



Document Delivery: Best Practices and Vendor Scorecard – 2012 Update

WHO'S INSIDE

British Library
Copyright Clearance
Center, Inc. (CCC)
Deep Dyve, Inc.
FIZ Karlsruhe
Information Express, Inc.
Infotrieve, Inc.
Linda Hall Library
OCLC Online Computer
Library Center, Inc.
ProQuest LLC
Reprints Desk, Inc.
Research Investment, Inc.
Swets



November 14, 2012



Benchmarks &
Best Practices

Advancing the Business of Information

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Why This Topic?

When content budgets get crunched, information managers cancel subscriptions. When information managers cancel subscriptions, collections grow holes and crucial content becomes inaccessible. That's when info pros turn to document delivery to buy hard-to-get content, paying per document. Information managers make document delivery their backstop, not just a source for exotica. Our analysis finds that information managers prefer a mediated model of document delivery to full-fledged self-serve. In response to client interest, this report also updates the document delivery landscape, last reviewed in our 2008 report. Who are the players and how are they performing? We also look at the industry as a whole.

Methodology

Outsell conducted a short survey in September 2012 to pinpoint information professionals' views on specific document delivery vendor usage and performance. The survey drew 156 respondents, 68% from the corporate sector, 14% from government, 13% from education, and 5% from healthcare. Using the survey's findings, we created a document delivery vendor scorecard and compared ratings with results from a similar survey Outsell conducted in 2008.

We developed the scorecard by asking for satisfaction ratings on a scale of 1 to 5, with 1 "very dissatisfied" and 5 "very satisfied" on the following attributes:

- *Depth and breadth of coverage.* One of the critical elements of a document delivery supplier's service is how comprehensive and deep its reach is across subjects. This attribute measures whether or not the content available from the vendor is what the buyer requires.
- *Fair pricing.* It is typical for buyers to want lower prices. We asked buyers to rate how reasonable (fair) they believe providers' pricing to be.
- *Ease of doing business.* Sales staff turnover, company restructuring or acquisition, customer service, and processes or methods that fit the needs of enterprise buyers are factors in the ease of working with vendors.

We derived an "overall satisfaction" score from an average of the three satisfaction scores: depth and breadth of coverage, fair pricing, and ease of doing business. For calculating averages, we use the mean.

Additionally, we asked respondents to rate document delivery providers on one loyalty attribute, "would recommend," on a scale of 1 to 5.

We conducted interviews with five information professionals from a variety of industries (information technology, publishing, life sciences, and consumer products) about their perspectives on document delivery practices and issues. We also conducted briefings with four

major document delivery services vendors to learn about the evolution of their offerings since 2008. We also used knowledge gleaned from our dialogue with marketplace players and published Outsell research.

Document Delivery: Still a Bedrock Service

“Document delivery is our most important service.”

“Document delivery” has two meanings to information professionals. Foremost, document delivery is a crucial information center service. The information center receives requests for documents – in the form of citations, bibliographies, and hastily scrawled notes – and fulfills those requests quickly and accurately with articles, papers, patents, etc., retrieved from content sources licensed by the center. This is “document delivery” from information center to end-user.

When a search on these content sources retrieves no results, the information professional turns to a document delivery vendor. The document delivery vendor uses its own quite extensive resources to find even the most obscure document, and then transmits it to the information professional. The info pro in turn forwards it to the waiting end-user. The information center pays the document delivery vendor a per-document fee. This is “document delivery” from vendor to information center.

Forces both internal and external to information management (IM) are driving new ways of thinking about both layers of document delivery services:

- *Evolving user preferences and the ubiquity of digital information.* The growing dominance of digital content over print – respondents to Outsell’s 2011 Information Management Benchmark Survey planned to spend 71% of their 2012 content budgets on digital content – is changing document delivery and the expectations and requirements for article supply. Digitization has impacted everything from more traditional concerns like speed and quality to the newer landscape of linking technologies, system integration, mobility, and the challenges of copyright compliance. The ubiquity of easily transmitted digital content has taken document delivery from a high-touch, labor-intensive service to a quick-turnaround exercise. An information manager described this: “PDFs are sent to us [by our document delivery vendor]. We forward them to the end-users. We very rarely receive any paper. Digital content fits the mobility of our workforce. They can get articles from their e-mail inboxes when they are not in the office.” End-users now expect documents in minutes from the information center; information managers expect the same from their document delivery vendors, no matter how obscure the document.

- *IM resource optimization.* IM functions face rising content costs and the pressure to reduce budgets and staffing. Making best use of precious buying power means choosing where to cut subscriptions and fill in the gaps with a document delivery vendor. One information manager illustrated the gap: “45% of document delivery requests are fulfilled internally from the information center’s print collection or online databases, while the remaining 55% go to our document delivery supplier.” Astute information managers analyze document delivery statistics to assist with making subscription decisions. When many articles obtained from the document delivery vendor are published in a single journal, they may even take the opposite tack and subscribe to that journal. Vendors are helping. Reprints Desk’s document delivery service includes a component that analyzes spending and journal usage, plus other metrics, while the Infotrieve service reports granular data that info pros can use to make buying decisions.
- *Changing face of IM.* Many information managers view document delivery as a bedrock service that has to be provided no matter the fiscal circumstances. In response, document delivery vendors have expanded their range of content sources and improved their document delivery infrastructures. Still, the process for making document delivery happen has moved to the back office and out of the limelight of key information center services. IM functions want to be known for creating value, advancing knowledge, and catalyzing discovery, not for supplying articles. Despite these goals, document delivery remains a strong channel to end-users.
- *Copyright compliance.* Information managers are serious about compliance in the face of multiplying channels for digital content. They view document delivery vendors as vital partners in compliance management, expect them to obtain permissions for documents when necessary, or, preferably, by only supplying documents that already fall under the Copyright Clearance Center licenses held by the information centers. Farther down the pipeline, they also view the document delivery services provided to end-users as opportunities to educate end-users about copyright compliance. Document delivery service is critical to compliance in the enterprise.

Models and Best Practices in Document Delivery

We talked with five information managers about their internal processes for document delivery. Outsell has identified four models for supplying documents to end-users, but today we find only two in common use. We also find a general reluctance to embrace the self-serve model.

Self-Serve

In this model, document delivery runs on its own, with no IM intermediation at all, largely driven by the notion that document delivery is a commodity service. In 2008, self-serve seemed an



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up-and-coming model. In 2012, information managers expressed dissatisfaction with self-serve. Information managers are concerned that end-users, when buying articles on their own, will ignore copyright restrictions written in the fine print, and haphazardly redistribute and archive PDFs. An information manager found, during an experiment with self-serve, copyright violations popping up everywhere. Frequent calls were made to the Copyright Clearance Center to negotiate the appropriate rights.

