

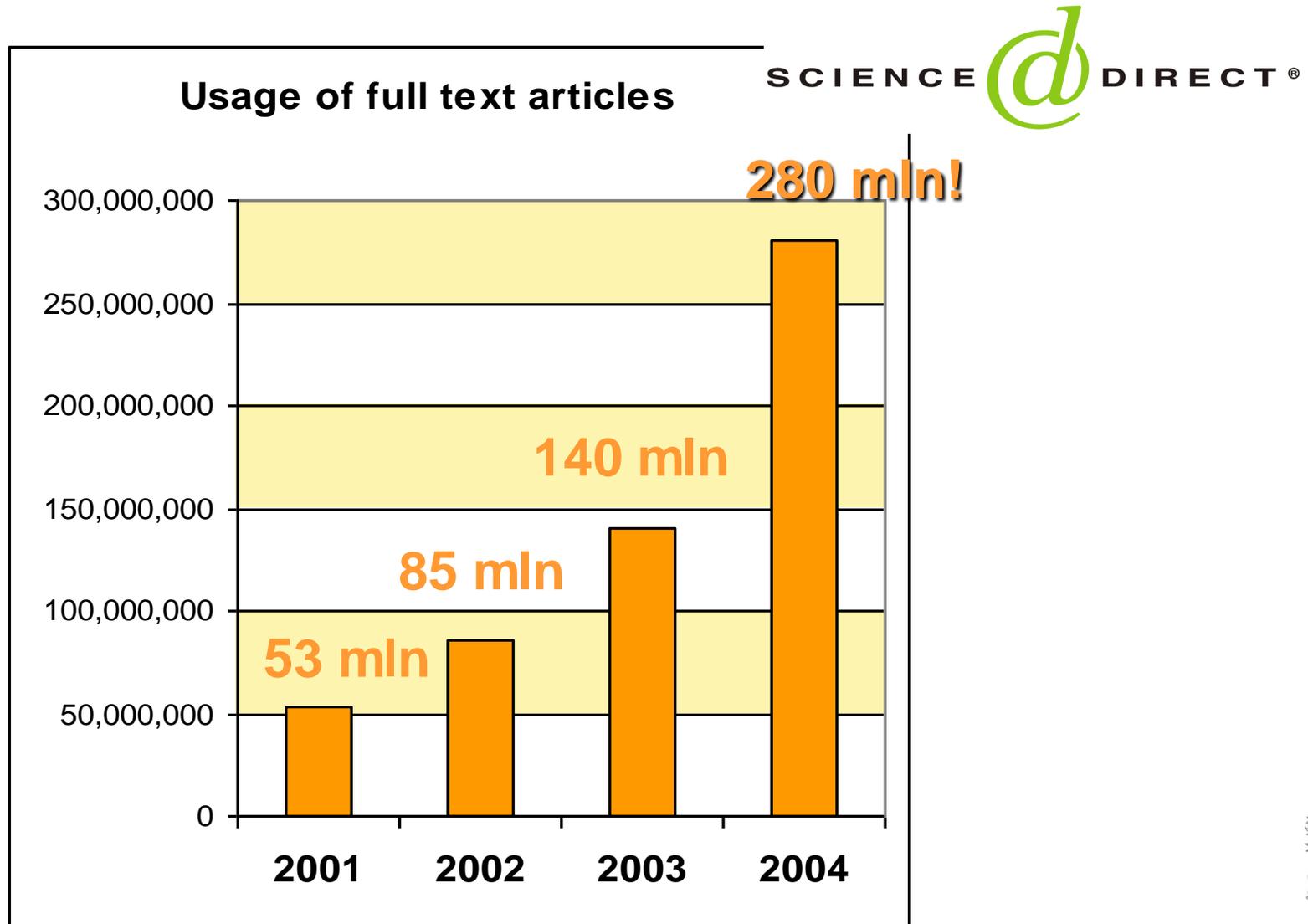
Agenda

- Use/Value
- Price and Models
- Open Access
- Copyright

Benefits ScienceDirect

- Well over 6M scientists connected out of a global population of ~ 10M scientists
- Vastly increased access to a wealth of Elsevier titles; 1950 journals on-line
- Global usage levels doubling year on year and availability well above 99%
- More than 6M articles available on-line, embedded in rich functionality, including back-files and electronic annexes - less than 0.15% missing issues
- For well over 95% of the articles, electronic distribution is quicker than print (including articles in press)
- Increasingly transparent indicators of value; Usage, Users, ROI, Cost per Use, ...
- Broad availability in low-income countries (Hinari / AGORA initiatives in close cooperation with WHO and FAO)
- Archival Policy through Royal Dutch Library The Hague

Benefits - Increased Usage



Academic Usage (FTA) 03

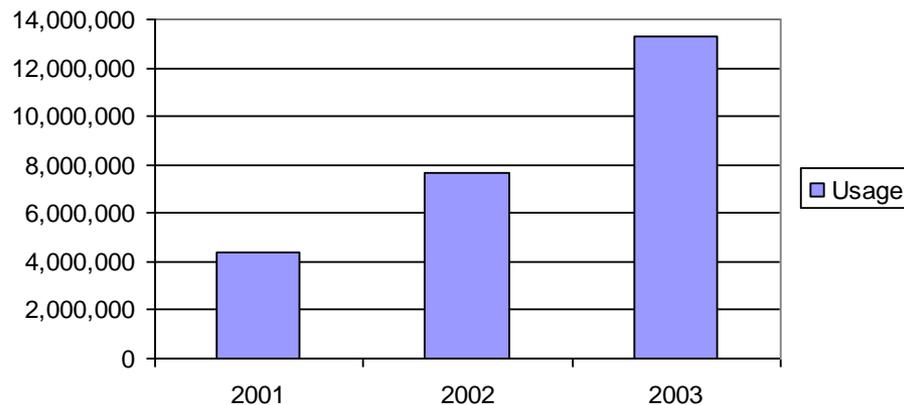
Academic	FTA 03	EMEA-Usage
NESLI	12.5 mio	22%
Couperin	5.5 mio	10%
Italy	3.5 mio	6%
Turkey	3.3 mio	6%
Spain	3.2 mio	6%
UKB	3.0 mio	5%
Germany	2.4 mio	4%
Poland	1.9 mio	3%
Swiss	1.5 mio	3%

