 | 7 | 54 | 10 | 77 |
| 2013-41.2 | 28 | 14 | 50 | 16 | 60 |
| 2013-41.3 | 33 | 23 | 70 | | |
| 2013-41.4 | 31 | 21 | 68 | | |
| 2014-42.1 | 31 | 19 | 61 | | |
| 2014-42.2 | 29 | 19 | 66 | | |
| 2014-42.3 | 23 | 13 | 57 | | |
| 2014-42.4 | 23 | 13 | 57 | | |
| 2015-43.1 | 29 | 16 | 55 | | |
| 2015-43.2 | 30 | 20 | 67 | | |
| 2015-43.3 | 27 | 16 | 60 | | |

Fig. 1 – Literature Review references found and % that are OA

Thus the impact of OA on document supply especially when it is priced must be significant and growing.

The impact of both the Big Deals and Open Access on document supply can perhaps be best illustrated by looking at the decline at the British Library Document Supply Centre, still the largest in the world.

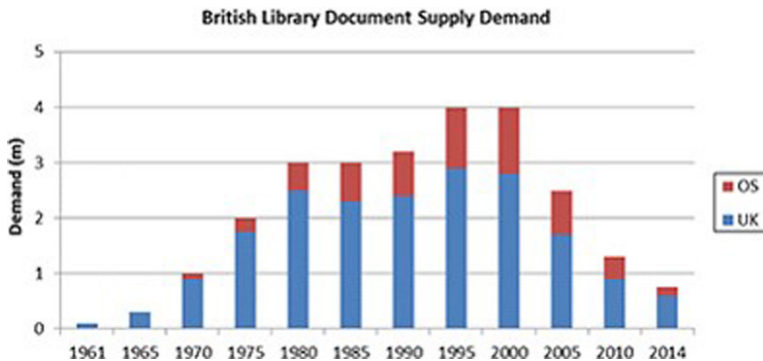


Fig. 2 – Trend in demand - BLDSC since 1961

I was lucky to retire in 2001 just as the peak passed. One of my last tasks was to conduct a review into the future of the Centre. I predicted that demand would drop by about 40% as a result of the Big Deals and Open Access, clearly an underestimate of the true fall.

The decline in document supply may or may not continue and in conclusion I want to look at its future and hence your role in it.

We have seen some pessimism of the intellect so far so now for some Gramscian optimism of the will but also some intellectual optimism.

Who navigates the stormy waters of my title? Well you do! The ship is full of your users, customers, researchers whatever you like to call them. Your job is to navigate to the harbour where the information they want is to be found. To navigate successfully requires skills and flexibility.

So let's look at your current situation.

On the one hand, there is the reduction in staffing, caused by a reduction in demand but also by technical changes to the

document supply process removing the need for much manual intervention; examples of which are the widespread acceptance of copyright signatures, the use of link resolvers to populate request forms, electronic searching including Google and automatic searching of the library's own catalogue for material already held.

On the other hand, there is a demand for skilled searching in an increasingly complex environment. These skills are of course bread and butter for ILL librarians and I reference how one library in the US deals with identifying articles that have been requested via ILL. It becomes increasingly important to check if requested material is freely and easily available. This saves money, and provides a better service to your users. I suggest that this will become an important part of the job of any ILL librarian.

I will illustrate this by looking at four classes of published material:

'Business as usual'. One reason why ILL exists is that many articles are rarely read; for example research by CIBER in 2009 demonstrated that over 90 per cent of title use derived from 50 per cent of journals at a number of research universities in the UK.

Another reason why ILL will continue to be important is because most published material is not available digitally let alone freely. This will surprise many students who think that if it isn't on the net it doesn't exist. Librarians know this to be wrong but even they often overestimate the amount that has been digitised. The only systematic research that I am aware of is for books by Robert Darnton whose work I reference. There are about 150 million books ever published and about two million are published every year. Various bodies including Google are digitising them – only last month in the US Supreme Court Google won the right to continue digitising. Google estimates that it has digitised about 25 million already but only those in the public domain are accessible freely on the web which one can infer from Darnton's work in 2008 is now about 15% or four

million, thus only 3% of the total books ever published are now freely available on the web. Other bodies have digitised perhaps as many as two million or 2% more. Thus about 95% of all books published can only be obtained via purchase or ILL unless they are held in the reader's library.