Information managers also are concerned about cost control – they have to be. But, with self-serve, end-users buy documents from the most convenient sources, which are not always the most cost-effective. With many isolated purchases from many scattered sources, the relationship that grows with repeated purchases from a single source is not established. Information managers cannot harness buyer/provider relationships and leverage buying power for cost control.

Other obstacles to self-serve are difficult or incorrect citations; users' inexperience with searching, locating, and ordering documents from so many content sources; longer turnarounds; and complexities of payment from users' desktops. Centralization of buying procedures in the IM function means convenience for end-users. As an information manager observed, "Users are offered so much on their desktops, but they still come to us."

*"Users are not savvy. You can only push so much to the client's desk.
People are swamped with their regular tasks."*

Even so, document delivery vendors – allured by the possibilities of self-serve – are rolling out new technologies and products for self-serve document delivery; Infotrieve's Mobile Library is a good example. From the start of development in 2006, Mobile Library was optimized for self-serve document delivery without any mediation by an information manager. Reprints Desk's integrated document delivery platform, with automatic checking of open access, is also targeted at self-serve.

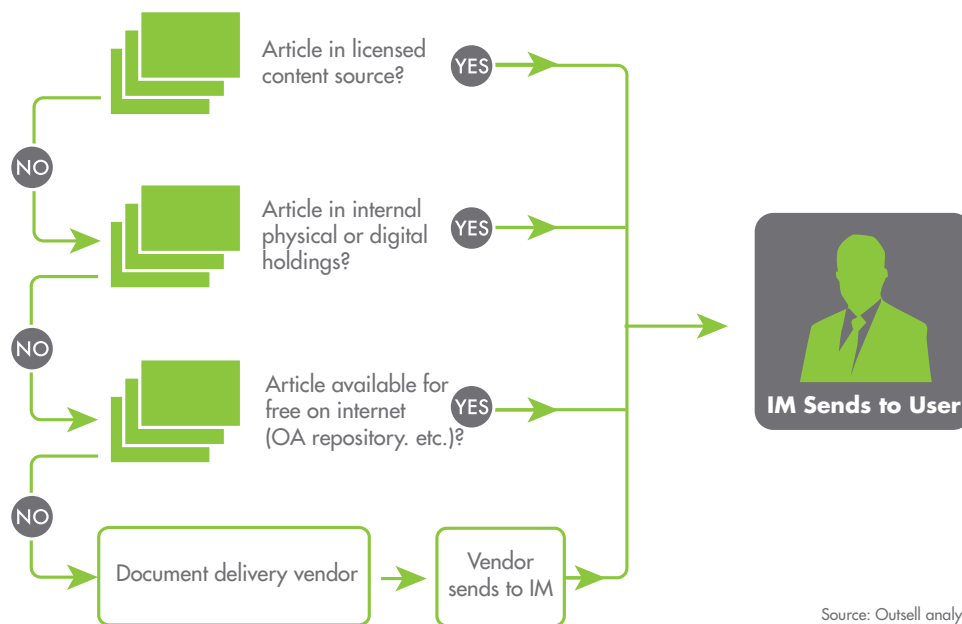
Self-Serve + Limited Mediation

In this model, the enterprise information center mediates orders that cannot be filled from licensed e-journal collections via a link resolver. When an end-user clicks on a link, the link resolver generates an e-mail to the document delivery professional in the information center. The info pro then requests the document from the document delivery vendor. We spoke to an information manager using this model. The information manager supplements this process with a search of an internal document repository. The repository stores articles, purchased from the document delivery vendor, on the enterprise's products or other important topics. This way, valuable articles need only be purchased once and can be retrieved quickly. The repository – and the related copyright compliance – is jointly managed by the information center and the document delivery vendor.

Mediation + Limited Self-Serve

Information managers prefer the mediated document delivery model, with limited self-serve only when absolutely necessary. In this model, there is not a direct connection between the end-user and the document delivery vendor. Mediation consists of verification of the citation information, a check on whether the document can be delivered using licensed content sources, print archives, or open access sources, and, when not, procurement of the document from one or more document delivery vendors, as shown in Figure 1. When an article exists only in an information center's print archives, typically it is scanned and converted to a PDF file, as long as this procedure complies with the center's Copyright Clearance Center license.

Figure 1. Document Delivery Mediation



In this model, the info pro relieves an end-user from the burden of searching and fulfillment, the burden that the self-serve model hands back to the end-user. For example, information managers get e-mails with long bibliographies. The document delivery professional has the responsibility of taking this list, checking it against the library's internal holdings and licensed databases, and then filing requests with the document delivery vendors for those articles that fall between the cracks. These bibliographies and article requests often aren't pretty – one information manager noted that 50% of citations were incomplete or inaccurate. The self-serve model moves this burden back to the end-users, but information managers observe that end-users do not have time to search on their own, or the expertise to best locate the document.

"The information professional knows the best places to get documents. Our customers would not know to check in-house resources before buying something."

With mediated document delivery, information managers gain some cost control. Using their skills, they can negotiate better fees for a document, leveraging the buying power that comes with the relationship with the document delivery vendor. They search other sources or go directly to a publisher when a better price can be had, a common tactic with dissertations and patents.

Information managers also understand the impact of copyright compliance on costs. A Copyright Clearance Center license can support photocopying or scanning articles held only in print by the information center. When an end-user wants a document in digital form, this may be cheaper than buying a digital version from a document delivery vendor. A license may also support making a limited number of copies of a digital document for distribution, rather than buying four copies from a document delivery vendor. End-users often do not know the parameters of copyright. This also comes into play when someone wants to transmit a document outside the enterprise. The information manager knows to pay the required royalties under the copyright license.

Even with this model, information managers like to have the option to “turn on” limited self-serve on weekends and holidays when end-users are working, but the information center is unstaffed. Information managers like document delivery vendors with the flexibility to support this quick, temporary switch. Information centers with global locations have part-time document delivery specialists who provide services for different time zones, so that document delivery never goes dark.

On-Site Outsourced

In this model, IM brings in an outsource partner to manage document delivery on site. While this encompasses mediation, the work is offloaded to the third-party provider, thereby releasing IM staff for other work. Document delivery specialists from the third-party provider bring the expertise to procure documents cost-effectively.

Document delivery vendor Infotrieve offers this model, and, in fact, can handle on-site outsourcing of the entire enterprise information center function, with document delivery a piece of this.

Document Delivery Challenges and Issues

“The process of document delivery is unbelievably efficient. It takes less than one hour to send a request and get an article. That is very efficient.”

