

# SCONUL Shared Services Community Event

Domain 1: Electronic Resource Licensing and Management

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# Domain 1: E-Resource Licensing & Management

## Introduction

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- **About JISC Collections**
- **The current licensing model**
  - Challenges and ‘sub-optimality’
- **SCONUL Shared Services Survey**
- **JISC Collections User Satisfaction Survey**
- **The Proposal - Electronic Resource Licensing and Management**
- **What is JISC Collections taking forward?**
  - SHEDL model
  - JISC Usage Statistics Portal
  - JISC Licence Comparison and Analysis Tool
  - Study on the economics of bloc payments for e-journals and re-distribution model

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## About JISC Collections

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- Established as a mutual trading company in 2006
  - Members include all UK HE, FE and Research Councils
  - Negotiate for schools, public libraries, museum libraries, other national consortia, health sector
- National centre for the licensing and procurement of digital content to support education and research
- In 2010, savings to the JISC community from JISC Collections activities are estimated at c£50 million

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## About JISC Collections

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### ■ Aims -

- Save time and money through central licensing and negotiation that leverages buying power and avoiding duplication of effort
- Widen accessibility to online content through best value pricing of subscription resources and the central procurement of content
- Help institutions manage the demands of licensing and develop capacity within the sector to improve licence management

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How does JISC Collections support that mission?

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- **Currently managing over 160 agreements including -**
  - UK National Academic Archive
    - Over 20 archives licensed in perpetuity and available freely to all UK universities, colleges and research councils
  - NESLi2
    - 40+ agreements for e-journals
  - JISC Collections
    - Over 100 agreements for online databases, reference materials, multimedia resources and e-book collections
- **Working at all academic levels and with all subject areas**
- **Manage over 7,000 subscriptions.**
- **20 members of staff**

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## About the current model

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- JISC Collections has certain criteria for an agreement
  - Use of JISC model licence
  - Unlimited concurrency
  - Pricing banded to reflect institutional size
  - Implementation of federated access management
- Mixture of paid for and freely available resources
- Institutions 'opt in' to the agreements they wish to participate in
- For e-journal agreements additional requirement on institutions to agree how the negotiated agreement applies in to them
- JISC Collections role is licensing and negotiation – responsibility for implementing access, technical assistance etc is between the supplier, the institution, other relevant third parties

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## A Sub-Optimal Model?

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“To provide an effective information infrastructure to support Research Pools, it is important to provide all researchers access to a comprehensive, common, collection of online resources, regardless of affiliation.

The UK national collective licensing system, JISC Collections [...] meets only part of this need in negotiating terms for online access to content for selection at the institutional, rather than the sectoral level. As a result of requiring each institution to decide whether or not to opt-in to a particular licence, coverage in Scotland is patchy. Furthermore, there is a considerable range of relevant publishers outside the JISC licensing scheme, which is limited by JISC to selected publishers [...].

**The JISC scheme has to be seen as sub-optimal.”**

**John Cox**

**From the Executive Summary to “Investigative Study towards establishing a Scottish Higher Education Digital Library for Scottish Universities”**

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## Issues with the existing model

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- Maintains individual choice
- Provides value for money
- Consistent licensing

BUT does it meet the expectations and requirements associated with transition to 'e-only'

- Don't license everything so institutions still have to do a lot of licensing themselves
- Doesn't leverage expenditure of sector as fully as it could
  - Use of data in negotiations
- Licensing and negotiation are only a part of the life cycle
  - Access management
  - Interpretation and communication of licence terms
  - Management of title lists, provision of MARC records etc



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Support for changes to the current model

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## SCONUL Shared Services Survey

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There was much in the responses to the SCONUL Surveys that was of interest to and aligned with JISC Collections own internal discussions...

