Introduction

The quotation chosen as a theme for this paper comes from the Book of Ecclesiastes. The gardeners amongst you may visualize this more in terms of the cycle of growth and decay in nature. And those of you of a certain age may simply think of the track by the Byrds. Wherever your imagination takes you, I hope you will detect a common thread; which is the underlying concept of CHANGE. I specifically want to explore the concept of change in relation to the ‘big deal’ – a term which now slips off our tongues with practised ease. However, for the avoidance of doubt, and for the benefit of those who may not be so familiar with the concept, this is what I mean by the big deal: it is a purchase model which emerged in the UK HE sector in the late 1990s whereby a publisher’s complete (or almost complete!) journal collection is made available to subscribers. The pricing model is invariably based upon a maintained print spend value dating back to when big deals as we know them began, in 1999; topped up by an additional e-access fee which permits access to all the unsubscribed content. Deals are usually multiyear and include an annual price cap. The majority of big deals in the UK higher education (HE) sector are offered under the National Electronic Site Licence Scheme – currently branded as NESLI 2, but there are others which are simply offered direct to libraries by publishers or aggregators. The main driver for the creation of big deals was the Follett Report of 1993, which suggested that the inability of academic library budgets to keep pace with the constant escalation in journal price rises posed a serious threat to future academic research. Thus the original big deal concept was itself seen as a catalyst for change; utilizing emerging developments in electronic publishing to test whether a national licensing scheme could reduce the unit cost of information provision in the HE sector.

That the big deal has had a major impact is indisputable. For academic libraries, the most immediately striking evidence has been the huge increase in the size of our journal collections. Many journal collections have effectively doubled in size since the late 1990s. Coupled with this has been a dramatic decline in photocopying and inter-library loans (ILL), which have been replaced by ever-growing numbers of full-text
downloads – for example, those at Newcastle University Library were well over 1.4m last academic year. All of which shows how wonderfully successful big deals have been, doesn’t it? Well – yes but, despite the fact that our journal collection is now running at just under 10,000 titles, as opposed to the 5,380 we had in 1997/98, there is still a constant demand for new journal titles. At Newcastle, requests are accepted throughout the year and are prioritized in readiness for the next round of journal renewals in the autumn. Once the costs of the existing subscriptions have been confirmed, the journal wish-list is reviewed to see how many new titles can be purchased.

Since 2003 there has been nothing to touch NESLI big deals as a means of securing new journals at Newcastle. This could be seen as yet another ringing endorsement for big deals. Yet whilst they have undoubtedly helped us to acquire access to some of the titles we knew we wanted, big deals have not necessarily helped us to satisfy our strategic priorities in journal acquisition. Furthermore, we have only been able to acquire a relatively small proportion of titles that have been requested – typically around 33%. Indeed in the last two years we have been able to secure only 20% of the titles requested. Some schools, notably in the humanities and engineering, where titles from smaller, specialist publishers may be required, have had very few new titles for several years, mainly because it has not been possible to free up the requisite funding by cancelling titles that were deemed no longer of interest, or of a lesser priority.

There is nothing new or inherently surprising about the concept of demand outstripping supply. Nevertheless, I have come to believe that with big deals currently accounting for over 75% of journals expenditure at Newcastle, and the inflexibility imposed by no or low cancellation clauses, this is now inhibiting the ability to adapt our journals portfolio to match the changing information needs of the University. My sense of unease about the long-term sustainability of the big deal concept as currently configured has been growing over the last couple of years, and has been noted elsewhere, for example Baker (2006)4. This year, something else occurred to add a sense of urgency to this concern. I refer of course to the economic downturn which led to a lack of funding for new subscriptions.

Table 1. Changes in ILL and photocopying demand since the advent of the big deal

| Newcastle University Library | 1997/98 | 2006/07 | % change |
|-----------------------------|---------|---------|----------|
| current serials subscribed to | 5,380   | 9,023   | 67.71%   |
| ILL requests made           | 24,345  | 9,873   | -59.45%  |
| number of photocopies made   | 5,264,343 | 1,341,324 | -74.52%  |

Figure 1. Analysis of journal procurement methods at Newcastle University Library
has had, and continues to have, a profound impact on both our personal and professional lives.

