Unbundling the “Big Deal”

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Unbundling the “Big Deal”

Structure of presentation

- Subscription Review 2015
- Process of Unbundling
- The Aftermath
- Lessons Learnt
Development of Evaluation Criteria

- **Pertinence** to current Teaching and Research (discipline and subject specific)

- **Quality** indicators, i.e. Impact factors & DHET accredited list

- **Content** available elsewhere, i.e. aggregator, subscribed databases or open access

- **Usage** data

- **Cost** per Use

- Move from print to electronic
Application of Evaluation Criteria

✓ After careful consideration
✓ Small departments/niche subject areas
✓ Exceptions regarding print
✓ Special Collections
Engagement with Faculty

- Workshops with librarians
- Dean’s meeting
- Faculty Dean’s Advisory Committee meetings
- Academic departments
Unbundling the “Big Deal”: Subscription review 2015

- 612 individual subscriptions identified for cancellation;
  - 1st and 2nd cut individual subscriptions.
  - 3rd cut individual subscriptions, if available online.
  - MUST HAVE individual title subscriptions, if available online.

- Value of these cancellations = **R 3,876,175**

Remaining amount of **R 1,123,825** to be attained by unbundling e-journal packages
Unbundling the “Big Deal”: Process of unbundling

- Saving of R 1,123,825 to be attained by unbundling our e-journal packages.

- Minor additional saving achieved by implementing administrative changes in existing Sage and Wiley e-journal deals

- UCT bespoke model
  - Highest used titles (minimum of 50 downloads averaged over 2 years)
  - 25% reduction in 2015 package cost
  - If bespoke model not possible, we will move to smaller subject collections or individual subscriptions within budget

- Negotiations with the following publishers to move from a Historical Subscribed Titles pricing model to a bespoke model.
  - Oxford University Press
  - Springer
  - Taylor & Francis
Unbundling the “Big Deal”: Process of unbundling

1. Usage
   - MUST HAVE = ≥100 average downloads over 2 years
   - TO BE CONSIDERED = 21 – 99 average downloads over 2 years
   - CUT = ≤20 average downloads over 2 years

2. Cost per use on list price
   - TO BE CONSIDERED = < GBP 7.00
   - CUT = > GBP 7.00 not financially viable (ILL cheaper than subscription cost)

3. Small departments
   - Number of researchers (Academics/Postgraduates)
   - Identify titles important to small departments (list of titles with 21-99 average downloads over 2 years)
   - Usage per researcher in department
     - TO BE CONSIDERED = ≥1 download per researcher
     - CUT = <1 download per researcher
   - Times cited by UCT researchers over the period 2010 - 2015
## Unbundling the “Big Deal”: Process of unbundling

<table>
<thead>
<tr>
<th>PACKAGE</th>
<th>TITLES LOST IN UNBUNDLING</th>
<th>NO. OF TITLES AFTER UNBUNDLING</th>
</tr>
</thead>
<tbody>
<tr>
<td>OUP</td>
<td>203</td>
<td>89</td>
</tr>
<tr>
<td>Springer</td>
<td>1600</td>
<td>236</td>
</tr>
<tr>
<td>T &amp; F</td>
<td>1414</td>
<td>123</td>
</tr>
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</table>

** Funds allocated for articles obtained via interlibrary loans
Unbundling the “Big Deal”: The aftermath

“cutting academics off from the latest research by top international scholars in their discipline will inevitably reduce UCT’s research revenue. UCT scholars will not be able to publish as many peer-review articles in academic journals as they would have been able to if they had had access to research being done by other scholars in their field.”

“... pulled the rug out from under our ability to do our job adequately—let alone to an excellent standard. Access to the core generalist journals in one's discipline is such a cornerstone of academic working conditions that I know this is an issue over which many, if not all, academics would be prepared to participate in industrial action. At present, I do not see how I can in conscience advise any student to pursue postgraduate research studies at UCT ...”
Unbundling the “Big Deal”: The aftermath

Steps taken to address the concerns raised

- a meeting was convened with the DVC Research and ED Libraries
- proposal that HODs, through the Deans, would consult their departments to identify a list of journals (in priority order) that are mission-critical for teaching and research in their disciplines.
- titles collated and costed by the Libraries
- a funding request submitted to the university executive for approval and requisite funding to re-instate the journal titles.
## Unbundling the “Big Deal”: The aftermath

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Unbundling the “Big Deal”: Lessons learnt

• “Perhaps the most startling thing for me was how some of the journals which academics most valued were so seldom used by them through the library – many seemed to obtain their own copies, or key articles, by way of their membership of societies, or role on editorial boards, or through the invisible college of colleagues in the same research areas….”

• “… it’s almost impossible to extricate oneself from these journal packages and retain "mission critical" titles at a lower price. The publishers are ahead of the game and have all escape routes blocked off.”

• Those academic who say they never use the library may have discovered that they actually do.
Thank You