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The JSTOR African Access Initiative

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Meeting:

137 Serials and Other Continuing Resources

Simultaneous Interpretation:

No

WORLD LIBRARY AND INFORMATION CONGRESS: 73RD IFLA GENERAL CONFERENCE AND COUNCIL

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<http://www.ifla.org/iv/ifla73/index.htm>

Abstract

JSTOR is a not-for-profit organization founded in 1995 whose mission is to create an archive of scholarly journal literature and extend access to that archive as broadly as possible around the world. My comments at the 2007 IFLA meeting regarding our efforts in the developing world, and Africa in particular are in the spirit of executing that mission. JSTOR currently extends access to over 3,500 institutions around the world; nearly 50% of those institutions are outside the United States. Over 470 publishers also participate in JSTOR and provide over 900 journals to the archive for the purposes of their long-term preservation.

As part of JSTOR's mission to create an archive of scholarly literature and extend access to the archive as broadly as possible, JSTOR has taken steps over the last several years to better enable institutions in the developing world to obtain access to the literature contained in the archive. This has been done in three ways: 1) Making all of the content in JSTOR available; 2) partnering with the Foundation community and, 3) by significantly reducing the fees for access, thus lowering the economic barrier to participation.

These efforts have had varying levels of success over the years. We have received generous support from the Foundation community, which has enabled JSTOR access to be extended to Russia, Belarus, and Nigeria (The MacArthur Foundation); India and Sri Lanka (The Ford Foundation); and South Africa and Eastern Europe (The Mellon Foundation.)

Non-grant sponsored institutions also initiated participation from other areas of the developing world, (from countries with a GNI of less than US \$770 per year). Over 100 of these institutions initiated access in 2005 alone.

It remained evident that our continuing efforts were not having the desired effect on extending access to institutions on the continent of Africa. From 2000 through mid-2006, only 42 institutions had begun participating in the archive. Most of them were in South Africa, and most of those institutions were supported by grant funding. On July 1, 2006 JSTOR adopted a plan to waive participation fees for any academic, government, research, or not-for-profit institution on the continent of Africa. This plan affected new participants, as well as institutions that currently participate in JSTOR, and was initiated to fulfill JSTOR's mission of extending access more broadly on the continent.

The "JSTOR African Access Initiative" had an immediate positive effect on the number of institutions able to receive access to the archive by eliminating the economic barrier for access. Since July 1, 2006, 123 additional institutions have initiated participation in the archive (as of 30 May 2007), and total access to JSTOR reached 3.7 million in 2006. More than 1 million journal articles have been printed and 700,000 searches performed from Africa alone, which is evidence that access is being extended more broadly and that scholars are using the archive as well.

Participation and Access in the Developing World

The use of the Internet as a technology for access to scholarly resources is driving a tremendous amount of usage online for virtually every content provider. JSTOR has been no exception to this, and the number of institutions supporting the archive has grown substantially since the launch of JSTOR's first collection at the dawn of the Internet age in 1997 (see Appendix A).

Participation in the archive, both in terms of number of institutions as well as number of total accesses¹ has continued to grow both in the U.S. and around the world (see Appendix B).

Global Fee & Access Structure

JSTOR's efforts to extend access to institutions outside of the United States required JSTOR to develop different fee and access models due to several factors. The archive is currently a mostly English-language archive of literature; the value proposition for non-U.S. libraries to hold an archive of journals they might not otherwise be holding in their collections is different; and because of vast disparities in library and higher education budgets across scores of markets.

As JSTOR's participant base continues to grow and expand internationally, the content in the archive is growing to reflect literature that is published around the world. However, the utility of a mostly English language resource loses some effect in non-English speaking countries, despite the fact that much of the literature in JSTOR is core journals in their fields of discipline.

¹ Total accesses are not simply a measurement of the number of web hits to the archive or a particular article. Total accesses measures actual usage of the archive and is a sum of activities such as number of articles viewed; number of searches performed; articles printed; table of contents viewed, etc.

