Portico

A New Electronic Archiving Service

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Portico's Mission

To preserve scholarly literature published in electronic form

and to ensure that these materials remain available

to future generations of scholars, researchers, and students.

Portico's History

- In 2002, JSTOR initiated a project known as the Electronic-Archiving Initiative, the precursor to Portico.

- The goal was to facilitate the community's transition to reliance upon electronic scholarly journals by developing a technological infrastructure and sustainable archive able to preserve scholarly e-journals.

- Portico was launched in 2005 by JSTOR and Ithaka, with support from The Andrew W. Mellon Foundation.

What Portico Is

- Portico is a not-for-profit organization with a mission and singular focus to provide a permanent archive of electronic scholarly journals.

- Portico is centralized archive that is open to all peer-reviewed journals.

- A community-based, cooperative approach to the digital preservation challenge.

Portico Advisory Committee

- John Ewing, American Mathematical Society

- Kevin Guthrie, Ithaka

- Daniel Greenstein, California Digital Library

- Anne R. Kenney, Cornell University Library

- Clifford Lynch, CNI

- Carol Mandel, New York University

- David M. Pilachowski, Williams College

- Rebecca Simon, University of California Press

- Michael Spinella, JSTOR

- Suzanne E. Thorin, Syracuse University Library

- Mary Waltham, Publishing Consultant

- Craig Van Dyck, John Wiley & Sons, Inc.

Portico's Approach to E-Journal Archiving

- Portico preserves the intellectual content of the journal, including the text, images, and limited functionality such as internal linking. "Look and feel" and publishers' value-add features are not preserved.

- Publishers deliver to Portico the "source files" of electronic journals (SGML, XML, PDF, etc) shortly after initial publication.

- Portico converts or "normalizes" the source files from their original proprietary format to an archival format and deposits the content in the Portico repository.

- Portico's normalization proceeds carefully and deliberately. The process is focused on long-term preservation requirements rather than immediate content access.

Portico's Access Model

- Portico offers access to archived content to only those libraries supporting the archive financially.

- Access is offered only when specific trigger event conditions prevail **and** when titles are no longer available from the publisher or other sources.

- Trigger events include:

  - When a publisher ceases operations and titles are no longer available from any other source.

  - When a publisher ceases to publish and offer a title and it is not offered by another publisher or entity.

  - When back issues are removed from a publisher's offering and are not available elsewhere.

  - Upon catastrophic failure by publisher delivery platform for a sustained period of time.

Portico's Access Model

- For all libraries supporting Portico, trigger events initiate campus-wide access regardless of whether a library previously subscribed to the publisher's offering.

- Until a trigger event occurs select librarians at participating libraries are granted password-controlled access for archive audit and verification purposes.

- Libraries may also rely upon the Portico archive for post-cancellation or "perpetual" access, **if** a publisher chooses to name Portico as a mechanism to meet this obligation.

Sources of Support

- Support for the archive comes from the primary beneficiaries of the archive - publishers and libraries.

- Contributing publishers supply content.

- Publishers committed to archiving journals in Portico to date include:

  - Elsevier

  - American Mathematical Society

  - John Wiley & Sons, Inc.

  - The Berkeley Electronic Press

  - UK Serials Group

  - Symposium Journals (UK)

  - Oxford University Press

Sources of Support

- Publishers make a financial contribution.

  – An annual Supporting Publisher Contribution to fund initial conversion tools development and to defray the cost of adding new content as it is published.

  – Contributions are tiered and vary according to the size of the publisher's annual journals revenue (subscription and advertising).

  – Annual contributions range from $250 to $75,000.

Sources of Support

- Libraries are asked to make an Annual Archive Support payment to defray ongoing operations, maintenance and enhancement of the archive's technological infrastructure, and content migrations as technology evolves.

- The Annual Archive Support payment is based upon total Library Materials Expenditures (LME) reflecting Portico's role in protecting a critical component of library collections.

Annual Archive Support Levels
Individual Library

Total LME	Annual Fee	Total LME	Annual Fee
$25-30 million	$24,000	$2-3 million	$ 7,800
$20-25 million	$19,000	$1-2 million	$ 6,700
$15-20 million	$17,500	$750k-1 million	$ 5,400
$13-15 million	$16,100	$500-750k	$ 4,200
$11-13 million	$15,200	$250-500k	$ 3,100
$9-11 million	$14,300	$150-250k	$ 1,500
$7-9 million	$13,000	<$150k	1% of LME
$5-7 million	$11,500		
$4-5 million	$10,000		
$3-4 million	$ 8,900		

Sources of Support

- All libraries that initiate support for Portico in 2006 and 2007 will be designated "Portico Archive Founders."

- Libraries that initiate support of Portico in 2006 will receive a 25% savings each year for five (5) years on their Annual Archive Support payment.

- Libraries that initiate Portico support in 2007 will receive a 10% savings each year for five (5) years on their Annual Archive Support payment.

- To recognize cost savings achieved by working with groups of libraries, Portico will offer savings to systems and consortia.

Benefits of Archiving

- Facilitates the community's transition to reliance upon electronic resources.

- Enables savings through reduced processing and storage of print resources.

- Provides a means of assuring access to e-resources over the long term and protects against gaps in library collections.

- Provides a practical mechanism to address "perpetual access" needs.

- Shared infrastructure or "virtual stacks" reduces costs system wide.

Ask me questions!

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Sunday, January 22
2 – 3pm
ARTstor Suite
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