NESLI Key Results 2001-2003

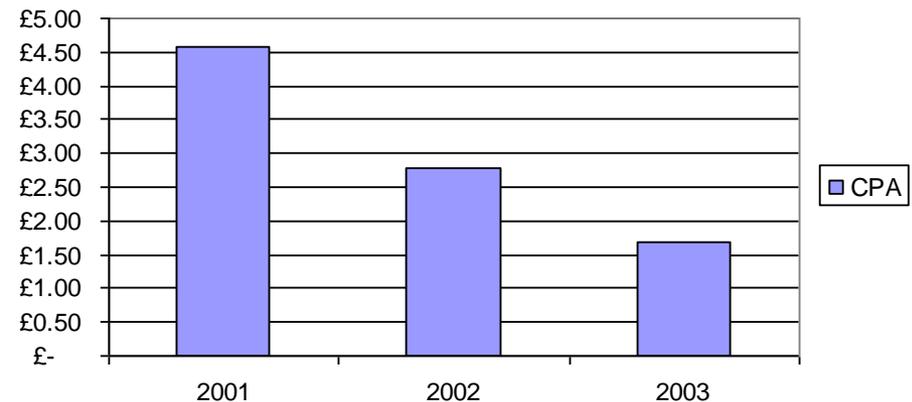
- NESLI

- ◆ Full text downloads increased by 73% per year
- ◆ Cost per article [CPA] down by 63%

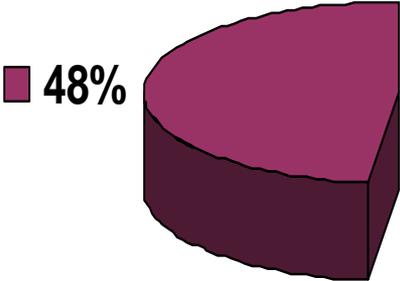
Full text article download (UK researchers)



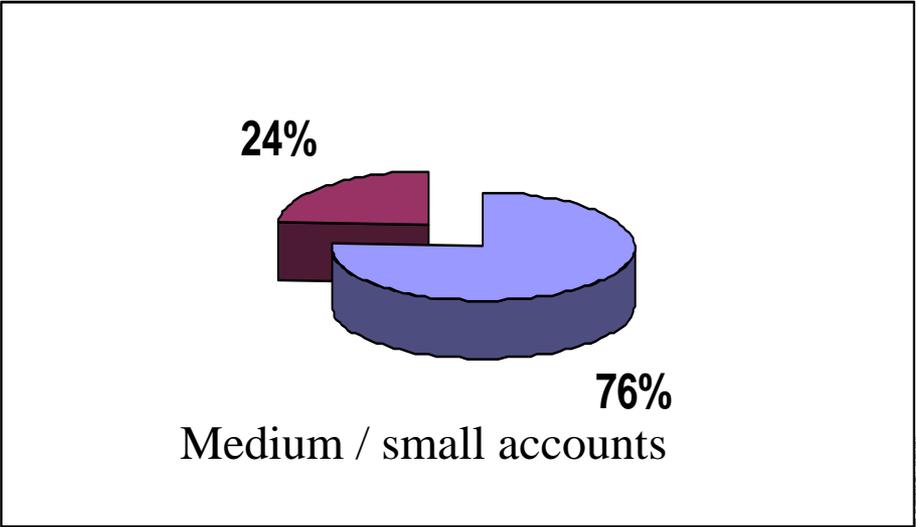
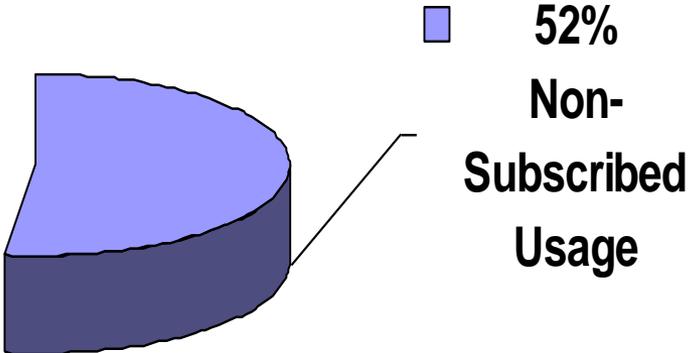
Cost per article development (UK NESLI)