One of JSTOR’s key value propositions for U.S. (and other) libraries is the ability for libraries to move print-based journal content off of the library shelves in order to allow those institutions to use that space for other purposes. With over 900 titles and 23 million (and growing) pages of journals archived in JSTOR, a library could potentially save more than one mile’s worth of linear shelf space if they were to outsource the access and preservation of these titles to JSTOR (see Appendix D).

Since non-U.S. or non-English language markets do not necessarily hold all, or part, of these same titles, the cost savings realized by their ability to move titles off of their shelves may not be the same as their U.S. counterpart.

All of these factors lessen in impact as institutions from poorer or developing countries consider participation in JSTOR. For them the initial consideration is financial, not in utility. In extreme cases, as we have seen in Africa, there are many other barriers to participation as well, including but not limited to, infrastructure issues.

Because of these factors, JSTOR’s fees and in some cases, access models, are different depending on the country. Using the World Bank’s analysis of countries based on GNI, JSTOR fees are broken out into five different segments, with corresponding discounts provided off of U.S. fees:

<u>% Savings off JSTOR Fees</u>	<u>GNI</u>
20%	>\$9200
35%	\$2980 - \$9199
50%	\$770 - \$2899
65%*	<\$770
100%*	Africa

*Developing Nations category / includes access to entire archive
 Source: www.worldbank.org

JSTOR, through our work with philanthropic organizations, are only a part of the overall solution to solving issues such as bandwidth, electricity reliability, or enhancing technological and library infrastructure. By providing JSTOR access to institutions supported by organizations such as the MacArthur Foundation or the Mellon Foundation, we are leveraging the excellent progress that has been made in these areas by those organizations.

As access in the developing world began to expand after the adoption of our developing nations fee and access model, it became apparent that only eliminating the economic barrier to entry was going to have any significant and lasting effect in Africa.

The African Access Initiative

In early 2006, the JSTOR Board of Trustees considered a proposal to conduct a trial of waiving participation fees for 13 African countries to test the response to the effort

and to see what impact this access would have on JSTOR's resources in terms of staff time dedicated to managing the program. The proposal was met with positive response from the Board, and the proposal was immediately amended to make this an effort that would affect the entire continent, not just the countries outlined in the original proposal. A July 1, 2006 date was chosen as the start date for the initiative, and steps were taken to ensure that the initiative could be launched on time, including a communications plan, amendments to necessary license agreements, and staff education on the availability of the plan.

The terms of the plan are as follows:

- Participation fees waived (for a minimum of 3 years) for any educational institutions and appropriate non-profit organizations on the continent of Africa
- Fees will remain waived for as long as economic conditions in the country or at the institution dictate