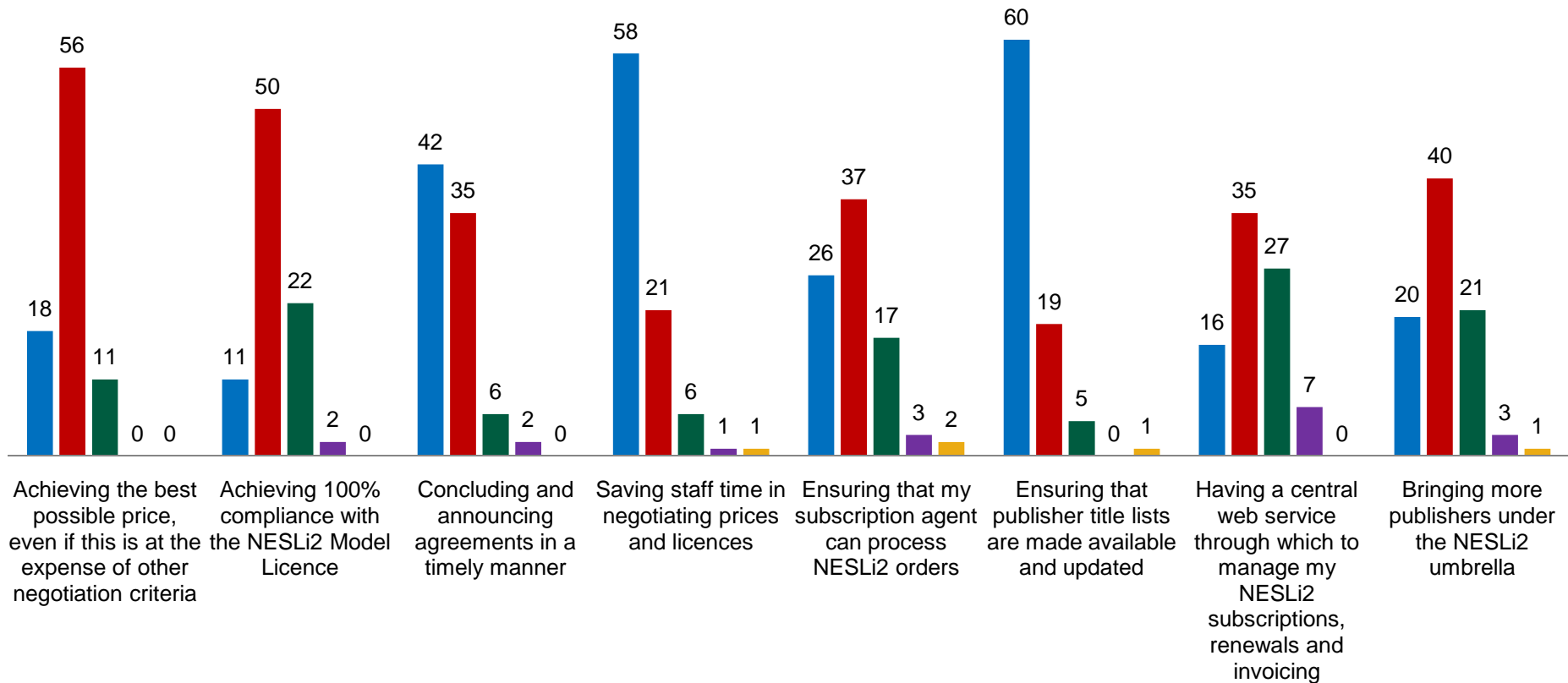
- 70% of respondents believed there could be high rated cost benefits linked to content licensing
  
- Candidates for shared services:
  - 98% of respondents - electronic resources licensing
  - 90% of respondents – digital content and rights management
  
- ERM Survey –
  - 88% of respondents either agreed or strongly agreed that “ERM linked to licensing at a national level would be liberating”

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## JISC Collections User Satisfaction Survey (80 responses)

**How important are the following issues to you/your institution when thinking about NESLi2?**

■ very important ■ important ■ somewhat important ■ not very important ■ not answered

