Big deals from a University’s point of view

A case study from the University of Bern

Research carried out by Dr. Michelle Schaffer, presented by Claire Powell and Gerhard Bissels (all Bern University Library)
A big thank you!

This paper is based on a research project by Dr Michelle Schaffer formerly of Bern University Library Switzerland. The presenters thank Dr Schaffer for allowing them to use her data from her presentation:

- Increasing transparency for e-journal subscriptions and Big Deals: Comprehensive assessment of e-journals in Science, Technology and Medicine, given at the ISEW Library, Helsinki, 1st June 2016

and her article:

What is a big deal? (1)

> First introduced by Academic Press in 1996
> Big deals are online subscriptions to large bundles of electronic journals bought by libraries from publishers e.g. Springer, John Wiley, Elsevier for a fixed price
> Journal bundles can consist of
  - 'core titles' - journals previously subscribed to by a library and
  - 'collection titles' - access to previously unsubscribed titles (some of which might not be subject relevant)
What is a big deal? (2)

> Big deal journal packages can be attractive to libraries
  - but
  - can prove expensive with annual increases and
  - limit flexibility in title selection

> Annual increase of e-journal bundles can exceed library budgets leading to cuts to other library expenditure

> STM disciplines are most affected by increasing costs limiting the ability to purchase additional resources
Motivation

> Journal packages **limit the flexibility** in the selection of titles
> The annual increase of such arrangements **exceeds the normal growth of the media budget** and forces the library to find ways to stabilise its expenditure
> The **STM disciplines are most affected** by the increasing costs which limit their ability to purchase additional resources
Aims of Project (1)

> 3 month research project by Dr Schaffer to verify relevance of STM e-journals in relation to their cost
> Provide STM subject librarians with overview of cost and composition of e-journal bundles increasing transparency and evaluate relevance of titles within the Library’s e-journal collection
> Use research project findings as basis for renegotiation of subscription costs and conditions with publishers
Aims of Project (2)

> Use project evaluation as basis of discussion with faculty on e-journals subscriptions and identify cost savings (if any)
> Redirect cost savings to buy additional resources e.g. e-books, databases, student textbooks
Project Methodology (1)

Introduction

Aim

Methods

Results

Summary

Conclusion

Outlook

Electronic Resources Management (ERM)

- Journal name, mode of licensing, publisher, ISSN, URL

COUNTER:

Uses (SFTAR)

- Invoices from various branch libraries
  - Costs, fund name
- E-Library: Individual lists
  - long-term preservation
Project Methodology (2)

> Project based on collected data for each individual e-journal (2014)
  • cost
  • uses
  • CPU (cost per use)
  • mode of licencing
  • Publisher
  • long-term preservation
  • assignment to individual disciplines
  • ISSN
  • URL
  • journal name
Comparison of different license models in the STM area

> **3 Big deals** have the **greatest share** in journal titles (90%), but account for only 29% of all use

> **smaller bundles** from non-profit publishers are **frequently used** and reflect the **high quality** of the journals
Distribution of the e-journals to individual subjects

- Veterinary Medicine
- Science-General
- Plant Science
- Physical Science&Astronomy
- Pharmacy&Pharmacology
- Medicine
- Mathematics&Statistics
- Material Science
- Life Science
- Healthcare&Nursing
- Engineering&Technology
- Earth&Environmental Science
- Dentistry
- Computer Science&Information Technology
- Chemistry&Biochemistry

Frequency (%)
Distribution of e-journals to individual subjects

> largest number of journals in Medicine (28.7%).
> lowest number of journals in Plant Science and Veterinary Medicine (1.5%, each)
> number of journal titles subscribed to corresponds to number of academics and students in a subject area
Ratio of e-journal usage to number of titles subscribed in a subject

- Veterinary Medicine
- Science-General
- Plant Science
- Physical Science&Astronomy
- Pharmacy&Pharmacology
- Medicine
- Mathematics&Statistics
- Material Science
- Life Science
- Healthcare&Nursing
- Engineering&Technology
- Earth&Environmental Science
- Dentistry
- Computer Science&Information Technology
- Chemistry&Biochemistry

Frequency (%)
Ratio of e-journal usage to number of titles subscribed in a subject

> Roughly **50% total e-journal usage** are generated by the **general Science journals** due to a few highly popular titles (Nature, Science, PNAS)
> **Maths, Physics, Chemistry, Geosciences, IT** have a **very low usage ratio**
> **Veterinary Medicine** shows the highest relative use (15%) within the individual subjects
Evaluation of the three Big Deals for all disciplines

> the University has **permanent access** only to the **17% self-selected titles**
Big Deals: Number of titles for the individual subjects: Elsevier

