Never let a good recession go to waste....
The opportunities and the threats

- Licensing restrictions
- BL funding
- Customer funding cuts
- New technology driving efficiency
- Customer funding cuts
- Opportunities to re-invent yourself

Document Supply Today

Negative

Positive
It is not an easy time to be a document supplier!
Library budgets are reducing!

Research funding cuts: 'I just feel discouraged'
Carlos Gias, a stem-cell researcher at University College London, tells Jeevan Vasagar why he is considering moving away from the UK to further his career

Fees must rocket to cover teaching funding cuts, says UUK head

28 September 2010
By Simon Baker

Tuition fees may need to rise to more than £7,000 a year to compensate universities for the cuts in teaching funding being considered by the coalition government, the president of Universities UK has warned.

University fees 'could triple to £10,000'
Student tuition fees could triple to £10,000 under Government plans to slash direct state funding for universities, it emerged today.
Library budgets are reducing!

<table>
<thead>
<tr>
<th></th>
<th>Academic</th>
<th>Public sector and government</th>
<th>Corporate</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than 10% down</td>
<td>27.0</td>
<td>27.0</td>
<td>24.6</td>
</tr>
<tr>
<td>Less than 10% down</td>
<td>16.8</td>
<td>9.4</td>
<td>11.4</td>
</tr>
<tr>
<td>About the same</td>
<td>39.4</td>
<td>45.9</td>
<td>50.9</td>
</tr>
<tr>
<td>Less than 10% up</td>
<td>13.0</td>
<td>11.8</td>
<td>11.3</td>
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<tr>
<td>More than 10% up</td>
<td>3.6</td>
<td>5.9</td>
<td>1.9</td>
</tr>
</tbody>
</table>

Charleston Observatory 2009
British Library budgets are reducing

Most public bodies expect announcement of c25% funding cuts in October 2010
Institutions are committed to investing in full text resources

Total number of journals subscribed to by 115 UK universities

Source: SCONUL, from RIN 2009
Demand is falling……
But never let a good recession go to waste....
Our objectives over the next 3 years

1. Invest in efficiency.
2. Move to a sustainable model.
Origins of Document Supply

• Founded 1961 as National Lending Library by Dr Donald J Urquhart.

• 1973 The British Library is established by an Act of Parliament and the NLL is merged with the National Central Library to become the British Library Lending Division.
My Basket

- 'Mother's Boy': David Cameron and Margaret Thatcher (View Details)
  - Evens, S.
  - BLACKWELL PUBLISHERS
  - Date added: 2010-09-16 13:20:03.05

- Applications of the artificial compressibility method for turbulent open channel flows (View Details)
  - Lee, J. W.
  - John Wiley & Sons, Ltd
  - Date added: 2010-09-16 13:00:59.233

- Noninvasive Determination of Spatially Resolved and Time-Resolved Tissue Perfusion in Humans During Nitric Oxide Inhibition and Inhalation by Use of a Visible-Reflectance Hyperspectral Imaging Technique (View Details)
  - Zusak, K. J.
  - AMERICAN HEART ASSOCIATION INC
  - Date added: 2010-09-16 12:29:50.788

Remove Selected Items

Total excluding VAT
Total price including VAT
Order Selected Items
BL DRM options are improving

BL about a year ago

BL today

SED

Ariel

Electronic Delivery Options

SED

Ariel

Fileopen

Unencrypted supply for electronic coursepacks
How customers are receiving electronic documents

Electronic delivery routes – June 2009

- Adobe Digital Editions 86%
- Unencrypted 10%
- Fileopen 4%

Electronic delivery routes – October 2010

- Fileopen 55%
- Adobe Digital Editions 35%
- Unencrypted 10%
Our objectives over the next 3 years

1. Invest in efficiency.
2. Move to a sustainable model.
Where your documents come from today

Delivered through third parties: 1%
Delivered from our paper based collection: 88%
Delivered from electronic store: 11%
Where your documents comes from tomorrow?

- Delivered through third parties: 20%
- Delivered from our paper based collection: 27%
- Delivered electronically with top 50 publishers: 53%

Where your documents comes from tomorrow?

I’m the customer
- Quicker delivery
- Full colour, native PDF
- Cheaper
Our objectives over the next 3 years

1. Invest in efficiency.
2. Move to a sustainable model.
In what format is the BL’s 150m collection available in?

- Electronic: 1%
- Paper: 99%
Just a few of the digitisation projects we have just completed

“The British Library digitises over a quarter of its Greek manuscripts (284 volumes) and makes them available for free for the first time”

“British Library and Brightsolid partnership to digitise up to 40 million pages of historic newspapers”

“Extra! Extra! British Library adds extra 1 million pages to online newspaper resource …”

“Online boost for Islamic Studies as 1,000 theses are digitised and made available online for free”
ETHOS – making UK post doctoral theses available to the World
Our aims and objectives

• To offer a ‘single point of access’ to all doctorate theses produced by UK Higher Education

• To support the transition of UK Higher Education from print to e-theses

• To help UK Higher Education expand available content by digitising paper theses.

• To demonstrate the quality of UK research and help attract students and research investment into UK HE
Demand for UK theses from the BL – last 3 years

![Graph showing demand for UK theses from the BL over the last 3 years. The graph displays data in thousands, with months on the x-axis and demand on the y-axis. Peaks and troughs are visible, indicating periods of high and low demand.](image-url)
ETHOS – Where have the orders come from since Jan 09?

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

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

**Orders by Region**
- **Europe**: 72%
- **North America**: 28%
Center for Research Libraries sponsors the digitisation of 400 theses related to Islamic Studies

“Scholarship today at the major UK universities is a cornerstone of global research and access to that scholarship is of primary importance to the thousands of graduate and postgraduate researchers in the CRL community. We are delighted to have sponsored the digitisation of hundreds of theses identified as being of special interest and value in the field of Islamic studies, and that, through EThOS, they are now accessible to researchers worldwide.”

Bernie Reilly, Center for Research Libraries, Chicago
• The global economic recession has merely accelerated all of the issues facing the document supply industry.

• It increases the urgency for traditional suppliers, such as the British Library, to re-invent themselves, their processes and the role that they play in the information chain.

• Never let a good recession go to waste.