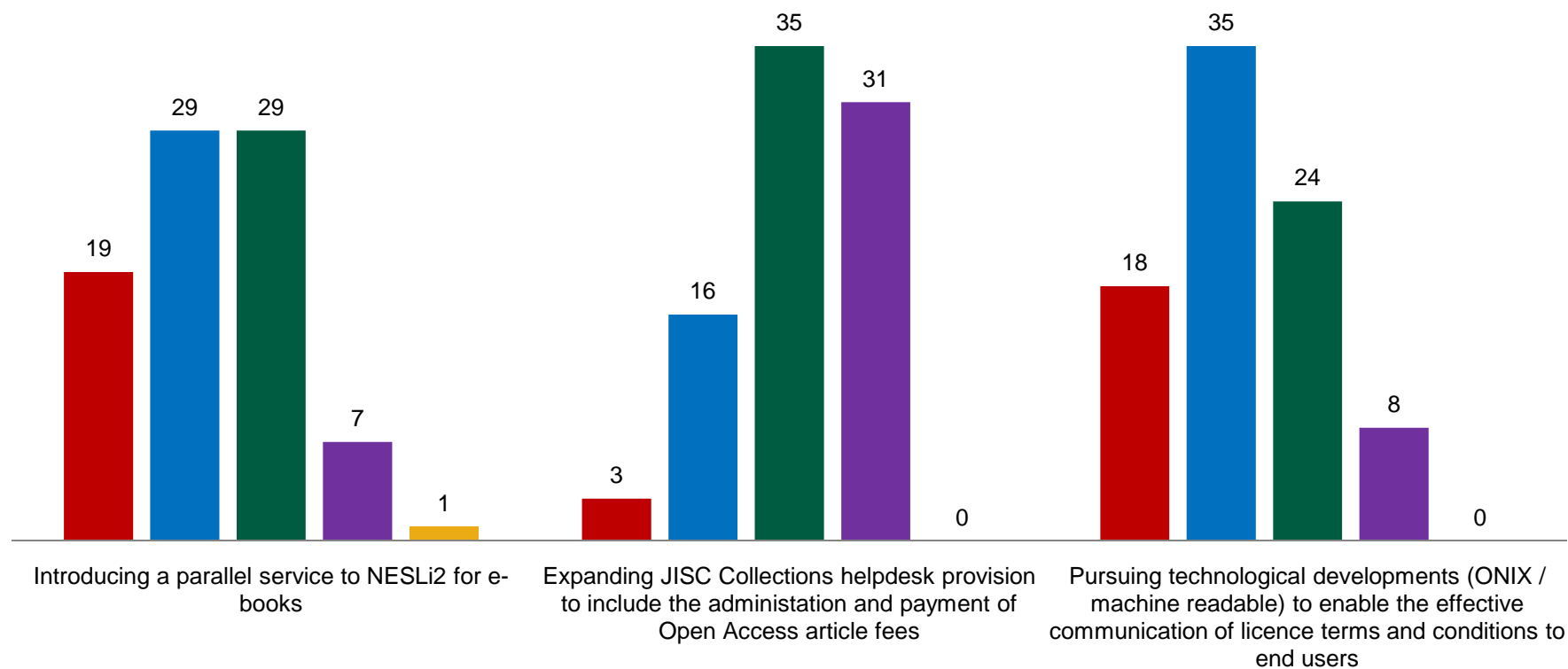


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## JISC Collections User Satisfaction Survey

**If JISC Collections was to undertake any of the options below, how would you rate the importance of these to your institution?**

■ very important ■ important ■ somewhat important ■ not very important ■ not answered



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The proposal - Electronic Resource Licensing and Management