I never expected to have exchange rates at the top of my list of internet favourites, but for most of this academic year, it has been a daily ritual to check them and it has not been cheerful viewing. The graphs shown in Figure 2 speak for themselves. The dramatic fall in the value of the pound against the dollar and euro has had, and continues to have, a profoundly negative impact on library budgets in the UK HE sector. In the Library at Newcastle University, for example, the exchange rate problems have resulted in a £200k shortfall in journal expenditure – a significant sum of money. As the pound continued its downward spiral, librarians battled to identify savings and make cogent cases to their paymasters for additional funding to keep our current serial portfolios afloat.

This process has been greatly handicapped by the unparalleled delays and lack of clarity which have characterized a small number of publisher offers this year. All of which begs the question – are librarians starting to fall out of love with the big deal? I think I am, and I wanted to find out if my concerns were shared.

**Method**

Eliciting responses from busy people is never easy, and I elected for an online survey largely because I thought it would be simple to administer and circulate. The survey was designed and analysed by myself and my colleague, Cliff Spencer, using the Bristol Online Survey software, and was piloted with a small group of librarians whom we knew would give robust critical feedback. We went ‘live’ in early March 2009 and closed at the end of April. The survey was posted on lis-nesli-reps, a closed list for UK HE libraries who participate in NESL-brokered big deals. A follow-up posting went out on lis-e-resources, and, despite the fact that the survey was confined to UK HE, it attracted interest and comment from colleagues in Australia, New Zealand and Europe.

The survey was designed to gain insight into librarians’ opinions of the big deal, both positive and negative. It aimed to identify how UK librarians were handling the fiscal problems caused by the current weakness of the pound and also to see if they were planning any different strategies in 2010.

**Sample size**

The survey attracted 38 responses, which represented around 30% of the target audience. Although I would have liked to see a higher response rate, all the core JISC funding bands are represented, which suggests that the responses accurately reflect the views of the larger population.
Some librarians who said they would have liked to complete the survey were deterred by the financial questions which required retrospective analysis of expenditure. In some instances, local financial systems made it difficult to extract big deal expenditure from total serials spend. Follow-up survey work will include more optional financial questions, although as money is at the heart of this debate, it is important to gain as much hard detail as possible.

Initial findings

There is a wealth of data in the survey responses, including many free text comments which will take some time to analyse. What follows is essentially a preliminary report which will form the basis for further investigation.

In order to get a feel for the level of commitment libraries had to big deals, librarians were asked to indicate how many they had subscribed to over the last three years. Whilst the cumulative total of big deals subscribed to had increased by 17.6% over the three-year period, this inevitably masked some significant variations in subscription size. The median has remained fairly constant at between nine and ten, whilst the mode, or most likely number of deals subscribed to over the period, has risen from five to 15. Three libraries were significantly ahead of the rest, with between 32 and 38 big deals. NESLI is by far the dominant subscription model, accounting for 74% of big deals subscribed to in 2009 (slightly down from a high of 79% in 2008.)

Given my concern about the proportion of my journals budget currently taken up by big deals, I was understandably keen to see how this compared with other academic libraries. As Figure 3 demonstrates, the majority of respondents (41%) report that big deals account for 26-50% of their journals budget. Around a quarter are clustered in the next band, 51-75%; but for me, the most telling change over the three-year period is in the number reporting that big deals account for more than 75% of the journals budget. None of the responding libraries were in this band in 2007, but 5.7% were there in 2008, and by 2009, just under 13% were in this position. Clearly, I am not alone in having the lion’s share of my serials budget devoted to big deals.

If we are spending so much of our serials budgets on big deals, it seems reasonable to assume there must be something librarians like about them (see Figure 4). The main attraction (cited by 31% of respondents) was the opportunity to acquire more titles for a marginal cost increase; closely followed by the perception that big deals were easier to administer than cherry-picking individual titles or subject clusters (22%). The option of a one-stop acquisition process for key titles was also popular (18%). There are no real surprises here and if we reflect that one of the key objectives of the PSLI was to explore whether the site licence concept could deliver increased value for money, it seems that those who responded to my survey believe it is doing just that. However, there are

Figure 3. Proportion of journals budget taken up by big deals
also aspects of the current big deal offerings that librarians dislike, and here, opinions were less polarized (see Figure 5).

There is remarkably little to separate the top three concerns: 21% of respondents dislike the limited cancellation options; 20% are frustrated by the pricing model based on historical print spends and 19% are concerned about the impact of titles moving publisher. Irritation about the lack of clarity about which titles are included/excluded from deals was not far behind, and the frustration I had noted about the inflexibility of big deals when trying to respond to changing University needs was also highlighted by other libraries. So even though we like big deals and are spending large proportions of our budgets on acquiring them, our admiration is not uncritical. My feelings towards the big deal have certainly changed over time, so I included a follow-up question about satisfaction levels and whether these had changed (see Figure 6). The responses were fairly evenly split between those who are still happy with the big deal (42%) and those who are less happy (45%). There was no perceptible link between high percentage spend and greater levels of dissatisfaction. Those who had indicated they were less happy with big deals than they used to be were asked to say what had caused them to change their mind. Once again, there was a reasonable spread of responses.