NESU non-subscribed usage



Large accounts



Medium / small accounts

Benefits - Indicators Of Value; Example NESLI - UK

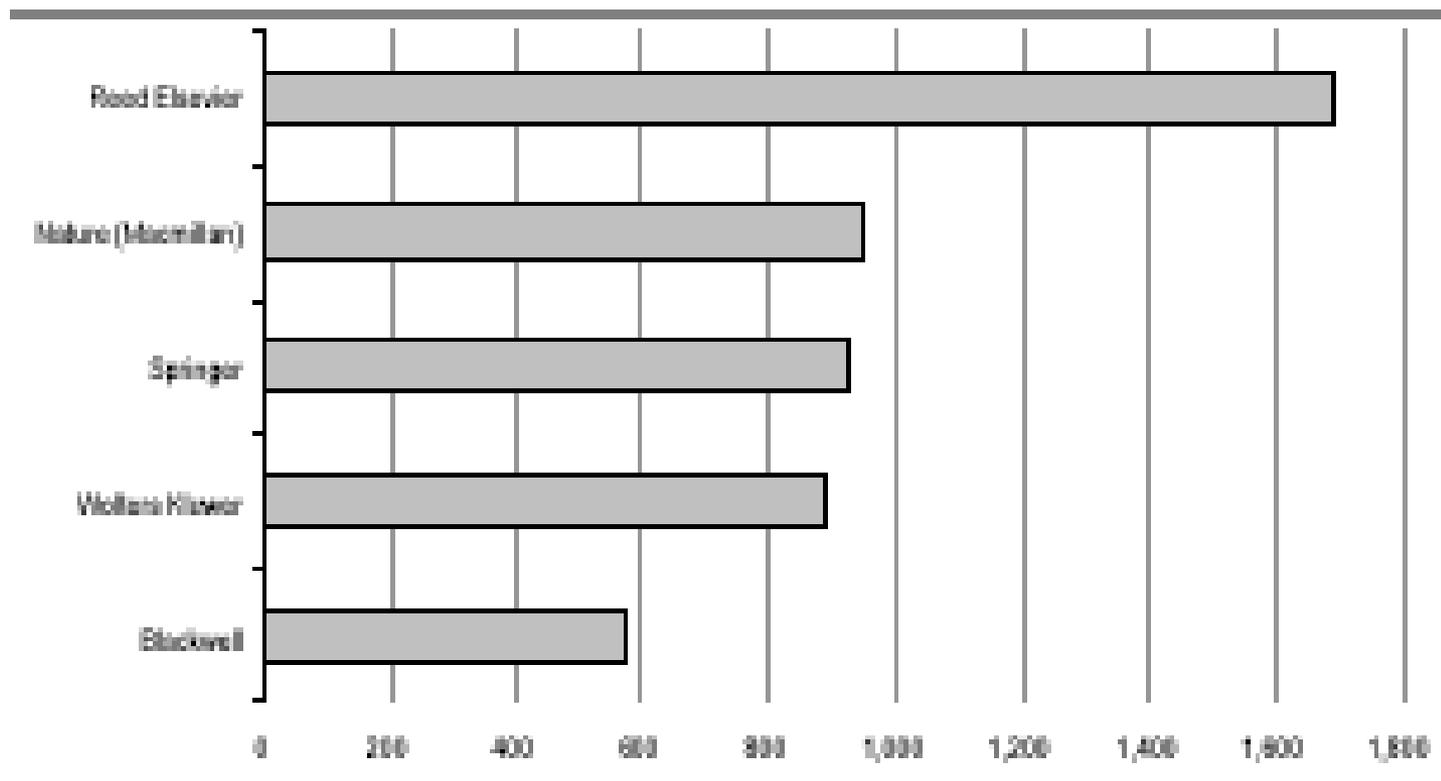
- **Cost per Journal Used**
 - ◆ 2001: Euro 285
 - ◆ 2003: Euro 169
- **Cost per Article Downloaded**
 - ◆ 2001: Euro 6.40
 - ◆ 2003: Euro 2.34
- **Cost per User**
 - ◆ 2001: Euro 32
 - ◆ 2003: Euro 21

Case Study: University of California

Average list price per title (2004)

Figure 7 :Average list price per title (2004)