For information managers, document delivery – from document delivery vendor to information center to end-user – seems to work well. Digital content prevails, the transaction from vendor to information center to end-user more often is entirely electronic, and turnarounds can be almost instantaneous. However, pain points still exist:

- Staffing the document delivery function. The IM function has, at most, a single, expert document procurement professional, but some centers cannot afford a full-time employee whose sole duty is document delivery and some could use more than one. Request volume is high, with no signs of slackening. As one information manager said, “We no longer have a dedicated document delivery person – those days are over!”
- Lack of transparency of document delivery vendors. Strong relationships with document delivery vendors and clear pricing are valued by info pros, but both can be elusive. One information manager lamented, “I haven’t heard from our vendor for almost 18 months: no contact whatsoever aside from sales and marketing e-mails. And invoices.” Pricing surprises are an issue, too, and info pros feel that vendors do not explain clearly the pricing variations among documents. As a result, information managers are signing more multi-year contracts with vendors. These contracts “lock” arrangements and pricing, and prevent painful surprises for a time.
- Integrating open access content. Information managers do not have best practices yet for integrating free open access content into their internal document delivery processes. A free open access version of an article, even in preprint, is a cost-effective alternative to the published version in a journal. Yet locating this version takes time. Open access content is being integrated into discovery services, link resolvers, and the platforms of document delivery vendors, but faster progress is needed. To info pros, document delivery vendors are trying, but not quite there. One information manager said, “Our document delivery provider maintains a limited open access content directory, but it contains only junk. They won’t conduct a simple internet search for free open access content.” With Outsell’s analysis showing that a transition of a significant part of STM publishing to open access models seems inevitable, this is an area requiring rapid evolution.
- Archives of purchased documents. Information managers rarely archive articles, purchased from a document delivery vendor, for future reuse. Information managers are concerned that internal archives or databases violate copyright, and generally avoid the practice. Instead, upon receipt of a document in PDF form from a document deliver vendor, the PDF is e-mailed to the end-user. After transmission, it is deleted immediately, or stored temporarily

on a hard drive in the information center as a safety backup. If an end-user accidentally deletes the document or has computer problems, the information center can deliver a replacement without spending money on a second purchase. A document delivery vendor can help with this. The vendor can work with the information manager on internal archive creation and procedures to ensure that document archiving complies with usage rights under the center's Copyright Clearance Center license.

- Copyright compliance. Information managers are dedicated to strict compliance with copyright requirements. They maintain annual copyright licenses with the Copyright Clearance Center, and pay any additional royalty fees through their document delivery suppliers. Most feel that they address internal compliance so that users are taught about what they can and can't do with the documents they receive, but also feel that internal compliance is more difficult with digital documents proliferating in the enterprise. They appreciate document delivery vendors that provide strong digital rights management (DRM) technology with their digital documents. At the same time, they tire of end-users' complaints about those frustrating restrictions. Document delivery vendors could approach publishers about the easing of DRM restrictions.

Document Delivery Vendor Competitive Landscape

Infotrieve, Reprints Desk, British Library Document Supply Service, Linda Hall Library – these are familiar figures in the document delivery vendor landscape, names well-known to information professionals globally. A “long tail” of smaller, niche suppliers extends out from the big players.

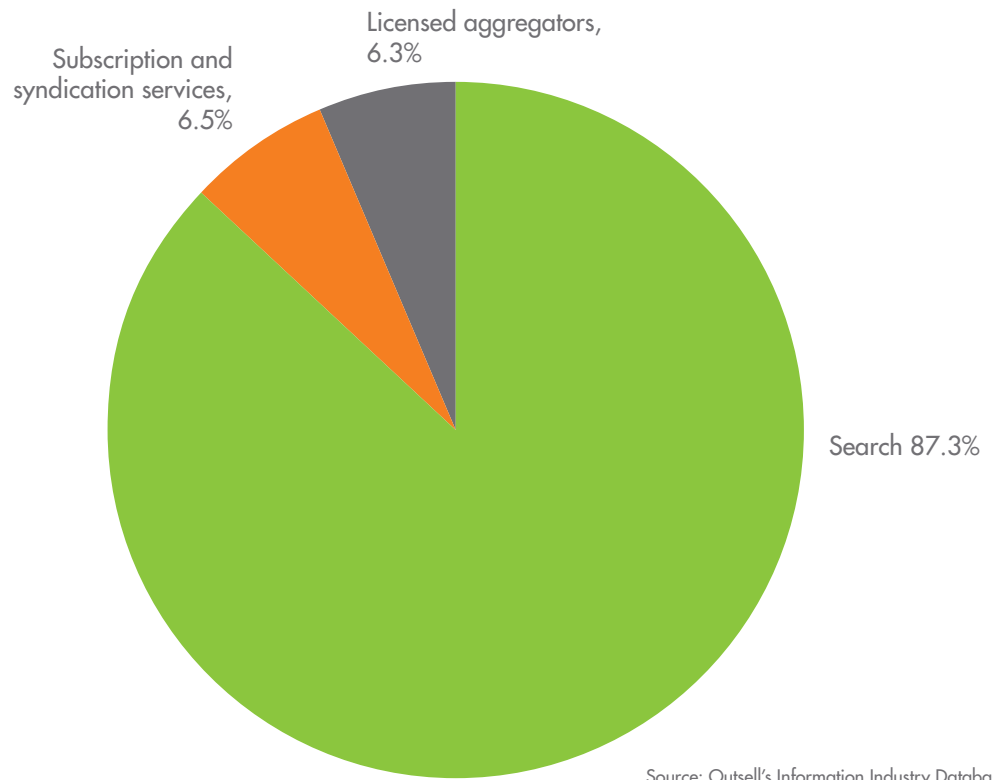
Market Size and Share

In Outsell's analysis, document delivery vendors are part of the subscription and syndication services subsegment of the information industry's Search, Aggregation & Syndication (SAS) segment.

In this subsegment, a diverse collection of companies – whose activities range from managing enterprise subscriptions to delivering advertising-supported content – provides a broad range of services that are centered on the common themes of providing access to and usage rights for content. These services typically fall into three categories: management of subscriptions and content licenses, document delivery, and rights management or syndication services.

In Outsell's analysis, the 2011 market size of the subscription and syndication services subsegment was \$4.12 billion, a small part of the \$63.4 billion SAS segment, as shown in Figure 2. Document delivery, in its pure form, is a very small piece of that subsegment.

Figure 2. SAS Subsegment Market Share, 2011



Source: Outsell's Information Industry Database

Table 1 shows the top twelve players ranked by total revenues in 2010 and 2011. Revenues are significantly smaller for all suppliers below the top four. Information Express and The Research Investment lead the “long tail” of small suppliers.