‘Critical mass’ of titles through single interface
Model licence
Stable platforms
Value for money

Figure 4. What librarians like about big deals

Pricing model based on historical print spend:
Inflexible: unable to adapt to meet changing teaching and research needs:
Limited cancellation options:
Lack of clarity about which titles are included/excluded:
Impact of Titles moving publisher:
Other (please specify):

Admin, late deals, restricted years, lack of uniformity and standards in nesli deals.
Print spend model is arbitrary, pricing according to usage might well increase rather than decrease costs…
Lack of transparency in pricing. Complex. Multiyear nature in uncertain financial climate.
Nothing – except the psychological aspect of tying up funds with a few suppliers
Price caps too high. Deals where new and transfer titles are not included. Deals where post-cancellation access is unclear and/or restricted to ‘subscribed’ titles
Pricing models are becoming more complicated each year.
Whilst we retain print too the complication of checking print subscription renewals!

Figure 5. What librarians dislike about big deals
Those librarians who had indicated they were less happy with the big deal now than they were three years ago had three main areas of concern. The lack of flexible options regarding the inclusion or exclusion of titles was cited by 23% of respondents, closely followed by increased costs (19%) and the fact that it is proving harder to find funds for non-big deal spend (18%). It was interesting to note that, when asked if anyone had cancelled any big deals, over a third said they had done so (see Figure 7). The main reasons given for cancelling were that the deals were not perceived to be delivering value for money (24%), unacceptably high price rises (20%) and budget pressure caused by currency weakness (18%).

A major challenge for librarians this year has been managing their budgets to limit the impact caused by the weakness of the pound against the two main currencies we purchase in: euros and US dollars. Librarians were invited to indicate the extent of their shortfalls. The highest shortfall notified was £400K, the lowest £50K and the median £120K. Next, librarians were asked how they were coping with this shortfall. A third of respondents said they had asked their university for extra money to bail them out, while 20% had resorted to that old

complexity and unhelpful policies
Other concern is the length of deal if they don’t have ‘annual’ opt out clause.
favourite – cutting the book fund. Only 9% said they had made cuts in the serials fund, with 8% having cut staff or other non-materials budgets.

One highly organized library had managed its shortfall by utilizing a special fund set up for this purpose, and only 4% of respondents had cancelled big deals. However, several libraries indicated they were planning major journal cancellation exercises in 2009/10. This evidence backs up perceptions gathered from discussions with other librarians and with publishers. Despite some trimming at the margins, it seems that HE libraries have actively sought to protect their big deal expenditure by seeking additional funds or making savings elsewhere. This may have led publishers to conclude that all is well, but I think I would have to disagree. Several libraries indicated that some of the funding sources they had deployed to manage shortfalls were short term, or one-off options and would not necessarily be available in successive years. Given that it is clear the economic downturn is going to persist well beyond the current year, I wanted to know what colleagues planned to do to make ends meet in 2010.

This is where it gets interesting because there is a distinct shift in emphasis from what happened in 2009. As shown in Figure 8, almost a third of us plan to ask for yet more top-up funding – although several librarians cautiously observed that asking and receiving are two different things. The book fund will still take a hit, but not quite as many librarians plan to raid that again (down 2%). On the other hand, far more of us plan to trim the serials budget – up from 9% to 20% – and, most striking of all, 14% (as opposed to 4%) intend to cut back on our big deals. This very much accords with my perception that most of us have scrimped and saved to maintain our current big deal spends this year, but are anticipating having to take more stringent measures next year. Respondents were also asked if they could look ahead for the next three years (Figure 9) and indicate what they thought their

Looking more critically at usage stats
Review all serials spend to identify cuts in titles across the board, not just BDs
We might need to look at cancelling Big Deals but are unsure of what viable alternatives there are – publishers are offering nothing and seem confused as to why we are asking!