\$



Source: University of California, CSFB research

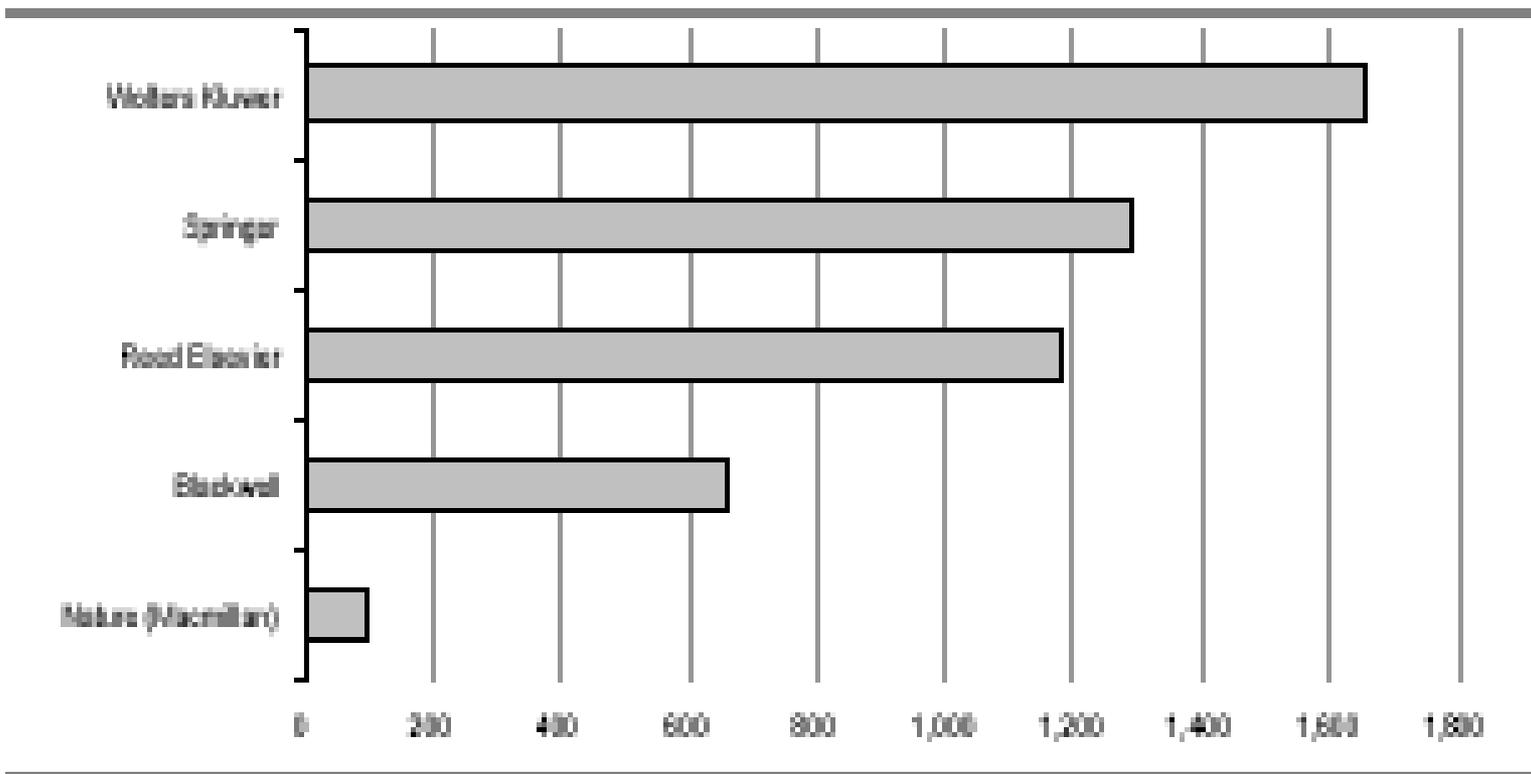
Source: CSFB Report on STM publishing, 29 Sep 2004

Case Study: University of California

Average price paid per Impact Factor point (2004)

Figure 8 : Average price paid per Impact Factor (2004)

\$ per Impact Factor



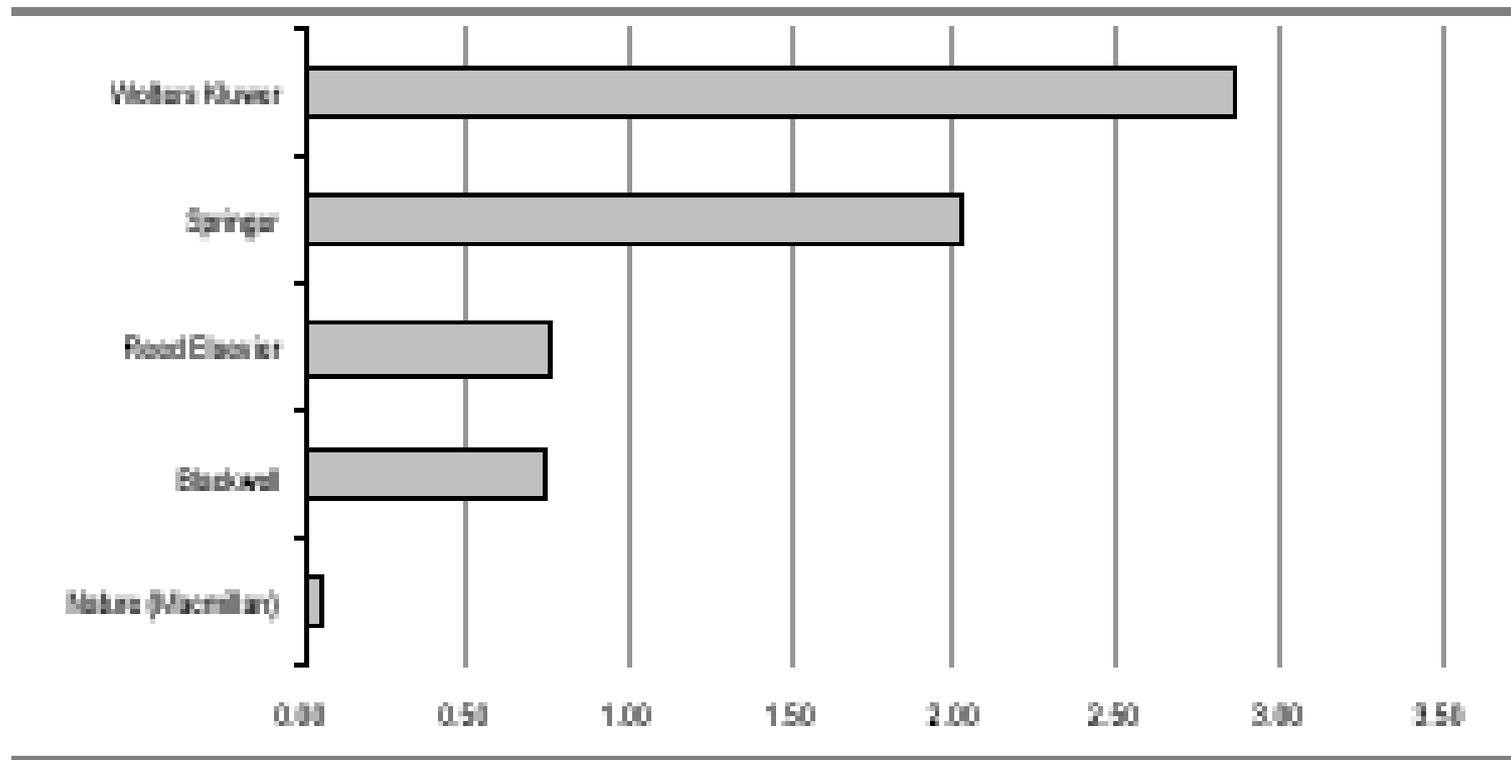
Source: University of California, CSFB research