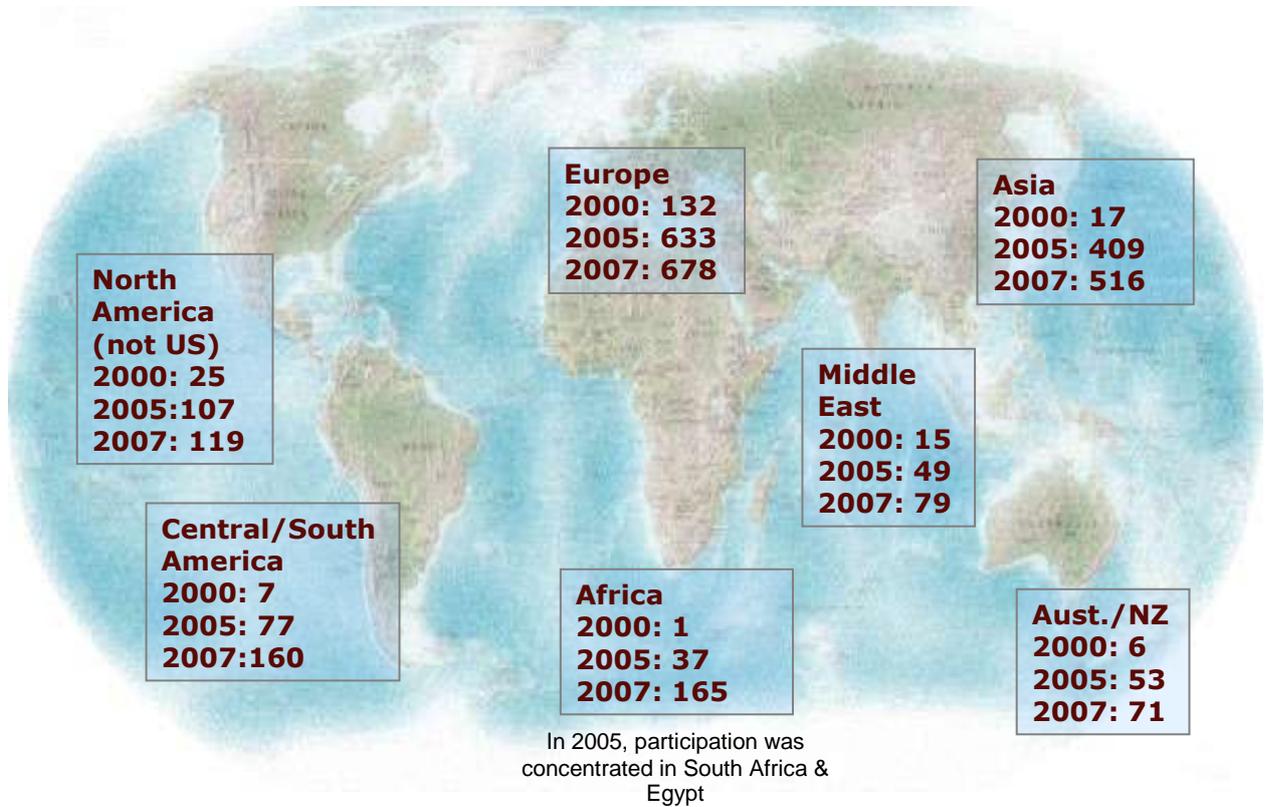
As of 30 May 2007, 165 institutions have begun participating in the archive, up from only 37 institutions at the same period in 2005. The vast majority of these new participants have begun participation since July 1, 2006.

At this time, free access is extended only to institutions on the continent of Africa. We understand that there are many other regions of the world and many institutions that would benefit from a similar policy. We have limited this access plan to Africa in part because barriers to sustainability and access are so broadly similar across this region. The African Access Initiative is latest effort we have taken in the last few years to address issues of affordability, utility, sustainability, and access.

Expected Long Term Outputs

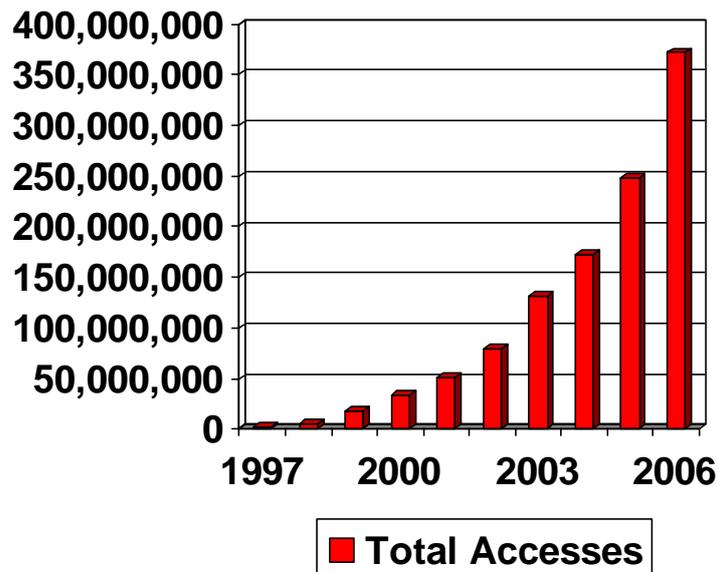
We are hopeful that as the African Access Initiative broadens access across Africa, JSTOR will be regarded as a valuable electronic resource for scholars and researchers and increase the ease with which scholars in Africa can access high quality peer reviewed scholarly journals. That value may come from simply providing more convenient access to core scholarly journals, vis-à-vis web-based access versus paper-based access. It may also come from the fact that much of the journal literature in JSTOR was never available to these institutions, even in paper form, and therefore access to the archive has opened whole new vistas for research and scholarly pursuit. We also hope that access to JSTOR will also stimulate cross disciplinary research and that this will enhance research habits and scholarly practices of researchers and scholars in Africa.