Figure 8. Planning for 2010

| Strategy                        | 2009 | 2010 |
|--------------------------------|------|------|
| request more funds from University | 33%  | 31%  |
| cut book fund                   | 20%  | 18%  |
| cut serials fund                | 9%   | 20%  |
| cut staff or other non-materials costs | 8%   | 7%   |
| cancel Big Deals                | 4%   | 14%  |
| Other (please specify)          | 20%  | 10%  |

Figure 9. What is driving you to reduce big deal expenditure?
strategies would be regarding big deals. The result was that 38% thought they would maintain the big deals they already had, but a striking 28% have indicated they will only take on new deals if old ones are cancelled and 24% said they would actively seek to reduce big deal expenditure. Only 3% of respondents thought they would be actively seeking to add in more big deals as they arose.

After all these years of steadily increasing our big deal collections, the concept of reducing them may be difficult to come to terms with, and even harder to implement. A recent report by the Research Information Network (RIN) described e-journals as ‘the lifeblood of UK research institutions’. However, 24% of the respondents to this survey see the weakness of the pound driving them to make economies, whilst 23% highlight the need for more flexibility to enable them to adapt to changing subject interests. A similar proportion (21%) of respondents feel they must act to prevent the serials budget eroding the bookfund. Given that requests for more books feature in every student satisfaction survey we ever encounter, it is quite understandable that librarians should feel the need to protect the bookfund from further depredation. Which brings me back to my original question – have librarians fallen out of love with the big deal? On the evidence I have gathered, I think it is fair to say that there is still strong support for the big deal. Yet amidst that support, there are signs of growing frustration, which have been exacerbated by the fiscal pressures we are under because of the economic downturn. It is time for the big deal model to move forward, and librarians have some clear ideas about how it needs to change.

As shown in Figure 10, top of the list of desiderata is a pricing model which makes it affordable for us to move to e-only, i.e. one which effectively cancels out the cost of the VAT on top of the original print spend. As far as I am aware, only one major publisher has ever come up with a pricing policy which did this – and many of us took it up with alacrity. Also high on the list is a move away from pricing policies based on historical print spends. Those of us who were high spenders when we signed up for our major deals often feel frustrated by the obligation to maintain spending levels that now bear no relationship to the current shape of our University; and which we feel inhibit us from being more responsive to evolving subject interests. Conversely, those who had low print spends when big deals arrived generally feel they are getting a very good return on what is a comparatively smaller investment. Now that so many of us are e-only with the larger big deals, it would be timely for the perceived inequalities arising from the historical print spend models to be addressed. Librarians would like to be able to customize collections more – selecting titles they wish to exclude for a reduction in fees.

### Conclusion

This survey has shown that despite continuing satisfaction with the big deals amongst UK HE librarians, there is also a significant body of opinion which feels they need to change. The financial challenges posed by a weak home currency have made librarians more aware of big deals as ‘the
elephant in the room’ and, whilst in 2009 we have generally acted to protect them, they are going to come under much greater scrutiny in 2010, which is likely to result in some cancellations. The likelihood of budget problems generating a more critical approach to big deals was highlighted by Gatten and Sanville (2004).6

There seems to be a clear agenda for change amongst librarians, focusing around more flexible purchasing options, with the ability to exclude content and reduce costs, and a pricing model for e-only which does not rely on historical spending patterns. What is not yet certain is whether publishers will rise to the challenge. Thus far, all the web postings I have seen about modest or zero price rises for 2010 have come from small and society publishers. The Big Guns are clearly keeping their powder dry. Of the many free text comments included with survey responses, I thought these two were particularly relevant in highlighting Librarians’ concerns:

“One absolutely critical factor will be how far the publishers are prepared to reduce price increases. Many present price caps are too high for the changed circumstances. If publishers do not alter tack radically I suspect they will see significant withdrawal from big deal arrangements. ”

“There is a lot that publishers can do to make big deals more attractive to libraries; the challenge is getting them to recognise that this is something they need to do. However, we can now see the flaws as well as the benefits of the current big deal structure. The financial challenges we all face should provide the necessary impetus or catalyst for change. ”

Which brings me back to my initial refrain: ‘to every thing there is a season’. The big deal is ripe for change, but is it ready and willing to change? As we celebrate the bicentenary of Charles Darwin’s birth it is perhaps timely to remind ourselves of the consequences of leaving it too late to change. The flightless Dodo prospered on the Island of Mauritius because it had no predators. When predators arrived in the shape of men, it was unable to adapt to the changed circumstances and was rapidly hunted to extinction. Unlike the Dodo, there is ample warning of the need for the big deal to change, so all that is needed is the willingness to embrace it: Carpe Diem.

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If you would like to see a copy of the survey questionnaire, please contact the author

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