Table 1. Top Dozen Document Delivery Vendors by Revenue, 2010-2011

Company Name	2010 Total Revenue (\$US Millions)	2011 Total Revenue (\$US Millions)	Total Revenue % Change from 2010
Infotrieve	43.0	43.4	0.9%
British Library ¹	30.0 ²	28.0 ²	-6.6%
Reprints Desk	22.0	22.3	1.4%
Linda Hall Library	22.0	22.2	0.9%
Information Express, Inc.	7.9	7.9	0.0%
Research Investment, Inc.	4.1	4.3	4.9%
Document Engineering Co., Inc. (DECO)	3.3	3.3	0.0%
Access Information Services, Inc.	<5.0*	<5.0*	NA
Document Center, Inc.	<5.0*	<5.0*	NA
InFocus Research Services	<5.0*	<5.0*	NA
subito e.V.	<5.0*	<5.0*	NA
The Chinese Source	<5.0*	<5.0*	NA
Subtotal	144.8	143.9	1.5%

Note: ¹ = Fiscal year 2010-11, 2011-12

² = Total revenue from British Library priced services

* indicates estimated midpoint of 2.5

Source: Outsell Information Industry Database

Two prominent suppliers from Outsell’s 2008 overview of document delivery, CISTI and TDI Library Services, are not included this year, as Infotrieve and Reprints Desk looked outside for expansion:

- In 2009, Infotrieve took over the global document delivery activities of CISTI. CISTI’s roots as a national content repository for Canada’s National Research Council had become obfuscated by its document delivery business. As such, it made the strategic decision to exit the business, and looked for a strong partner to perform the task, one also in the business of making money. Infotrieve also assumed Nerac’s document delivery business in 2010.
- In late 2010, Reprints Desk acquired the document delivery business of TDI Library Services. Reprints Desk also acquired the customer lists of Research Associates, PinPoint Documents, and Research Solutions.

Companies at a Glance

Across the landscape of document delivery vendors, we distinguish between niche providers (depending primarily upon their own collections for document supply) and full-service providers (using a broad array of sources with a goal of filling any request), as shown in Figure 3. However, the distinction between these categories continues to blur as many traditionally niche providers now extend their reach through partnerships with other institutional collections. Full-service providers are expanding their horizons, too, providing turnkey services and fully outsourced arrangements that offer a complete document delivery solution.

Figure 3. Document Delivery Vendors

Full-Service Providers National and Local	Niche Providers National and Local
British Library Infotrieve Reprints Desk Information Express, Inc. The Research Investment, Inc. Access/Information, Inc. AICSERVICES ArtRieve Docutrieval Information Services GK Documents Wisconsin TechSearch FIZ AutoDoc	National and Local Linda Hall Library NTIS US National Library of Medicine Boalt Express InfoNOW InfoQuest (Auburn University) Michigan Information Transfer Source MIT Libraries Document Services NYAM Library CRS Penco Information Retrieval
Non-US	Legal and Financial
INIST Libraries Australia DD OriProbe Information Services Subito The Chinese Source	Bloomberg BNA LexisNexis CourtLink Document Retrieval Perfect Information US Document Retrieval Service
	Technical Info, Standards, and IP Specialists
	AGI GeoRef ASM International IEEE IHS, IOM3 Landon IP OneMine OnePetro Petroleum Abstracts DDS

The prevalence of digital content – both born-digital and digitized – has driven these developments. With so much content available digitally, owning a specialized, exemplary print collection or physical proximity to excellent research libraries is no longer necessary to supply documents. If a company can license a database of digital content, it can use that database as a source for a document delivery service. This means that full-service providers are becoming hubs of extraordinary amounts of digital content and with their content discovery layers and copyright clearance services are now, in Outsell's analysis, appearing more and more like licensed aggregation providers. Also, they are adding sophisticated technology to their service.

Key Suppliers' Products and Packaging

Respondents to Outsell's 2012 Document Delivery Survey depend on a mix of vendors, using two on average, and sometimes many more. Both niche and full-service suppliers rate high on respondents' lists, offering an array of approaches, coverages, and services.

When information managers were asked "Which document delivery vendors do you currently use?" in Outsell's 2012 Document Delivery Survey, the full-service providers most mentioned were Infotrieve, Reprints Desk, and the British Library. All three are well known for finding hard-to-get documents, especially in scientific, technical, and medical (STM) fields; returning them quickly; and ensuring copyright compliance. The most mentioned niche provider was Linda Hall Library, which fulfills requests from its renowned scientific literature collection.

Table 2. Key Service Models and Attributes of Four Popular Document Delivery Vendors

SUBJECT COVERAGE	
British Library Document Supply Service (BLDSS)	Collects content in all subject areas and all languages, with special focus on STM
Infotrieve	Scientific, technical, and medical
Linda Hall Library	Science, technology, and engineering
Reprints Desk	All subjects with specialization in scientific, technical, and medical content

INFORMATION TYPES

British Library Document Supply Service (BLDSS)	Scholarly journals, conference proceedings, books, patents, grey literature (government and federal publications), technical reports, theses and dissertations, newspapers, and musical scores
Infotrieve	Articles, e-books, standards, conference proceedings, patent information, conference posters, scientific protocols
Linda Hall Library	Scholarly journals, conference proceedings, government documents, historical documents, foreign language journals, monographs, conference proceedings, indexes and abstracts, technical reports, engineering standards and specifications, patents, and technical meeting papers from engineering societies
Reprints Desk	Journal articles, book chapters, papers from conference proceedings, technical reports, dissertations, government reports

SOURCES

British Library Document Supply Service (BLDSS)	Full-service provider from own holdings and collections of other UK libraries, commercial partners, and overseas libraries
Infotrieve	Full-service provider: Infotrieve has partnerships with 140+ leading STM publishers, including Elsevier, AMA, ASTD, ACM, BioMed Central, Cambridge University Press, Harvard Business School, Institute of Physics, National Academy of Sciences, Nature Publishing Group, Oxford University Press, SAGE Publications, Springer-Verlag, Taylor & Francis, Wiley-Blackwell, World Health Organization, and others
Linda Hall Library	Niche provider: Linda Hall Library fills requests from its print collection, but it can provide documents not in collection.
Reprints Desk	Full-service provider: Reprints Desk has partnership agreements with 100 STM publishers, including AACR, BMJ Group, Elsevier, IEEE, Informa, Nature Publishing Group, Springer, American Chemical Society, and Wiley to deliver PDFs of single articles from their journals. Reprints Desk can deliver content from any publisher. Pilot program underway for delivering a managed publisher token service.