Source: CSFB Report on STM publishing, 29 Sep 2004

Case Study: University of California

Average price paid per UC Online Use (2004) = # FTA downloads

Figure 8 : Average price paid per UC Online Use* (2004)
\$/per online use



Source: University of California, CSFB research

Source: CSFB Report on STM publishing, 29 Sep 2004

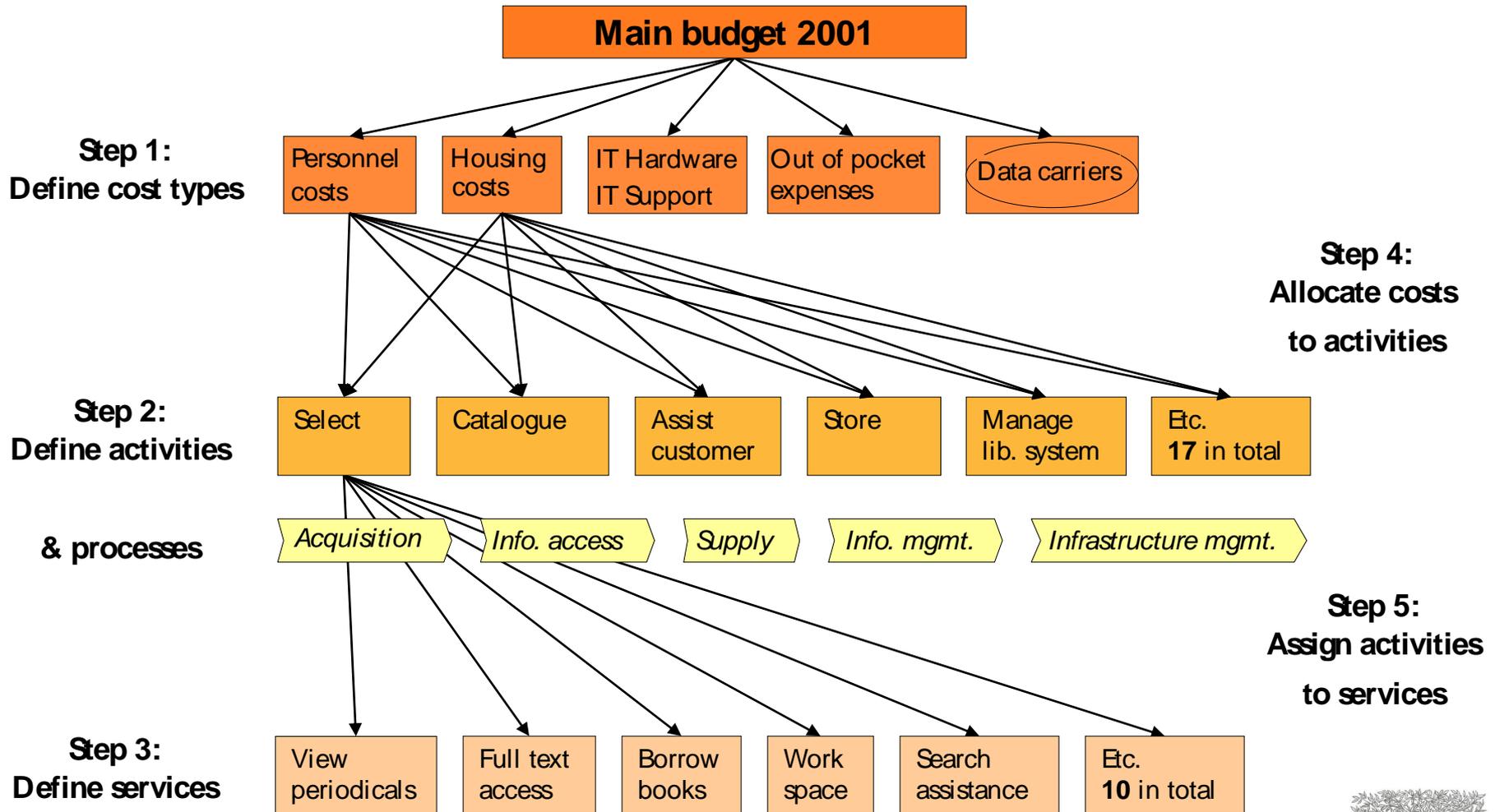
Case Study: University of California

Conclusions (CSFB):

- Elsevier content is 9% and 29% cheaper than Springer and Wolters Kluwer, per impact factor point delivered
- The value proposition disparity between the publishers on usage is even more striking, with Elsevier's content significantly cheaper per use than its commercial peers.
- Elsevier value metrics are so much better because of:
 - A higher number of articles per issue
 - The high penetration of ScienceDirect, providing first mover advantage to Elsevier
- Elsevier has a higher proportion of high-use journals than most of its commercial peers