- Veterinary Science
- Science - General
- Psychology, Education and Social Science
- Physical Science&Astronomy
- Medicine
- Mathematics&Statistics
- Life Science
- Law&Criminology
- Humanities&Political Science
- Engineering&Technology
- Economics&Business
- Earth&Environmental Science
- Computer Science&Information Technology
- Chemistry&Materials Science
- Art&Aplied Arts

**Number of titles (%)**

- Collection titles
- Core titles

Big Deals: Number of titles for the individual subjects: Springer
Big Deals: Number of titles for the individual subjects: Wiley Blackwell

![Graph showing the number of titles for various subjects under Wiley-Blackwell](image-url)

**Veterinary Science**
**Science - General**
**Psychology, Education and Social Science**
**Physical Science & Astronomy**
**Medicine**
**Mathematics & Statistics**
**Life Science**
**Law & Criminology**
**Humanities & Political Science**
**Engineering & Technology**
**Economics & Business**
**Earth & Environmental Science**
**Computer Science & Information Technology**
**Chemistry & Materials Science**
**Art & Applied Arts**

**Number of titles (%)**
Big Deals: Number of titles for the individual subjects

● 40% of e-journals are from
  • Medicine (26%) and
  • the Life Sciences (14%)
Big Deals: Relative use for the individual subjects: Elsevier

Big Deals: Relative use for the individual subjects: Springer

- Veterinary Science
- Science - General
- Psychology, Education and Social Science
- Physical Science & Astronomy
- Medicine
- Mathematics & Statistics
- Life Science
- Law & Criminology
- Humanities & Political Science
- Engineering & Technology
- Economics & Business
- Earth & Environmental Science
- Computer Science & Information Technology
- Chemistry & Materials Science

Relative uses (%)
Big Deals: Relative use for the individual subjects: Wiley-Blackwell

- Veterinary Science
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- Computer Science&Information Technology
- Chemistry&Materials Science
- Art&Aplied Arts

Relative uses (%)
Big Deals: Relative use for the individual subjects

> **High e-journal usage** for
  - Medicine
  - Economics
  - Psychology
  - Education

> **Low usage** and high costs in
  - Maths
  - Physics
  - Chemistry
  - Geosciences
  - IT

The low usage numbers are caused mainly by the “collection titles” with an average frequency of use of 30%
Big Deals: CPU (cost per use) for core titles

<table>
<thead>
<tr>
<th>CPU (EURO)</th>
<th>Elsevier</th>
<th>Springer</th>
<th>Wiley-Blackwell</th>
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<td>Art &amp; Applied Arts</td>
<td></td>
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<td>Chemistry &amp; Materials Science</td>
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</tr>
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<td>Economics &amp; Business</td>
<td>5.88</td>
<td>3.31</td>
<td>4.10</td>
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<td>Engineering &amp; Technology</td>
<td>115.75</td>
<td>24.49</td>
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<td>11.68</td>
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> CPU
— Elsevier: 3.6 €
— Springer: 7.7 €
— Wiley-Blackwell: 3.4 €

> usage does not justify the costs
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> usage does not justify the costs
Key findings

> 5% of the STM titles have more than 1000 full-text article requests per year

> Journals in Maths, Physics, Chemistry, Geosciences, Astronomy and IT have high CPU

> Small nonprofit publisher packages show a five times higher usage than the Big Deals and are twice as likely to be used than individual subscriptions

> Big deals have the highest percentage of STM e-journals but these bundles mainly contain little used 'collection titles'

> Springer has the highest CPU
Conclusions

> **Transparency**
  — STM Subject librarians were able to gain an overview of the e-journal bundles and their contents – costs, frequency of use and options for long-term preservation

> **Collection Development**
  — Survey forms the basis for further decisions and encourages further discussion with relevant university faculties
  — Survey results form important indicators for the relevance of the e-journals in the STM subject areas
Next steps

> Challenges – limited flexibility in renegotiation of strict and complex contracts with publishers

> Focus on one Big Deal: Springer
  — Why Springer?
    • Renegotiations start in September 2016
    • Smallest amount of titles (=smallest risk of loss)
    • Highest CPU

> More evaluation?
  — Consider several years (2011-2014)
  — Include more parameters: turnaways, bibliometrics
  — Decisions can never be based on statistics alone – process needs to be managed by a subject librarian in collaboration with academic departments
Acknowledgements

> Dr. Michelle Schaffer (now SAKK)
> Marion Prudlo, Dr. Isabelle Kirgus, Team E-Library (Carla Buser, Tamara Leuenberger, Igor Hammer, Jan Stutzmann, Oliver Evers)

Thank you
SUPPLEMENTARY
Number of titles for the individual disciplines
# CPU (cost per use) of the Big Deals for core titles

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</tr>
</tbody>
</table>
Why Springer?

- Renegotiations with Springer starts in September 2016
- Smallest amount of titles (= smallest risk of loss)
- Highest CPU