ADMINISTRATION AND USAGE REPORTING

British Library Document Supply Service (BLDSS)	Customer information manager can check order status via the web or receive status updates by e-mail; information manager can mediate end-users' accounts
Infotrieve	Information manager can monitor orders and run reports, including customized reports Reporting provides granular data for use in content buying decisions
Linda Hall Library	None
Reprints Desk	Information managers have tools for spending management and administration plus customer support, including: real-time order tracking, spending, journal usage, linkouts orders, registered administrators and users, turnaround reports, customer service inquiries, customer support response resolutions, and end-user customer satisfaction

DELIVERY METHOD

British Library Document Supply Service (BLDSS)	<ul style="list-style-type: none"> • Secure electronic delivery (SED) of encrypted PDF files via e-mail • Mail (A5 color booklets) • Ariel 	<ul style="list-style-type: none"> • Unencrypted PDF files can be delivered where licenses permit • 80% of all documents delivered electronically
Infotrieve	Mobile Library via web or mobile/tablet interface; can be mediated or self-serve: <ul style="list-style-type: none"> • Standard version – web-based platform • Plus version – integrates rights management • Full version – integrates client's holdings so that request fulfilled with article already licensed by client if possible before ordering from Infotrieve 	
Linda Hall Library	<ul style="list-style-type: none"> • E-mail • Fax • FedEx 	<ul style="list-style-type: none"> • Odyssey • Ariel
Reprints Desk	<ul style="list-style-type: none"> • Instant access to native PDF articles, or link delivery for both native PDF and "born in print" documents (in color for no extra charge) put through a quality and accuracy control process, including straightening and removal of borders and black dots; PDFs have no plug-ins and articles can also be formatted for regulatory submissions • Link delivery also available for subscription, open access, and print collection content 	

TURNAROUND TIME

British Library Document Supply Service (BLDSS)	<ul style="list-style-type: none"> • Service options are: immediate download, scan on demand, and loan • Turnaround times: <ul style="list-style-type: none"> • Standard: Two to four working days, but usually within 48 hours • Digital content usually within minutes • Two-hour rush delivery • 24-hour delivery
Infotrieve	75% to 85% of content available electronically in less than five minutes <ul style="list-style-type: none"> • Rush Service: guaranteed next-day service for article orders placed before 4 pm ET, Monday through Friday • Panic Service: guaranteed same-day service for article orders placed before 4 pm ET, Monday through Friday
Linda Hall Library	Properly cited requests fulfilled within 24 to 48 hours
Reprints Desk	<ul style="list-style-type: none"> • "Rush-like" service level only • Most orders fulfilled in minutes

ORDERING AND SOFTWARE INTEGRATION

	Online search and order interface is available via BLDSS	
British Library Document Supply Service (BLDSS)	<p>The BLDSS infrastructure also supports ordering via e-mail, integrated library systems, and application programming interface</p> <p>BLDSS integrated with Google Scholar, PubMed, and Ex Libris' Primo web-scale discovery service</p>	
Infotrieve	<p>Order via Mobile Library:</p> <ul style="list-style-type: none"> • Use search and ordering tools in Mobile Library to find known title and citation • Use search and ordering tools in Mobile Library to find possible articles • Use search within information center's licensed databases, such as Web of Knowledge, or on internet, and order via "Order by Infotrieve" button; has built-in link resolver • Can order with pasted list of up to 50 citations <p>Searches include Infotrieve's digital and print holdings</p> <p>Provides price prior to order, with breakdown of article cost and usage rights cost; will always try to fulfill order from client's holdings when possible; will fulfill from source that works best with client's Copyright Clearance Center license</p>	
Linda Hall Library	<ul style="list-style-type: none"> • Use form on website for corporate clients • Via e-mail to requests@lindahall.org • DOCLINE (US National Library of Medicine) • Fax: 816-926-8785 • Phone: 800-662-1545 • Academic customers can use ILLiad document delivery through OCLC or the RapidILL Consortium of academic libraries (rapidill.org) 	
Reprints Desk	<ul style="list-style-type: none"> • Via reprintsdesk.com • From clients' intranet or order form • By e-mail for single articles or batches of articles, with no surcharge for citation verification or manual order entry • By third-party linkouts, link resolvers, and other third-party systems like QUOSA • Can provide integrations with pre-ordering workflows and systems (e.g., PubMed, EndNote, SciFinder, Ovid), and rights management systems (e.g., Copyright Clearance Center's RightSphere) for real-time access to reuse rights; integration saves time through order form auto-population, auto-checking, and display of available reuse rights 	<ul style="list-style-type: none"> • Granular rights-enabled integration available for matching citations against previously purchased workgroup articles • Article Galaxy platform provides user dashboard buttons for A-Z collections, PubMed searching, and federated Article Search simultaneous searches across databases (IEEE, PubMed, ScienceDirect, HighWire, SpringerLink, Wiley Online Library, PubMed Central, etc.); custom buttons can be added

PRICING AND BUSINESS MODEL

British Library Document Supply Service (BLDSS)	<ul style="list-style-type: none"> • Transactional and contractual • Credit card purchases available; accepts all major credit cards
	Depends on customer needs: transactional or multiyear agreement
Infotrieve	Corporate accounts can include volume discounts and multiple payment options (credit cards, deposit accounts, and invoice accounts)
Linda Hall Library	Transactional only
Reprints Desk	<ul style="list-style-type: none"> • Per transaction service fee plus copyright fee • No platform fee options • Contractual agreements only

PRICE

British Library Document Supply Service (BLDSS)	<p>Typically, BLDSS charges per article, plus copyright fees where appropriate</p> <p>US Standard Service (rates per article, excluding copyright fee):</p> <ul style="list-style-type: none"> • Electronic delivery: \$14.95 • Airmail: \$18.95 • Loan (one item): \$32.15 	<p>US 24-hour guaranteed:</p> <ul style="list-style-type: none"> • Electronic delivery: \$27.00 • Airmail: \$31.00 • Loan (one item): \$43.45 <p>US 2-hour guaranteed:</p> <ul style="list-style-type: none"> • Electronic delivery: \$43.50 • Airmail: \$47.50 <p>Will provide open access if available</p>
Infotrieve	<p>Standard Service Fee when ordering document through Mobile Library:</p> <ul style="list-style-type: none"> • \$15 for a clean citation • \$21 if order requires referencing <p>Delivery fees (per document):</p> <ul style="list-style-type: none"> • First Class mail: \$5 for first document; multiple documents based on weight 	<ul style="list-style-type: none"> • Ariel (TIFF by e-mail): \$0 • Fax: \$1 per page • FedEx: based on service level and weight; typically, \$17 for standard delivery <p>Enhanced services surcharges:</p> <ul style="list-style-type: none"> • Rush: \$11 • Panic: \$22 • Manual order entry: \$4 • FDA-compliant copy: \$10 • Color copy: \$2 per page
Linda Hall Library	<p>Corporate customers pay cost recovery fee per article; fees for academic customers set at lower rate:</p> <ul style="list-style-type: none"> • Academic: \$12.00 • Corporate: \$16.00 • Add 25¢ for each page over 50 pages • Color copies available upon request for an additional \$1.00 per page 	<p>Delivery fees per document:</p> <ul style="list-style-type: none"> • E-mail: no additional charge • Ariel: no additional charge • Fax: no additional charge • Mail: \$3.00 • FedEx 3-day: \$8.00 • FedEx Standard Overnight: \$22.00
Reprints Desk	\$15.00 per document with discounts available based on volume and service configuration	