Source: CSFB Report on STM publishing, 29 Sep 2004

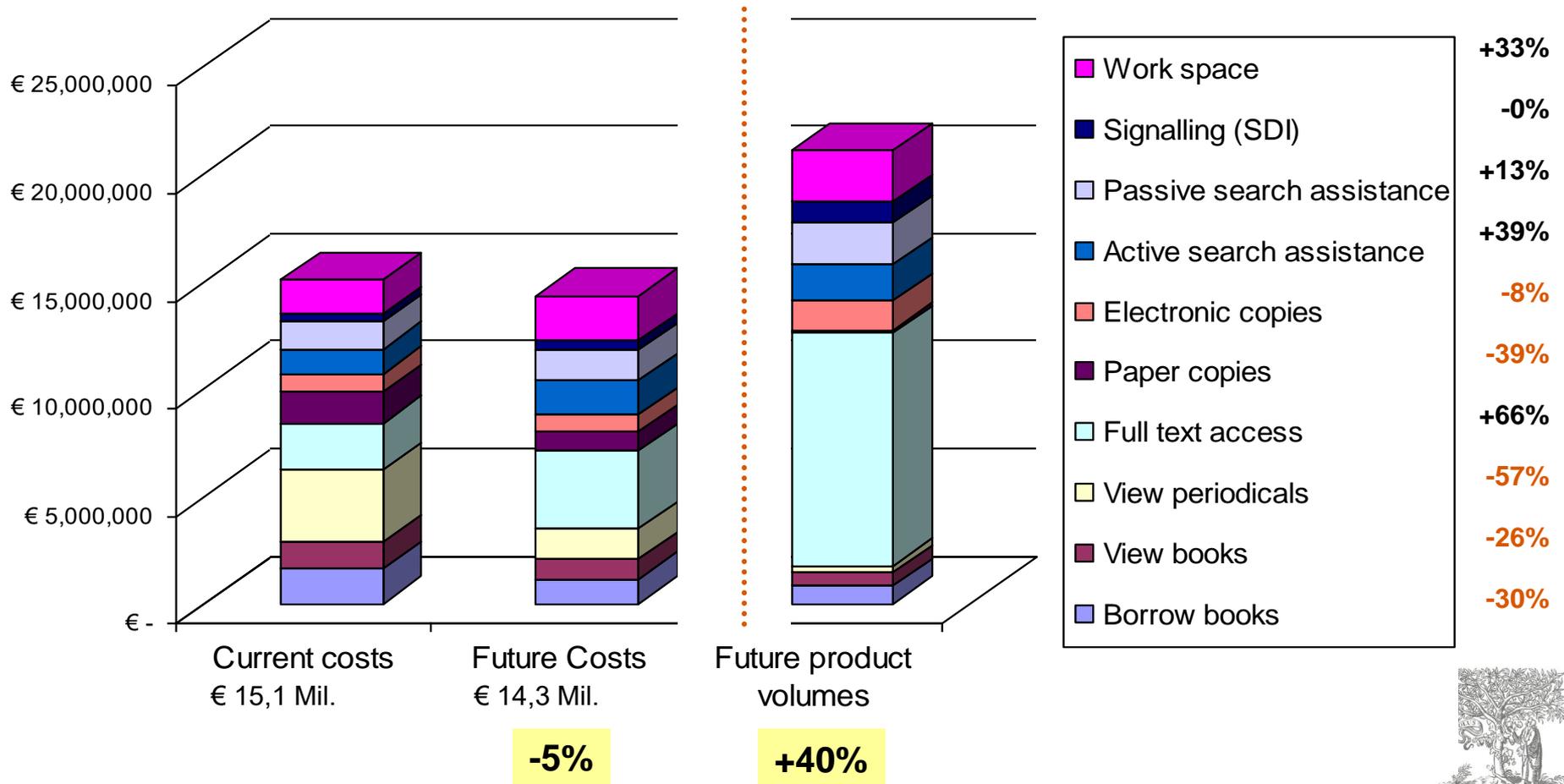
Print To Electronic - Activity Based Costing (ABC)