Nobody knows how many journals remain undigitised, most are defunct. It is generally acknowledged that there are about 28,000 current English language peer reviewed journals most of which exist in digital form – and many back to Vol 1 No 1. However according to Ulrich's there are over 300,000 journals currently published and I estimate that based upon the holdings of national libraries there are about 700,000 journal titles both current and defunct. Even if the core of 28,000 current journals were all digitised back to Vol 1 No 1, that is still only 4 to 5% of all journals ever published available on the web and of course most are not free. A digitised back file of Elsevier's journals will cost a research library over a million euros. Most journals will never be digitised as the demand would be insufficient to justify the cost. Most researchers will not have access to more than a small proportion of them and hence will need to obtain them via ILL. And of course there is plenty of current material to which your library does not subscribe and hence must be obtained elsewhere. We should also note that more older and non-digitised material is being exposed as references in digitised back files. So the future of ILL is assured albeit at a lower level than in the past.

'Hybrid journals'. These are subscription journals which publish Gold OA articles. It is a growing category but the Article Processing Charge currently is about double that of a fully Gold OA journal and very large sums of money are being devoted to APCs as I noted earlier and these amounts can only grow. A search should be made to ensure that users are not ordering an ILL when the article maybe freely available.

'Gold OA'. Currently the Directory of Open Access Journals gives access to over 11,000 journals that are fully open access.

This resource is certainly a first port of call for ILL librarians. Some journals will have APCs and all will be of varying quality but the first is irrelevant for your user as they don't pay the APC and the quality is for them to decide.

'Green OA'. Articles are published conventionally, that is to say behind a pay wall but a version will be deposited in a repository and made freely available after an embargo period which varies depending on publisher policies and funder mandates as well as the policy of the author's institution. If that isn't complex enough the version available varies: often it is the final agreed version before publisher processing; less often it is the Version of Record. The population of institutional repositories is growing rapidly under the impact of funder mandates. For example my local consortium of three university libraries is receiving an average of about 1000 deposits a month principally of articles but also monographs and conference proceeding and this amount is increasing rapidly, the total currently stands at 36,000 deposits.

All these forms of OA require someone to have the knowledge and experience to find the appropriate item in the form that is wanted, the library user is unlikely to do more than conduct a Google search if that. ILL staff can use their skills in this more complex environment thus saving time and money for the library.

And finally I would also note the emergence of what the US calls Patron Driven Acquisition or Purchase on Demand. This successful service requires the close cooperation of the ILL staff as noted in many published articles.

So all is not doom and gloom in the land of ILL.

So what of the future?

Well predictions are always difficult especially about the future, a quote I think from that well known academic Yogi Berra.

In the short term of 1-5 years matters will increase in complexity. Publishers see their future in Gold OA and they are starting to move against institutionally managed green OA. The Max Planck Institute is leading a campaign which aims to flip all subscription based journals to OA by 2020 and I reference the paper on which the campaign is based. This goal can only be achieved by adopting Gold OA leaving control firmly in the hands of existing publishers. So the current publisher strategy would appear to have some support within our profession.

In the medium term of 5-15 years it is likely that most STM literature will become OA immediately, and Humanities and Social Science will be a mix: some, perhaps most, will be funded for Gold, some will publish in free Gold journals that are funded in various ways, some will be published conventionally, i.e. behind pay walls, some will become available via peer to peer networks.

It is certainly going to be complex!

And in the long term 15-30 years? Well, Henry Mintzberg is one of the most sensible marketing theorists that I have ever read, he says never plan for longer than a year because the world moves too fast for more. Global warming and resource exhaustion will become paramount in this time period and so only a fool would try to predict where libraries will be! But I would certainly love to be here in 15 years time to see how things have turned out!

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