ANCILLARY CHARGES

British Library Document Supply Service (BLDSS)	<ul style="list-style-type: none"> • Copyright fees, plus VAT where applicable • Service fees for extended search services Find It for Me and Get It for Me (premium services for locating and acquiring documents from third parties when not held by BLDSS)
Infotrieve	Copyright service fee and tax when applicable
Linda Hall Library	<ul style="list-style-type: none"> • Rush service – within six working hours: \$10.00 • Super rush – within three working hours: \$20.00 • Drop everything rush – within one hour: \$100.00 • Copyright fee • Copyright permission acquisition for item not available in Copyright Clearance Center or for publishers that have not made copying agreement with Linda Hall Library: \$50 per hour • Documents from other collections: \$20 plus copyright and fees from lending library
Reprints Desk	<ul style="list-style-type: none"> • Copyright fees • No additional fees for rush, clean, or color copies, nor for royalty markups from publisher list prices, holdings loads, account configuration, data entry, citation verification, reporting statistics, or third-party integration

COPYRIGHT AND REDISTRIBUTION POLICY

British Library Document Supply Service (BLDSS)	<p>Additional charges for copyright. No mark-up. BLDSS does not authorize redistribution of articles. Licensed Reprints service available for multiple article copies.</p> <p>Copyright fees are set by publishers and vary; average fee is \$27.00</p>
Infotrieve	<p>Copies and delivers document only when rights holder has granted express permission through direct agreement with Infotrieve; where Infotrieve does not have an agreement with a publisher, copyright permission may be obtained through a reproduction rights organization; where copyright permission is not available through a reproduction rights organization, Infotrieve will contact the publisher directly to secure authorization to copy and deliver a document. In the event Infotrieve cannot obtain copyright permission, the customer is notified and the document is not delivered.</p> <p>Infotrieve does not authorize redistribution of articles</p>
Linda Hall Library	<p>Additional charges for copyright</p> <p>Copyright fees determined by rights holder</p>
Reprints Desk	<p>Reprints Desk provides multiple account configuration options for copyright-compliant article ordering and reuse, both for internal sharing (e.g., research) and external distribution (e.g., sales, marketing, medical affairs)</p>

COLLABORATION

British Library Document Supply Service (BLDSS)	N/A
Infotrieve	Personal and Shared Library Suite add-on to Mobile Library; user has own library of purchased documents; users can add own content. Can search within personal collection; can annotate, rate, and share documents. A user can click on a document in Shared Library to see all annotations.
Linda Hall Library	N/A
Reprints Desk	<p>BiblioGo – STM document management solution, available in free and paid versions with:</p> <ul style="list-style-type: none">• Reference management with auto-assisted curation• Aggregated alerting and intelligence monitoring• Collaborative writing for publications• Personal and workgroup document collections• Fast document delivery and reprints ordering• Compliant external article distribution• Discovery via full-text search

IN OUTSELL'S OPINION

British Library Document Supply Service (BLDSS)	<p>Since 2008, the British Library repositioned itself from a niche-based provider to a full-service provider with access to a broad range of content and a new ordering and management platform released in August, 2012. It now goes beyond its own collections, and obtains documents from other UK libraries' holdings, commercial partners, and overseas libraries. It has worked hard to aid discovery. Its holdings were added to the index of Ex Libris' Primo web-scale discovery service. An application programming interface is being developed that will permit seamless document delivery requests from integrated library systems, and mobile access is being investigated. The British Library also began stressing digital delivery via secure electronic delivery, and, to help information managers cope with DRM restrictions, began working with publishers on fulfillment with unencrypted digital documents. As digital content has grown to be a larger part of its business, the British Library has made its pricing more competitive. Users like the British Library's fast turnaround, good customer service, and strong DRM. The British Library has evolved to keep up with Infotrieve and Reprints Desk.</p>
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IN OUTSELL'S OPINION (continued)

Infotrieve

After an expansion of its product line into other markets, in 2006 a new management team at Infotrieve decided to refocus its product line on its core document delivery business. The team, realizing the importance of supporting document delivery with technology, began work on Infotrieve's flagship product, Mobile Library. Mobile Library is a web-based or mobile channel for document ordering and retrieval that can support mediated and self-serve models. Mobile Library can be integrated with an information center's holdings, so that resources already licensed by the information center are checked first. Mobile Library also has collaboration functionality, added due to input from Infotrieve's clients. In fact, Mobile Library can be customized and configured in many ways, including its look and feel. Information managers gain power to brand what was once a very "vanilla" service. With input from customers and an advisory group, Infotrieve updates Mobile Library four times a year. Users report that Infotrieve is reliable with a fast turnaround and good coverage across time zones, and offers a strong variety of delivery options. Infotrieve is an established full-service provider and, with Mobile Library, is adding sophisticated functionality with a powerful, and popular, interface to traditional document delivery.

Linda Hall Library

Linda Hall Library is comfortable being a niche provider. It will continue basing its service on its unique print repository and be a supplier of print articles to fill in holes in digital collections or answer needs for rare content, such as scientific articles from former Soviet bloc countries. Its expertise is in fulfillment from the "long tail" of scientific content from small publishers. This content is not yet digitized nor in the public domain. Linda Hall Library is known for fast turnaround and comparatively low prices, but users recognize that it is not a source for "everything."

Reprints Desk

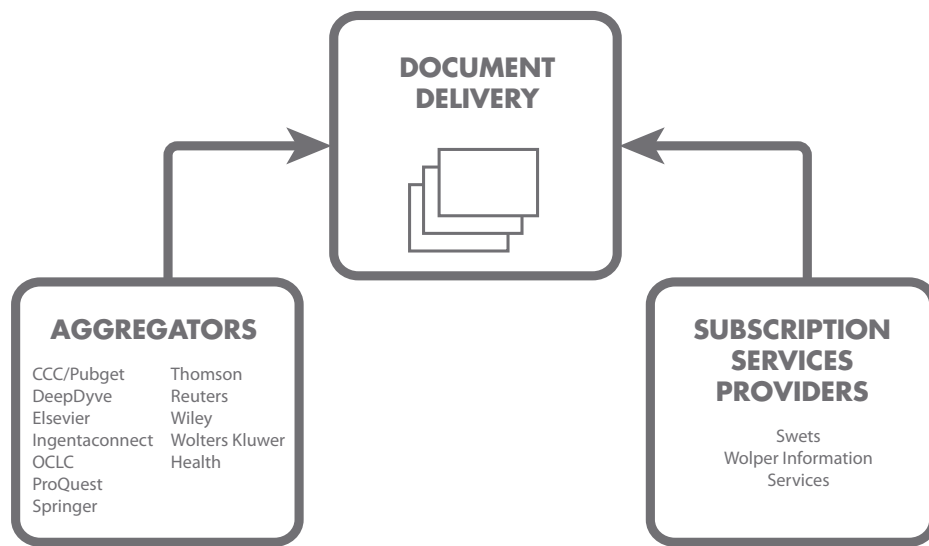
Reprints Desk, founded in 2006, is a relative newcomer, but is enhancing document delivery with technology. Reprints Desk's document delivery platform – its channel for delivering documents – is designed for ease of use, ideal for the self-serve model. The platform is also modular, customizable, and adaptable to different information environments. While it can be accessed on Reprints Desk's website, the platform can be placed within a corporate intranet or integrated with an application. Reprints Desk positions itself as a content problem solver, not just a document delivery vendor. Its main customers are research-intensive organizations, such as biotech and pharmaceutical companies. Users like Reprints Desk's strong relationships with Copyright Clearance Center and with digital content providers; responsive customer service; fast turnaround; reliability; and lack of rush fees. Reprints Desk has penetrated the market since it opened up in 2006, and its reputation for working closely with its customers has won it many fans.