Future situation = bottom-up approach ↑

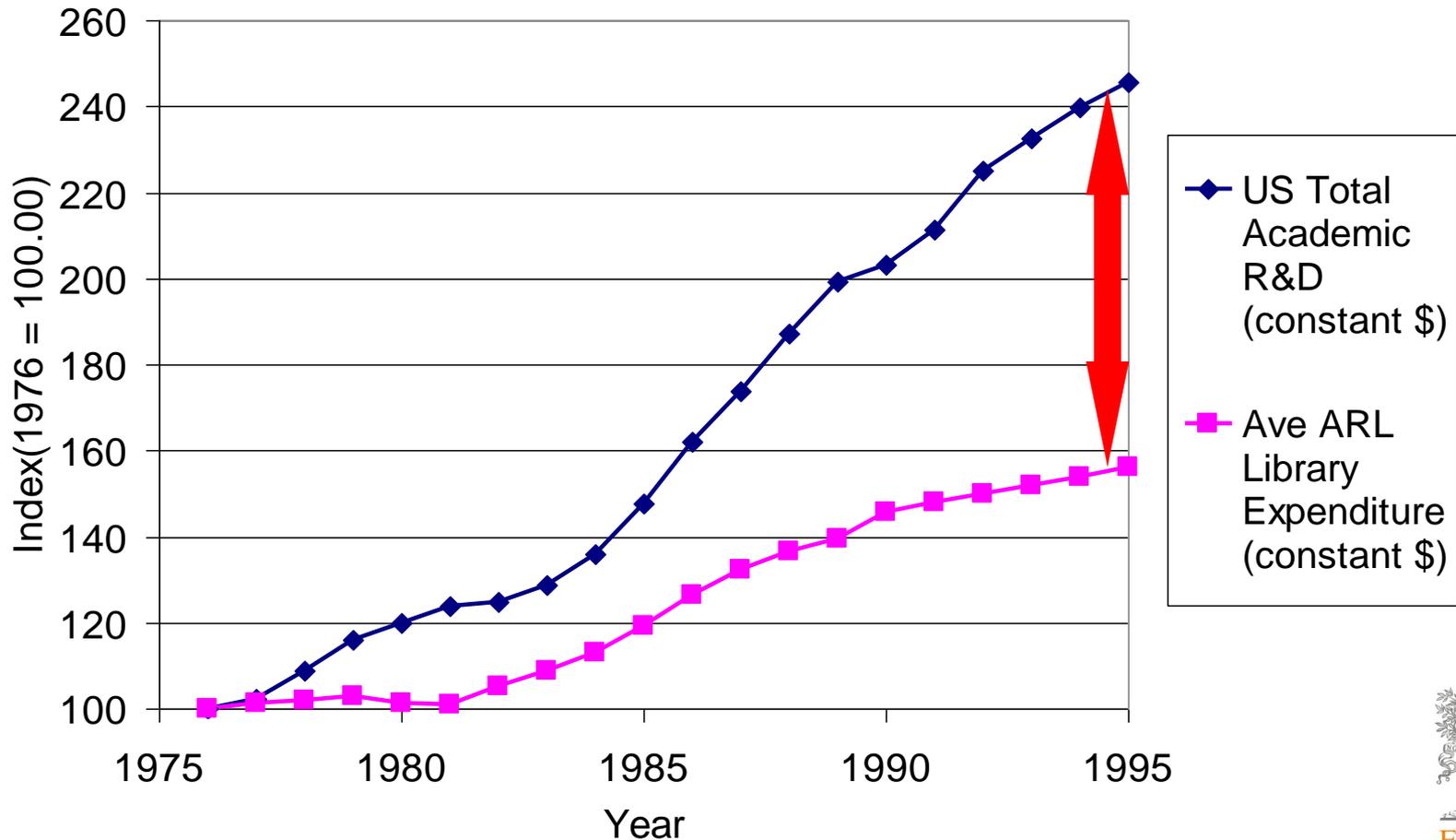
Print To Electronic – Example Utrecht

Total costs per service



Library Funding

Growth in research and library spending 1976-1995



Preliminary conclusions from a pilot academic research study

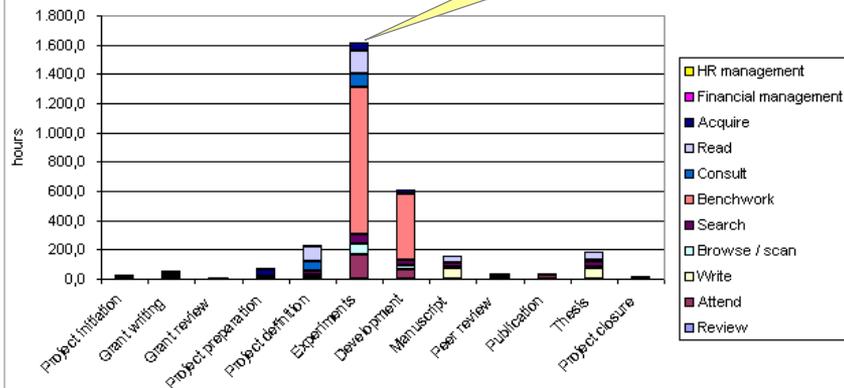
Conclusions

- In the As Is situation UMCU appears to be a digital faculty already:
 - ◆ the bulk of the work is concentrated in the experiments and development phases
 - ◆ content-related activities (browse/scan, search and read) account for 25% of all time spent on a research project (or 31% if writing is taken into account)
 - ◆ time spending on content by participants is almost fully electronic
- Compared to the As Was situation, in the As Is situation:
 - ◆ more time is spent on the preparatory phase and less time is spent on the experiments and development phases of research
 - ◆ slightly less time is spent on content-related activities: researchers now spend less time on browse/scan (-30%) and search (-10%) and read slightly more (+ 5%)
 - ◆ however, searches in abstracting & indexing databases and internet search engines increased by an estimated 200% and the volume of books and P&E journals read increased by an estimated 25%

Participants estimated their time spent per activity per phase for one research project in an ideal complex of projects

Time spending per activity per phase for one project (overall estimation)

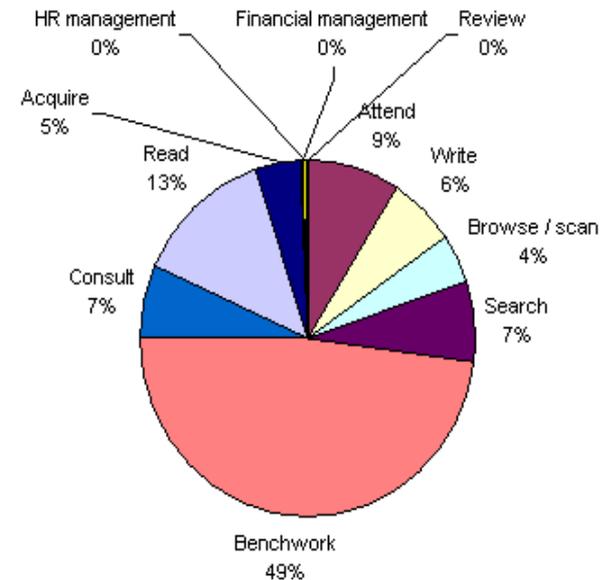
Explanation: all roles together spend 1,620 hours per annum on the experiments phase



Source: UMCU / Elsevier

- The bulk of the work is concentrated in the experiments and development phases
- Project definition, manuscripts and thesis also require considerable effort