**APPENDIX A
GLOBAL GROWTH OF JSTOR PARTICIPATION
2000 – 2007**

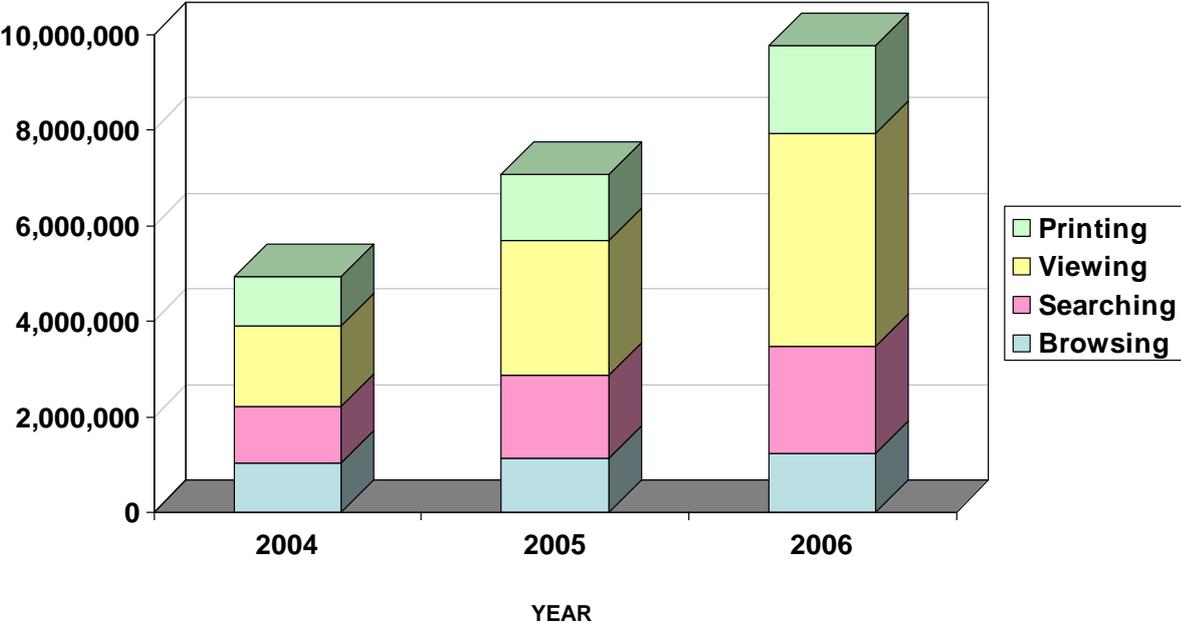


**APPENDIX B
JSTOR TOTAL ACCESSES
1997 – 2006**

Year	Total Accesses
1997	1,614,408
1998	5,913,259
1999	17,311,453
2000	33,301,021
2001	50,279,206
2002	80,082,633
2003	131,510,667
2004	171,969,141
2005	248,692,309
2006	371,796,772



**APPENDIX C
JSTOR TOTAL ACCESSES – DEVELOPING WORLD**



**APPENDIX D
JSTOR SHELF SPACE OVERVIEW**

Collection	Total Pages	Total Linear Feet
Arts & Sciences I	5,749,730	1,409
Arts & Sciences II	3,721,322	912
Arts & Sciences III	3,163,219	775
Arts & Sciences IV	3,659,544	897
Arts & Sciences Complement	2,629,883	645
Biological Science	2,867,619	703
Health & General Sciences	1,944,788	477
Ecology & Botany	1,315,344	322
Business	1,897,832	465
Business II	718,964	176
Language & Literature	1,636,955	401
Mathematics & Statistics	2,464,043	604
Music	651,559	160
TOTAL	23,454,777	5,749