Source: Outsell analysis

Emerging Competitors from Other Worlds

The complexities of digital content distribution create new opportunities for non-document delivery vendors in the subscription and syndication services subsegment, and lead to entry of new competitors from the licensed content aggregators subsegment, as shown in Figure 4. Old lines between divergent companies are blurring rapidly as they all push for a greater role in all facets of distribution, i.e., enabling publishers and information professionals to monitor and track content from discovery to purchase and then ultimately consumption in the enterprise. Subscription services firms are moving into document delivery. Licensed aggregation providers like ProQuest and Elsevier are adding elements of discovery, delivery, and clearance to the core.

Figure 4. New Competitors in the Distribution of Business Information



Source: Outsell analysis

As one vendor told us, these emerging competitors “pick off the cream of content.” Instead of detectives doggedly tracking down obscure documents – how traditional document delivery got its start – they leverage relationships with digital content publishers established in the normal course of business. This way, they provide the “cream” of digital content on pay-as-you-go, pay-per-document terms, when the enterprise information center cannot afford long-term subscriptions:

- *Subscription services.* These companies manage subscriptions and content licenses for information centers. Subscription services firms are embedding a la cart electronic delivery that puts them in the document delivery realm. Swets’ Document Delivery Service offers copyright clearance, checking of resources to which the information center already subscribes prior to document ordering, and supports a self-serve model.

- *Licensed content aggregators.* Pay-per-view (PPV) access to articles on aggregators' platforms is not new. But, in Outsell's analysis, the PPV model is now at the forefront of discussions about what the future for content acquisition could look like as information centers cope with tough budget reductions. Elsevier's ScienceDirect ArticleChoice is a good example of PPV. When a specific journal is not included in an information center's ScienceDirect subscription, a requested article is purchased with PPV. Elsevier promotes ArticleChoice as an alternative to document delivery, and we see information managers signing on. Some are not renewing document delivery vendor contracts, and instead using PPV from multiple content vendors from their portfolios. Other new PPV offerings target end-users who lack access to an information center. For example, ProQuest's Udini, which complements ProQuest's Dialog SourceOne document delivery service for information managers, is aimed straight at the end-user. Its scholarly content is chosen for knowledge workers without information center access. Other new entrants are DeepDyve, an online rental service for professional and scholarly research articles, and Copyright Clearance Center, which acquired Pubget in early 2012. Pubget offers a combination of search technology and instantaneous delivery in a rights-compliant environment, and is targeted at the life sciences industry.

Finally, there is OCLC's interlibrary loan, which is reliable and inexpensive. One information manager noted that "the bulk of our articles come through OCLC interlibrary loan," while another always attempts interlibrary loan from the owning library via OCLC before turning to its document delivery vendor. But OCLC is not a dedicated document delivery vendor. Instead, information managers must rely upon lending libraries, which also are not dedicated to the fast turnarounds and accurate fulfillment of established document delivery vendors. If an information center is an OCLC member, it may consider using OCLC for document delivery when rapid turnaround is not crucial.

Document Delivery Vendor Scorecard

In our analysis, information professionals are pleased with their document delivery vendors, as shown in the positive scores for all vendors in the scorecard. Information managers still conduct periodic due diligence checks, as they do with all their most important vendors. They may even switch vendors, usually in pursuit of lower prices or superior customer service.

In selecting among document delivery suppliers, it's key to match requirements to the broad range of available services and approaches. We believe that recommendations from other buyers are crucial in the selection decision, whether you're looking at a vendor for the first time, considering renewing the relationship, or vetting alternative suppliers. We recommend that information managers quiz buyers about the strength of customer service, even more than scope of collections or technology.

We polled information professionals for feedback on key attributes that drive their satisfaction with document delivery vendors: content depth and breadth, fair cost, and ease of doing business. This last category encompasses technical competence and willingness to work with customers.

Results of Vendor Satisfaction Survey

Among the suppliers that we have previously tracked (all but FIZ AutoDoc, which we begin tracking in this 2012 survey), Reprints Desk and Linda Hall Library both were strong in 2008 and 2012 across all three attributes. Reprints Desk scored the best in all three attributes, continuing its standout performance from 2008.

In depth and breadth of coverage, the British Library stood out, too. FIZ AutoDoc, Infotrieve, and Linda Hall Library also rated highly. For fair pricing, information managers put Linda Hall Library near Reprints Desk. FIZ AutoDoc, Linda Hall Library, and The Research Investment also rated highly for ease of doing business.

Table 3 shows detailed vendor satisfaction ratings. For easy comparison in each category, we present the ratings for depth and breadth of coverage, fair pricing, and ease of doing business, and compare 2012 with 2008. Within each category and for 2008 and 2012, we also highlight the highest performer (shaded in orange). Reflecting the general satisfaction with document delivery vendors, all ratings averaged 3 (neutral) or higher, with most ratings clustering around 4 (satisfied).

Table 3. Document Delivery Vendors: Satisfaction Ratings

Vendor	Depth and Breadth of Coverage		Fair Pricing		Ease of Doing Business	
	2008	2012	2008	2012	2008	2012
British Library Document Supply Service (BLDSS)	4.4	4.4	3.7	3.7	3.8	3.7
FIZ AutoDoc	NA	4.2	NA	3.6	NA	4.3
Information Express – IE Online	3.7	3.8	3.7	3.6	3.8	3.8
Infotrieve – Infotrieve Document Delivery	4.0	4.0	3.5	3.3	3.7	3.4
ingentaconnect	3.5	3.8	3.0	3.4	3.6	3.6
Linda Hall Library – Document Delivery Services	4.4	4.1	4.1	4.0	4.2	4.1
Reprints Desk	4.5	4.5	4.1	4.2	4.5	4.4
The Research Investment, Inc.	3.7	3.9	3.1	3.7	3.6	4.0
Thomson Reuters IP & Science – Document Solution	3.8	3.6	4.0	3.2	3.8	3.4

Scale: 1=very dissatisfied, 2=dissatisfied, 3=neutral, 4=satisfied, 5=very satisfied Bases: 2008=9-83; 2012=8-56 Source: Outsell's 2012 Document Delivery Survey

Using the mean scores from the three satisfaction ratings, we derived an overall satisfaction rating for each vendor, shown in Table 4. The average satisfaction rate is 3.8, down slightly from 3.9 in 2008. Reprints Desk took first place, at more than a half point above average. British Library, FIZ AutoDoc, Linda Hall Library, and The Research Investment, all came in above the average satisfaction rate.