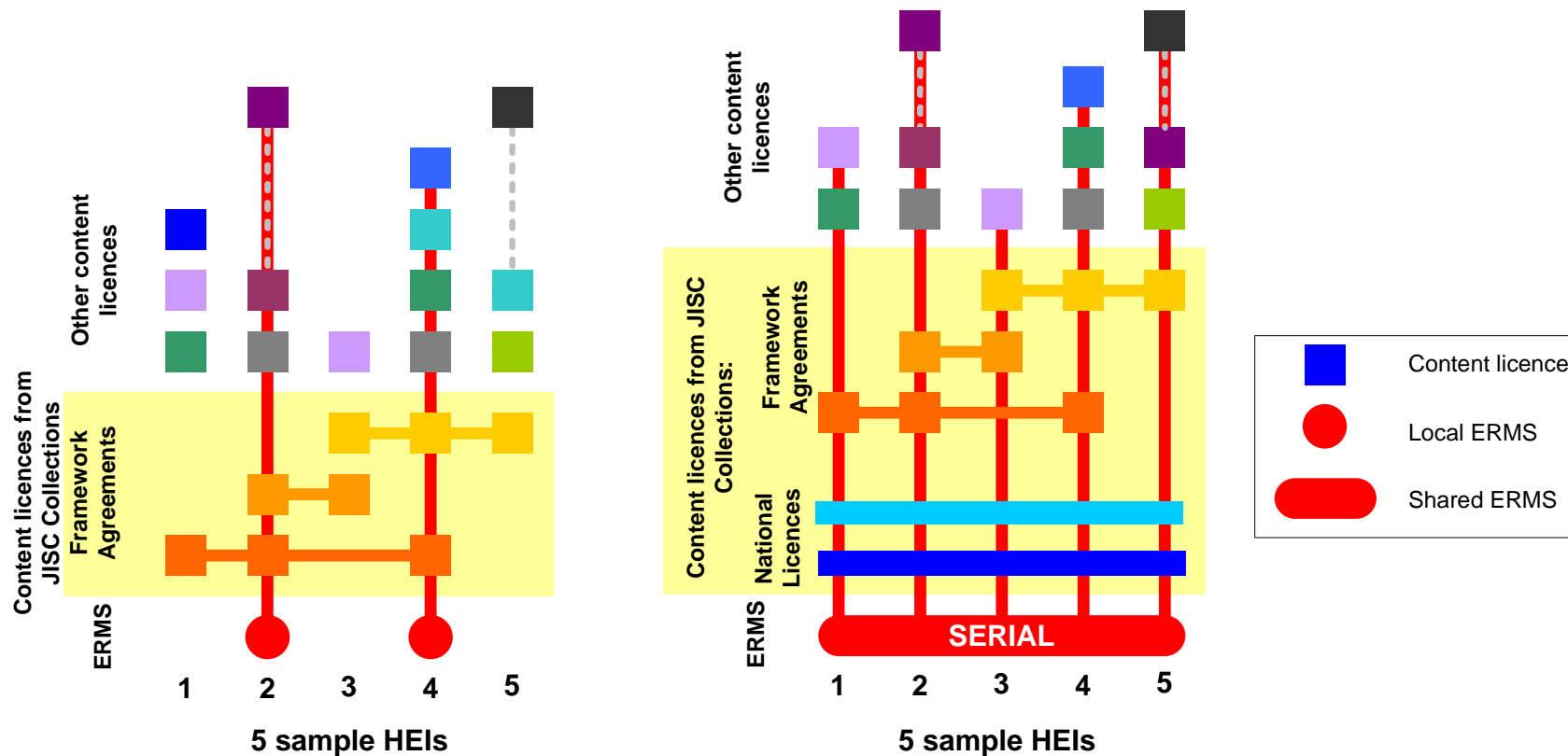
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## The proposal

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- Formulates all-in national licensing schemes plus opt-in frameworks for e-journals and e-books
- Covers the lifecycle from procurement to user desktop
- Underpins the service with a one stop license and rights data management, including historic licenses and local agreements
- Offers benefits of administrative cost saving in each participating institution and wider access to licensed collections across the sector

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## Current

- Low uptake of ERMSs
- Many content licences but fragmented licensing
- JISC Collections negotiates framework agreements
- Institutions can use framework agreements

## SERIAL

- Sector shared service ERMS
- Coherent licensing from sharing of licence information
- JISC Collections has increased bargaining power
- National Licences benefit all

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## From opt-in to national licence

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### **Institutional Licence:**

Limited subscriptions at individual institutions – per institution price



### **JISC Collections New Agreement:**

Licensing based on framework agreement and individual need – per institution price



### **JISC Collections Mature Agreement:**

After multi-year agreements e-resource has reached limits of its 'organic' market – per institution price



### **JISC Collections National agreement:**

Limit of organic market used as basis of pricing for 'national' access – national price divided between all HEI



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## What is JISC Collections doing?

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- Direction of travel for JISC Collections remains unchanged
- Currently undertaking negotiations and projects on:
  - **SHEDL model**

Ongoing negotiations on behalf of SHEDL

First attempt to use the model across UK with BIOSIS

How does one 'fairly' apportion cost?
  - **Study on the economics of bloc payments for e-journals and re-distribution model**
    - The economic modelling has been completed, based on a wide range of parameters, including metrics such as Total Library Budget, Serials budget, FTEs relating to staff and students, journals usage data, Institutional income (total and research income), and RAE data
  - **JISC Usage Statistics Portal**

Will allow institutions to verify and benchmark usage statistics across the JISC Consortia. Initially just for e-journals, but e-books and databases will follow
  - **JISC Licence Comparison and Analysis Tool**

Based on the ONIX-PL standard – web based tool for the analysis and comparison of machine readable licence expressions

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Liam Earney

**THANK YOU**