Time spending per activity for one project (overall estimation)



Source: UMCU / Elsevier

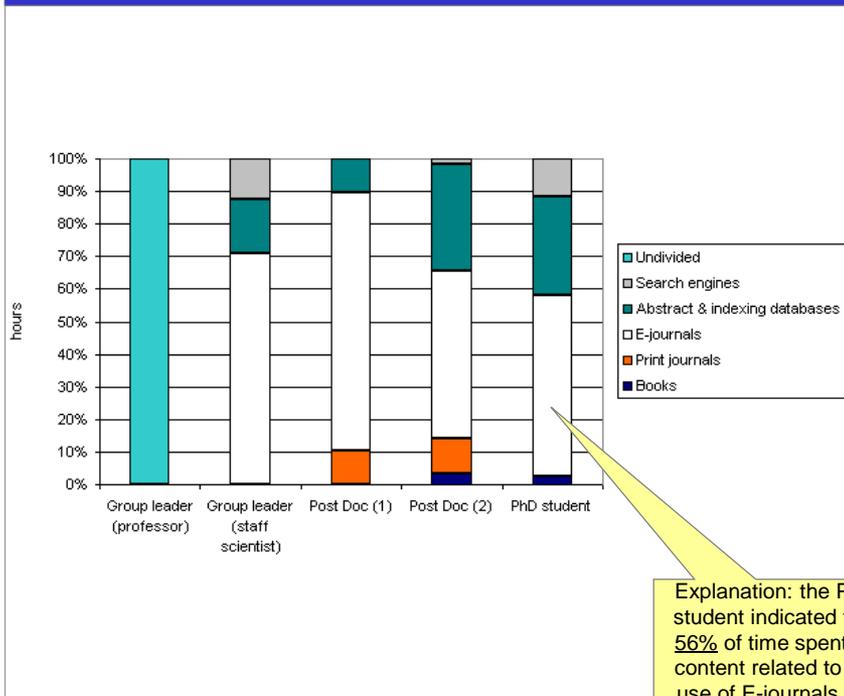
- Benchwork is by far the most time consuming activity
- Content-related activities (browse/scan, search and read) account for 25% of all time spent on a research project. If we take write into account this percentage increases to 31%



ELSEVIER
SCIENCE

Actual time spending on content by participants is almost fully electronic

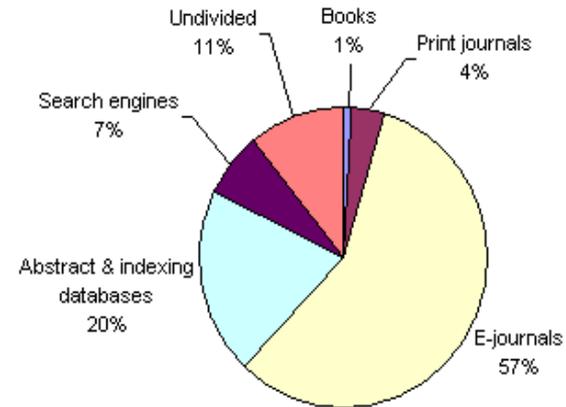
Time spending on content per role



Explanation: the PhD student indicated that 56% of time spent on content related to the use of E-journals (12 hours out of 21)

Source: UMCU / Elsevier

Time spending on content per role per type of content (time writing)

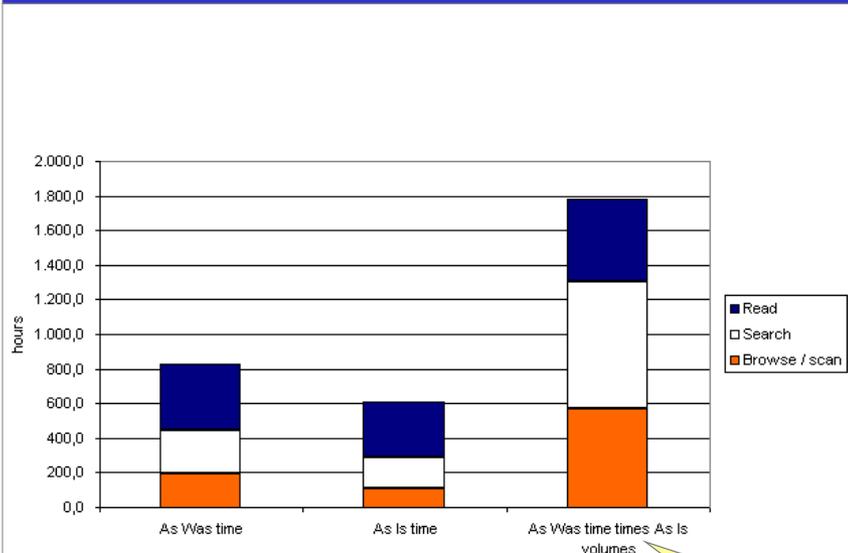


Source: UMCU / Elsevier

- Use of paper-based content (books and print journals) accounts for only 5% of total content use
- The large share of electronic content appears to be mainly due to the advanced stage of this research organisation

Participants estimated how time spent per activity for one research project in an ideal complex of projects changed over the course of some five years

Time spending on content-related activities for one project (overall estimation)



Explanation: increasing volumes at constant time spending per search and book or journal read

Source: UMCU / Elsevier

- Volumes of content increased by 100%
- Time spending on content-related activities decreased by 25%

Key trends

- Evolution of enabling technologies
- Increase in the number of available titles



- Search time being reduced
- More need to read

Time study

Corporate Research Lab (Pharma)