Table 4. Document Delivery Vendors: Overall Satisfaction Scorecard

Vendor	Overall Satisfaction	
	2008	2012
British Library Document Supply Service (BLDSS)	4.0	4.0
FIZ AutoDoc	NA	4.1
Information Express – IE Online	3.7	3.8
Infotrieve – Infotrieve Document Delivery	3.7	3.6
Ingentaconnect	3.4	3.6
Linda Hall Library – Document Delivery Services	4.2	4.1
Reprints Desk	4.4	4.4
The Research Investment, Inc.	3.5	3.9
Thomson Reuters IP & Science – Document Solution	3.9	3.4

Scale: 1=very dissatisfied, 2=dissatisfied, 3=neutral, 4=satisfied, 5=very satisfied

Bases: 2008=9-83; 2012=8-56

Source: Outsell's 2012 Document Delivery Survey

Another component of our scorecard is customer loyalty, a key aspect of which is willingness to recommend the service to other buyers. Information managers put their own reputations on the line when they recommend a service, so this rating category, along with the buyer's intention to renew or continue a service, is the ultimate indicator of how well the service or product works for them. As Table 5 shows, Reprints Desk has the most loyal following, with Linda Hall Library, The Research Investment, and FIZ AutoDoc close behind.

Table 5. Document Delivery Vendors: Loyalty Ratings

Vendor	Would Recommend	
	2008	2012
British Library Document Supply Service (BLDSS)	4.3	4.1
FIZ AutoDoc	NA	4.3
Information Express – IE Online	4.0	3.6
Infotrieve – Infotrieve Document Delivery	3.9	3.6
Ingentaconnect	3.6	3.8
Linda Hall Library – Document Delivery Services	4.6	4.4
Reprints Desk	4.6	4.6
The Research Investment, Inc.	3.7	4.4
Thomson Reuters IP & Science – Document Solution	3.9	3.6

Scale: 1=very dissatisfied, 2=dissatisfied, 3=neutral, 4=satisfied, 5=very satisfied

Bases: 2008=9-83; 2012=8-56

Source: Outsell's 2012 Document Delivery Survey

Imperatives for Information Managers

Document delivery is a core service of the information center. Information managers find today's processes very efficient and, frankly, in need of little improvement. While document delivery vendors inject new and impressive technology into the process, reliability and flexibility are still the most important characteristics, and our research shows that information managers are content with their document delivery vendors. As an info pro stated, "Our supplier is great about correcting mistakes and goes the extra mile to track down odd documents."

Still, there are some recommended actions for information managers:

1. Self-Serve is Not for Everyone
2. Look for Free Open Access Content
3. Take Advantage of the Wide Array of Suppliers
4. Usage Reporting Is Important
5. Vendors Would Like to See This Report

✓ Self-Serve is Not for Everyone

Full-service document delivery vendors are marketing the self-serve model, and are introducing mobile interfaces. For vendors, this opens up a new market of potential customers: enterprises without information centers, freelance researchers, and other professionals – lawyers and doctors – all wanting to access content via pay-per-view. New competitors such as DeepDyve are targeting this opportunity, too. And one day, when all content is digital and all discovery is through a single interface, all document purchases will be simple, self-serve, and conducted via the device of choice. Until then, information managers see a vital role in relieving their end-users of the complexities still inherent in document delivery.

✓ Look for Free Open Access Content

The growth of open access article volume is around 20% annually with publishing volumes dwarfing those of earlier time periods, driven primarily by the demands of research funders, according to Outsell analysis. An information manager can search for documents in open access repositories. Still, ideally document delivery vendors – experts in document location – will search open access as part of their normal workflow, giving their customers this less expensive option.

✓ Take Advantage of the Wide Array of Suppliers

We said it in 2008, but it's still true: there are hundreds of suppliers, plus new entrants from other areas. An information manager's best choice may be a document delivery vendor portfolio – say, a full-service provider, some specialists, some pay-per-view, and OCLC – that fit an information

center's specific needs. This fine-tuning of document delivery provision may reduce document delivery costs.

✓ Usage Reporting Is Important

A document delivery vendor's usage reporting tools are important for controlling costs. The tools should provide an understanding of usage, so that information managers know when opting for a subscription may be cheaper than getting articles through document delivery, or when one document delivery option may be better than another. In addition, information managers should negotiate on pricing. Document delivery is a very competitive area with many strong providers. If one vendor cannot meet your pricing requirements, consult another.

✓ Vendors Would Like to See This Report

This report provides a scorecard and a reality check for document delivery vendors. Overall, our research shows they are doing a good job and have a happy customer base. This scorecard shows areas where they can shine more brightly.

Related Research

More information on the companies analyzed in this report is available to Outsell subscribers at <https://clients.outsellinc.com/vendormarket/?report=1123>

See our additional insight into the information industry, available at http://www.outsellinc.com/information_managers

Reports

[Information Management Trends and Benchmarks 2011](#) (December 15, 2011)

[Search, Aggregation & Syndication: 2011 Market Forecast and Trends Report](#) (November 16, 2011)

[The Business Intelligence Landscape Today: The New Rules of Aggregation](#) (September 12, 2011)

[Infotrieve: A Case Study in Market Alignment and Positioning for Growth](#) (March 16, 2009)

[Document Delivery – Best Practices and Vendor Scorecard](#) (April 10, 2008)

Insights

[Udini Has Potential to Make Magic for ProQuest](#) (May 24, 2012)

[Copyright Clearance Center Acquires Search Startup Pubget](#) (January 19, 2012)

[A Long, Hot Summer for Open Access](#) (October 17, 2011)

[STM Publishing: The Big Deal Goes Crunch?](#) (March 30, 2011)

[Workflow Tools Enhance Analytics for Corporate Content Management](#) (February 16, 2011)

[There's a "Path" for That – Infotrieve's New iPad Offering Redefines the Application Game](#) (September 28, 2010)

[Infotrieve Takes Over CISTI's Document Delivery](#) (October 23, 2009)

Product Reviews

[DeepDyve](#) (April 3, 2012)

[ingentaconnect](#) (January 25, 2012)



Roseanne Spagnuolo
VP & Practice Leader
T. +44 (0)20 7610 9959
rspagnuolo@outsellinc.com

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www.outsellinc.com
info@outsellinc.com

Burlingame, CA. USA
+1 650-342-6060

London, United Kingdom
+44 (0)20 8090 6590

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